White paper

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Worst Practices in Marketing Operations

Key approaches for improving marketing effectiveness

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FORWARD

The following white paper provides valuable insights on some of the common mistakes marketers are making in the face of a rapidly changing, technology-driven marketing landscape. The author is Simon Daniels, Director, Marketing Operations Consulting at Percassity Marketing Data Solutions, a UK-based marketing consultancy and resourcing firm. Simon's experience spans a number of business-to-business sectors, working across Europe, North America and Asia Pacific. Responsible for data strategy development, CRM and marketing automation system implementation, analytics and data quality initiatives at a number of respected organizations, Simon continues to lead these disciplines at Percassity. Based in London, he also assumes the blogging guise of Marketing Insight Guy (www.marketinginsightguy.com and @mktginsightguy on Twitter) where he shares thoughts, ideas and anecdotes on marketing data strategy and operations. I hope you enjoy Simon's perceptive take on the challenges facing today's marketers—and the solutions that can help assure their success.

Jeff Chamberlain
VP, B2B Solutions Marketing
Aprimo

INTRODUCTION

As the economic slowdown inevitably slips behind us, the opportunity presents itself to re-evaluate the role of Marketing Operations in our organizations. This is particularly the case for the many Marketing departments that had shed staff and now need to find smarter ways of undertaking some of those lost individuals' activities.

Effective Marketing Operations require a clear long-term vision and strategy to drive process and technical development. Yet marketers are drowning in point solutions, multiple vendor relationships, short-term tactical initiatives, conflicting stakeholder input and oceans of data. Marketing leaders, supported by organizations' senior management, must re-evaluate their approach to these conflicting priorities in order to remain relevant and successful.

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The trend of falling marketing spend reflects not just economic circumstances, but a growing loss of confidence in the marketing function. It's a distressing development which must be corrected, not just for the sake of Marketing itself, but also for the success of the wider organization.

So, here are five of the worst practices in Marketing Operations which limit the success of Marketing. Intended to help organizations learn from the mistakes of others, avoiding these worst practices will contribute to the creation of an agile Marketing Operations environment.

How many do you recognize in your organization?

WORST PRACTICE NO. 1:

RENTING MAILING LISTS AT THE LAST MOMENT

There is much more to obtaining targeted contacts for marketing activity than renting a list. We see successful organizations taking a long-term approach, and avoiding renting lists for forthcoming tactical campaigns just to meet some arbitrary quantity of names or unrealistic deadline. As you might expect, there's a vigorous debate taking place on the best way of building data for marketing activity. One side suggests that the use of any kind of external list runs counter to the ethos of permission marketing, where only individuals that have indicated a specific desire to receive communications should be included in a database. In an ideal world this would be the perfect approach, and the appropriate content, social media and search engine optimization programs would maximize "natural" database population in this way.

"The gold standard of business communications permissions today is to offer a choice to customers"

This may not always be practical though, and a less gradual approach could be required, goes the other side of the argument. We see successful organizations test new list sources before roll-out, as well as employing data planning strategies that accept that a number of marketing touches are needed to introduce the brand and proposition to cold prospects before response is likely.

In addition, our experience of leading organizations is that they spend time researching the right data source and using custom contact discovery if necessary. This might involve a careful review of targeting strategy and evaluation of possible source data, which in turn may need further validation and refinement. However, such custom contact discovery is not an overnight activity, necessitating that sufficient time be allowed. This will still be considerably faster than organically building a database while optimizing the resulting data quality.

CHECK POINTS:

- Plan data acquisition well in advance of campaign execution and allow sufficient time to obtain the required data.
- Test samples from different data sources to establish which are most responsive, before rolling out to a wider selection from the most successful source.
- Consider whether bespoke data discovery is required, where custom research is undertaken to identify the required contacts and build your database.

WORST PRACTICE NO. 2:

TRACKING EVERY MARKETING CAMPAIGN SEPARATELY

A practice common in downsized marketing departments is the outsourcing of campaign execution, particularly involving digital activity. External vendors can pull landing pages and micro-sites together quickly and easily, where building such facilities into a corporate website can be onerous and time consuming. Campaign execution may be handled internally of course, utilizing CRM, email broadcast, website content management tools and so on. Regardless of how campaigns are handled though, we see best practice marketers insisting that reporting takes place within existing processes as a business-as-usual activity.

