



Vendor Profile

Provides a set of cloud applications to help sales and marketing functions predict future customer/prospect purchasing behaviors

Capabilities allow organizations to target leads, enable sales and identify opportunities across the customer lifecycle

The applications leverage data from internal and external data sources, including social networks, sales force automation, marketing automation and customer service databases

Lattice

Leaving the targeting and positioning of products and solutions up to sales and marketing professionals without any guidance is akin to an athletic coach telling players “go win” without a specific game plan. The result is an unpredictable, hit-or-miss approach that leads to wasted time, inefficiency and an inability to communicate accurate value propositions.

Using a combination of sophisticated predictive analytics technology, visualizations and external data sources, Lattice’s offerings are designed to help sales and marketing optimize their productivity at every stage of the customer lifecycle. A marketing function promoting a new product could use Lattice Predictive Lead Scoring to help deliver qualified leads with a high propensity to purchase to sales, while a territory rep could use Lattice salesPRISM to prioritize accounts, then Lattice playMAKER to identify the best accounts for cross-sell and upsell opportunities.

Pricing is generally focused on the deployment level (usually a business unit), but large deployments can have enterprise license agreements. Contracts are generally two or more years in length and based on number of contacts or accounts with Lattice for Marketing and by the number of users for Lattice for Sales, so pricing will vary based on complexity and scope. Engagements with Lattice generally include setup, the selected offerings, training and support.

Functionality and Vision

The presence of functionality is a dimension that SiriusDecisions uses to evaluate a vendor’s offerings; in addition, vendors must demonstrate the functionality is capable, and have a vision for continuous improvement. Our analysis of Lattice around these components follows:

- **Functionality presence.** Lattice’s offering portfolio has two main solutions, Lattice for Marketing and Lattice for Sales. Lattice for Marketing contains Predictive Lead Scoring, while Lattice for Sales contains salesPRISM and playMAKER. Each offering uses internal and external information to provide insight to its users. The Predictive Lead Scoring product uses profile and behavioral information plus external information to identify attributes for lead scoring. salesPRISM and playMAKER are focused on providing sales organizations the ability to implement predictive methods to identify accounts that have a high propensity to purchase and then use playMAKER to prepare opportunities within those accounts. With any application that is using customer data security is critical. Lattice’s offerings are ISO 27001

Vendor at a Glance: Lattice

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Client Roster

Bank of America
DocuSign
Dropbox
PayPal
RingCentral
Staples

Operations

Revenue: \$11MM-\$25MM
Employees: 175
Global Presence: Asia-Pacific, EMEA
Key Industries Served: Financial Services,
High Technology, Information Services



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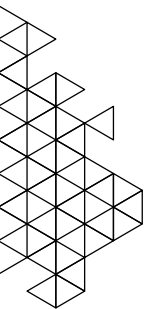
certified in order to ensure customers that data used within the applications will be protected.

- **Functionality capability.** Predictive Lead Scoring uses information from a customer's marketing automation platform (MAP) to profiles that can be applied to future leads to identify which are sales ready and which still need to be nurtured. Lead attributes are identified through a combination of Web, third-party data in the Lattice Data Cloud and internal data. The core of salesPRISM is the ability to collect, integrate and manage data from a variety of internal and external sources, including sales force automation (SFA) platforms, purchase-history databases, MAPs and third-party data providers. It also helps reps prioritize accounts by their likelihood to buy, and which products are most appropriate. It can even offer dynamic talking points to address solution overviews, objection handling, or key selling points. As well, reporting capabilities allow a company to analyze the effectiveness of specific strategies (e.g. targeting accounts with a specific product) and the selling time devoted to those strategies, through integration with the customer's SFA platform. playMAKER helps customers leverage the resulting data to improve sales effectiveness for future opportunities.
- **Vendor vision.** Based on the collection of massive amounts of data, business-to-consumer companies such as Amazon, Wal-Mart and Netflix have made predicting customer buying habits a cornerstone of their business strategies. It was just a matter of time before the concept was adopted in the b-to-b world. Lattice's vision is to provide predictive applications that manage revenue across the entire customer lifecycle. It has built a culture heavy on mathematics (many of its employees hold doctorates in math and/or science) and sales and marketing practitioners. As b-to-b companies become more disciplined in capturing data about prospects and customers from various sources, the demand for the type of predictive analytics that Lattice provides will no doubt increase.

Essential Elements

As important as features and functionality is a vendor's ability to deliver and implement its solutions. Our analysis of Lattice along this dimension that we call "essential elements" is as follows:

- **Integration.** Lattice's offering portfolio is a software-as-a-service (SaaS) based set of applications that requires minimal infrastructure. Internal IT and data governance resources need to be involved with initial implementation and ongoing support. The applications can integrate with major SFA systems and MAPs using standard APIs.
- **Training.** Training is delivered either onsite or online, and has been created for three key user groups: marketing analysts, sales reps and administrators. The training program is called Lattice University and is delivered in a train-the-trainer manner. Training for marketing focuses on using the Lattice





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technology to configure programs, referred to as “plays,” and the messaging for sales and marketing. Training for sales reps helps them to learn to use the tools in the course of a typical work day, while sales manager training focuses on how to use the reports being generated by the system. Administrator training teaches a business analyst how to use the Administration Console to easily configure user interface elements.

- **Support.** Once operational, Lattice provides continuous support typical of a SaaS-based application, including regular updates, and an account manager assigned to each client to oversee deployment and ongoing support. Support calls are handled by a support desk. Lattice has signed SLAs with all their clients, defining both response times and escalation paths.
- **Best practices.** Lattice provides best practices information through training, support and client case studies.
- **Vendor viability.** Founded in 2006, Lattice is privately funded and has worked with more than 50 companies to date. In December 2012, the company received \$20 million in Series C funding from New Enterprise Associates (NEA) and Sequoia Capital. The vendor’s challenges are to differentiate itself from sales analytics and business intelligence application vendors. As with any private vendor, we recommend securing references from similar organizations and gaining some financial visibility into Lattice’s operations as part of due diligence.

The Sirius Decision

Lattice’s approach offers sales and marketing the ability to apply advanced data science that is easy to use to better control which accounts reps are targeting, identify which leads are sales-ready, determine the right time to engage accounts, and identify cross- and upsell opportunities with existing customers. As more b-to-b sales and marketing leaders strive to forecast beyond the current quarter, predictive applications will become a more prominent component of their toolkits.

