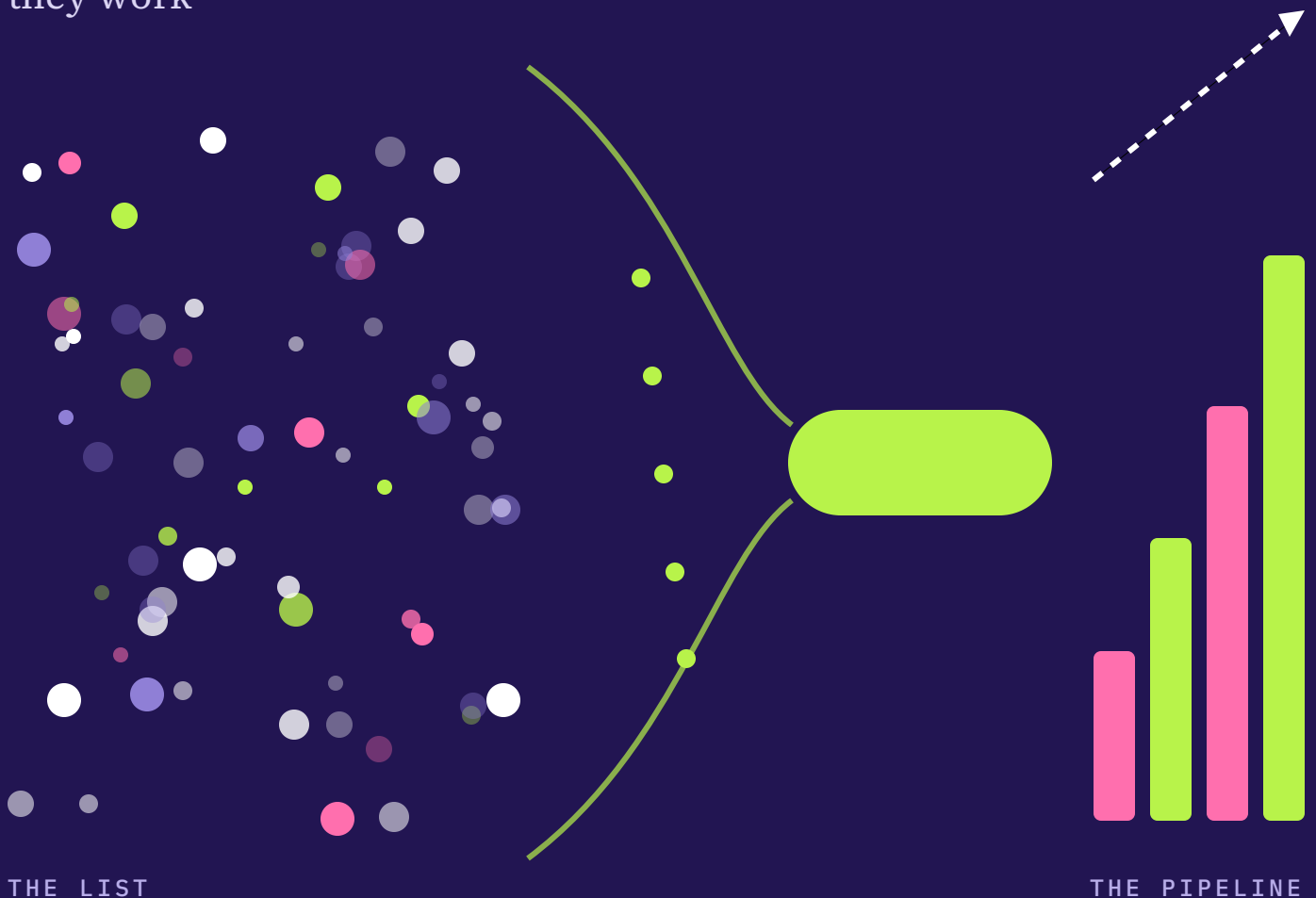


— INSTALLED BASE INTELLIGENCE SERIES

From List to Pipeline

Nine campaign plays built on technology users data, with sequences, sample messages, and the metrics that prove they work



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CONTENTS

Inside this eBook

	Why good lists still fail	03
	The activation framework	04
	Segmenting a technology users list	05
P1	Competitive displacement	06
P2	Integration-led launch	07
P3	Migration-window outreach	08
P4	Renewal-timed conversations	09
P5	Adjacent cross-sell	10
P6	Partner co-sell introduction	11
P7	Tier 1 ABM with stack personalization	12
P8	Technology-targeted events	13
P9	Lost-deal revival	14
	Channel playbook	15
	Measuring plays by segment	16
	Eight mistakes that waste good data	17
	How Data InfoMetrix builds play-ready audiences	18
	Frequently asked questions	19
	Sources	20

INTRODUCTION

Why good lists still fail

Buying the right installed base data is step one. What happens next decides whether it turns into pipeline or into another disappointing campaign.

