



# Breaking Down Predictable Pipeline

How marketing and sales can align to  
drive real, measurable and predictable results



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# Introduction: achieving more with predictable pipeline

It takes the effort of an entire organization to achieve quarterly revenue targets, but achieving those targets consistently to ensure year-over-year growth? That's predictable pipeline. When successfully implemented, a predictable pipeline model aligns and integrates sales, marketing and customer success efforts to generate steady qualified leads and seamlessly move them throughout the entire buying journey.

Now you're expecting the myth busters team to charge into your (home) office and shatter the notion of this seemingly unattainable framework. Well, guess what? They're not coming. The fact is that building a marketing program that delivers repeatable, scalable and predictable results is not as hard as you may think.

From establishing measurable revenue targets to integrating sales and marketing teams, optimizing tech stacks to delivering thoughtful campaigns and personalized content journeys, a predictable pipeline framework ensures your organization achieves optimum results quarter after quarter and year after year.

So, how can you get started with a predictable pipeline model? Well, you're looking at it. This e-book will provide you with a high-level overview on building an organizational structure in which every member of the marketing, sales and customer success teams take on equal revenue responsibility and work strategically, efficiently and cost effectively to close deals and drive measurable revenue.

**Read on to learn more.**





# Identifying roles and responsibilities

Building a solid foundation is the first step toward building a predictable pipeline strategy, and that begins with making sure your teams are aligned on overall business goals and objectives. Every team member should be clear on their individual roles and responsibilities and how those roles contribute to the bigger picture and understand how to measure success.

There are four primary groups to consider when it comes to the roles and responsibilities that support a predictable, profitable pipeline.

These are:



## The executive team:

The company leaders and C-level executives responsible for the culture, direction and vision of the company.



## The marketing organization:

Is accountable for all things marketing, from buyer personas to messaging, content to MQL generation and, ultimately, marketing-influenced revenue.



## The sales organization:

Is accountable for all things sales—from converting MQLs to closing deals.



## The customer success organization:

Is accountable for ensuring customers are onboarded successfully, the delivery of high-quality service in perpetuity, and renewals and expansions.

When incentives and interlocks are uncertain, or inconsistent from department to department, the system falls apart. But when these teams are aligned and the goals are focused on closing deals and driving revenue, the whole organization inches toward a predictable pipeline model.



# Tools for predictable pipeline

An effective tech stack should be made up of tools that help you drive your business objectives, automate your campaigns and fuel your data flows. Sounds easy enough, right? You might actually be surprised. There are so many tools and technologies available today, it can get downright overwhelming to decipher how to select and implement an appropriate tech stack.

Too often, organizations look at tools before creating their overall strategy resulting in mismatched tech solutions, overinvestment and misuse. When the wrong tools (or too many tools) are in place, workflows get disrupted and goals become convoluted. To make sure you are getting the most out of your tech stack, it helps to categorize tools and technology by function.

**Foundations:** Foundational tools are the foundations of your business operations. They connect to numerous other tools and are core to the success of your sales, marketing and customer success programs. Without them, it'd be incredibly challenging to do any kind of thoughtful, automated or timely campaigns.

**Orchestrators:** Orchestration tools help marketers and sellers plan and orchestrate their efforts more seamlessly, efficiently and effectively.

**Identifiers:** Identification tools help identify prospect accounts and targets who fit within your desired audience and ideal customer profile.

**Attention-getters:** Attention tools help capture the attention of prospects through inbound activities, search engine optimization and social media.

**Engagers:** Engagement tools enable people to engage with your business through outbound activities and website functionality.

**Optimizers:** Optimization tools help you to analyze your data, enabling insights and actions that can be used to optimize performance of your business efforts.

You can see how this can get tricky. Most organizations unwittingly end up with extensive tech stacks full of flash-in-the-pan applications that get a job done, but do not necessarily fit into the overall strategy, or integrate with the rest of the stack. It's important to remember that the tools and tech platforms are there to support your initiatives,

not to dictate them. We have all worked for organizations that fall into this trap. And in all fairness, it's hard not to! Selecting the right tools and mapping where and how they fit into your overall objectives will help your teams work smarter, faster and more effectively.

