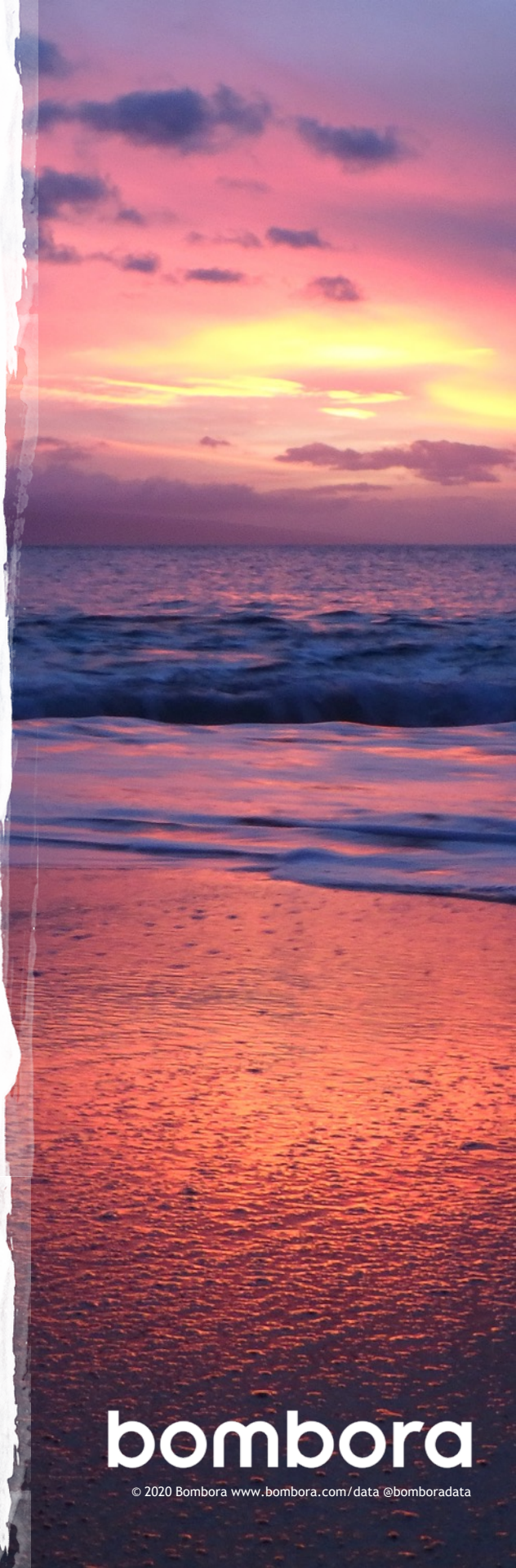


Bombora + Outreach: Intent-driven tasks

Integration guide

June 2020



bombora

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Getting started with Bombora Intent-driven tasks for Outreach

Prioritize outreach to accounts with high buyer intent

Bombora's Company Surge® Intent data identifies which accounts are researching topics related to your business, products and services.

Bombora's Company Surge® data is integrated with Outreach to create 'high priority' tasks when accounts show buyer intent for those topics. These tasks help account owners take immediate action to engage their high intent accounts.

Features of this integration:

- **Weekly updates:** New Intent-driven tasks populate every week.
- **Automated tasks:** Account owners receive a 'high priority' task for accounts showing buyer intent.
- **Bombora Intent topics:** See the topics your target accounts are engaging with now.
- **Topic count:** Know how many Intent topics your target accounts are engaging with - the greater the number, the hotter the account!

Connecting Bombora + Outreach

This guide will take you through how to connect your Outreach account to Bombora and setup the integration to empower your Outreach users with Intent-driven tasks every week.

Powering the Bombora + Outreach integration

Company Surge® Intent data identifies which businesses are actively researching products or services signaling buying intent. It indicates when a business is consuming content on an Intent topic significantly more than usual, according to historic data consumption behavior and benchmarks.

