

Leveraging Marketing Automation

Best practices for creating new marketing models to engage and convert customers

Marketing automation technology is being used by more and more marketing teams to get messages to the right recipients at the right time, find qualified leads and get detailed information on how customers are engaging with brands.

With the help of marketing automation, campaigns can be deployed more quickly, targeting the most relevant recipients and saving huge amounts of time for marketing teams. And more time is a good thing, because the market landscape is constantly shifting, and consumers are moving faster than marketers.

"This technology is not just an enabler or commodity the way it has been historically, it's inspiring creativity and creating stories," says Mayur Gupta, global head of marketing technology & operations for Kimberly-Clark, who spoke at the recent MarTech conference in Boston.

The exciting part of this evolution lies in the fact that marketing automation is now creating new business models for marketers, allowing them to sort through data and find leads in new ways, and get immediate feedback on what's working and what isn't.

A NEW LANDSCAPE

Technologies such as marketing automation are changing the way marketers are doing business, says Laura McLellan, vice president, marketing strategies for Gartner Research, who also presented at MarTech. Marketing's focus is still on the customer, but companies are now turning their focus to the



web, e-business opportunities and digital marketing.

"The future is digital business and automation. Business opportunities without people in between will become the norm," McLellan says.

Marketing is about disruption and getting people's attention, she says, and disruption at a technology level is already happening and will only proliferate. The big impacts this shift is having on the marketing world is that the customer is now in charge of the sales process, as online research and price comparisons have put them in the drivers seat. McLellan says this has affected the traditional sales funnel, as many customers are more than halfway to a purchasing decision before talking to a sales representative.

"Data is the driver of decisions and innovative technology underlies it all," McLellan says, adding that research indicates that spending on marketing automation and other tech solutions is on the

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MAKING IT WORK

HOW IDOLOGY AND SHIPSERV LEVERAGE MARKETING AUTOMATION

Marketing automation technology is helping companies track leads, figure out which leads are the most important and save lots of hours by automating what used to take teams much longer to do.

According to a Marketo's "ROI of Marketing Automation" report, before implementing a marketing automation system, identity-verification tech supplier IDology had no automated way to nurture leads, and prospects received emails on a formally structured basis. The team also was unable track marketing's actions in its Salesforce CRM, so sales reps received leads without knowing the history of previous interactions. IDology wanted a solution that would eliminate manual processes and automatically track each lead source.

Within a few days, the company had created personalized landing pages and was able to automatically segment leads. By automating these tasks, IDology's marketing team was able to focus more time on strategic activities.

IDology now delivers twice the number of marketing programs with the same budget. Automated email campaigns, web activity tracking and list segmentation capabilities have doubled marketing efficiency and yielded a 25 percent improvement in monthly ad conversion rates.

"After a one-day implementation of Marketo, we doubled the effectiveness of our marketing programs, and improved lead quality and marketing and sales alignment," says IDology marketing director Jodi Florence.

Marketo also teamed with maritime shipping e-marketplace ShipServ to help it turn marketing qualified leads to sales accepted leads.

Before introducing marketing automation ShipServ faced challenges of flexibility and scale. ShipServ is relatively small (120 employees), but its potential market is worldwide.

Since the brand's marketing staff was small and had a limited budget, it needed a solution that could help them create more qualified opportunities without creating a burden on their already taxed marketing team.

Using marketing automation, ShipServ was able to eliminate manual processes, automate demand generation and lead management, and prioritize and qualify sales-ready leads.

"In our second year of using Marketo, we now drive significantly more sales opportunities with the same budget and have increased sales-ready leads by 400 percent," says John Watton, ShipServ's VP Marketing.

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rise across the board. McLellan says that Gartner's research shows that two-thirds of companies will increase expenditures on marketing tech in the coming year, including automation solutions.

"Everything we see points to increased spending—very few people are staying flat. Among CEOs, digital marketing technology is the number one most important area of investment to improve business over the next five years," McLellan says. The budget for the marketing funding increase will likely be coming out of sales budgets, she says. "We're seeing a reduction in selling expenses," McLellan says.