But what is the secret to putting together this elusively operative tech stack? There are a few things to keep in mind. First, you need to really understand the tools you already have and if you are using them to the full extent of their capabilities. This will help you identify the gaps between what you have and what you need, and will also help you better evaluate prospective tools. What are your greatest needs, goals and desired outcomes? Identifying and prioritizing those needs will also help you measure the effectiveness of your tools.



# The elements of the predictable pipeline model

## Define your ideal customer profile

Delivering the wrong content at the wrong time or to the wrong audience is like ordering messy ribs during an important business lunch or crab legs on a first date. Wrong place, wrong time. And the consequences can be... well... messy. Building out thoughtful content, messaging and campaigns will help you avoid going after the wrong people with the wrong message. But before that process can even begin, you must establish a clear picture of your ideal customer.

Not to be confused with a buyer persona, an Ideal Customer Profile, or ICP for short, refers to the characteristics of your ideal buyer at the account level rather than the individual level. This includes characteristics such as industry, company size, current tech-stack gaps, company values and aspirations, product releases etc. Going into an acquisition opportunity equipped with a complete and accurate ICP in mind will help you avoid embarrassing blunders and lost opportunities. It will also help you peak the interest of your prospective buyers and ultimately, move them through the customer journey.

Keep in mind that not every company you service will meet your criteria for ICP, so you may want to do a little bit of digging when determining what kinds of attributes yours might include.

## The buying committee

If you are reading this, chances are you have either sold to a buying committee, or have been a part of one. Either way, you know how important these committees are to the buying process and how complex they have become. These days, a buying committee can involve upwards of seven people in various roles from C-level executives to individual contributors, and anywhere in between.

And every single member is crucial to the buying process. The crux is determining the role each member plays in the buying scenario and how to address the needs and concerns of each and every one of them.

**We think about the buying committee by asking two questions:**

**1 What is the buying scenario?**

**2 Who plays a role in that buying scenario?**

## What is the buying scenario?

Understanding how a purchase gets made will help you determine how to approach each member of the committee. Understanding factors like purchase timeframes, number of buying centers

and members, as well as what level a purchase decision can be made can massively help marketers and sellers more effectively plan and go to market with the right content, message, channels and expectations in mind.

In the table below, we've identified three distinct buying scenarios as observed by Forrester.

Scenario	Decision Authority	Purchase Timeframe	# of Buying Centers	# of Members
<b>Committee</b>	Agreement at the executive leadership level	One to two quarters (or more)	Five (or more)	Six to 10 (or more)
<b>Consensus</b>	Agreement across teams, functions or departments	One to two quarters (but no more)	Three to four	Three to five
<b>Independent</b>	Agreement among individuals	Less than eight weeks	One to two	One to two



When we ask who plays a role in the buying scenario, we think about four distinct personas or roles:

1

**Decision makers:**

Personas who have the final decision on a purchase (i.e., they have Yes/No authority). Decision makers fall into one of two categories:

**Business decision makers:**

Personas who are focused primarily on how the purchase impacts business ROI and revenue.

**Technical decision makers:**

Personas who are focused primarily on how the purchase impacts business technologies, processes and operations.



2

**Executive sponsors or champions:**

Personas who drive the purchase decision forward internally, acting as the primary spokesperson for your solution amongst their teams and the executive leadership.



3

**Purchase influencers:**

Personas who may not have a direct role in the purchase decision, but they have influence over the outcome. They fall into one of two categories:

**Business influencers:**

Who are focused primarily on how the purchase impacts business ROI and revenue.

**Technical influencers:**

Who are focused primarily on how the purchase impacts business processes and operations.



4

**Users:**

Personas who will use the product in their day-to-day jobs. They are directly impacted by the purchase and are focused on how the solution will help them be more efficient, effective and productive.



For example, many sales development representatives begin the conversation by speaking to someone who will likely be using the product on a day-to-day basis. To continue the conversation, this sales rep will need to

appeal to this “purchase influencer” by demonstrating how the product in question will help make their job easier. The conversation changes completely when

dealing with Business Decision Makers who are going to be much more interested in how this solution will impact revenue and ROI.