Benefits for sales:



Immediately identify highly interested accounts



Understand what Intent topics target accounts are researching



Have context for timely and effective sales conversations

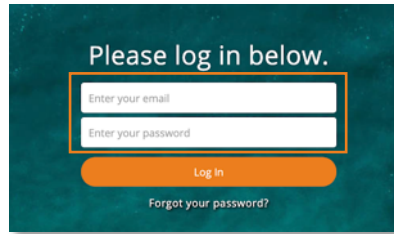


Identify opportunities for cross sell, upsell or risks of churn

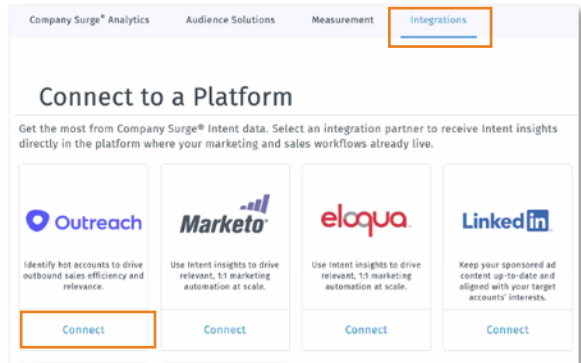
Authenticating your Outreach account

1. Login to the Bombora user interface with your secure credentials.

If you didn't receive credentials, please sign up here.

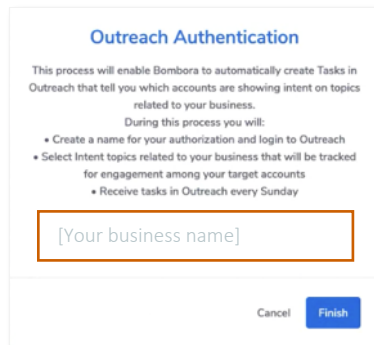


2. Click on the 'Integrations' tab and select 'Connect' in the Outreach box.



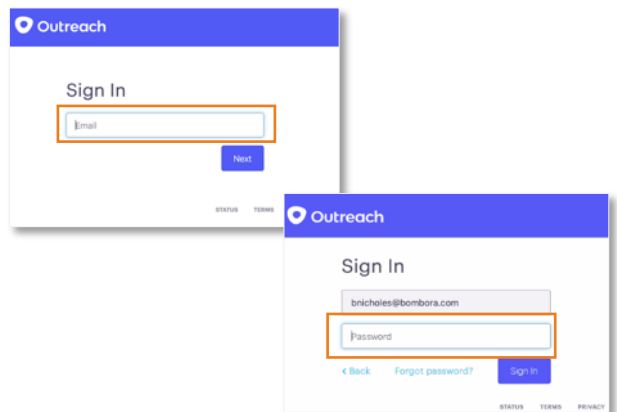
3. Begin your authentication by inputting your business name here.

This gives Bombora permission and the ability to create Outreach tasks on your behalf.



4. Use your username and password to log in to Outreach.

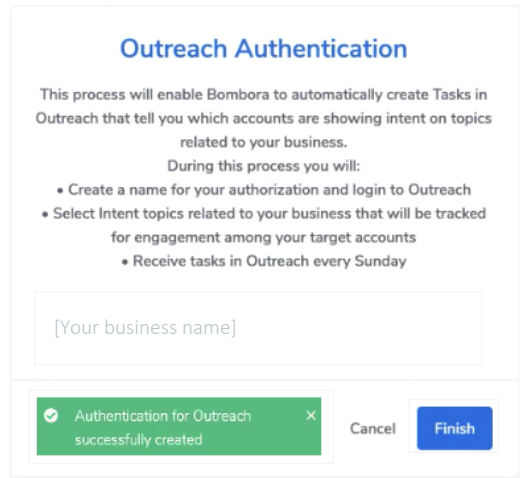
Note: If this box does not appear, then you are already logged in to Outreach on your browser, and your settings allow us to to authenticate your account without manually inputting your Outreach credentials.



Authenticating your Outreach account

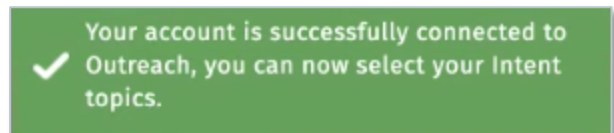
5. Your account is connected when you see this success message.

Click 'Finish' to close the window.



6. The Outreach window will close, and you will see another success message.

The **topic selection tool will open automatically** when your Outreach account has been *successfully* authenticated.



Selecting Intent topics

7. You will next select Intent topics from Bombora's taxonomy that will be monitored for engagement and content consumption behavior.
- Outreach freemium users will need to select a minimum of 10 and up to 25 topics
 - Bombora customers can set their minimum and maximum according to their subscription

The 'high priority' tasks that your users receive in Outreach will be based on the topics that you select. These topics should be relevant to your brand, products and services. Please refer to the 'Intent topic selection guide' to help with your selection.

