A MODERNIZED APPROACH
TO SALES & MARKETING IN

Payments

A guide for revenue teams to create and convert more pipeline in Payments

Misaligned Sales and Marketing Efforts

Sales and Marketing teams at most payments companies are working towards the same goals but lack the data and tools to properly work together to **focus on revenue from the right companies.**

Marketing teams run broad-based campaigns targeting companies with firmographic (industry, revenue, etc.) data, whereas sales teams often focus on predefined account lists set at the beginning of the year.

Both teams are missing out on a huge opportunity to focus both sales and marketing teams on the businesses that are actively researching their solutions, but not talking to sales or de-anonymizing themselves through marketing channels (we call this anonymous activity the "dark funnel").

That's where **6sense Revenue AI** comes in. In this guide, we'll show you 3 simple use cases for both marketing and sales, and exactly how they'd work for your company.

The Traditional Approach No Longer Works

70%
of the client's journey is done anonymously

3%
of website visitors fill out forms

10%
of your targets are in-market to buy

84%
of deals are won by the first firm a client contacts

UNKNOWN DEMAND
Missing Out on **Opportunities**

POOR TIMING
Falling **Conversation Rates**

NOT SUSTAINABLE
Team **Burnout**

LIMITED RESOURCES
Creating **Inefficiency**

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Focus Resources on Clients that are Ready to Engage

Total In-market Clients

Known In-market Clients

If we just knew **when clients were *In-market* (looking for solutions)**, sales and marketing would be so much easier.
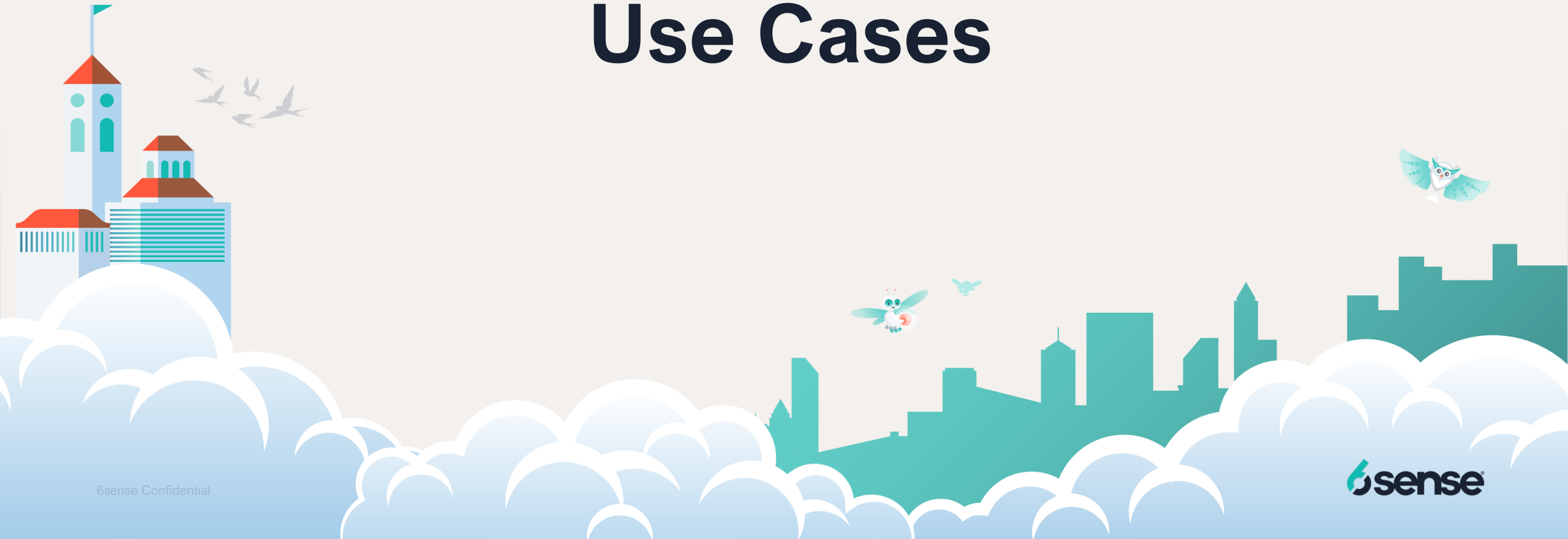
When clients are in-market | **Which products they're interested in**

Who to contact | **How to contact them**

6sense pulls together 3rd party internet research (what keywords or topics people are researching on the internet) with data that you already own (website, CRM), and matches it at the company level, to guide you on…