# Developing buying personas

We all know that understanding buying personas is important to the success of our sales and marketing initiatives. But the key to developing useful buyer personas is identifying what your buyers want to achieve, and the challenges that stand in their way.

Understanding the pain points and goals of your buyers will shape the messaging and content you cultivate.

<b>Functional bias (how they approach decisions):</b>	<b>Responsibilities:</b>	<b>Preferred content:</b>
<b>Why [our company]:</b>	<b>Business goals &amp; concerns:</b>	<b>Pain points:</b>
<b>Titles:</b>		
<b>Reports to:</b>	<b>Attitude &amp; reputation in the industry:</b>	<b>Use cases:</b>
<b>Decision-making/influence power:</b>	<b>How they shop/research:</b>	<b>Potential objections:</b>
<b>Budget approval:</b>	<b>Purchase decision criteria:</b>	
<b>Direct reports:</b>	<b>Where to find them:</b>	





## What the buying journey is

Once upon a time, the buyer's journey was straight forward, linear and easy to understand. From awareness to consideration to decision making, marketers could easily map out content journeys that made sense and could reliably anticipate conversion. But buyers are not as predictable as they once were. With countless content options being delivered via a multitude of digital mediums, touting countless service and product options, buyers now have the ability to “shop around” on their own terms and timeline, resulting in a buying journey that does not progress from left to right or top to bottom. Essentially, there is no funnel.

Buyers have taken control of their own journeys. In fact, 70% of buying decisions are now being made long before the initial sales call is ever made. Still, there are guiding principles of the buyer and customer journey that marketers can account for.

# Stages of the buying journey

Buyers will not always move toward a purchase decision as we traditionally expect them to, but it's still helpful to understand each stage of the buying journey to create a fuller picture of buying committees and, ultimately, accelerate their decision to purchase. Remember that for every phase of this journey, buyers will have a separate set of questions, actions and needs, all of which you should aim to identify so you can better align the appropriate content with the appropriate stage.



## It's helpful to think about the buying and customer journey in **six** primary stages.

Each stage is centered around a specific action or state that the buyer is in. These stages help us, as sellers and marketers, better understand what our buyers are looking for, what questions they have, and what they need:



**1 Awareness:** During the awareness phase, buyers are still looking for solutions to their immediate problems and for ways to improve the efficacy of their organization as a whole. This is generally when a buyer will begin researching to better understand their problems and what types of solutions exist to help them. Helping prospects to articulate their problems at this stage will also help them to understand the consequences of failing to correct these issues.



**2 Solution:** During this stage, the buyer has likely become more aware of their challenge and is now actively looking for solutions that address it. They might ask themselves some questions, like how their peers are addressing this issue and what solutions have others tried and seen. Your goal at this stage should center around proving to the prospect why and how your solution is a good fit for their organization.



**3 Selection:** This is typically the phase during which the buyer is ready to make a final purchase decision and become a customer. Before taking the leap, they will want to be sure that your product will be able to meet their needs and help them be successful. Buyers often make this determination by asking themselves whether your other customers are happy, if your product is within their budget and whether or not you can truly meet their needs. You can help buyers through this process by serving up content that validates their decision to purchase. This can include case studies and online reviews.



**4 Onboarding:** Once the customer is onboarding and/or beginning to implement and utilize your solution, they will want to make sure they are getting the most out of it. Remind them why they chose you by ensuring a smooth onboarding, and providing the right resources, materials and guidance.



**5 Adoption:** If everything has gone according to plan, your customer is using your solution at this point, and eager to explore more ways to work with you. Give your customer new ways to expand their utilization and consider additional products in your portfolio.



**6 Advocacy:** By now, your customer has become a strong advocate of yours. Great job! Reward their loyalty and celebrate their achievements by asking for referrals and testimonials on their behalf. This will go a long way with your customer and may even help you move potential buyers through the selection phase of their journey.