There are four ways to select topics:

7.1 Manual selection - Best to build an initial group of topics, by searching key topics related to your business.

7.2 Selecting topics by filtering on 'Theme' or 'Category' - Best to find topics outside your core group of topics, that are related to your industry or competitors.

7.3 Topic suggestion tool - Best if you have a core group of topics and want suggested topics related to these.

7.4 Direct upload - Best if you have pre-selected topics in a CSV format.

7.1 - Manual selection

Select individual topics using the Search function:

- Enter a topic name in the Search box
- Select the topic(s) by clicking '+'
- The topics you've selected will appear on the right side in the 'Selected Topics' box
- When you have finished selecting topics, click 'Update Settings' to save your topics and go to step 10. If you're a premium user, please go to step 8

Select Intent topics to connect to Outreach

Select Intent topics (Select up to 25)
Select Intent topics relevant to your business, products/services and industry

Selected Topics (0 Selected)
View your selected topics below, remove if needed.

Your selected topics will be populated here after you click the '+'

Search

Filter Topics By Theme

Filter Topics By Category

- .NET
- 181 IONOS
- 1105 Media Inc
- 2-in-1 PCs
- 21Vianet (VNET)
- 3Checkout
- 3D Animation
- 2D Animation Software
- 3D Animation

Suggest 50 topics based on my selection

Choose or Upload File Download CSV

Minimum Topic Threshold 3 # of tasks per user 10

Update Settings

Disconnect

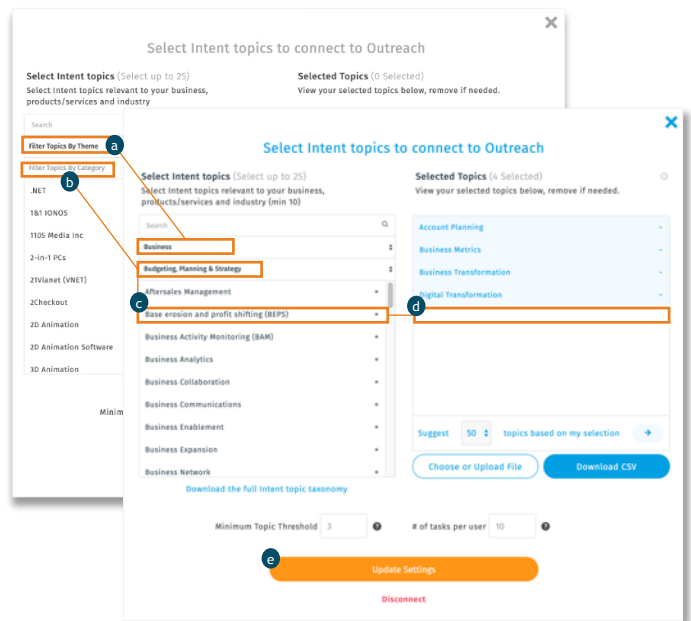
Selecting Intent topics

7. 7.2 - Selecting topics by filtering on 'Theme' or 'Category'

Select individual topics by searching or filtering by 'Theme' or 'Category':

- Select 'Filter by Theme' (e.g. Business)
- To further refine topics, select 'Filter by Category' (e.g. Budgeting, Planning & Strategy)
- Select topic(s) by clicking the '+'
- The topics you've selected will appear on the right side in the 'Selected Topics' box
- When you have finished selecting topics, click 'Update Settings' to save your selection and go to step 10. If you're a premium user, please go to step 8

Note: 'Themes' describe a macro grouping of topics within Bombora taxonomy that fit within a prescribed hierarchy. Categories are sub-groups within Themes.



7.3 - Topic suggestion tool

This tool will suggest additional topics related to those that you've already selected.

- When you've selected one or more topics, in the 'Selected Topics' box, navigate to the 'Topics suggestion tool' (located at the bottom of the module).
- Choose the number of suggested topics you'd like returned and click 'the arrow'.

Please note: You will not be able to advance to the next step of the process if you select more topics than your contract allocation.

- Once you click the arrow, a box will appear containing your suggested topics based on the one(s) you have already selected.
- Add your preferred topics by clicking the '+' sign next to the topic or click 'Add All Topics' to select all suggested topics.
- When you have finished selecting topics, click 'Save' to save your selection and go to step 9. If you're a premium user, please go to step 8.



Selecting Intent topics

7. 7.4 - Direct upload

Upload your pre-prepared list of topics in .csv or .xlsx format.

