B2B Marketing™



BEST PRACTICE GUIDE

MARKETING AUTOMATION IMPLEMENTATION

B2BMARKETING.NET



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Foreword

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It now seems that no B2B marketing department is complete without marketing automation (MA). This is a trend that is only going to continue in the months and years to come, as marketing becomes increasingly sophisticated and reliant on technology. However, implementing MA is not easy – it can be a costly process that requires the co-operation of numerous departments across a business. It can also be a highly successful tool, but only if it's implemented properly, right from the start.

We've developed this guide to help marketers of all levels and from businesses of all sizes to implement MA, covering everything from the factors to bear in mind before you embark on an MA programme to planning for the long-term success of MA within a company.

The first chapter, by Adam Dore, senior functional consultant at SuccessFlow, looks at some of the questions marketers should be asking before developing an MA strategy. He also provides responses to some of the things marketers typically claim are holding them back when it comes to MA, such as a poor database.

Next, Gareth Russell-Jones, managing consultant at CleverTouch, discusses five of the key data and tech focus areas to guarantee MA success. These range from ensuring you have a data strategy in place to making sure you have a clear idea of what metrics matter most to your organisation and why.

In the third chapter of this guide, Lee Hackett, founding director at Bluprint, considers the importance of people and processes in MA, as this is just as important as ensuring your data and technology is in place for your MA system.

The fourth and final chapter, by David van Schaick, director of marketing innovation and planning at The Marketing Practice, discusses what it takes to make MA successful in the long term. Here, he advises on the importance of having a long-term roadmap, as well as other elements such as integration with sales.

Introduction

1

Introduction

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SENIOR FUNCTIONAL CONSULTANT
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How do you feel about MA? Does the mere mention of it fill you with trepidation or do you view it as a tool that can contribute significantly across all your marketing activities? Whatever view you take, MA's here to stay and is rapidly becoming an important factor in the marketing mix.

Preparing to embark on an MA programme

If you're going to make the most of MA, it's important to take a long-term view. For the system to deliver a good ROI, it needs to be developed and implemented in line with your key business objectives. It can't simply be a matter of pick a system, install it and we're off. MA is a multifactorial process. Every business that initiates an MA programme will have different requirements and expectations. It's only by being fully aware of your own particular needs that you'll be able to successfully embrace the process.

In other words, before you embark on an MA programme, you'll need to create a structured strategy that will guide you through the stages you'll need to complete at each step along the way. You may find the following set of questions useful for distilling your business objectives – you'll need to have a clear idea of what these are before you can start to build a realistic strategy:

- **Where are we today?** Think about your position in the market and where you stand in relation to your clients and competitors.
- **Where do we want to be tomorrow?** What are your short-, medium- and long-term goals?
- **What's the best route to get there?** Do you have a roadmap, outlining the steps your business needs to take to achieve your goals?
- **What moves do we make to get there?** The answer to this may not be obvious, but you should at least have a good awareness of your options.
- **What action points do we need?** Tasks need to be assigned for each forward step to happen. Use milestones to make sure you stay on the right path and break up the journey.
- **How do we monitor our success?** There's no point in initiating a business plan and then forgetting about it. Keep reviewing it to stay on track.

When you have a clear idea of your business objectives, you can then develop a strategy for using MA as part of your onward drive. There are several steps to forming a cohesive strategy. You'll need to address each of the key elements of MA – database segmentation, content creation, outbound messaging, lead nurturing and analytics. Take a phased approach, gradually building up to a fully functioning process. At each step along the away, reviewing is critical to learning what works and what doesn't – not only in the marketplace as a whole, but within each distinct sector.

> *"When you have a clear idea of your business objectives, you can then develop a strategy for using MA as part of your onward drive"*

Take the following steps to develop your MA strategy:

1. Do your research on the possibilities offered by MA and apply them to your business goals and objectives. The sort of outcomes you might expect include:

   - Creating and building relationships and trust with potential prospects and clients.
   - Significantly increasing lead generation with less effort from your marketing department.

- Closing the gap between marketing and sales, which could result in substantial top-line revenue growth.
- Allowing for more targeted and effective marketing campaigns.
- Taking the guess work out of marketing and shortening the sales cycle.
- The provision of analytics so you can capitalise on your most successful channels and campaigns.

2. Run a strategy workshop with key stakeholders to make sure their priorities and concerns are addressed. Remember, MA may represent a significant change in the way your marketing and sales departments work and interact with each other. If they're resistant to this change, implementation will be problematic. It's essential they understand the benefits at both an organisational and a personal level.

3. Create a marketing framework using tried and tested methodologies, such as SOSTAC or RACE, allowing for a phased approach. Start off small and build up your MA activities gradually, taking direction from each new set of analytics.

4. From the very outset, you need to set realistic goals for your marketing and sales KPIs. Implementing MA comes with a steep learning curve, so don't expect turbo-charged results from day one. Track your indicators, such as the number of marketing and sales-qualified leads, number of opportunities or activities a sales person has completed; and remember to filter them by time or region as necessary.

5. Review your analytics regularly. This is the only way you're going to get it right. Check what works and what doesn't, the areas in which your team is successful and the areas which may be a little lacklustre. In the areas which aren't showing the improvement you want to see, adjust what you're doing and review regularly. In time, you'll get it down to a fine art.

Marketing challenges – What's holding you back?

In our experience there can be a single factor – or a combination of several – holding companies back from fully embracing MA. Culprits include data, content and knowledge of suitable tactics. If any of these are mismanaged, they can prevent the satisfactory adoption of MA and adversely affect your marketing budget. So, how do you utilise available technology and manage your resources to get around these challenges? The first thing you need to do is identify the problem. At SuccessFlow, when we step in to help new clients introduce MA, one thing we always ask them is why they haven't embraced it before now. Generally, what's holding them back is one or more of the following responses. How many of these apply to your business?