## Let's check in:

We addressed the many potential buying committee members earlier. Now is a good time to apply your understanding of where each member fits into the purchase decision as not every persona is active at every stage of the customer journey. Where a C-level executive might be heavily involved at the Selection stage, a mid-level manager might be highly active in the Solution stage, and an operations lead might take control at the Service stage. Understanding who in your target audiences' buying committees is most active and most engaged at each stage of the customer journey enables you to provide the right content, with the right message, through the right channels to facilitate progression and conversion.



# Creating content for predictable pipeline

Persuading potential customers to buy your product or service relies on your ability to craft effective messaging. Address pain points, offer solutions and answer questions to build your case. This will also be the messaging that marketing and sales teams will use as a foundation when attempting to engage buyers and close deals.

Unfortunately, there's no one-size-fits-all approach when it comes to crafting meaningful messaging to get the job done. It's important your messaging is personalized, relevant and authentic, but being authentic and personal is about more than using first names in emails. Meaningful messaging is about giving, educating and providing useful resources when your customers need it most.

## **We think about messaging using four key components:**

**The primary message** can be thought of as the main takeaway we want our audience to have when they think, read or hear about our solution. This message should be focused entirely around the outcomes of purchasing your solution. How is the purchaser enabled to achieve their goals with your solution?

**The challenge messages** are the main challenges audiences face that hinder their ability to achieve their goals. What are the roadblocks to success? Where do they feel the most pressure coming from?

**The benefit messages** are the key benefits of your solution that address the challenges faced by your audience. These messages should, like the primary message, be focused entirely around the outcomes of purchasing your solution—communicating what your solution can actually accomplish for them.

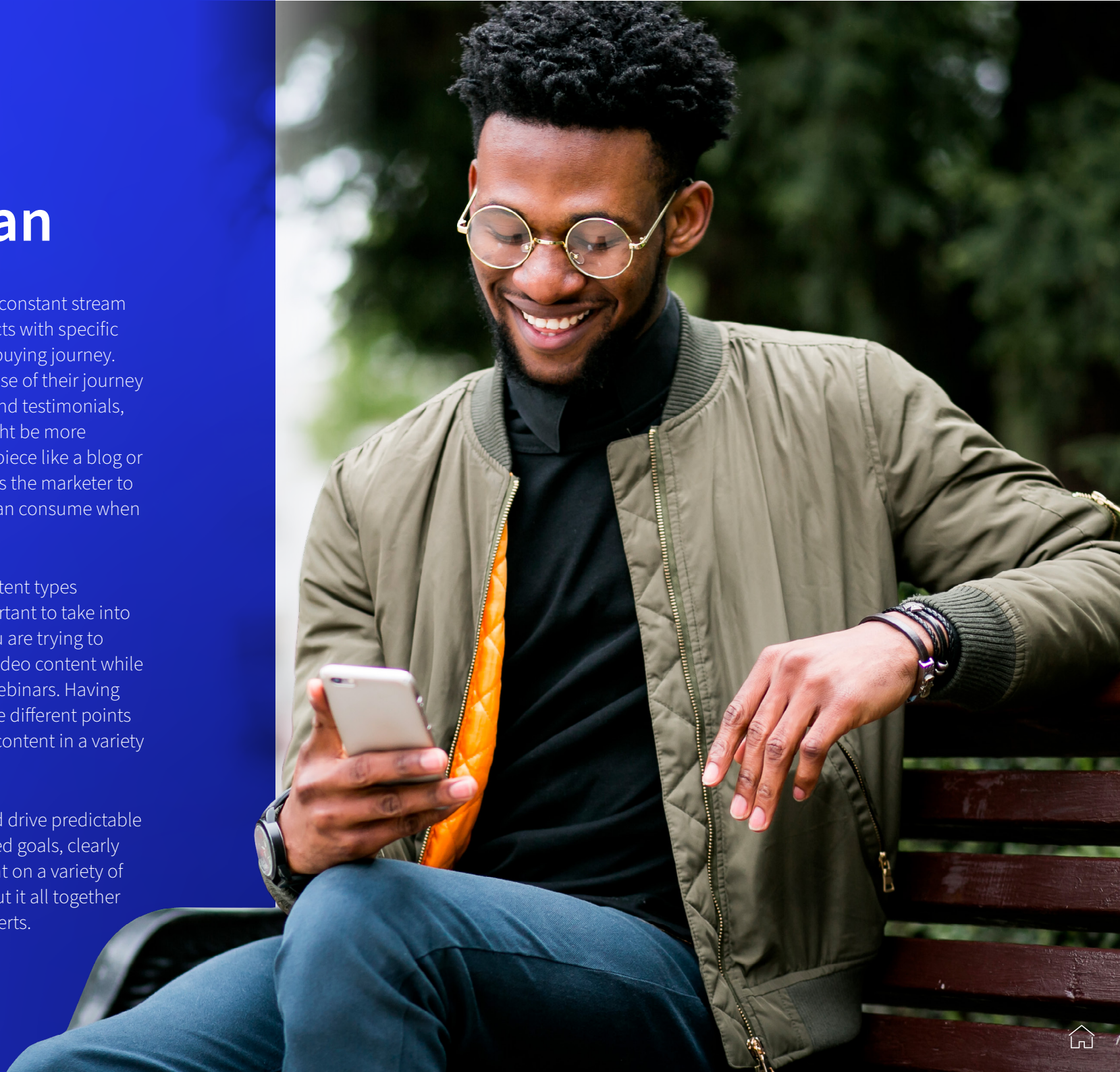
**The solution features** are the key product features that enable the outcomes expressed in the Benefit Messages. These should be product-specific—communicating what your solution does.