The most common failure pattern is simple. A team buys a well-built list of accounts running a specific technology, then sends every one of them the same generic sequence it sends everyone else. The data knew which platform each account runs. The message didn't use it.

13 + 9

internal and external people influence the average B2B purchase, per Forrester

2.5

vendors is all software buyers actively engage on average, per Gartner Digital Markets

80%+

of buyers say integration with existing tools matters, ranking it above cost

70%

of a sales rep's time is spent on non-selling tasks, per Salesforce

Each of these trends rewards specificity. Larger buying groups need messages for more roles, shorter shortlists punish generic outreach, buyers filter on fit with their stack, and reps have little time to research each account. Technology users data solves all four, but only if campaigns are built to use it.

“ The list tells you what an account runs. The play decides whether you say anything about it.

THE METHOD

The activation framework

Every play in this eBook follows the same six-step framework. Steps one and four, highlighted, are where technology users data does the most work, and where most campaigns skip it.

1**Segment by relationship**

Compatibility, displacement, or expansion. Each segment gets its own play.

2**Tier by fit and timing**

ICP fit, technology fit, and signals such as migrations or renewals.

3**Map the buying group**

Platform owners, admins, business owners, finance, and security.

4**Match message to stack**

Open with the platform they run and the gap they feel.

5**Sequence across channels**

Email, ads, calls, events, and partners, timed together.

6**Measure by segment**

Compare plays and segments against a control, not just campaigns.



Skip step one and every account gets the same message. Skip step four and the data never reaches the buyer.

STEP ONE

Segmenting a technology users list

One installed base list usually contains several different opportunities. Split it by how each account's stack relates to your product before you write a single message. These five segments map directly to the nine plays that follow.

SEGMENT	THE ACCOUNT	PLAYS THAT FIT	PLAY
Compatibility	Runs a platform you integrate with or extend	Integration-led launch, adjacent cross-sell, partner co-sell	P2, P5, P6
Displacement	Runs a competitor you replace	Competitive displacement, renewal-timed, lost-deal revival	P1, P4, P9
Migration	Runs a platform facing a deadline or licensing change	Migration-window outreach	P3
Top accounts	Strong ICP and technology fit, high value	Tier 1 ABM with stack personalization	P7
Community	Practitioners of a platform in a region or industry	Technology-targeted events	P8

Then tier

Within each segment, rank accounts by ICP fit, technology fit, and timing signals.

Then map roles

List the owners, operators, and budget holders you need to reach in each account.

Then pick a play

Match each segment and tier to one play, and resist running all nine at once.

PLAY 01

Competitive displacement

01

Best for

Challenger vendors replacing an incumbent platform

Audience definition

ICP accounts running [Competitor], excluding any known to have renewed or signed in the last year

Message angle

Name the limits [Competitor] users hit at scale, then show a low-risk path off it

THE SEQUENCE

Day 1

Email

Platform owner: what teams on [Competitor] ask us

Day 3

LinkedIn

Connect and engage with the platform owner

Day 5

Ads

Account-based ads with a comparison guide

Day 8

Email

Business owner: a switch story from a peer

Day 12

Call

SDR call referencing the comparison

Day 15

Email

Offer a migration plan and timeline

SAMPLE OPENER

Subject: Teams moving off [Competitor]
Most [Competitor] teams we talk to hit [specific limitation] once they pass [scale]. [Peer company type] moved in [timeframe] without disrupting [process]. Worth comparing notes?

METRICS TO WATCH

- Reply rate by competitor
- Meetings booked
- Opportunity rate
- Win rate versus direct deals

WATCH OUT Never trash the competitor. Lead with the pain their users already describe, and prove the migration is safe.

PLAY 02

Integration-led launch

02

Best for

ISVs and add-on vendors with a native integration

Audience definition

ICP accounts running [Platform], with contacts across admins, platform owners, and business owners

Message angle

The integration removes a workflow gap they already feel inside [Platform]

THE SEQUENCE

Day 1

Email

Admin: a 90-second integration demo

Day 2

Ads

Platform-user ads announcing the integration

Day 4

Email

Business owner: the outcome, not the feature

Day 7

Webinar

Invite to a session co-hosted with the platform partner

Day 10

Call

SDR follow-up to engaged admins

Day 14

Email

Case study from a [Platform] customer

SAMPLE OPENER

Subject: [Your product] now connects natively to [Platform]

If your team runs [workflow] in [Platform], our new native integration removes [manual step]. Here's a 90-second look at how it works for teams like yours.