> *"In our experience there can be a single factor – or a combination of several – holding companies back from fully embracing MA"*

Our content isn't ready

Having high-quality content is critical to a successful automated marketing campaign, and great content is the cornerstone of great marketing. This means it's important to take the time needed to develop key content pieces across the year that can be repurposed into smaller offerings for repeated use. Your content can be adapted for dissemination across a range of different channels and to different market sectors. You can also add value at each stage of the sales cycle.

We're all bombarded daily with hundreds of pieces of content – and you know how many of them you take notice of. The content you send out needs to be the one piece that stands out from the crowd, gets people interested and they can derive some real value from. So, plan your content carefully and execute it to the highest possible standard.

There are two key elements to producing great content:

1. You'll need to develop a content framework that will allow you to produce different types of content. This content needs to be appropriate to each segment of your database for different touch-points along the sales cycle.

2. You'll need to establish a content production process by which you can maintain a consistency of tone and brand message across varied segments and channels.

Your initial content production should be the development of premium content, with which you'll be able to generate leads. What is premium content? These are your high-level, thought leadership pieces that position you as an influencer within your market – for example, whitepapers, webinars and guides. Once this has been created, you'll need supporting content to drive traffic towards the premium items; such as emails, social media and blog posts, and landing pages with which you'll promote your premium content.

Our marketing database is poor

Guard your database against data decay – the database you build up through automated marketing techniques is one of your most valuable non-tangible assets. Through careful information gathering and smart profiling, it holds the key to future sales. However, as with all electronically stored information, there exists a risk of data decay. For this reason, it's important to manage and store your data following protocols to reduce the risk. If yours needs some attention, employ tools to clean and validate it – a small clean database is far more effective than huge quantities of poor-quality data. When you introduce MA, you can use it as a tool to expand your database by capturing information on potential leads and allocating profiles.

We don't generate enough high-quality leads

Addressing this question is often the whole point of undertaking MA in the first place. Email continues to be the most popular and effective form of digital marketing and running this through an automation platform allows for better tracking so you can increase the number of leads entering the top of the funnel. However, it doesn't end there. MA enables you to do far more. From this one central platform, you can market your content and capture all your lead activity. This means that you can see exactly what you need to do to turn visitors into new prospects, and then what more is required to convert them into opportunities.

There are five steps to successful lead generation:

1. Create a multichannel campaign schedule to maintain a consistent flow of engaging content.

2. Don't hit your visitors with huge amounts of information to begin with. Keep web forms short and simple at first and then use progressive profiling and pre-filled forms to build up the amount of data you have on your prospects.

3. Repurpose your content to make it suitable for a variety of channels – this way you'll maximise your lead generation from any given item of content.

4. Keep your prospects engaged by using secondary landing pages at strategic points along the customer journey to present them with auxiliary relevant content. This will increase the chance of consumption, while cementing your position as a thought leader in the market.

5. Ensure that leads are allocated to an appropriate nurture programme and pass them to the relevant sales team member once it's been established that they fit sales-ready criteria.

Departmental alignment – Bringing marketing and sales into harmony

If your sales and marketing teams don't co-ordinate, you're not alone – these departments often have a love-hate relationship. They need each other but it doesn't mean they understand each other. If this is the case in your business, then you need MA. A misalignment between sales and marketing is a reason to adopt MA, not a reason

to avoid it. With MA, your marketing campaigns will feed directly into your sales funnel and this is certainly one of the key strengths of the whole process. Once the system is in place, hot leads are passed across to sales in real-time and sales can track the exact path they've taken to reach this point. The efficiency and effectiveness of both departments are boosted with the proper alignment.

> *"A misalignment between sales and marketing is a reason to adopt MA, not a reason to avoid it"*

The first step is for stakeholders from both departments to agree upon shared definitions and to set mutual goals. MA will provide shared metrics, which can then be used to review and refine these goals. Once your MA programme is in place, there are a number of things you can do to facilitate alignment between the two departments:

- Schedule CRM tasks that allow sales to immediately identify and pick up leads that are sales ready.
- Set up alerts to notify sales whenever prospects engage with your brand by landing on key pages or consuming content. Sales can use these interactions to monitor a prospect's level of interest in your products and/or services, and then make a judgement as to when to approach them.
- If sales have access to a marketing intelligence dashboard, they can trace a prospect's interactions with the company back over time, giving them access to a full history of the relationship development.
- Create a lead recycling loop – if a prospect that was assumed to be sales ready actually isn't, allow them to be passed back to marketing for further nurturing.
- Use the MA platform for sales communications too. By running sales emails through the MA dashboard, they can be tracked. This will add valuable information to the analytics on market sectors and individuals.

Filling the experience vacuum

No one walks into fully functioning MA with all the bells and whistles on the very first day. Take your time to build it up gradually by starting simple at first, in line with whatever budget you can allocate to it.

MA is still relatively new on the scene and, for many companies, fear of the unknown is what's holding them back. If no one in the marketing department has had any experience of using MA, it can seem like a large investment in the unknown.

However, what most businesses don't realise is that MA is a process that can be introduced step-by-step. As mentioned, you don't have to start by launching everything at once. It's better to begin with a small foundation, and as the experience and skill of your marketing team grows, your MA programme can be expanded. Complex elements can be added over time, but even from very simple beginnings, MA can impact your top-line revenue. Once the system has generated a few wins, your stakeholders will begin to appreciate its potential and engage more fully. The case for expansion will be made and your experience and skills vacuum will dissipate.

This approach can also combat the issue of not having the perceived budget. Trying to start with full functionality from day one is likely to overstretch your stakeholders and mean that budget holders will be less likely to see this as an area of growth. Your initial phase can be brought into play with a relatively modest budget. Once you see results coming in, you can expand the budget to build the programme.

Of course, this is advocating a slowly, slowly approach and you may be in a hurry to reap the benefits of this powerful new tool. If that's the case, bring in the professionals. A good digital marketing agency will be able to set up your MA platform and train your stakeholders, in both marketing and sales, so you can hit the ground running. If you want to go big from the start, there's a steep learning curve, but the potential rewards are great, which means that once they understand this, most sales and marketing teams are eager to embrace the process.