# Building a content plan

Predictable pipeline depends on a constant stream of high-quality content that connects with specific audiences at various stages of the buying journey. While someone in the decision phase of their journey might be looking for case studies and testimonials, a buyer in the awareness stage might be more interested in a thought leadership piece like a blog or educational webinar. It's your job as the marketer to serve up relevant content buyers can consume when and where they need it.

With the various mediums and content types available to us today, it's also important to take into consideration the type of buyer you are trying to engage. Some buyers respond to video content while others prefer e-books, articles or webinars. Having a breadth of content addressing the different points between buyers—and having that content in a variety of formats—is essential.

To create content that converts and drive predictable pipeline, you will need to set defined goals, clearly identify audiences, produce content on a variety of topics in a variety of formats and put it all together in a marketing campaign that converts.





## Define content goals

The first step to creating content that converts is defining your goals of moving a prospect to the next stage of their buying journey.

Take a step back and ask yourself why you need a particular piece of content, who that content is for, what it is—from theme and topic to format—where it resides in the buying journey, how it will move prospects to the next stage and where you'll promote it.

With these questions answered, you should have enough material to draft a goal for your content. Use the SMART framework (specific, measurable, actionable/achievable, relevant and time-bound) to set goals for your content. For example, if your objective is to collect net new names, your SMART goal may look something like this:

**What we want to accomplish:** we want to increase the percentage of industry leaders subscribed to our blog.

- **Specific:** Increase the number of industry thought leaders to our blog.
- **Measurable:** In a regular month, we get about 15 notable thought leaders who subscribe to our blog. Let's increase those blog subscriptions by 25%.
- **Actionable and achievable:** Yes, through use of our website, blog thought leadership material, social promotion and guest posting.
- **Realistic:** Certainly, provided content is targeted and engaging, which may mean we need to develop content in multiple formats.
- **Time-bound:** We have a small team, so let's start with "heavy" content that'll take time to develop, but can be reused across different channels. Because of this, we'll aim to hit that 25% increase by the end of the quarter.

With a high-level goal and objective in place, you'll have a better idea of how to hone in on your audience. Jot down where your target audience primarily resides, which industry or verticals they're in, company size, the different personas they may work with and where in the buying journey they may be.

### **Topic, format and content strategy**

After your goals and target audiences are defined, you'll need to decide on both a topic and format you'll use to connect with your audiences. To help identify suitable topics to create content on, write down two or three content themes reflective of your company values and messaging. Don't overthink this stage—themes can be as simple as “Predictable Pipeline.”

With your themes in place, develop your content topics. These ought to be a simple list of topics relevant to your theme that you can develop content on. For example, if your theme is “predictable pipeline,” then topics can include “how predictable pipeline affects marketing,” “the role of sales in predictable pipeline,” “why predictable pipeline is important” and others.