CUTTING EDGE SOLUTIONS

Some marketing automation suppliers are now expanding their business offerings in an effort to help clients get the most out of their tech solutions.

"We've expanded our services to include strategic services, strategy content management. We call it revenue marketing. This allows clients to get up and running quickly and transition their team into the lead role in automation," says Scott Benedetti, vice president of sales and revenue marketing, The Pedowitz Group.

Pedowitz is now putting marketing automation programs and plans in place for clients across multiple channels.

"We're executing in that regard for clients now and we're proposing for folks to outsource to us, just like they would a traditional marketing agency. We set up the marketing automation system, run the system, put the content into the system and they use us as the subject matter expert to help them achieve success," says Benedetti.

The Pedowitz Group sees that as a viable strategy for clients who are new to the marketing automation space as their ramp-up plan, as marketing automation is a big investment in marketing automation, and they can help get new systems up and running very quickly. The Pedowitz services team gets things going at the beginning of the process, then client team members are slowly plugged in and the knowledge is transferred over to them, so they can take over ownership of the entire program in the future.

"That's become a viable option for marketers from an onboarding standpoint, as opposed to doing some training, building a nurture program, figuring out a content plan, then a year or two later they're fully executing all of the functions that are available in marketing automation," Benedetti says.

COMMUNICATING WITH SALES

One problem Benedetti regularly sees when newcomers adopt automation systems is marketers getting

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excited about the latest tech solutions and getting funding for marketing automation, but then falling short in implementing the solutions properly. That includes getting the sales team on board with the

“Marketing automation companies are masters at selling their products and selling the upside of what can happen with those products. When you get that new technology, it doesn’t mean you know exactly where to go with it. If the sales team is not on board with it, it’s just another lead gen source. So if you don’t actually put the processes in place to bring those two groups together, then you are inevitably not going to see as much success,” Benedetti says.

A third party can help facilitate that communication, and suppliers can work with marketers to put a change management plan in place and educate team members on new processes. That set of strategies can include lead management, lead management processes, technology dataflow processes, reporting plans and dashboards, content management and audience engagement.

“When you integrate marketing automation and CRM, you’re able to see that digital interaction, and you can leverage those in a strategic pursuit for the entire process, from awareness, when you first get that prospect all the way through to the close, and thereafter, advocacy,” Benedetti says.

AUTOMATION REQUIRES NEW SKILLSETS

With new advancements in marketing tech come new skillsets that marketers need to get the most out of it.

“Companies bring in these technologies and if they don’t have the skillsets that you need to build, execute, analyze in a continuous fashion, then you’re not taking full advantage of it. And if you do have some of those skillsets, companies are often resource-constrained by the number of people they have in those skillsets,” Benedetti says.

If marketing teams don’t have the strategies, the content pieces, the communication plans and the reporting to make sure that it all works together, then it can take up to nine months to two years before you have it all up and running properly.

PR 20/20 CEO and author Paul Roetzer says the talent war for tech-savvy hybrid marketers who are fluent in the language of automation has already begun, and that it’s up to marketing teams to train their own marketing technology specialists.

This new breed of marketers are capable of building, managing and executing fully-integrated campaigns that produce results, and are the types that execs want to build their teams around, says Roetzer, who spoke at the MarTech conference.

The rise of marketing automation means that the

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GETTING IT SORTED

FIGURING OUT WHO NEEDS WHAT, AND WHEN

Marketing automation can be a big help to salespeople and marketers sorting through data and leads from social media. The recent “25 Marketing Automation Tips” study on the topic from Salesforce/Pardot indicates most marketing automation tools provide prospect tracking to give marketers real-time insight into prospects’ activities (Pardot’s real-time sales dashboard is called LeadDeck). By customizing these real-time notifications to the actions that are most important sales teams, reps can be notified the moment that one of their prospects downloads a piece of content, views the pricing page, submits a form, and more.

“There’s nothing quite like working away during the day and seeing what your customers are doing behind the scenes, all using real-time prospect activity alerts. It’s incredibly useful to be able to know their engagement levels — I’ve even reopened and won closed opportunities from these real-time notifications,” says Pardot account executive Annie Jensen.