Five key data and tech focus areas to ensure marketing automation success

2

Five key data and tech focus areas to ensure marketing automation success

GARETH RUSSELL-JONES
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Too often when setting out on an MA journey, data and tech are left out of the equation rather than being seen as the foundation upon which everything is built. This pitfall can easily occur if thinking is limited to the way you market today rather than considering the art of the possible and plotting the route to get there.

The data you acquire, structure, put into your MA system and manage should be with this ideal in mind. Get it right and see your marketing vision become a reality; get it wrong and spend the rest of your MA journey in a costly muddle.

Here are the five key areas you should keep in mind when setting out on that journey:

Technical and data architecture

Before you begin to think about the 'what', 'why' and 'how' of MA, you will need to have a defined data strategy in place. Introducing MA will expose and magnify your data deficiencies rather than solve them.

Do you have a coherent data management strategy in place with clear data governance structures, rules and standards to ensure that customer and prospect data is accurately and consistently captured at every touchpoint with your business? Do processes exist to maintain this data so that it remains fit for purpose and legally compliant throughout its lifetime? Is there formal ownership and clear responsibility for data within your organisation to enforce these standards and policies?

You should think carefully about the type of data you will need within your MA system, understand where it is mastered and how it will be used. The customer relationship management (CRM) system is the central hub for all customer information and relationships within a business and is the main tool for your sales organisation, so MA implementation has to be approached with this in mind. MA should enhance the quality of leads passed to the CRM and create a virtuous feedback loop, but in a way that leverages the best of the existing rules, functionality and processes.

Is all data you need to drive your future marketing activity in your CRM, or are there other sources that should be considered too, such as a separate data warehouse or product system? The answer to this question will be key to the choice and configuration of your MA platform as more advanced integration methods may be required to store and manipulate this data such as custom objects, APIs and possibly even a middleware application.

Are you confident that your data is compliant with current legislation and the new Data Protection Regulation (DPR)? Is it properly permissioned with those flags correctly stored and accessible in your customer master data? Do you operate in any markets with country-specific email marketing legislation (e.g. Germany and their 'confirmed opt-in' laws)? All of these elements are critical in deciding how you configure, share and manage subscription preferences across your MA platform and other systems.

Poor quality and incomplete data is the single biggest obstacle in failing to realise the potential of an MA investment, so commissioning a comprehensive audit of your source data to highlight any integrity and completeness issues and to determine corrective actions is highly recommended. This should encompass a review of not only those fields, which drive segmentation and personalisation, but also 'system' data that is instrumental to lead scoring, lead routing and lead source reporting.

> *"Poor quality and incomplete data is the single biggest obstacle in failing to realise the potential of an MA investment"*

System integration

Your MA platform, CRM and content management system (CMS) need to work in harmony for your project to be an ongoing success so you should consider how your end-to-end lead management process will look and how those leads will be ranked.

You will need a pre-defined lead management process and a well-thought through lead scoring model to ensure you don't bloat the sales pipeline with false leads but, instead, supply high-quality, high-value prioritised leads.

According to Forrester, only eight per cent of organisations have true alignment around lead management. This means it's certainly worth investing the time upfront with sales and marketing in the same room to map your end-to-end process from leads flowing into the top of the funnel to the point of conversion and all stages and interactions in between.

In this process consider where leads could 'leak' from the funnel and the trigger points, handoffs, rules and notifications when they pass from one stage to another. What SLAs need to be put in place to ensure they are acted on immediately? What are the feedback loops between marketing and sales to constantly improve the process?

Often the hardest step on this path is to reach a common agreement on what constitutes a lead – unsurprisingly, sales and marketing often have differing views. Luckily at the heart of all MA systems lies the lead scoring model, which provides for the first time a scientific and objective method to qualify and rank leads.

Marketing

Accurate and relevant data twinned with well-thought out integration enables you to dramatically expand your marketing thinking and take full advantage of the power of MA technology.

What data will you need to fulfil your future dreams of 'always on' marketing? The temptation when deciding which fields to bring into your MA platform is to use your current campaigns as the point of reference. Now is the time to step into the brave new world and think big and bold.

> *"Accurate and relevant data twinned with well-thought out integration enables you to take take full advantage of the power of MA technology"*

What data is available that you've never considered before? How could you harness it to inform and drive future marketing campaigns and frameworks? The sales, marketing, data and IT departments should all be engaged in this conversation – think about what data could provide additional segmentation insight or act as a key trigger within a customer journey. Getting this right at the start saves a lot of time and pain later down the line.

MA provides the vital ingredient missing from traditional email marketing – engagement behaviour. Combining trusted demographic and filmographic data with behavioural information enables you to dynamically target, segment and personalise based on relevancy, providing the right information to the right person at the right time to move them to the desired next step on your customer journey. Better still, the same information can be fed into propensity models to anticipate your customer's future behaviour (to engage, purchase, unsubscribe, churn, convert etc.) and needs.

While content management won't necessarily be your top priority right now, it will quickly become a hot topic. MA has a veracious appetite for content, requiring assets for each stage of every customer journey for each target segment or persona. It pays to start considering now how you may want to store, search, manage and distribute your content moving forward, as there are tech solutions that can really make a big difference to the way you work. Some vendors sell these solutions alongside MA within a 'marketing cloud', or they're available as 'connectors or app' plug-ins to the MA platforms themselves.

Organisational change

Your marketing department will require a new set of skills to take advantage of the technology with more emphasis on planning and analysis

alongside traditional campaign execution. Alignment with other parts of the organisation, such as sales, that manage and touch the same data and systems, is key.

Marketing departments have traditionally outsourced their tech needs to the IT function. But now the CEO is looking to the CMO to understand the technology and translate it to a language that the rest of the business understands. While marketers cannot be expected to become technology experts or developers, marketing 'thinking' needs to adapt to this new technology. Everyone within the marketing team must understand how to develop campaigns that consider the broader customer experience. This will involve upskilling the existing team and/or creating completely new MA-focused roles within the department.

