Leveraging Bombora data to drive financial services growth

Identifying high-intent prospects is crucial for aligning sales and marketing efforts and driving growth. Bombora's premium B2B data including Intent, Identity, and Audiences empowers financial services companies to prioritize their investment, deepen engagement with in-market accounts, and continuously optimize their strategies. Derived from our one-of-a-kind Data Co-op, governed by persistent privacy-first, consent-driven data collection protocols, Bombora's data is both accurate and reliable. The following case studies illustrate how financial services businesses have used these insights to enhance their sales and marketing efforts.

Harnessing B2B data for market expansion

Challenge

A leading payment solutions organization struggled to identify when enterprise clients were in the market to explore new vendors or solutions, particularly those locked into multi-year contracts. Without insight into online research behavior, they found it challenging to prioritize their sales and marketing efforts and engage with high-intent accounts.

Solution

The organization enhanced the effectiveness of its traditional lead scoring model, historically dependent on firmographic data, by incorporating real-time Company Surge® data. This allowed them to identify high-potential prospect accounts actively researching payment processing across the web and enabled them to focus on those with high composite scores and engagement across multiple topics. By layering these Intent signals onto their lead scoring system, they shifted from static targeting to a dynamic, Intent-driven approach, equipping sales reps with the insights needed to prioritize their time and ensure outreach was both relevant and impactful.

Results

This Intent-based prioritization approach transformed their pipeline. A proof-of-concept pilot validated the strategy, generating a $50 million opportunity and solidifying confidence in the new approach. Within three months, they attributed $800 million in pipeline contributions directly to Bombora-powered insights.

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Sales teams used actionable data to engage high-intent accounts, resulting in better alignment and more impactful outreach. The organization leveraged Bombora data to prioritize the right opportunities, drive consistent growth, and support sustained success.

Bombora's suite of data solutions elevated sales returns by 4X

Challenge

A $50 billion global financial services business faced challenges improving ROI of its outbound sales team targeting middle and large-market prospects. The team's reliance on cold calling and emailing resulted in low conversion rates, lengthy sales cycles, high churn, and limited engagement. Marketing needed a reliable solution to build a pipeline of warm leads that could power their sales team with higher close rates, shorter sales cycles, and greater contract value— all while meeting the organization's strict data privacy standards.

Solution

Bombora was selected for its privacy-first, consent-driven data and ability to seamlessly integrate with the client's existing CDP and sales workflows. Bombora's team of B2B data experts collaborated closely with the client to develop a tailored, three-step roadmap designed to expand their pool of warm leads and achieve their business goals.

First, Bombora integrated Intent data into the client's Salesforce instance, enabling the sales team to prioritize in-market accounts based on real-time insights; this included providing recommended talk tracks for the sales team based on the specific topics prospects were researching. Next, Bombora's Visitor Insights tag was implemented to identify anonymous B2B web traffic, providing the sales team with a fresh set of warm leads to engage. Finally, the Marketing team started working with Bombora's Audience Solutions team to activate the Company Surge® Intent data and the Visitor Insights-driven website visitors in digital marketing campaigns. These digital campaigns, personalized bottom-funnel messaging, accelerated Sales pipeline development and led to elevated campaign form fills.

Results

Leveraging Bombora's data and insights, the sales team was able to engage the right prospects at the right time with the right messaging. This approach led to a conversion rate four times higher than their cold leads and a 15% increase in average contract value.

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The initiative validated the predictive strength of Bombora's data and set a new standard for how the business approached sales and marketing alignment. The team went from cold calls going unanswered to engaging with a multitude of highly interested prospects. As one sales team member put it, "My voice is so tired from talking on the phone so much!"

If you're a financial services organization ready to drive growth through Bombora's premium B2B Intent, Identity and Audience targeting solutions, underline{contact us}.

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