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Use Cases

Top 6 Plays for Payments

MARKETING

Play #1

Improve marketing efficiency by targeting businesses in need of new payment products

Play #2

Promote products that businesses need for their stage and industry

Play #3

Find new businesses that are beginning to think about payment products they need

SALES

Play #1

Prioritize prospects who are actively seeking payments solutions

Play #2

Act at the right time on real prospect interest to get ahead of competitors

Play #3

Build deeper customer relationships through cross-sales

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Play #1: Measure and improve marketing efficiency by targeting businesses in need of new payment products

EXAMPLE

Problem: You're launching a new vertical payments product built for law firms.

Impact: Previously, marketing campaigns have been broad and generalized with low conversion rates.

Solution: Rather than advertising this to all law firms, you build a segment of law firms that have been researching payments related topics.

Result: Only these firms will hear about your new product, and your ROI on dollars spent on the campaign is 2x higher than it would've been.

Add Filters

CRM
- Salesforce: Account
- Salesforce: Contact
- Salesforce: Lead

Map
- Marketo: Lead

6sense AI
- 6QA: Current Status

Take Action
- View Performance Report
- View Connections (NaN
- Sync to Google Ads
- Sync to LinkedIn
- Sync to Facebook
- Create Orchestration
- Create Alerts
- Publish Segment

Advanced Targeting

Persona

I want to target

Chief Investment Officers

or

Investment Analysts

or

Investment Committee

Estimated Daily Spend
$1,500 - $2,000

		Visitors	Keywords	Activities	Latest Activity	Latest Impression
Small Business 1	United States	95	56	769	September 27	September 27
Small Business 2	United States	130	43	870	September 23	September 23
Small Business 3	United States	80	24	539	September 20	September 20

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Play #2: Promote products that businesses need for their stage and industry

EXAMPLE

Problem: You're launching a new international payments product.

Impact: You don't have a method of identifying who is doing business internationally.

Solution: With 6sense, you create an advertising audience of companies that meet your ICP and are researching cross-border payment solutions.

Result: You significantly increase your click through rate (CTR) and return on ad spend (ROAS).

Top Generic Keywords

FOREIGN EXCHANGE RISK   NEW MARKETS

CROSS-BORDER PAYMENTS   ONLINE PAYMENTS

Top Keyword Groups

Online Payments	45	
Law Payments	42	
In-Person Payments	30	
Cross-Border Payments	25	

ACCOUNTS (59)   PREDICTIVE ANALYTICS   BEHAVIORAL ANALYTICS   PROFILE ANALYTICS

Branded Keywords	Generic Keywords	Research Activities	Accounts
25	208	7,488	61

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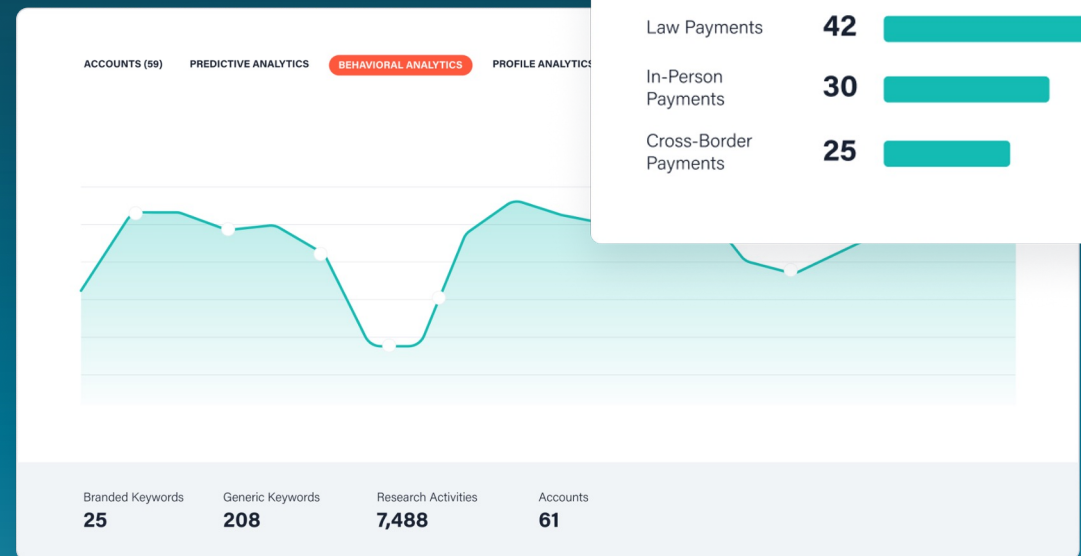
Play #3: Find new businesses that are beginning to think about payment products they need

EXAMPLE

Problem: New businesses that can leverage your payment solutions are constantly being launched.

