

# Smart Marketing for Emerging Tech

## Roots Software Case Study

**Roots Software** is a construction project life-cycle management system, providing end-to-end reporting and tracking that generates project efficiency, process uniformity, and cost savings. Roots Software was built for builders, by builders. Bristlecone Construction was tired of having spreadsheet errors, tracking in multiple formats, each job doing things differently, and the multitude of software solutions. Bristlecone created Roots Software as a single platform for their team, but soon realized its value to generate project efficiency, process uniformity, and cost savings for the entire industry.



**237**  
leads



**59**  
scheduled demos



**\$422K**  
in potential revenue



Construction Management Software for Builders

<http://www.rootssoftware.com>



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# About the Project

Today's builders; general contractors, sub-contractors, government contractors, and heavy civil construction companies are up against a whole set of challenges that are impacting their bottom line - increased competition, budget constraints, tight bidding markets, high customer expectations and restrictive project timelines. **The drive to be more efficient and more cost effective is stronger than ever** leaving little room for outdated methods and redundant technologies.

As an emerging tech company with a fantastic but newly developed software product, Roots Software is on the cutting edge of a new technology for the construction industry, but has not been able to access their target market effectively - on their own website and especially on social media. They were looking for a marketing solution that would help them clearly define their brand, create brand awareness, increase engagement on social platforms, reach new markets and deliver high quality leads. They also knew they needed to be smart about which areas of their own marketing they could perform for themselves and where they needed outside help.

It didn't take long for Roots to select North Star HQ (NSHQ) to help move them forward. North Star's comprehensive portfolio of services, their proven track record, their focus on innovation and their ability to deliver a fully integrated system drove Roots' decision to award them a contract designed to generate leads, increase traffic, and boost awareness. Once the teams began working together, it also became clear that North Star's collaborative approach and their knack for solving problems before anyone knew there was a problem distinguished them from other vendors.



**“Being able to work with a company like Roots Software was such a great experience for us,”** said Katrina Padron, CEO and founder of North Star HQ. “We share a common goal, always looking for ways to solve problems. For us, it was about helping solve problems for David (Dipasquale) and his team, and it was obvious that their focus was on helping to solve problems for companies in the construction industry.”



# Implementing the Solution

**North Star HQ used leading-practice-based business processes as the foundation for the project.**

By leveraging a best practices model, Roots was able to derive benefits from the collective experience of other North Star projects that had already proven to be successful. This helped the company avoid an expensive, time consuming effort and allowed North Star to implement a solution that Roots Software could maintain and support with internal resources after the conclusion of the project.

## NORTH STAR'S IMPLEMENTATION STRATEGY ADHERES TO FOUR-PRONGED METHOD FOR EACH PROJECT ENGAGEMENT:

### IDENTIFY // MONTH 0

- Analysis of future dangers, opportunities and strengths
- Technology selection to reach ideal decision makers
- Review strategy map

01

### BUILD // MONTH 1

- Audience development
- Creative coordination
- Technical configuration
- Workflow configuration

02

### TRACK, ANALYZE & CONVERT // MONTH 2 - 7

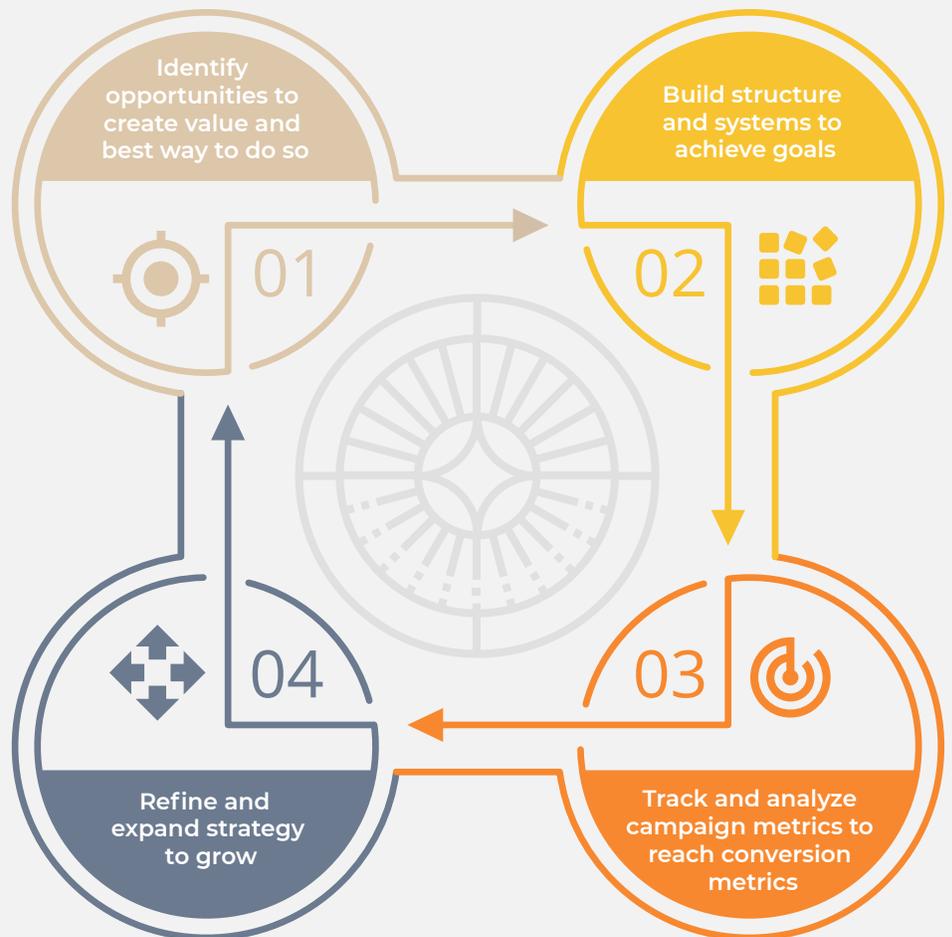
- Launch advertising
- Funnel and conversion metrics
- Funnel optimization