METRICS TO WATCH

- Demo video views
- Integration trial starts
- Meetings booked
- Integration attach at close

WATCH OUT Lead with the workflow the integration fixes, not a feature list. Admins become champions only if their day gets easier.

PLAY 03

Migration-window outreach

03

Best for

Systems integrators, alternative platforms, and hyperscalers

Audience definition

ICP accounts still running [Legacy platform] that haven't committed to a new path

Message angle

The deadline is real, the cost of waiting rises, and here is a plan

THE SEQUENCE

Week 1

Email

Executive sponsor: a one-page deadline brief

Week 1

Ads

Readiness checklist offer to the account

Week 2

Email

Platform owner: offer a migration assessment

Week 3

Call

SDR call to schedule the assessment

Week 4

Event

Invite to a peer roundtable on the migration

Week 6

Email

Peer migration story and next steps

SAMPLE OPENER

Subject: [Platform] support ends [date]: where does [Company] stand?

Most [Platform] teams are weighing an upgrade against a move ahead of [date]. We've turned what we learned from recent migrations into a one-page readiness checklist. Want a copy?

METRICS TO WATCH

- Checklist downloads
- Assessments booked
- Accounts moving between stages
- Pipeline by stage

WATCH OUT Segment by migration stage first. Pitching an assessment to an account that already signed with someone else burns the relationship.

PLAY 04

Renewal-timed conversations

04

Best for

Vendors competing for accounts locked into contracts

Audience definition

ICP accounts on [Platform] with a renewal expected in the next six to nine months, where known

Message angle

Give them options and leverage before the renewal decision is made

THE SEQUENCE

T-9 mo

Email

Benchmark report for [Platform] users

T-8 mo

Ads

Thought leadership on renewal planning

T-7 mo

Email

Business owner: a renewal business case template

T-6 mo

Call

Discovery call on renewal plans

T-5 mo

Email

Offer a proof of concept before renewal

T-4 mo

Meeting

Commercial conversation with finance involved

SAMPLE OPENER

Subject: Before your [Platform] renewal
Renewals are the one moment teams can rethink [category] without disruption. Here's a short template teams use to compare staying, renegotiating, and switching. Useful ahead of yours?

METRICS TO WATCH

- Meetings before the renewal window
- Proofs of concept started
- Opportunities created
- Win rate on renewal-timed deals

WATCH OUT Renewal dates are rarely public. Treat them as a signal to verify in discovery, not a fact to state in the first email.

PLAY 05

05

Adjacent cross-sell

Best for

Vendors whose product complements a platform the account already owns

Audience definition

ICP accounts running [Adjacent platform], where your product extends its value

Message angle

Build on an investment they have already made and defended

THE SEQUENCE

Day 1

Email

Business owner: getting more from [Platform]

Day 3

Ads

Use-case ads for [Platform] users

Day 6

Email

Platform owner: how the two connect

Day 9

Call

SDR call on a specific use case

Day 13

Content

Share a guide for [Platform] teams

Day 16

Email

Peer example with measurable results

SAMPLE OPENER

Subject: Getting more from [Platform] at [Company]

You've already invested in [Platform] for [function]. Teams that add [your category] on top usually [specific outcome]. Here's a two-minute view of how the two connect.

METRICS TO WATCH

- Engagement by platform owner
- Meetings booked
- Opportunity rate
- Average deal size

WATCH OUT Prove the connection concretely. Vague "works great with" claims sound like every other vendor.

PLAY 06

Partner co-sell introduction

06

Best for

Vendors with an active technology or channel partner

Audience definition

ICP accounts running the partner's platform, split into mutual customers, shared prospects, and untouched accounts

Message angle

A trusted partner introduces a solution that makes their own platform more valuable

THE SEQUENCE

Step 1

Planning

Share the overlap list and agree on owners

Step 2

Partner

Partner rep makes a warm introduction

Step 3

Email

Joint email from both companies

Step 4

Webinar

Co-hosted session for the partner's users

Step 5

Meeting

Three-way meeting with the account

Step 6

Review

Quarterly review of joint pipeline

SAMPLE OPENER

Subject: Introducing [Your company], from [Partner]

Hi [Name], we've been working with [Your company] on [use case] for [Platform] customers like you. Given [specific situation], I thought a quick conversation would be worth your time.