Impact: The payments industry is highly competitive with many well-known players making it critical to get in front of these young companies early.

Solution: Now, you can market directly to buyers at these companies that are actively searching for payment gateways.

Result: By getting in front of these new businesses before your competitors, your company can create a long-term relationship with them, maximizing their lifetime value.

Top Keyword Groups

Payment Education	45
Payment Products	42
Online Payments	30
Cross-Border Payments	25

Top Branded Keywords

PAYMENT GETAWAYS   PAYMENTS PROCESS

HOW TO   COLLECTIONS   NEW MARKETS

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Play #1: Prioritize prospects that are actively seeking payments solutions

EXAMPLE

Problem: You're a mid-market AE with a territory of hundreds of businesses.

Impact: You don't have much inbound right now and don't know where to focus your outbound efforts.

Solution: With 6sense, you have a list of 15 accounts at your fingertips that are showing high intent, including important information like what they've been searching for and who the key contact is.

Result: By reaching out to these contacts with personalized outreach you're able to convert 30% into scheduled meetings.

Account details page, embedded within your CRM, display relevant account information, like intent keywords researched and which web pages are being visited, where your sellers already work.

Play #2: Act at the right time on real prospect interest to get ahead of competitors

EXAMPLE

Problem: As an AE, your day is spent focusing on research, prepping for calls, pitching companies, and much more.

Impact: Your quota requires you to source 25% of your own opportunities but you have limited time to prioritize outbound outreach.

Solution: Now, you get a daily 6sense alert that shows you exactly what companies in your territory are researching payment products, including what they're searching for and a list of contacts to engage with.

Result: This allows you to carve out 30 minutes a day for outbound outreach to warm accounts, which allows you to source your own leads and satisfy your quota.

Play #3: Build deeper customer relationships through cross-sell

EXAMPLE

Problem: A significant portion of customers initially purchase a starter product (like a payment gateway), but eventually evolve to require more advanced products, like payment processing APIs.

Impact: Customers typically begin researching about APIs, software integrations, and similar topics once their needs evolve, indicating a potential loss of sales if not addressed promptly.

Solution: By leveraging 6sense, you create a segment to track when customers start this research, letting you know it's the right time to check in.

Result: This proactive approach enables you to educate and assist your customers in their transition, optimizing customer retention and increasing upsell opportunities.

Kasey Patterson
Strong Profile
REACH OUT

Aiden Hopkins
Strong Profile
BUY INFO

Top Keyword Groups

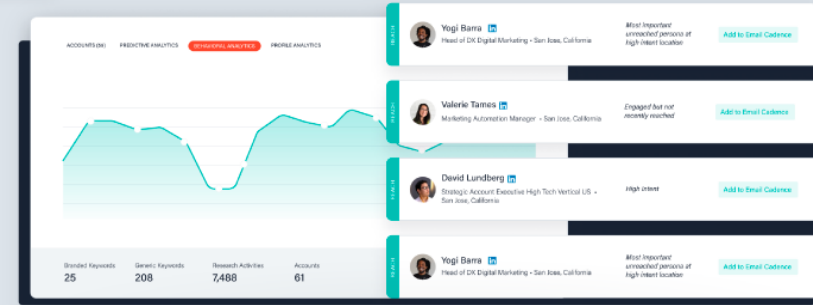|	
Online Payments	45
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FOREIGN EXCHANGE RISK   NEW MARKETS

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ACTIVATION LAYER

Revenue AI™ for Marketing

Revenue AI™ for Sales

INTELLIGENCE LAYER

WHO
Anonymous Buyer Intelligence

WHEN
Predictive Intelligence

Data Cleansing & Connecting

HOW
Recommendation Intelligence

WHAT
Generative Intelligence

DATA LAYER

Web Activity   Company   Intent   People   Pre-Intent

CRM   MAP

6sense®

Join the suite of payment companies and other financial services firms using 6sense to drive quality revenue.

MORNINGSTAR® **SEI** New ways. New answers.®

VOUCH **experian.**

ENVESTNET® **Alacriti**

Continue your learnings here.

+39%
More Opportunities

+13%
More Wins

+45%
Larger Deals

-38%
Shorter Cycles

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