The format and casing of the topics in your list must be an exact match for those in Bombora's Topic Taxonomy. Otherwise topics **will not be uploaded**.

- Select the 'Choose or Upload file' button under the 'Selected Topics' box.
- A box will pop up. Select the 'Upload a New File' button to find and select the file with your list of topics.
- When your selected file appears, select the 'Use Selected File' button.
- The topics you've uploaded will appear on the right side in the 'Selected Topics' box.*
- When your topics are populated, click 'Update Settings' to save your selection and go to step 10. If you're a premium user, please go to step 8.

**Note: When you upload a new topic list, it will be saved in the 'List Manager' tool. You will be able to search for previously used topic lists in the future, or you can upload a new topic list using this tool.*

The screenshots illustrate the following steps:

- Step 1:** The main interface shows the 'Selected Topics' section with a 'Choose or Upload File' button.
- Step 2:** A 'Choose or Upload a File' dialog box appears, with 'Upload a New File' selected.
- Step 3:** A file explorer window shows the selected CSV file, 'BomboraSalesIntentTopics2020-200520052207.csv', with 'Use Selected File' selected.
- Step 4:** The main interface shows the 'Selected Topics' list populated with various topics, and the 'Update Settings' button is highlighted.

Setting thresholds and tasks

- 8 The following features are available to **Bombora customers**. It allows **customization of the topic threshold and number of tasks that Outreach users receive**. This allows adjustment of topic thresholds based on user feedback and the ability to increase the number of Intent-driven tasks users receive every week.

a. Selecting a minimum topic threshold

This field allows you to set a minimum for the number of topics that an account is showing interest in, before triggering a high priority Intent-driven task in Outreach.

Example: If you select 25 topics and your threshold is set to 3: Outreach high priority Intent-driven tasks will only be created for accounts with interest in 3 or more topics.

b. # of Tasks per user

This field allows you to set the maximum number of high priority Intent-driven tasks that can be created per Outreach user.

Example: If this is set to 10, Outreach users will only receive 10 high priority Intent-driven tasks per week - regardless of whether other accounts are showing high intent.

9. Select the 'Update Settings' button to save your topic list, threshold and task settings.

10. Your account setup is complete when you see a success message. Your Outreach users will see updated 'high priority' Intent-driven tasks in your Outreach dashboards every week.

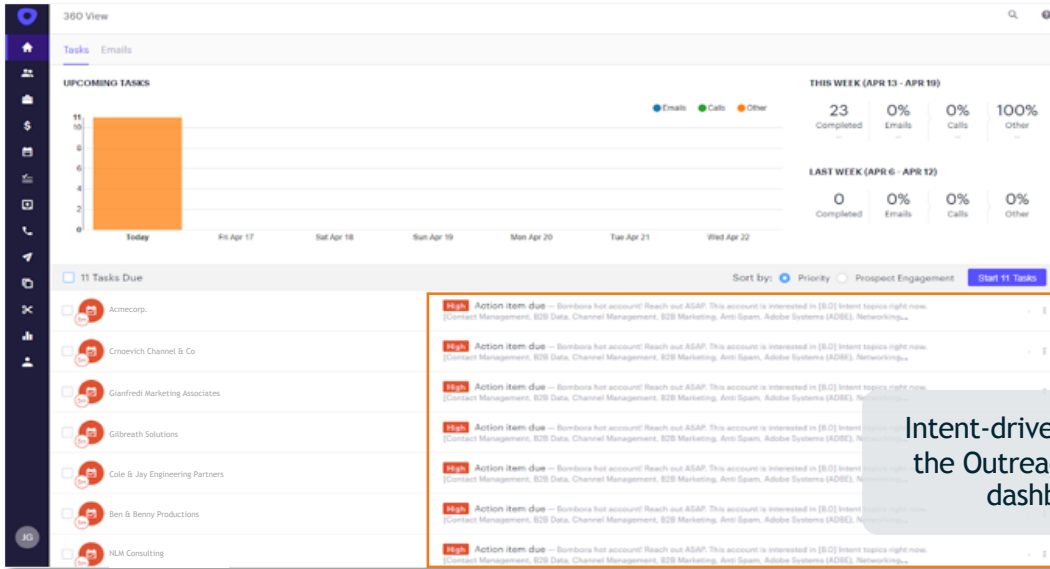
The screenshot shows the 'Select Intent topics to connect to Outreach' interface. On the left, there is a list of topics to select, including .NET, 181 IONOS, 1105 Media Inc, 2-in-1 PCs, 21Vianet (VNET), 2Checkout, 2D Animation, 2D Animation Software, and 3D Animation. On the right, there is a 'Selected Topics' section. Below the topic lists, there are two input fields: 'Minimum Topic Threshold' set to 3 and '# of tasks per user' set to 10. An orange callout bubble points to the 'Update Settings' button. A red 'Disconnect' button is also visible. A note at the bottom states: 'Please note: The Topic Threshold is set at 3 and Number of Tasks is set at 10 for Outreach freemium users. This is not customizable.'