The topics you list should naturally map to an audience and, in some cases, a stage. For example, “why predictable pipeline is important” is a very high-level, big picture topic, meaning it'll likely connect with audiences that are at the top of the

funnel and are beginning their journey. Here, short-form, passive content, such as blog posts, briefs or short videos can introduce your audience to the theme and push them to the next stage.

Understand the closer your audience comes to making a decision on your product, the more targeted and involved your content will need to be. A technical person who resides on a buying committee will happily sit through an hour-long webinar so long as it provides a deep exploration of how your product works and integrates with the wider business.

To help you identify and target your content to these audiences, break out your ideal customer profiles along personas (e.g., executive, managerial, technical) and stages (awareness, solution and selection). With this content strategy matrix in place, you'll be able to map your topic ideas to the ideal stage, persona and content format.

### **Integrating content into a campaign**

Now you have a good idea of what content is needed for which persona at what stage of the buying journey. The next step? Neatly wrapping it all up into a campaign.

When thinking about a campaign you need to consider several factors. Ask yourself some questions—like what are your objectives and goals, what target personas will be involved, which core

messages you'll promote and on which channels will your campaign live—to hone your campaign thinking. Take the time to also think about who on your team is responsible for what, what you'll need to contract out (e.g., copywriting, website development, etc.) and what specific content you'll need to support your campaign.

At this stage, you should also identify how your campaign will fit within the wider customer journey and experience. Does the campaign target the top or bottom of the marketing funnel? How will your audience progress from one stage of the campaign to the next? What will your sales team need to do to help connect and accelerate prospects? Finally, what will your audiences do once the campaign is over? Will they convert or will they take advantage of a new product or feature?

**Sit down with your wider marketing and sales teams to walk through these questions and refine your approach.**



# What a predictable pipeline marketing campaign is

Reaching audiences today requires a strategic, well-defined and structured approach that goes beyond sending a few emails and white paper download offers. Awareness, solution, selection, onboarding, adoption, loyalty and advocacy become achievable with long-term marketing campaigns that include content and messaging that build trust and rapport between brand and consumer.

An effective marketing campaign should take into account the context of the greater customer journey including channels, messages, content and personas. How do all of those pieces evolve as a buyer progresses from one touchpoint to the next? How can you incorporate messaging and content in a way that gets and keeps the attention of buyers? Short-term activity and long-term value should align.



# Campaign plan

No matter what, your customer should always be at the center of your campaign

<p><b>1. Objectives:</b> What are the specific outcomes we hope to achieve with this campaign?</p>	<p><b>6. External teams:</b> Are there freelancers, copywriters, or agencies that should be accounted for too?</p>
<p><b>2. Goals and KPIs:</b> How will we measure the effectiveness of our campaign?</p>	<p><b>7. Channels:</b> What channels will we utilize throughout this campaign?</p>
<p><b>3. Target personas and buying stages:</b> Who are we creating this campaign for?</p>	<p><b>8. Content:</b> What content will we utilize throughout this campaign?</p>
<p><b>4. Core message and themes:</b> What do we want our campaign to say and communicate?</p>	<p><b>9. Results:</b> How has our campaign performed?</p>
<p><b>5. Internal teams:</b> Who is involved internally to help plan, orchestrate, and manage this campaign?</p>	



# Understanding intent data

The average B2B buyer today has conducted a lot of their own research before they ever engage with a salesperson. <sup>1</sup>Forrester has found that nearly 70% of B2B buyers prefer to research online on their own. So how do you ensure these buyers don't fly under the radar and end up going with a competitor?

Simple: You use intent data to fill in the gaps.

Intent data is all about understanding the specific buyer behaviors and actions they take across the internet. For example, what content types and topics are your buyers downloading?

How much time are they spending in each piece of content, and how often are they downloading from you? Monitoring these content-based activities will give you valuable insight into the interest and needs of your buyers.

This is also an amazing way to put your engagement data to good use. All those opens and clicks your marketing teams have been tallying can now become invaluable contributions to pipeline. Monitoring opens and clicks on a specific campaign, frequency of engagement, attendance of webinars,

online subscriptions etc. will help you understand who is demonstrating intent so you can respond accordingly.