These new skills can broadly be split into two areas: strategic and operational. An MA strategist is marketing-orientated, owning and driving optimised campaign design and workflow development as well as content planning and mapping. The operational role is delivery-focused, requiring a good technical and functional knowledge of the MA platform to build and run campaigns from templates or a clear brief. Underpinning both is the ability to effectively monitor and analyse campaign performance, extract insight and tune journeys to maximise response and improve ROI.

Your sales and marketing teams might not be fully aligned today but both share a common goal: to generate revenue for the business. However, sales often believe that marketing don't provide enough viable qualified leads and marketing think that sales do a poor job of following up on the leads they do supply and tracking them through the sales cycle.

MA is the perfect catalyst for change. In fact, alignment is fundamental to the success of your MA journey.

Sales and marketing need to align across the whole lead management process, tracking and managing new revenue opportunities from the creation of the lead to its conversion into a new customer relationship or existing customer opportunity. This involves collaboration in defining a qualified 'sales-ready' lead, agreeing a lead-score framework and lead-management process (see earlier section), establishing ownership for each funnel stage and putting in place measurement and feedback mechanisms to constantly enhance the process.

Reporting and analysis

MA brings access to an unprecedented wealth of customer data; but with that comes the added pressure that for the first time marketing will be expected to report on their contribution. However more data can simply mean more noise unless you know what you're looking for. It's vital to have a clear idea of what metrics matter most to your organisation and why, to ensure that you have the right data and structures in place to support them. When embarking on an MA journey, reporting requirements should be at the forefront of your mind and not an afterthought. You will need to extend your thinking beyond tactical 'open and click' metrics, (although this is still very valuable) to those that can measure the overall effectiveness of complex 'always on' lifecycle frameworks and to ROI and sales forecasting.

> *"When embarking on an MA journey, reporting requirements should be at the forefront of your mind and not an afterthought"*

Tactical and strategic metrics you should consider:

Asset
Tracking the reach/engagement and utilisation (sweating) of your individual email and web assets (content, forms, landing pages).

Campaign
Understanding individuals' interactions across all assets in a campaign and comparing them to your and industry success benchmarks. This is great for highlighting the 'killer' and weak points.

Framework
Measuring the flow of contacts through one or more stages of a customer lifecycle (e.g. nurture or recycle). Which programmes are performing? Where are the bottlenecks? Where is the drop out?

* Harvard Business Review: "Making the Consensus Sale"

Funnel
The holy grail for sales and marketing – tracking lead flow and behaviour through each stage of the funnel from source to sales conversion. This enables you to identify the right levers to pull to achieve the desired outcome, for example: How many contacts of which profile and from what source do I need to enter into which marketing programme to generate more leads of the type I need?

This enables effective ROI analysis, demand throttling and accurate sales forecasting.

Decision-making unit
Tracking engagement by a client's decision-making group rather than at an individual level to provide sales with aggregated account-based intelligence. This is critical in B2B marketing where on average five to six decision-makers are involved in a purchasing decision.*

With inaccurate, incomplete, or poorly structured data, these metrics will be skewed, non-scalable or, worse still, unachievable. Funnel reporting, for example, is only possible with a robust lead source capture and standardisation process in place, well-defined and consistently applied funnel stages and the availability of target segments built upon reliable data.

Careful consideration needs to be given as to how and from where to deliver reporting. MA platforms have differing levels of 'out of the box' and optional custom reporting and dashboard capabilities. They do struggle, however, to offer 'big picture' customer lifecycle metrics, to provide true end-to-end funnel reporting and, in most cases, to analyse at a decision-making unit level.

To fulfil these requirements and bridge the gap you may need to look further afield to third-party providers who specialise in offering 'off platform' reporting and dashboard products and services.

Finally, don't think that once your MA platform has been integrated within your organisation the work is done; it's just the beginning of your journey into digital excellence and where the fun really begins.

The importance of people and processes in marketing automation

3

The importance of people and processes in marketing automation

LEE HACKETT
FOUNDING DIRECTOR
BLUPRINT



So you've chosen the marketing technology you want to roll out. You've worked to get your data in order and segmented appropriately, which means you're all done and you're good to go...right?

Not quite.

Dealing with technology and data is, in fact, only half the battle facing organisations looking to transform their marketing. At Bluprint, we work from the starting point that there are four, equally important, pillars required to support any organisation's marketing transformation. Technology and data form the two more commonly accepted pillars, while people and processes are the other two. You have to ensure the latter are set up in such a way as to complement your technological procurement. To put it bluntly, without the right team of people adhering to the best methodology, you're likely to be left with a powerful but redundant expense rather than a truly revolutionary business asset.

Many businesses underestimate this and only consider the second two pillars of this transformation after the fact upon realising that their new toy doesn't necessarily work as well as they'd hoped. While it's never too late to make this realisation, it could impede other elements of your marketing if you don't address these pillars. For maximum efficiency it's best to consider both your people and your processes before procuring any platform. This allows you to hit the ground running when the technology is finally in place.

> *"Without the right team of people adhering to the best methodology, you're likely to be left with a powerful but redundant expense rather than a truly revolutionary business asset"*

Below, I have broken down some of the most important reasons why people and process need to be at the forefront of any marketing transformation and marketing technology and advertising technology procurement.

People

People are crucial to successful marketing transformation. Your team is on the frontline during your marketing transformation, as well as the users of your new platform. Your team's input is crucial to the success of any project and a fundamental pillar in any marketing programme.

The problem with people in marketing transformation, as opposed to technology and data, is the conundrum of running the business versus changing the business. Generally speaking, technology and data tend to have an immediate impact on your department – essentially they're switched on. Solving issues around people is often a more time-consuming and gradual process. Consider the following and you'll go some way to de-risk this complication.

The topic of people within the confines of marketing transformation is two fold:

1. Do you have the skill set internally?

Training is at the forefront of how to manage your marketing transformation from a human perspective. With this in mind, is your marketing team or, at the very least, are your key stakeholders well versed in the platform you have chosen? If not, this needs to be a major priority for your organisation.