The notifications signal to sales reps that appropriate action is needed, and arms them with the information they need to reach out to their individual prospects.

Marketing automation can also help marketers handle social data. According to the Salesforce/Pardot report, a survey by International Data Corporation shows that B2B technology buyers receive an average of six phone calls and fourteen emails per day from vendors. With so many competing marketing messages, many companies are beginning to explore social selling as an alternative, according to the report.

Using the social profile lookups available in a marketing automation platform, sales reps can tap into the wealth of social data that their prospects are sharing, see where their prospects are engaging online, develop valuable one-to-one relationships, and jump into conversations with targeted, relevant information.

Remember to keep business and marketing messages to the right platforms, so the recipient doesn’t get turned off or feel intruded upon.

“Which [social] mediums and platforms are for personal use, and which are for business? Sales reps are conducting business engagements, so they should be responding via business mediums. Don’t comment on your prospect’s Facebook status—instead, shoot them an email or reach out over Twitter. It’s all about mutual respect,” says Salesforce.com marketing evangelist Mathew Sweezey.



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marketers of today and tomorrow must learn to speak the language of marketing tech and learn how to make it work best for them and their organizations. In essence, it means that marketers must become technologists themselves, on a certain level.

McLellan says that as automation becomes more prevalent, marketers and their teams will be responsible for mastering automation technology and other digital techniques to improve customer-related processes and using tech to grow business by defining markets and attracting, acquiring and retaining new customers.

The rise of marketing automation and associated tech solutions means that marketing teams and IT departments will need to work together more closely than in the past.

"They are working together already, and collaboration and innovation are taking center stage," McLellan says.

This new breed of marketers is agile, adept at advanced marketing tech and experts at inbound strategy, but where can this next generation of marketers be found? Not coming out of universities, Roetzer says, as only one of the top 10 marketing programs in the U.S. has a required undergrad course in digital marketing (The University of Bloomington). Roetzer says there's an imbalance between classroom-taught skills and marketplace skills because marketing is moving forward too quickly. Businesses must take the initiative to mold their own modern marketers.

"If lead gen is the most critical part of your business, then you need to build a team that can do that," Roetzer says, suggesting that marketers take a scientific approach to recruiting and get information on team members' skillsets and efficiencies in tech and marketing automation solutions.

He suggests marketers create internal marketing academies around curriculums of books, webinars, certifications and events to build their team's expertise in marketing automation and marketing technology.

"Many organizations are lacking or under-utiliz-

ing fundamental marketing technologies, and most organizations aren't doing this yet, so even if you haven't built an internal academy yet, you're not far behind," Roetzer says.

TRENDS

Marketing automation is constantly evolving, and tech developers are constantly looking for an edge on the competition. Look for improvements in the area of personalization capabilities in the short-term.

"Right now, people are talking about what this technology can do from a personalization standpoint. I think that marketing automation vendors are going to realize quickly that they are in a best-of-breed stack, and they will make connectivity either simpler or more standard. You see that with the bigger players now, with the connection to webinar technology becoming standard. There's also a giant play in business intelligence, and solutions will leverage better BI tools," Benedetti says.

He also believes the marketing automation market will see some level of functional parity, and that will make the conversation more about price points than features (price per-email or per-database size, for example).

"The market has changed in a sense that there's significant recognition, Oracle has acquired Eloqua, IBM acquired Silverpop. All the big consultants are now investing in this and calling it their marketing automation services group. They're moving into the space too, because they see the connection to topline revenue," Benedetti says.

CUSTOMER-CENTRIC

While marketing automation and other tech solutions can make life easier for a marketing department, it's important to remember to keep the customer's needs at the forefront.

"We tend to get obsessed with technologies or channels and we end up creating ideas that make you wonder who's going to use them. Keep your focus on the customers and what problems your solutions will solve for them," Gupta says.

The flexibility and speed of marketing automation provides value in many ways—including learning about which programs and tactics aren't working.

"The moment you accept failure, you're lowering the bar. Remember, failure is getting one step closer to finding the solution that will work," Gupta says.



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