

Eighty Twenty CMO

How Quandri Built a Strong Foundation to Scale After Their Series A Raise with Eighty Twenty CMO



Jackson Fregeau

CEO, Quandri

“Before Michael, we were shooting from the hip with our marketing tactics. Michael gave us the strategic foundation we needed.”

Quandri transforms the policy renewal process for insurance agencies and brokerages by automating repetitive tasks, identifying actionable policy insights, and enabling insurance companies to achieve profitability and scale.

HIGHLIGHTS

Challenges

- Scaling after a Series A raise
- Obtaining executive-level marketing leadership
- Reducing uncertainty in the revenue pipeline

Solution

- Eighty Twenty CMO's 12-week Fractional CMO Engagement
- Align Business and Marketing Goals
- Craft and implement the process to hire a new VP of Marketing
- Define Ideal Client Profiles and Buyer Journeys
- Redefine pipeline stages in Quandri's CRM and streamline with automation
- Provide a valuable sounding board to solve business problems throughout the Engagement

Challenges

Scaling Efficiently After a Series A Raise

A successful Series A raise is a good news, bad news story. The good news: the founder has the resources they need to grow. The bad news: they have to move quickly to build a strong leadership team and put the right strategies in place to scale efficiently.

After Quandri's successful Series A raise, Jackson Fregeau, CEO of Quandri, filled the positions of VP of Sales, Head of Operations, and VP of Customer Success. But the VP of Marketing position remained vacant.

The lack of marketing leadership at the executive level had a cascading effect across the company. Quandri promoted their services through customer success stories, LinkedIn posts, and industry podcasts and conferences, but these activities weren't coordinated or necessarily tied to strategy.

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“We needed to zoom out and look at the big picture: what did we want to achieve with marketing overall in the next 12 months? And what do we need to do now to ensure we get there?” says Jackson.

Additionally, Quandri's marketing wasn't as targeted and focused as it could have been—which negatively impacted the success of its marketing campaigns.

The absence of a clearly defined ideal client also created uncertainty in Quandri's revenue pipeline. Because Quandri didn't know exactly who they were selling to, they couldn't map the Buyer's Journey and accurately measure important KPIs for each stage of the lead-to-deal process.

Results

- A new, world-class VP of Marketing
- More qualified pipeline
- Strong foundation to scale into the future and achieve ambitious ARR goals

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Solution

Eighty Twenty CMO’s 12-week Fractional CMO Engagement

Jackson knew he needed marketing help, but he wasn’t sure where to turn until his new VP of Customer Success recommended Michael Gaudet from Eighty Twenty CMO.

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“That referral carried a lot of credibility,” says Jackson. “When we met, Michael came across as extremely intelligent, very, very smart, and very competent.”

Jackson retained Michael for a 12-week Engagement as Fractional CMO.

Discovery Process

Michael commenced by meeting in person with Jackson and the Quandri Engagement Team to build rapport and get their buy-in. Michael followed this with a series of one-to-one meetings with Jackson to clearly understand the company’s business goals for the upcoming year.

After completing this groundwork, Michael worked with the Engagement Team to establish Marketing Goals that laddered up to Business Goals while also uncovering new opportunities and identifying challenges. He assessed the competencies and capacities of existing Quandri team members and reviewed Quandri’s current systems and processes.

With his analysis complete, Michael presented his findings and recommendations to Jackson and the Engagement Team to ensure alignment.

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“Michael knows what he’s doing,” says Jackson. “He was prescriptive about what we needed but also open to our feedback. It was the right balance.”

Plan Execution

With everyone aligned, Michael executed on his plan, which included:

1. Hiring a VP of Marketing

Michael worked collaboratively with Quandri’s HR lead and a recruitment agency to craft the process for hiring a new VP of Marketing, including aligning on the job description, reviewing candidates, and conducting interviews. He advised on the final decision and created a detailed onboarding plan.

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“Chantielle was the perfect person for us,” says Jackson. “Her skillset for what we are and what we’re doing is a perfect match. She’s been a great addition to our team.”

This high-quality hire was made without monopolizing Jackson’s time, freeing him up for other important strategic work.

“Michael could stand in for me. And it allowed us to be way more efficient with my time,” says Jackson.

2. Defining Quandri’s ICP (Ideal Client Profile) and Buyer Journey

During his analysis, Michael realized that Quandri didn’t have a clear grasp on their ideal clients, which undermined their marketing activities and introduced revenue uncertainty. Michael lobbied to define Quandri’s ICPs and Buyer Journeys before moving forward with other marketing initiatives.

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“I’m not a marketing executive so I didn’t place a huge importance on ICP prior to Michael coming in,” says Jackson. “But he pointed out that we need to focus on ICP first and move from there—and that’s exactly the kind of advice you want from a strategic leader because you don’t know what you don’t know.”

Michael interviewed top Quandri clients to understand their end-to-end Buyer Journey. He distilled these findings into a clear ICP, which he disseminated across the company.

Michael also coached the Marketing Team on conducting these types of interviews, empowering them to create and amend ICPs and Buyer Journeys as the business grows and changes.

3. Creating a predictable buyer-led revenue pipeline

With clearly defined ICPs, Michael met with Sales and Marketing stakeholders to align on definitions for Lead, MQL, SQL, and Deal. He then worked with Revenue Operations to put these stages into Quandri's CRM and implemented automations to make the process more efficient for sales and marketing teams. He also incorporated SLAs to boost client satisfaction and streamline operations further.

A valuable sounding board

Throughout the 12-week Engagement, Jackson utilized Michael as a helpful resource for problem solving and strategic direction.

He explains:

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“Michael was a really good sounding board. He helped me walk through some problems we were facing and helped me make the decision to hire the VP of Marketing much earlier than we'd planned—even though that meant we wouldn't renew our contract with him. It was the right decision for us, and he encouraged it.”

“Michael knows what he's doing. He was prescriptive about what we needed but also open to our feedback. It was the right balance.”

Results

Marketing Leadership and a Strong Foundation for Growth

Today, Quandri has the foundation it needs to maximize the value of their Series A raise and scale into the future.

The new VP of Marketing nicely rounds out the Executive Team. The new VP ramped up and delivered value quickly thanks to Michael's detailed transition plan, which included a Marketing Plan for the months following her hire.

Quandri also has greater revenue predictability than ever before. Each stage of the Buyer Journey is captured and tracked in the CRM, providing new visibility and data insights to guide strategic decision making.

In short, Michael fast-tracked Quandri's ability to scale after its Series A raise.

"Without Michael, we wouldn't have done the ICP. We would have hired a VP of Marketing, but it would have taken longer—and taken my focus away from other areas of the business that are really important," says Jackson.

Today, Quandri has all the pieces in place to focus on demand gen, which will allow them to achieve their ambitious ARR goals. Already they have more inbound traffic and a more qualified pipeline.

"We're starting to benefit from the ICP and Buyer Journey and everything that feeds into that—thanks to a lot of the stuff that Michael set up," says Jackson.

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KPI Driven, Fractional Marketing Leadership

Case Study

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