METRICS TO WATCH

- Introductions made
- Partner-sourced meetings
- Win rate with partner involved
- Days to close

WATCH OUT Give the partner a reason to care. Show how your product helps their customers and their platform, not just you.

PLAY 07

Tier 1 ABM with stack personalization

07

Best for

Teams running one-to-one programs for top accounts

Audience definition

Your top 50 to 100 accounts with strong ICP fit and strong technology fit

Message angle

A point of view written specifically about their environment

THE SEQUENCE

Week 1

Research

Map the stack, owners, and recent changes

Week 2

Content

A short point of view on their environment

Week 2

Direct mail

Executive package with the point of view

Week 3

Ads

Tailored ads to the full buying group

Week 3

Outreach

Multi-threaded outreach across roles

Week 5

Event

Invite to an executive dinner or briefing

SAMPLE OPENER

Subject: A point of view on [Company]'s [Platform] environment

We put together a short view on how teams running [Platform] alongside [Adjacent system] are handling [challenge], with three ideas specific to [Company]. Happy to walk you through it.

METRICS TO WATCH

- Buying group coverage
- Account engagement
- Meetings with senior roles
- Opportunities and pipeline

WATCH OUT Depth beats breadth. Ten accounts done properly outperform a hundred with a name swapped into a template.

PLAY 08

Technology-targeted events

08

Best for

Field marketing teams and event organizers

Audience definition

Users of [Platform] in [region or city], across practitioner and leadership roles

Message angle

Useful, platform-specific content in a room of peers

THE SEQUENCE

6 weeks out

Email

Invitation to [Platform] users only

5 weeks out

Ads

Localized ads to the invite list

4 weeks out

SDR

Personal invitations to priority accounts

2 weeks out

Email

Agenda and speaker reminder

Event day

Event

Roundtable or workshop

48 hours after

Email

Follow-up with recording and next step

SAMPLE OPENER

Subject: A [Platform] user roundtable in [City]

We're bringing together a small group of [Platform] leaders in [City] to compare how teams are handling [challenge]. No pitches, just practitioners. Would you join us on [date]?

METRICS TO WATCH

- Registration rate
- Attendance rate
- Meetings booked after the event
- Pipeline from attendees

WATCH OUT If the content is a pitch, platform users won't come back. Make the session genuinely useful and the meetings follow.

PLAY 09

09

Lost-deal revival

Best for

Teams with closed-lost deals to a competitor

Audience definition

Accounts that chose a competitor 12 to 36 months ago, revalidated to confirm what they run today

Message angle

A lot has changed since they last looked, on both sides

THE SEQUENCE

Step 1

Data

Revalidate what each lost account runs now

Step 2

Email

Original champion: what has changed since

Step 3

Ads

Product update ads to the account

Step 4

Email

New stakeholder: a fresh introduction

Step 5

Call

Call the original champion

Step 6

Offer

A no-risk evaluation or pilot

SAMPLE OPENER

Subject: A lot has changed since [year]
When you chose [Competitor] in [year], we didn't yet have [capability]. Since then, [peer company type] teams have used it to [outcome].
Worth a fresh look before your next review?

METRICS TO WATCH

- Re-engagement rate
- Reopened opportunities
- Win rate on revived deals
- Time to reopen

WATCH OUT Revalidate first. Some lost accounts have already switched again, and a pitch about the wrong platform ends the conversation.

EXECUTION

Channel playbook

Technology users data improves every channel, but only if each one actually uses the segment. Here is how to put the data to work channel by channel. On email in particular, relevance protects deliverability: Google asks bulk senders to [keep spam complaint rates below 0.1% and never reach 0.3%](#).

CHANNEL	HOW TO USE THE DATA	TIP
Email	Open with the platform the account runs; vary the message by role.	<i>Keep spam complaints under Google's 0.1% guidance.</i>
LinkedIn and account-based ads	Upload the technology-segmented account list as a matched audience.	<i>One creative per segment, not one for everyone.</i>
Programmatic ABM	Target only accounts in the segment, weighted by tier.	<i>Suppress accounts already in active opportunities.</i>
SDR calls	Give reps the stack, owners, and play before they dial.	<i>One stack-specific question beats a generic pitch.</i>
Direct mail	Reserve for Tier 1 accounts with a stack-specific point of view.	<i>Send to verified recipients only.</i>
Events and webinars	Invite by platform, so every attendee shares the same context.	<i>Follow up within 48 hours.</i>
Partners	Share the overlap list and agree on owners before outreach.	<i>Lead with value to the partner's customers.</i>

PROOF

Measuring plays by segment

Campaign-level reporting hides what technology data is doing. Measure each play by segment, and always keep a control group built from your usual firmographic list so the lift is visible.

