

# CIOReview

ISSN 2644-237X

FEBRUARY · 2022

CIOREVIEW.COM

The Navigator for Enterprise Solutions

**CUSTOMER  
ENGAGEMENT**  
E D I T I O N



*REID OVERCASH,  
CEO*

*MARIE OTTO,  
CHIEF RELATIONSHIP  
OFFICER*

*JOHN BROWN,  
CTO*

**HERON  
MARTECH**



INNOVATE, ENABLE, ENGAGE

**BRINGING  
BACK THE  
"HUMAN TOUCH"  
IN CUSTOMER  
ENGAGEMENT**





## COVER STORY

# BRINGING BACK THE “HUMAN TOUCH” IN CUSTOMER ENGAGEMENT

“Personalization” remains the keystone for building strong customer relationships. Whether it’s building brand awareness, attracting more customers, or gaining more leads in the sales pipeline, delivering personalized content and measuring its performance is paramount. Unfortunately, this is a novelty that several customer/sales engagement platforms fail to deliver. Even though there is no shortage of content in today’s digital-savvy world, delivering relevant content to nurture interest from leads is a hard nut to crack. This competency is precisely what Heron MarTech helps its clients unlock.

Heron MarTech’s scalable solution, ShareDirect, helps clients market to one-to-many prospects as easily as one-to-one. “We make it extremely easy for sales representatives and account managers to have personalized engagement sites that essentially presents sales reps as a concierge for their customers,” states Reid Overcash, CEO of Heron MarTech.

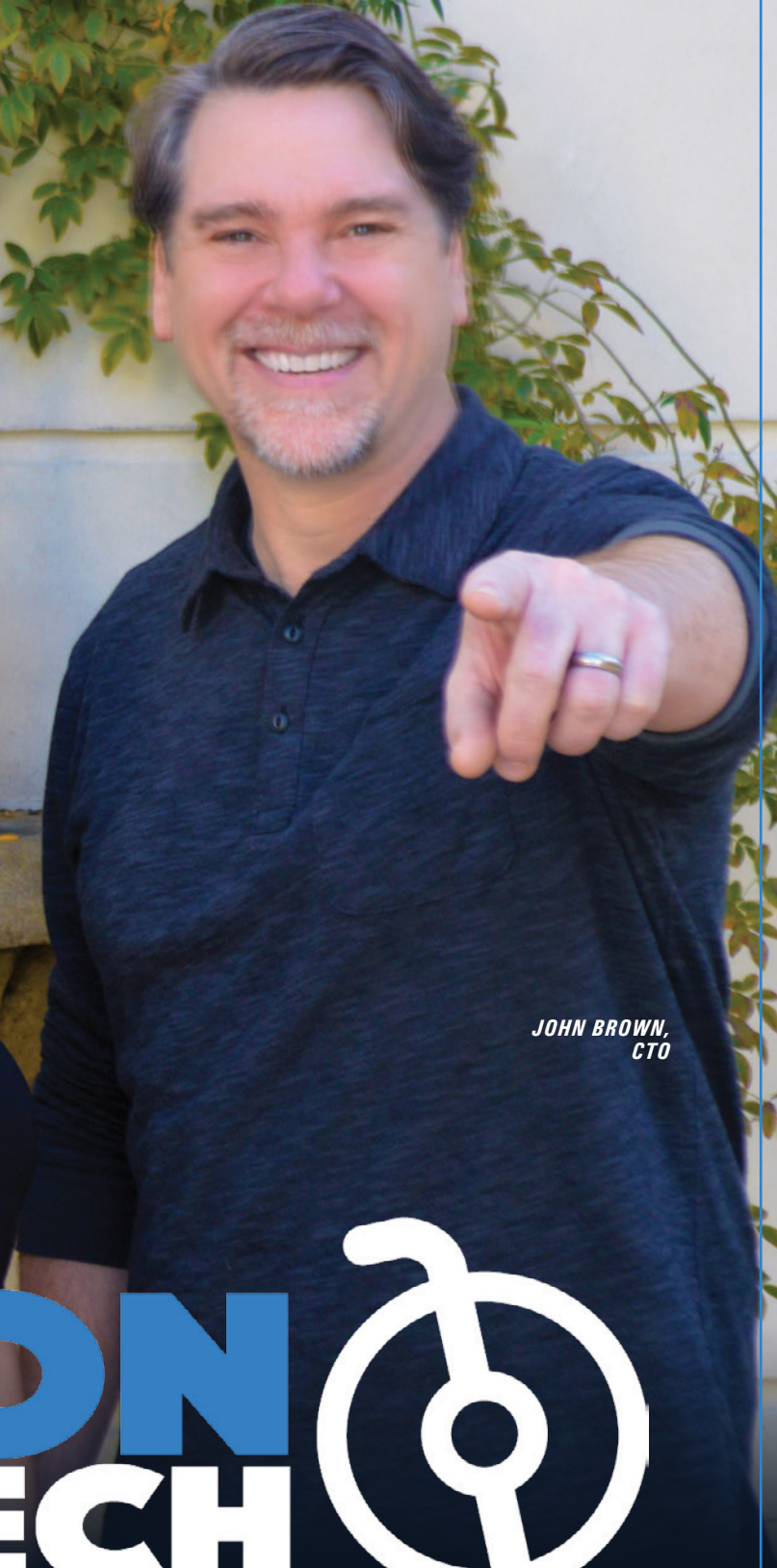
**CTO** 10 MOST PROMISING  
**CUSTOMER  
ENGAGEMENT**  
Review SOLUTIONS PROVIDERS - 2022



REID OVERCASH,  
CEO



MARIE OTTO,  
CHIEF RELATIONSHIP  
OFFICER



JOHN BROWN,  
CTO

**HERON  
MARTECH**

INNOVATE, ENABLE, ENGAGE





# SHAREDIRECT

## MORE THAN JUST A SALES ENABLEMENT SOLUTION

ShareDirect is a revolutionary Account Based Marketing (ABM) and customer engagement solution designed to deliver scalable personalized engagement. The company’s leaders, Reid Overcash, John Brown, and Marie Otto, developed ShareDirect as a tool to help marketing and sales teams work in tandem to offer their customers or potential customers the personalized engagement touch that was lacking in digital selling environments, especially on the B2B frontier.