If you would like access to this feature, please contact us.

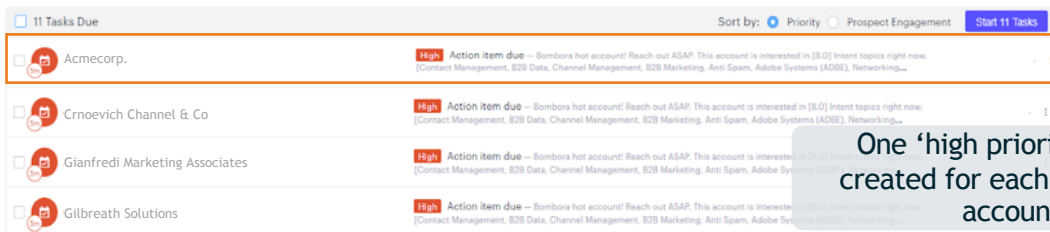
Your Outreach account has been updated successfully. Please note: Bombora 'high priority' tasks will appear in Outreach every Sunday.

Viewing tasks in Outreach

Outreach users will receive high priority Intent-driven tasks for their accounts each week. Here's how to identify these tasks:



Intent-driven tasks from the Outreach 360 View dashboard.



One 'high priority' task is created for each high intent account.

1 of 9 Tasks

Action Item
ACMECORP
ACMECORP.com

Task Activity Account

Bombora hot account! Reach out ASAP. This account is interested in [8.0] Intent topics right now. [Contact Management, B2B Data, Channel Management, B2B Marketing, Anti Spam, Adobe Systems (ADBE), Networking Applications, Channel Marketing] - reach out with a relevant sequence.

Bombora's Intent data tells you which businesses are researching your products and services right now.

Collapse

The tasks show the account's topic count and list the Intent topics that account is interested in.

Next steps with Bombora + Outreach

Setting up Outreach to receive Intent-driven tasks

Activating this integration gives Bombora permission to access data in your Outreach instance. To ensure that you receive Intent-driven tasks, we recommend that you check the following:

- 1. The 'Account Object' is activated and populated**
The integration uses this object to deliver Intent-driven tasks. Tasks cannot be populated against the 'Prospect Object'.
- 2. Either the 'Domain' and/or 'Website' fields are populated**
These fields are used to match your list of accounts against Bombora's database of monitored accounts. If missing, Bombora cannot match Intent data insights against your database of accounts.
- 3. That your list of accounts is assigned to an 'Owner'**
This field determines which of your users receives weekly tasks per account. Accounts with no assigned owner, will not be delivered tasks.

The Bombora + Outreach integration only uses the 'Account Object' and the above fields to deliver Intent-driven tasks.

You do not need to create any custom fields to activate the integration in your account.

Frequently asked questions

- **When will we receive Intent-driven tasks?**
Intent-driven tasks will appear the week after you connected the integration.
- **How do I check the connection?**
View your log of tasks the week after you connected your account and filter by 'Due Date' or 'High Priority'. The tasks should display as shown on the previous page.
- **Are Intent-driven tasks available in the Outreach Anywhere plugin?**
Yes. Intent-driven tasks will be available through the Outreach Anywhere plugin.

Do you need help with finding domains?

Bombora offers its customers a service to provide domains against a list of accounts.

Please send through your list of account names in CSV format to partners@bombora.com.

Please note, turnaround time for this complimentary service is approx. 1-2 business days, dependent on demand.

Resources

Bombora + Outreach integration

- [Bombora + Outreach info sheet](#)
- [Bombora Intent topic selection guide](#)
- [Video: Bombora + Outreach](#)

Bombora

- [Company Surge® Analytics](#)
- [eBook - Demystifying Intent data](#)

If you have any questions or for more information, please email partners@bombora.com.



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