"We see best practice marketers insisting that reporting takes place within existing processes as a business-as-usual activity"

It's very tempting, particularly when the focus tends to be on getting a campaign out of the door, to allow separate reporting mechanisms to be adopted, usually involving spreadsheets, PowerPoint slides and email alerts. Frequently understood by only a few people, we see these processes, sitting outside business-as-usual activity, avoided by best practice organizations. The issues encountered when "going out of process" range from unnecessary additional work, through harder cross-campaign results comparison, to restriction of proper touch control and poor opt-out management, to name just a few.

Where a marketing or campaign management system does exist, it's hopefully relatively straightforward to capture such responses directly - many systems have web-to-lead functions. If the process has to be a manual one however, organizations need to make allowances within the campaign response-handling plan for doing so. The investment in time and effort will pay off when it comes to reporting and tracking the campaign, both in the short term as responses are received and later on when analyzing campaign effectiveness and ROI.

Naturally, organizations that have already deployed a marketing automation tool (see Worst Practice No. 5: Undertaking marketing campaign activity manually) should never execute activity outside of this system. Part of the fundamental premise (and promise) of marketing automation is to create an end-to-end campaign management environment, and moving outside of this completely negates the investment.

If a "tactical" campaign doesn't seem worth undertaking within the system, it probably isn't worth undertaking at all!

CHECK POINTS:

- Ensure all campaign reporting takes place within business as usual processes, using existing campaign and response management tools and mechanisms where they exist, rather than developing alternatives.
- Avoid over-reliance on processes that depend on a single individual undertaking manual activity.
- If you do use external agencies for campaign execution, make sure you define your outcome data requirements as part of the contract.

WORST PRACTICE NO. 3:

KEEPING THE SALES AND MARKETING DATABASES SEPARATE

A common issue afflicting Marketing is a lack of integration between Sales and Marketing systems, particularly when it comes to sharing contact data and leads. Holding Sales and Marketing data separately means that updates to either are not reflected in the other system, which is a significant lost opportunity for data maintenance. Good sales people are close to their contacts and will have information on changes in individuals' circumstances, from new job titles to those who have recently left. Similarly, updates captured via marketing activity, web form submissions, email bounces and so on are made available to Sales by best-in-class practitioners.

"Holding Sales and Marketing data separately means that updates to either are not reflected in the other system"

Successful organizations have usually implemented marketing systems with interfaces to a sales force automation system, ensuring that leads, once qualified, appear directly in these systems - not shared by spreadsheet or email sent to Sales. (Email alerts are a good idea in some circumstances, but the information itself should be automatically available in a sales system.) This ensures high quality customer data is maintained, and it also means leads are available to Sales on a timely basis for rapid customer follow-up. This in turn improves lead tracking, ensuring against leads getting lost with the eventual outcome unknown.

The ability to deliver qualified leads that are acceptable to Sales, as well as being able to measure marketing effectiveness and ROI, is a key differentiator of successful marketing organizations.

CHECK POINTS:

- Enable contact data to be shared between Sales and Marketing, including updates and amendments.
- Present leads (once qualified) to Sales via a sales force automation system, not spreadsheet lists or email. There are plenty of solutions out there at all price points!
- Ensure the outcome of leads passed to Sales can be recorded and tracked in order to measure return on marketing investment.

WORST PRACTICE NO. 4:

CHECKING DATA EXTRACTS JUST BEFORE THEY GO OUT

The scenario of performing a quick last minute check of the list before sending an email or direct mail campaign is all too familiar, and probably dates to the first direct marketing campaign! Typically such a check consists of scanning the data by eye, running a few sorts and applying some filters, usually in Excel. (This is very much a B2B situation of course; consumer data volumes are typically too high for this kind of desktop manipulation to be practical.) Reviewing data at this stage of any campaign is too late in the process though, and we see leading organizations adopt a more considered approach to data quality management.

"Organizations that have an early-phase data strategy in place can expect up to a 25% uplift in inquiry conversion rates"

Data quality management is an ongoing task and leaving it to the last moment will mean it's always a panic activity that never gets done properly. Ideally, a true data quality program and a suitable system should be implemented in order to create a framework for proper quality management, although this is not to suggest that this is a technology problem or one that should be left to IT to fix. Data quality need not be complex or technology heavy, but we see successful organizations incorporating effective quality assurance tools and learning processes as a business-as-usual activity.

This might eventually lead to a cross-functional team, with representation from around the organization, putting into place the proper governance and technology solutions to achieve enterprise-wide quality management.