Where to go? Naturally, most of the leading marketing technology companies provide training that complements their platforms. Whether internally or using affiliated partners, they will have a solution to overcome this technical hurdle. Partners often provide even more comprehensive training due to their closer proximity and regular interaction with the end user, something the major vendors sometimes lack. True, there is often a cost associated with this training, but you know you're getting instruction from the creators and leading users of the

platform themselves. So while this initial cost is off-putting, it's a time-saver and, more importantly, an economic benefit in the mid- to long-term.

A lot of the time, training will consist largely of technical user training, as outlined above. This is vital: without thorough knowledge of the platform you won't make the most of it, that is a given, but there is a bigger picture to acknowledge. Procurement of these platforms is indicative of a much larger marketing transformation project. There are equally important fundamentals that need to be confronted to ensure you get the most out of your platform, including:

- **Sales and marketing alignment**
  The importance of sales and marketing alignment grows exponentially with the size of your organisation. With multiple teams working simultaneously in different parts of the world, getting your staff on the same page is easier said than done. However, without efforts to properly align them, you'll be reliant on inefficient sales and marketing teams. Loss of leads from marketing to sales or misguided qualification criteria can really hamper organisations using marketing technology.

- **Support around persona and content development**
  Content is the lifeblood of any marketing technology or advertising technology campaign, and personas offer the framework for you to build this content on. Content will be the hook in your e-shots, as well as the valuable nurture campaign within. Content plays a highly important part throughout the process and by that logic your personas need to be iron clad too. If you're not sure who you're targeting – and their interests – you're not going to get far when writing to educate and sell to them.

- **Analysis of metrics and KPIs**
  The significance of your reports and metrics should go without saying. If you don't know the impact of your campaigns, how can you make progress? Most organisations understand the basics, but fail to pinpoint crucial KPIs that really highlight the success and impact of a campaign. Sometimes it takes an external perspective to really find the analytics that matter to you.

Failing to train your team in advance needn't be a clincher, but it's best to be prepared for this possibility. Not only will it give you a truer reflection of the internal skills, it is also vital in identifying the true cost associated with procuring and adopting a marketing technology platform. Many organisations are fully aware of the need to train key stakeholders but subsequently forget to factor in the additional costs to the project as a whole, causing hold-ups and issues as they cut corners to meet their agreed budget. Training is as vital as any other element of your marketing transformation, so don't avoid it.

2. Approach people from a buy-in perspective.
If you currently lack a trained team with which to run your marketing technology platform, there are straightforward solutions to overcome this barrier. Company buy-in is often more difficult to overcome. Does your team understand the bigger picture? Are they on board with the how and the why behind your marketing transformation?

As a business, and even a team, you may well understand the need to adopt marketing technology, but do the individual people within your team have an understanding of the bigger picture? It is worth taking in feedback from the people who will essentially be using the technology and operating these new processes. There could be very real, detrimental issues associated with people unwilling to fully embrace the platforms and project as a whole. Eventually it could lead to the platform withering away at a large cost to the business.

> *"Get the whole team pulling in the same direction to achieve a truly modern marketing approach"*

Once again, training plays a part in convincing staff members of the importance and need for marketing transformation, but it only goes some of the way. Distinct from strictly technical training, you can educate your team on the bigger picture and how each individual will have a role to play during this transformational phase, irrespective of whether they're directly involved with the new MA platform. Consultants in this area have experienced every

disgruntled complaint and situation possible and subsequently helped these companies overcome these barriers.

Get the whole team pulling in the same direction to achieve a truly modern marketing approach.

Processes

The second of the two undervalued pillars is the value of implementing the correct processes. Processes are fundamental across all levels of your marketing team. From following uniform naming conventions to the management of content from creator to distributor, it is vital that everyone is on the same page, following processes and methods that show proven results. Marketing and advertising technology platforms are hugely powerful machines. Think of your processes as their foundations, as without these in place your technology will likely come unstuck. These technologies have the ability to supercharge your marketing activity but, if used incorrectly, they can seriously hinder your organisation. You need to get it right from the off.

Firstly, do you have any processes in place within the marketing team? Are they the right ones? The formulation of processes is something that can go by the wayside as you continue to run your busy marketing department. Don't think of this evaluation as a hindrance but as an appropriate time to restart and rekindle some things. Marketing technology procurement and marketing transformation provides a necessary window for change.

Consider content workflows, for example: it's something that you know in the long run will make your life easier, your content better and your engagement levels stronger – but when faced with getting said content distributed week in, week out, it often becomes easy to rely on a more 'as and when' approach to creation.

Working with many enterprise-level organisations trying to coordinate their multinational and disparate marketing teams, the client service team at Bluprint has seen dozens of instances of hold-ups and delays due to poor and non-existent processes. Modern marketing and the modern marketer should be a far cry away from these delays and inefficiencies.

Thinking about content specifically, examine the approval process in your organisation. How many hands does a high-level piece of content go through before final approval? How many amendments are needed? Each of these steps is a potential delay, another cog that could potentially jam causing further issues down the line.

Never underestimate the time required to fully evaluate your content workflow. It's best to spend time doing that in the early phase than to continue down an inefficient path, allowing bad habits to become further ingrained. All the while, be aware that process management is a constant necessity. At Bluprint, I have seen enterprise organisations creating marketing content on what could only be described as an ad-hoc basis. This has led to campaign delays that lasted weeks, sometimes months, in turn affecting the department's ROI. The management of content needs to be clearly defined with iron-clad processes.

How? Sometimes the simplest solution is the best. Visualisation is often the most straightforward means of building out processes. Drawn-out workflows, with explicit instructions and timeframes, is a must. Visual workflows are an easy reference point and provide simplified instructions for all involved. This may not overcome every hold up, we're all only human, but it ensures the best possible foundations are there to build upon.

> *"Visualisation is often the most straightforward means of building out processes. Drawn-out workflows, with explicit instructions and timeframes, is a must."*

Wondering how to go about it?