Putting intent data into the context of the greater customer journey is also a huge step in this process. By reading into the specific actions of your buyers, what can you discern about their buyer persona or buying situation? Where do they currently live in their customer journey? While it's helpful to link buyers to specific topics, focus areas, or solutions, your intent data is only as effective as your ability to put it to good use.

## Identify

Identify the fit of the buyer based on your ideal customer profile.

## Watch and listen

Watch and listen for your ideal buyers to demonstrate intent signals or indicate favorable situational conditions.

## Understand

Understand what types of buyers (based on persona, buying situation, and account) are demonstrating which types of actions.

## Respond

Respond appropriately based on the type of buyer and the type of intent signals they demonstrate.

When it comes to acting on intent signals, different types of buyers require different types of responses depending on the type of intent they demonstrate. For example, a marketing manager who has downloaded a few white papers will require a much different response than a CMO who recently attended your webinar.

<sup>1</sup>Beyond The Lead: How Content Marketing Builds Lasting Relationships, 2018 Forrester Research



# Measuring campaign success

Marketing is out of the business of delivering names. Even a marketing-qualified lead is not directional enough to adequately predict pipeline and revenue. True sales and marketing conversions occur when marketing can track sales-qualified leads and direct pipeline contribution.

Many companies still struggle to agree on how success should be measured and defined. Marketing goals tend to revolve around generating more MQLs, whereas sales teams are often sent into the breach without the data and insights they need to hit their targets. These teams need to converge around a single target for pipeline and revenue goals and align accordingly. For example, a well-run organization knows marketing and sales both need equal revenue responsibility to create predictable pipelines.

When it comes to measuring campaign success, every organization will likely have different views of what needs to be tracked and reported on. For example, different campaigns will require different metrics. So determining what's most important will really depend on the context of your own situation. Still, that doesn't mean that there aren't fundamental ways to guide how you measure success.



## We think about measuring success as five cyclical stages

**1. Goal setting:** At this stage, you should be identifying the goals and outcomes you want to achieve. You should also ensure those goals and outcomes align to or influence the greater goals of the organization.

**2. Selection:** Here, you're selecting the right metrics for your campaign.

**3. Analysis:** At this stage, you're analyzing the performance of your campaign.

**4. Benchmarking:** This is where you benchmark your campaign's performance to historical performance as well as industry averages to identify where you excel, where you fall short and where you could improve.

**5. Optimization:** Based on your analysis and benchmarks, you should be determining how you can improve your campaign to more effectively and efficiently meet your goals.

But measuring metrics alone is just part of the job. Unfortunately, many marketers make the mistake of tracking activities over outcomes. The truth is that many CMOs and other executive leaders don't care about the number of MQLs you're generating—they care about the impact those MQLs have on the pipeline. That's why it's important to understand the differences between programmatic metrics and revenue metrics, and to tell a coherent story from one type of metric to the next.

**Programmatic metrics** are what you'll typically use to gauge the performance of your campaigns. These are still metrics you should actively track, but aren't necessarily the ones that directly correlate to marketing's revenue impact.

**Revenue metrics** on the other hand are what you'd show to your CEO and CFO. This is the metric that will show your stakeholders the revenue impact of your marketing efforts.



# This is the future of the revenue marketer

The bottom line is that we need to drive results if we want to meet our annual goals.

Unfortunately, there is no magic bean guaranteed to grow us a pipeline capable of delivering on a consistent basis. We have to grow it ourselves. And that starts with putting a revenue plan at the center of our marketing and sales strategies. Companies need to leverage digital tools to look beyond the current pipeline, and provide a long-term vision for prospects and clients.

It's not about collecting more MQLs or getting bigger and better data. It's about implementing marketing that enables the sales process and drives pipeline in a predictable way. From understanding our ICPs to breaking down the many phases of the customer journey, dividing and conquering our buying committees and creating content that supports thoughtful marketing campaigns, there is no one size fits all approach. But establishing equal revenue responsibility across sales, marketing and customer success teams ensures that marketing programs generate leads, drive pipeline, and hit revenue targets quarter after quarter and year after year.







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