03

### GROW // MONTH 8 - 12

- Audience extension to 50,000 decision makers
- Campaign expansion to remaining decision makers
- Messaging evolution to connected influencers

04



## 01: IDENTIFY // MONTH 0

The North Star and Roots teams began working together in October 2017. North Star jumped in right away – as if they were sitting right next to their counterparts on the Roots team. Initially, the work involved an evaluation and audit of Roots’ current content assets and brand materials as well as an examination of their online presence and current digital capabilities, as well as any current processes and setups. The goal was to conduct an analysis that would identify future dangers, opportunities and strengths and to make technology selections that would allow Roots to reach their ideal decision makers.

## 02: BUILD // MONTH 1

After presenting their findings and reviewing the strategy map with the leadership team at Roots, North Star worked together with the Roots implementation team on the Build phase – audience development, creative coordination, technical configuration, and workflow configuration. Because Roots was a new company, their current marketing programs were limited, and North Star was able to come in and easily help out in several areas.

In a critical first step, North Star identified Roots’ total addressable market (TAM) - CEOs and project managers at general contracting firms with more than \$2M in annual revenue. Once identified, NSHQ created compelling messaging for each audience segment and built campaigns to reach the targeted users on digital platforms where they already spend their time - Google, YouTube, Facebook and LinkedIn.

Once the named targets on each platform were identified, by leveraging machine learning and AI, NSHQ instructed the platforms to share branded video content to these exact decision makers. YouTube was used for brand awareness, where targets watched the video for less than a penny per view, and the other three platforms were used for lead generation.

To round out the project for Roots, NSHQ also generated brand materials to modernize Roots’ digital presence, developing a style guide and generating compelling content that was on message and on brand. The NSHQ team re-crafted Roots’ website, set up an automated CRM, delivered custom 1-1 training to Roots power users and provided tech support. The entire project was supported by weekly status meeting and quick turnaround times on all communications.

## 03: TRACK, ANALYZE & CONVERT // MONTH 2-7

After completing setups North Star launched the digital programs social campaigns and began tracking and analyzing campaign metrics. Funnel and conversion metrics began to be accumulated with an eye towards optimizing the funnel and refining the campaigns based on performance.

Conversion data during the first 6 months reflects that all of the platforms combined are generating more nearly 40 leads per month - where a lead is counted as an individual who completes an intake form to request a demo. All new leads are automatically integrated into the CRM system for tracking and additional follow up.



## 03: BENEFITS // CONTINUED

- Within the first 6 months, NSHQ generated **237** leads for Roots Software. ▪ **59** demos were scheduled with about **\$422,000** in potential revenue. ▪ **\$40,700** in closed deals has been achieved with an additional **\$164,500** in deals currently under negotiation. ▪ Email click rates are averaging **13.99%** (11.96% above the average email click rate for the construction industry, which in 2018 is 2.03%). ▪ Email open rates are averaging **40.47%** (19.06% above average email open rates in the construction industry, which are hovering at about 21.01% in 2018). ▪ The average monthly return rate on advertising spend is **10x** based on cost per lead across all of the platforms - Facebook, LinkedIn, YouTube and Google.

## 04: GROW // MONTH 8 - 12

As Roots Software's engagement with North Star HQ continues, activities include extending the audience to 50,000 decision makers, expanding the campaign to some of the remaining decision makers, and evolving the messaging to connected influencers. The goal is to analyze and refine each program and expand the strategy to grow the brand, increase conversions, and continue to generate high value leads.

**SUMMARY:** North Star HQ has been able to achieve significant benefits for Roots Software – increased brand awareness and social engagement, high quality leads and tangible revenue. Roots now has best practices systems and efficient processes in place that will keep marketing costs low and ROI high. With a comprehensive marketing program in place, Roots is now able to track and score leads and generate targeted content that will reach specific decision makers effectively. North Star's on-time and on-budget implementation exceeded expectations.

Reflecting on his decision to work with North Star HQ, David Dipasquale, Chief Revenue Officer, Roots Software, said, **“We had a fantastic experience with North Star HQ. Working with Katrina and her team is like having marketing experts right here in the office with us. They make the work seamless - answering all of our questions, solving problems before we even know there is a problem, explaining marketing in a way that somebody who is not in marketing will understand, and - more than anything - delivering qualified sales leads.”**

North Star HQ is on the cutting edge of marketing technology with an emphasis on delivering people based marketing directed by technology. For emerging tech companies, being able to demonstrate their grasp of new technologies not only boosts their own brand, but being able to leverage those technologies to advance their own business targets is smart marketing.

**Find out more:** <https://northstarhq.com/>