A SIMPLE SEGMENT SCORECARD

SEGMENT	ACCOUNTS	REPLY RATE	MEETING RATE	OPPS
Segment A: [Competitor] users	[accounts]	[%]	[%]	[#]
Segment B: [Platform] users	[accounts]	[%]	[%]	[#]
Control: firmographic list	[accounts]	[%]	[%]	[#]

Same timing

Run the play and the control in the same weeks, so seasonality doesn't skew the result.

Same message quality

Give the control your best generic sequence, so you measure the data, not the copy.

Follow it to revenue

Track opportunities, win rate, and cycle length, not just replies.

RULE OF THUMB

If a play can't beat the control on meetings, change the message before you blame the data.

AVOID THESE

Eight mistakes that waste good data

Most underperforming technology campaigns fail for the same handful of reasons, and almost none of them are about the data itself.

1 One message for the whole list

The data knew the platform; the email didn't mention it.

3 Reaching one person per account

Technology decisions involve owners, operators, and budget holders.

5 Stating a renewal date as fact

Treat contract timing as a signal to confirm in discovery.

7 No control group

Without one, nobody can tell whether the data worked.

2 Running all nine plays at once

Pick the one or two that match your segments and do them well.

4 Pitching the platform they left

Revalidate before displacement and revival plays.

6 Ignoring the partner

Accounts on a partner's platform deserve a co-sell motion.

8 Measuring replies, not revenue

Follow every play through to opportunities and wins.

“ Good data with a generic play performs like bad data. Good data with the right play is where pipeline comes from.

DATA INFOMETRIX

How we build play-ready audiences

Data InfoMetrix specializes exclusively in Installed Base Data and Installed Base Intelligence. We build audiences around the plays you plan to run, so each segment arrives ready for its own message.

1

Segmented for your plays

Audiences built by technology relationship: competitor users, integration-partner users, migration candidates, and more.

2

Built around your ICP

Industry, size, region, and exclusions applied before delivery, with counts first.

3

The whole buying group

Verified contacts across platform owners, admins, business owners, and budget holders.

4

Refreshed before each play

Revalidation ahead of displacement, migration, and revival campaigns.

Tell us which play you want to run first

Share the play, the technologies, and your ICP, and we'll come back with counts by segment and a quote. One of our experts will respond within one business day.

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FAQ

Frequently asked questions

What is a campaign play?

A repeatable combination of audience, message angle, channel sequence, and metrics, designed for one specific segment of a technology users list.

How many plays should run at once?

Usually one or two. Each needs its own messaging and measurement, and running all nine dilutes effort.

How do we personalize at scale?

Segment by technology relationship, then personalize by segment and role. Save one-to-one personalization for Tier 1 accounts.

Can we use this with LinkedIn ads?

Yes. Upload each technology segment as a matched account audience and give each segment its own creative.

Which play should we run first?

The one that matches your largest, best-fit segment. Integration-led and competitive displacement plays are the most common starting points.

Do these plays work for SDR teams?

Yes. Each sequence includes calls, and the stack context gives reps a specific reason to call instead of a generic pitch.

How do we prove the data worked?

Run each play against a control built from your usual firmographic list, at the same time, and compare meetings and opportunities.

How often should we refresh the list?

Before each major play, especially displacement, migration, and revival plays, where accounts change platforms often.

REFERENCES

Sources

Statistics link to the pages they were taken from. The plays, sequences, sample messages, and frameworks are Data InfoMetrix guidance; adapt them to your market, and replace every [placeholder] with your own details.

- 1 [Digital Commerce 360: Forrester State of Business Buying 2026](#)
- 2 [Gartner Digital Markets: 2025 Software Buying Trends](#)
- 3 [G2: 2023 Software Buyer Behavior Report highlights](#)
- 4 [Salesforce: State of Sales statistics \(July 2024\)](#)
- 5 [Google: Email sender guidelines FAQ](#)

MORE FROM THE INSTALLED BASE INTELLIGENCE SERIES

Beyond Firmographics and The Installed Base Data Buyer's Guide (eBooks) · The Migration Wave · The Compatibility Economy · Technology Data Decays Twice · Ecosystem-Led Growth (white papers)

NEXT STEP

Turn the right list into the right conversations.

Tell us which play you're running and who you sell to. We'll build a researched, verified installed base audience, segmented and ready for it.

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