An outside perspective is a worthy consideration. Much in the same way that staring at a word for too long can make it lose all meaning, staring at your own processes can get to a point where you don't see new efficiencies or improvements. Fresh eyes, especially those of someone trained to do precisely that, can lead to massive refinements and a general amelioration of your processes and, in turn, hasten your marketing transformation.

The effective setup of these systems and the establishment of well-defined processes are absolutely critical factors to the long-term success of any project. Only by ensuring that the right foundations are in place can you expect to realise the required efficiencies and results from implementing a new marketing technology and advertising technology. Of course, when faced with the dilemma of managing your busy schedule and developing processes to keep on top of this busy schedule, it seems like a contradiction in terms. However, putting the effort in to begin with will, in the long run, save you time and, more importantly, ensure that your department is scalable.

Conclusion

The key consideration surrounding people and processes is to think before you act. If you take away anything from this, it is that time spent in advance of any implementation could save you an exponential amount further down the line.

Another important consideration in both people and processes is the ability to measure progress on an individual level. Due to the ongoing nature of change in these areas, it is genuinely critical that you track the progress made and monitor staff as your departments move forward. As training progresses and processes are implemented, you may find that certain team members may be be better suited to other roles or additional responsibility or you could unearth an asset internally that may have otherwise needed to come in from outside. The key to modern marketing is to track all analytics; improvements in people and processes are KPIs in that respect and can help provide a more well-rounded view of your teams.

To round off, people and processes are no more important than technology and data: all four are imperative for success. The difference is that they are less commonly accepted by many organisations and in recent times this has led to a more zealous education by consultancy teams to redress the balance. Never underestimate the importance of people and processes within your marketing transformation because without these areas up to scratch, you'll continue to run on an inefficient model and never truly realise modern marketing.

> *"Never underestimate the importance of people and processes within your marketing transformation because without these areas up to scratch, you'll never truly realise modern marketing"*

Vision and grit: Achieving long-term success with marketing automation

4

Vision and grit: Achieving long-term success with marketing automation

DAVID VAN SCHAICK
DIRECTOR OF MARKETING INNOVATION AND PLANNING
THE MARKETING PRACTICE



Marketing automation is, the story goes, integral to modern, data-driven marketing techniques. Certainly, it has the potential to enable more effective demand generation. It can be a catalyst for better data management, smarter segmentation, compelling content and more responsive audience journeys.

But there is a snag. As Bill Gates put it: "The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency."

In our experience, the biggest challenge (and biggest source of value) of implementing MA is that it holds a mirror up to your demand generation practices and infrastructure. And there is no flattering soft focus.

It's not realistic to expect immediate success. The challenges of getting your processes, practices, team and culture to a place where MA can be of real value should not be underestimated. In fact, in all the conversations we've had with clients very few, if any, would describe themselves as having got beyond the early stages of their journey.

But neither is it practical to wait until you have the perfect environment before you start. A major part of the value of automation comes from the work done alongside the technical implementation to improve skills, processes and practices. The process itself is an opportunity to improve in areas from content to data, lead management to targeting and sales alignment.

And here's the rub. Marketing is becoming ever more forensic. The ability to compete and deliver outstanding results will increasingly come from the capability to segment at a micro level, pinpoint market opportunity and personalise content and experiences. MA can be the platform from which to take that leap.

So here are our five tips to long-term success with MA:

1. Be clear on the business case

It's worth drawing a clear distinction here between small businesses and large. Small businesses typically have control over their core assets (CRM, website, social platforms) and can be relatively agile in designing and deploying campaigns and responding to events. This makes the value and business case for automation a lot easier to justify.

But there are serious challenges when translating the benefits to larger enterprise-level businesses. Here, automation technologies can add complexity that becomes difficult to coordinate across multiple departments. Particularly when ownership of core platforms is sat in different teams (such as CRM with IT), which have different levels of skill and approaches to marketing.

As a result, the first stage of any MA project can often resemble an existential crisis: why are we doing this again? Is it worth all the pain and extra effort? Does the business case stack up?

These are difficult questions to answer. The business case for MA remains a tricky one to pin down, particularly as there are very few examples of companies who have yet 'nailed it'. Stats are often quoted in its favour; for example, a 2014 report from Regalix states: "Eighty-six per cent of marketers using an automation solution said its greatest benefit was improved lead management and nurturing, and half said MA increased sales and marketing alignment." But it's not clear

"The first stage of any MA project can often resemble an existential crisis: why are we doing this again? Is it worth all the pain and extra effort?"

whether this is thanks to the platform or just that those using automation are likely to be more mature in their marketing practice.

This means there is all the more reason to have a model that clearly articulates the specific value you think your automation will deliver and when you expect to see that return. This will probably change and evolve as you go, and will reveal a number of areas that need work (e.g. sales integration, reporting, lead management). But if the business has bought into the goals from the outset, you'll have a framework to articulate the added value of addressing those issues.