ShareDirect’s bi-directional personalization feature enables users to customize the selling proposition with relevant messaging per unique customer requirements. Robust analytics and a complete suite of email, social media, and other outreach tools that come with the solution allow sales teams to understand customer interests better. It provides the right information that best suits the customer to build lasting and highly beneficial business relationships.



**WE ARE PASSIONATE ABOUT OUR RELATIONSHIP WITH CUSTOMERS AND WE STAY INVOLVED WITH THE CAMPAIGN STRATEGIES ON THE FRONT END WHILE IT’S IN DEVELOPMENT**

ShareDirect’s technology allows sales representatives to benefit from dynamically created template-based, automated, and scalable engagement sites. Using this, sales reps can offer customized content on the site to each customer. In addition, the platform comes with intuited federated dashboards that provides detailed insights and regular reports on key metrics, including visitor logins, demographics, content views, downloads, sales rep activities, and much more. These insights help the sales reps profile customers better, create targeted communications and improve customer engagement. “Based on the data we gather from the engagement site, emails, and

activity and contact lists, we come up with a useful metric that we call the ‘engagement score,’” says Overcash. While the sales reps can see the metrics of their engagement sites, a user at the program administrator level can see the aggregated engagement scores of each rep.

## A FORCE MULTIPLIER FOR COMPANIES

As a force multiplier for clients, the instances of ShareDirect ramping up the open rates for email/outreach are plenty. ShareDirect can integrate with other platforms like a CMS or CRM and enable companies to better utilize the content and relationships that they already have.

“ShareDirect can even serve as an ideal solution for companies that do not have a standard content library,” says John Brown, CTO of Heron MarTech. The solution intelligently contextualizes every piece of content that goes into emails or webpages—irrespective of their type and format—and associates them with tags that could be the product, solution, or audience-specific. The scope of the tags extends well into the nuances of the content. The tags, along with an algorithm-based weighing system, determine what content should show up in priority with other content sent to the target user. This can be used in various ways to build the engagement site content or emails or even segment users into a specific list or specific targeted category.

The effectiveness of ShareDirect goes beyond its features. It lies in the customer-centric and personalized approach that the Heron MarTech team employs for every new client that uses the tool. Attention is paid to the client’s existing processes through investigatory questions about where their content is stored, who their primary customers are, and if these customer contacts are stored on a CRM platform. This helps the team seamlessly integrate ShareDirect into the client’s marketing and sales processes and assist the sales reps in adopting the solution and realizing its impact faster. The company’s plug-n-play integration extends even to LinkedIn, which enables sales reps to better reach out to leads on the ‘professional networking’ social media platform.

“We are passionate about our relationship with customers and we stay involved with the campaign strategies on the front end while it’s in development. Working on their behalf, we strive to keep things simple from their perspective while giving

suggestions for improving their campaigns,” says Marie Otto, Chief Relationship Officer of Heron MarTech, reiterating the importance of personalization. The team ensures active engagement while using their extensive experience in marketing and brand management to guide clients in every step of the way—from building a mock-up site to creating the right content that is specifically targeted to their customers. They also perform regular follow-ups and consults with the clients to ensure that the program is healthy and the goals are being achieved. Further, the team constantly develops strategies to improve the client’s engagement programs through various channels such as websites, blogs, podcasts, social media, and more.



**WE MAKE IT EXTREMELY EASY FOR SALES REPRESENTATIVES AND ACCOUNT MANAGERS TO CREATE PERSONALIZED ENGAGEMENT SITES THAT ESSENTIALLY RENDERS SALES REPS AS A CONCIERGE FOR THEIR CUSTOMERS**

When digital selling is fast becoming a business norm, solutions such as ShareDirect are a boon for many industries, including biopharmaceuticals. Today, ShareDirect’s team works to engage many doctors and healthcare professionals across geographies. A number of finance and technology organizations also have integrated ShareDirect into the processes, leading to phenomenal results. In one such instance, a big tech company with about 300 sales reps and tens of thousands of channel partners was struggling to communicate to their customers through their channels. They onboarded ShareDirect and almost immediately saw 50 to 60 percent open rates on emails.

## A JOURNEY FUELED BY CUSTOMER-CENTRICITY

Having carved a unique niche in the sales enablement space, Heron MarTech is looking at exponential growth in the next couple of years. To keep up with the opportunities, the company plans to upgrade the platform on the data intelligence and systems integrations side. “By including advanced artificial intelligence and machine learning capabilities, we can make data-driven recommendations to our customers on what content is going to work well in certain kinds of segments or markets and how to drive increased performance and relationship building through machine learning,” says Brown.

As more companies discover the impact of ShareDirect, Heron MarTech remains steadfastly focused on its mission to empower the sales teams by positioning themselves as a trusted advisor in humanizing brand outreach, building trust, and growing revenue. 