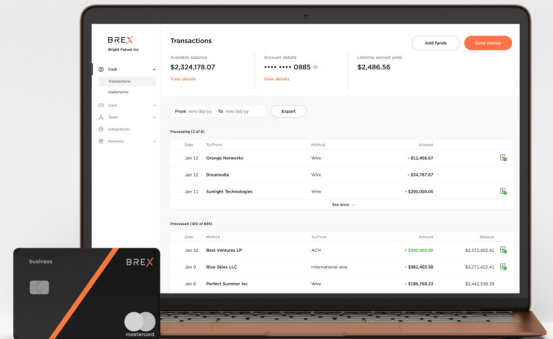




How Brex uses research to add proof to their value proposition



Financial services company Brex offers corporate credit cards and cash management accounts to help growing companies spend and save easily, and scale faster. The company had published a number of data-led opinion pieces about how burgeoning companies can lay a strong foundation and grow.

Aliza Edelstein, Director of the Product, Partner & Content Marketing team at Brex, says that from the very beginning, Brex has focused on supporting their messaging by collecting data.

“Best in class product marketing teams don’t make promises, they deliver proof,” Edelstein says.

Creating a thought-leadership presentation that resonates

When Brex launched the first-ever direct corporate card integration with leading enterprise resource planning (ERP) solution NetSuite, Edelstein and her team began preparing for a speaking session at the industry trade show, SuiteConnect, that offered an important opportunity to connect with their target audience of finance-decision makers. Edelstein turned to SurveyMonkey Audience to collect feedback on their messaging and ensure that Brex’s presentation would resonate.



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Aliza Edelstein, Director of Product, Partner & Content Marketing, Brex

Supporting a unique value proposition with on-demand research

Edelstein's team first conducted qualitative interviews to understand the unique challenges finance and accounting leaders faced, in order to craft a strong value proposition that spoke to their specific pain points. She then ran a quantitative survey with a more representative sample to validate her findings around key benefits. She also wanted to message test the phrase "bean counters," and ensure the term wasn't offensive to the target audience.

The responses guided the development of a value proposition that focused on efficiency, reducing human error, and more accurate data.

Edelstein received feedback from 292 finance and accounting professionals, and included qualifying questions to ensure respondents were decision-makers. The results helped Edelstein and her team craft a presentation that leveraged thought leadership, storytelling, and marketing to address customers' needs.

Understanding the customer in a whole new way

Edelstein collected the survey results in just two days, ensuring the team could remain on track while developing their presentation. The results confirmed her hypotheses, and lent credibility to Brex's customer value proposition. They also confirmed that Edelstein was safe to move forward with a "bean counter" theme, with 81% finding it endearing, feeling neutral about it, or not having thought about it.

For the trade show presentation, the team crafted a research report highlighting the survey insights in a digestible, easy-to-read format. These were included in seat drops before the presentation, alongside jelly beans in a fun play on the "bean counter" idea.



Brex's marketing and sales teams collaborated to promote the report in advance of SuiteConnect, boosting organic and paid reach on social and other earned media efforts.

Edelstein says that the key to leveraging both qualitative and quantitative data generated in proprietary research is telling a compelling story. "SurveyMonkey made it so much easier for us to do that with this opportunity, and streamlined the process from conception to execution."

Company

Brex

Strategic goal

Strengthen value proposition
Develop thought leadership

Solution

SurveyMonkey Audience

Success factor

Social proof

Create powerful stories with proprietary market research.
Learn more about how with [SurveyMonkey Audience](#).