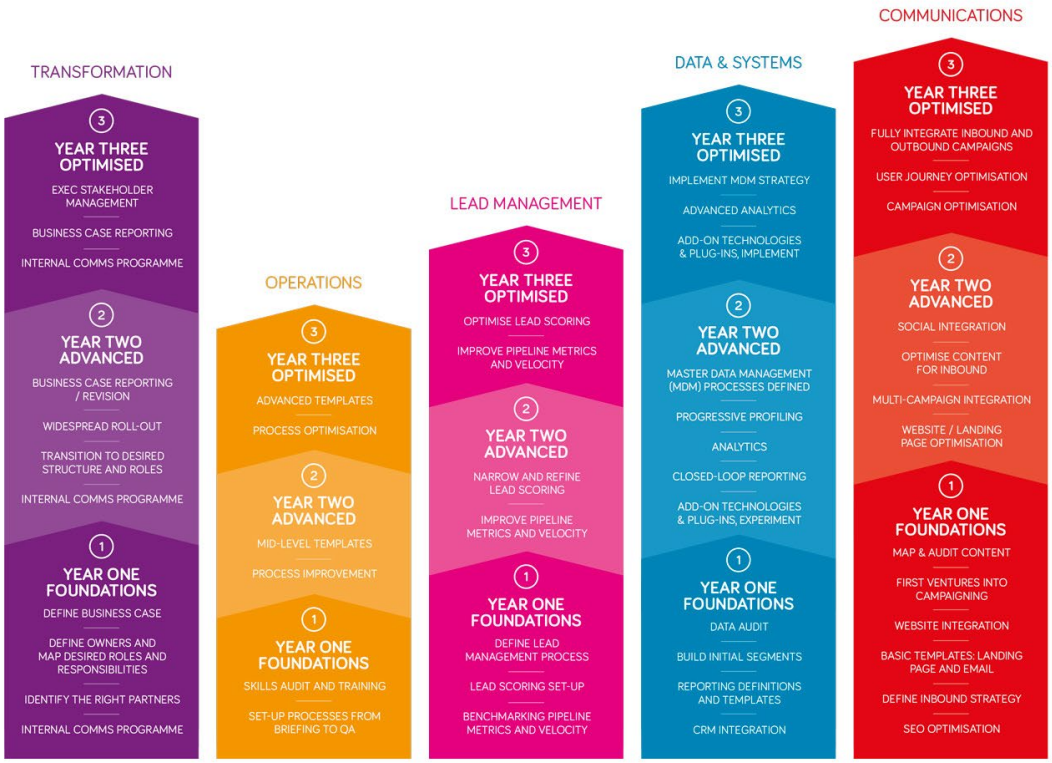
The business case is an obvious place to start – and to come back to regularly. But metrics and KPIs may not be enough on their own. It is likely, particularly in larger businesses, that any significant improvement in efficiency and results will take a long time to come to fruition – several years, perhaps.

There needs to be a vision that underpins the programme and that the business buys into. The vision should make it clear how automation will support the key drivers of success for marketing and sales. The argument needs to be made, and probably re-made many times over, that this is part of an important journey marketing needs to own. And the cost of not taking that journey may not become clear until it is too late.

2. Have a long-term roadmap

Vendors will have start-up programmes designed to get you up and running, for around six weeks. In our experience, this is just the tip of the iceberg. Implementing the technology itself, and giving people some training, is just the start. Then begins the work of building and refining data management processes, re-structuring and re-skilling teams, and educating people on the potential of the platform.

We've laid out our three-year roadmap below, which we feel is a realistic timescale to plan for. Having a long-term plan helps to set expectations and provide a mechanism to measure progress. It also helps to communicate with stakeholders, many of whom will be aware of MA and be keen to get their hands on the technology.



This eagerness is a reflection of the powerful vision being sold to them by MA vendors. Smart insights from digital body language; lead scoring that tells you where the best opportunities are; communications that deliver those leads to the sales team ready to buy. This is, we're told, the tool of the modern marketer; it's changing our game.

The reality is, of course, sobering. The gap between the expectations of the end-users and things like integration with CRM, creating exclusion rules and mapping content assets can cause frustration. As can the fact that most organisations struggle to find the right skilled resource to operate the system, creating backlogs for campaigns and long lead times.

Having a clear roadmap can help to set expectations and communicate the step-by-step approach that will ensure progress.

3. Invest in change management

There's a phrase that circles, like a proverbial vulture, around struggling MA programmes: "It has become a glorified email-sending system." All the promise of modern, data-driven marketing has boiled down to an expensive platform, sending 'trigger emails' to existing databases that link to landing pages nobody ever visits.

This is perhaps exaggerating to make a point. But if MA is going to become a platform for smarter, more evidence-based digital marketing, teams need to be coached and supported. Not only in how to upload data in the correct way or change assets on a landing page, but in how to build programmes that drive insight for better segmentation; in how to integrate social, SEO and digital advertising techniques with direct marketing and events; in how to build lead scoring models that give a real idea of propensity to buy; even in how to write emails that don't get ignored as spam.

> *"If MA is going to become a platform for smarter, more evidence-based digital marketing, teams need to be coached and supported"*

This educational process often centres on methodologies from content marketing like audience journeys and buyer personas. These are valid places to start and there is certainly merit in investing time to get under the skin of the audience. But this is still an emerging area and the education process should be ongoing.

As well as the need to reskill teams, automation programmes may well demand changes in the structure of marketing departments, the governance rules between sales and marketing, the way data is managed, and even how sales and marketing teams are rewarded and incentivised.

While it needs investment, the returns from making improvements in any of these areas can be significant. The change management programme that goes alongside any roll-out is probably the biggest source of value and should be invested in at least as much, if not more than, the technology itself.

4. Data is king

Prior to integrating an MA platform, you'll no doubt undertake a mini clean-up operation of your systems. But this will only get you part of the way. Your CRM will most likely still have duplicates at account and contact levels; your key segmentation fields will need further population and quality checking; and you won't fully trust the accuracy/relevance of the data you do have. This is all quite common. But, as alluded to above, you can't wait until your whole house is in order. The process of integration itself will provide insight as to where your efforts should be placed.

Key segmentation fields should be well populated and accurate, but – most importantly – they should enable you to split your data to align to your various propositions. You can work on population percentage and accuracy, but if they don't result in targeted segments that align to your propositions, there is little point in spending time making them accurate. Once you are happy with the fields, make sure you have processes in place to ensure this data integrity is upheld – whether that data is going directly into your MA system, or being input to the CRM by sales, or being generated by new contacts using progressive profiling etc. The key point is you do not want to invest time and money in tidying up your database, only for it to be back in the same position a few months later.

Duplication will most likely be another area of focus. You'll understand the issues of having duplicate accounts and contacts during integration, but it's unlikely that you will have fully addressed the issue by the time your MA platform is turned on and data starts to flow from your CRM. Before you spend money on tools to help you fix the issue, you need to begin by working out the source of the duplications. Perhaps your finance system is creating rogue account records, or at a contact level there may be rogue sales managers inputting bad information. Fix the problems at source, then start the clean-up operation.