In the absence of such a strategic approach, consider using one of the many (not necessarily expensive) tools available to identify data quality problems. In this way issues can be resolved on a routine basis, and their sources--such as faulty data capture processes or user-training deficiencies--can be identified and resolved. And if, in the worst-case scenario, list reviews are being conducted pre-campaign execution, at least these tools allow checks to be carried out methodically.

CHECK POINTS:

- Build data quality management into your organization's infrastructure rather than being an add-on process.
- These data quality initiatives should include both governance and technology solutions.
- Use appropriate tactical tools as a stopgap, but don't allow their use to become an excuse for not taking a strategic approach.

"The demands and expectations of modern marketing far outstrip conventional capabilities to deliver"

WORST PRACTICE NO. 5:

UNDERTAKING MARKETING CAMPAIGN ACTIVITY MANUALLY

Every sophisticated B2B marketer has a vision of multi-touch, cross channel, behavior-driven communications campaigns, featuring formal lead scoring and qualification processes, prospect nurturing and end-to-end measurement of marketing ROI.

In our experience, such a marketer will quickly realize that attempting activity like this by conventional means is a quick route to failure or insanity. At some point the need for a marketing automation solution will become apparent.

The demands and expectations of modern marketing far outstrip conventional capabilities to deliver. Customers and prospects expect timely, relevant, integrated communications, and they wish to be treated consistently as they interact with an organization. Sales demand quality, qualified leads and expect them to be handled intelligently. Finance demands the accurate measurement of marketing activity in terms of ROI, and the investment required to achieve that outcome is crucial for marketing to be taken seriously in the long term.

"Marketing Operations must play a central role in creating the necessary infrastructure and environment for the efficient execution of marketing activity"

It's now rare to see many successful marketing functions without a clear marketing automation strategy. Moving forward, any mid-size and larger enterprise attempting to undertake marketing without one would be like trying to run a business without a financials or ERP system. Neglecting to invest in the necessary tools, processes and skill sets to support and drive marketing into the future is merely setting out to fail. The growing breadth of functionality and cost represented in the marketing automation marketplace means that a solution almost certainly exists to suit every requirement and budget, so there's no excuse not to invest.

CHECK POINTS:

- Implement appropriate marketing automation solutions in order to achieve best-in-class campaign activity.
- Fully exploit the capabilities of any marketing automation solution, don't allow it to become an expensive email broadcast platform.
- Use an automation solution to ensure subsequent responses from the same contacts are related to any existing lead rather than creating a new lead, ensuring integrated response management.

SUMMARY

Overcoming some, and preferably all, of the worst practices in Marketing Operations highlighted here will help propel organizations to best-in-class performance. Marketing Operations must play a central role in creating the necessary infrastructure and environment for the efficient execution of marketing activity. Automation and technology are increasingly able to take on the heavy lifting, leaving marketing campaign managers free to focus on the objectives, proposition, messaging and creative aspects of marketing activity, without having to worry about the means by which this activity will be executed. In other words, focus on the what, not the how. The advantages to the organization are not only the increased effectiveness of execution and an improved customer experience, but also the ability to offer clear productivity benefits.

Achieving a new level of responsiveness, flexibility and effectiveness will, without doubt, also require the right skills, vision and commitment from Marketing and those in senior positions across the organization. The route to the proper recognition of the value of Marketing, however, lies before us.

ABOUT PERCASSITY

Percassity Marketing Data Solutions is a marketing data strategy and marketing operations consultancy based in the United Kingdom. Adopting advisory and implementation roles, Percassity assists clients in an "on-demand" capacity, joining marketing teams to tackle the challenges they face with marketing data and technology, without incurring the full cost and commitment of a permanent member of staff.

Harnessing data, systems and processes Percassity helps to identify the right prospects, overcome inefficient campaign execution, avoid sales disengagement and improve measurement. Find out more at www.percassity.com.

ABOUT APRIMO

Aprimo's integrated marketing software enables B2C and B2B marketers to successfully navigate the changing role of marketing by taking control of budget and spend, eliminating internal silos with streamlined workflows and executing innovative multi-channel campaigns to drive measurable ROI.

Through the use of Aprimo's modular and on demand software, Aprimo Marketing Studio® for B2C and Aprimo Marketing Studio® for B2B, marketers can integrate marketing organizations, manage, deliver and track the right message targeted to the right audience over the right channel and translate marketing efforts into measurable business impact and revenue.

Hundreds of thousands of marketers trust Aprimo to revolutionize their marketing. Aprimo customers include over one third of Fortune 100 companies, and nearly one quarter of Global 100 companies.

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