MA will more than likely come with a lead-scoring system. Some will split into profile scoring and engagement scoring. At a profile level (job function, job level, industry, company size etc.), your lowest scoring contact should actually still be a good fit for your propositions and your highest scorers would be considered your elite. To help you create this data nirvana, look at where you have had success in the past. Where did discussions begin on your biggest, highest-value closed opportunity? What was the contact's position? What industry was the account in and what size was it? What good case studies do you have? How are sales teams generating leads and who do they target? Create propensity models of your customers and pipeline, apply the knowledge to your addressable market and build that data up.

You'll be able to do more with your data than ever before using MA, but sensible thinking needs to be applied. Segmentation will only be as good as the data you hold. Take your propositions and marketing objectives, work out what data you need and how you need to segment it. Then create a plan for how to get to that point.

5. Make sales integration a top priority

If you created 1000 leads from your automation system, how many would turn into business? According to SiriusDecisions, the average is just under three. The best in class is a little more than 14. These are clearly averages and need to be taken as such, but they don't particularly make for many raised eyebrows or impressed nods.

Sales alignment has been a buzz phrase in the industry for a number of years. But it is often still only paid lip-service to. As a result, there are frequent examples of leads not being effectively followed up. This might be because communication isn't good enough, because targets aren't aligned so there's no incentive for sales teams to follow up marketing qualified leads, or because too many poor-quality leads are handed over, creating disillusionment. Whatever the reason, the end result is a lot of money and hard work being invested in opportunities that fall at the last hurdle.

There are, however, examples of impressive and effective programmes that tackle this issue head on. They typically involve clear ownership and direction from a very senior level in the business, and at least one individual with a clear remit to make it happen. Plus, a lot of hard work to make sure marketing and sales really do share common objectives and have the processes and platforms they need to effectively work together.

This may seem removed from MA and digital marketing techniques. But, somewhere down the line, it's the revenue number that's going to be the arbiter of success or failure. And the bottom of the funnel – the ability to turn marketing-qualified leads into sales-qualified leads, and to then close those leads – is the most important part of the whole demand generation engine. If that isn't working or is inefficient, that inefficiency is only going to be magnified across all your marketing efforts (back to Bill's rule again).

…and don't give up

Perhaps the biggest success factor for large-scale MA implementation is sheer determination. It's safe to say the journey will not be easy. But it could be a very important one if marketing is to keep pace and become a catalyst for genuine improvement in marketing practice.

Authors' biographies

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Adam is SuccessFlow's senior functional consultant and responsible for all things platform. This means making sure sales and marketing technology is adopted and implemented correctly meaning more time is spent reaping the results, rather than slogging over the platform. Away from the hustle and bustle of our head office Adam is a lover of cars and a keen sportsman, enjoying both watching and playing a wide variety of sports with a very mixed ability.

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Gareth is managing consultant at CleverTouch. He has over 15 years' experience in data and insight working within large B2B and B2C organisations across publishing, automotive, telecomms and lifestyle sectors including LexisNexis and BT.

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As a founding director of Bluprint, Lee focuses on the strategy around delivery of marketing technology solutions, which help enterprise clients worldwide achieve increased efficiencies, simplified operations and improved alignment of sales and marketing teams. Lee combines proven commercial acumen with pragmatic understanding when it comes to the management of business change with technology and the implementation of MA platforms.

bluprint

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David van Schaick is director of marketing innovation and planning at The Marketing Practice where he has spent the last 11 years growing a successful agency and delivering award-winning demand generation programmes. A keen cricket fan and footballer, his left foot has been described as poetic.

the marketing practice

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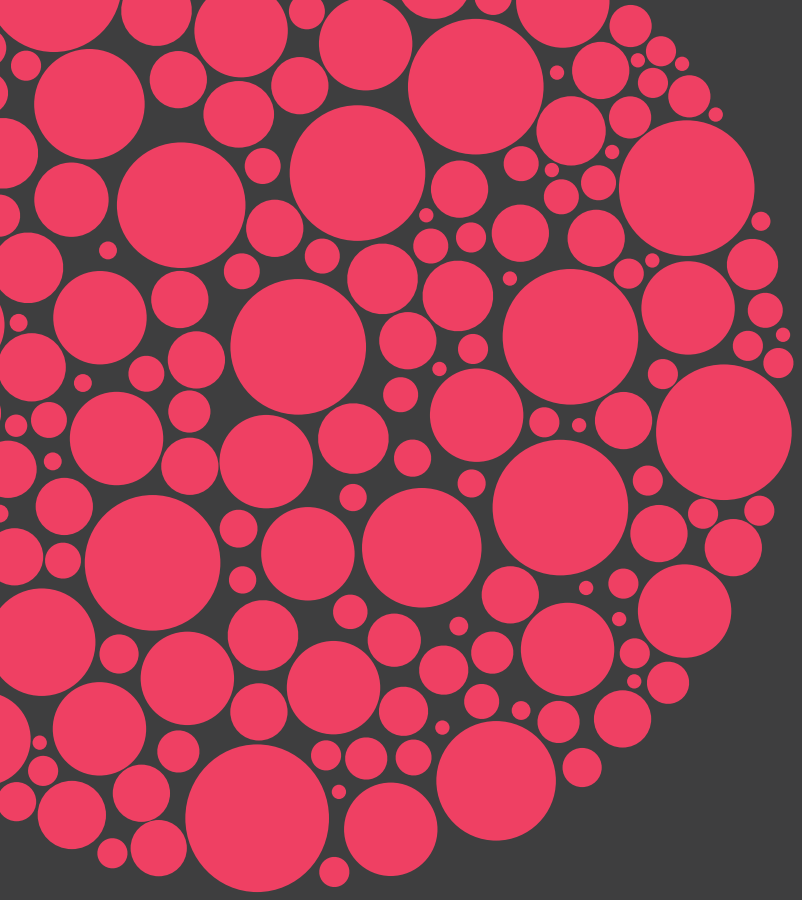
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