

Automation Nation

Trends for optimizing marketing automation across multiple touchpoints

As customer touchpoints increase and audience expectations become more and more demanding, the importance of marketing automation to help manage interactions both before *and* after the sale continues to grow.

Measuring multi-touch attribution is a struggle, says Irv Shapiro, CEO, DialogTech. "Merely first or last touch attribution does not work any more."

When you're tracking only your online marketing efforts with automation, you have a problem, says Shapiro. Thanks to the ever increasing number of consumers immediately following up a mobile search with a phone call, mobile can't be an afterthought.

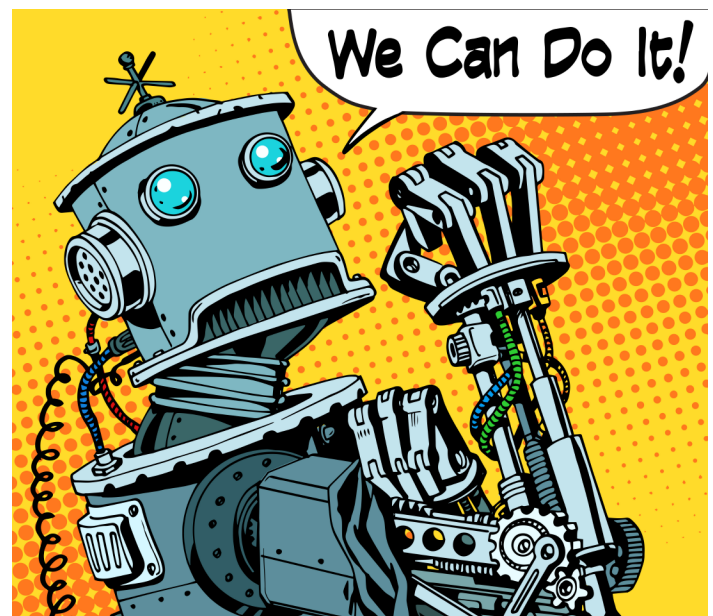
"You need a full picture of your customers," he says. "Many organizations need a CRM, an online marketing tool and call conversion tools. It's possible to get the same type of analytics on the call side as the website."

Marketers have a lot of data but they need to know what to do with it, adds Andy MacMillan, CEO, Act-On Software. "We're seeing a lot of people use marketing automation for more than just sales, doing post sales activities to keep the customer engaged."

While marketers may have been using CRM tools to manually build bonds with customers, automation can help create a richer, more data-informed interaction with both customers and prospects, he says.

This is why it is important to create a single audience hub, to consolidate your customer interactions, notes Sanjay Dholakia, CMO, Marketo.

"A lot of marketers dabbling in automation have 52 databases that don't talk to each other, says Dholakia. "But the reality is that customers are intolerant to all this disconnectedness. We need to create great experiences and you can only do this with a single audience hub."



It's no longer just about bringing leads into the funnel, says MacMillan. It's about the head of marketing taking responsibility for a prospect from the start and engaging with them over their lifetime with the brand. Both prospects and customers don't want to be bombarded at any point in the funnel, and automation can make the relationship more valuable for all involved.

MacMillan notes that his company is starting to work with partners, agencies and customers to build industry specific templates and programs. "Nurture programs might be very different for some industries, say higher education or healthcare. Industry specialization can shift how the technology is applied and how the tools are used, depending on volume and industry-centric practices.

Continued on page 2

THE BIG QUESTIONS

WHAT MARKETERS SHOULD ASK POTENTIAL PARTNERS—AND THEMSELVES—BEFORE INVESTING IN A MARKETING AUTOMATION SYSTEM

- Are you organizationally ready for the kind of change a marketing automation system will bring?
- Do you have an organization ready to rally around having a centralized hub that will think about all the interactions that impact a customer?

"It requires strong commitment from not only marketing leadership but heads of sales as well. Some organizations already have sales force automation in place so that's where a lot of the transactional data lives. Marketing automation looks at behavior more holistically and will drive a shift in business, because we all know that prospects are now doing 60% to 80% of their research online before engaging with sales person." —**Chris Lynch, senior director and head of product marketing, Oracle Marketing Cloud**

- What is your customer journey or lifecycle like?
- What are all the different points where you interact with the customer?

"You need to understand what are your biggest challenges around identifying, communicating and interacting with customers. Know what you want or need to automate and where you want to create personalized messages. And before you even start, now how you plan to measure your results, and tailor the package to meet those metrics. Understand your marketing goals and your goals for the software, including how you will address changing marketing needs and environments." —**Jackie Palmer, senior director, product strategy & marketing, Teradata Applications**

- Can your vendor tell you what they can do—besides providing you with technology—that will help you be successful?

"Most companies buying marketing automation are doing so for the first time. It's a new mindset for many to have sales and marketing working so closely together. Ask the vendor to share best practices and case history examples. The companies that really do this best have sales and marketing in lockstep when they bring in marketing automation. It's really *sales and marketing automation*. The budget to buy the system may come from marketing, but if you don't have sales as a strong supporter, you won't get as much out of your investment." —**Adam Blitzer, executive vice president/general manager of Sales Cloud, Salesforce**



Continued from page 1

KNOW WHAT YOU NEED

Because there are so many touchpoints, it's important that visitors see the right product alignment. "There's a diversification of message delivery, beyond email, social and retargeting," says Kipp Bodnar, CMO, HubSpot. "You need to engage at all touchpoints and evenly distribute content."

When you're evaluating a system, think about what you *really* need, versus what you think you need, Bodnar advises. "Don't add more complexity than what is necessary. It's easy to get lost in cool features. Take a step back and look at your business performance, and see where there are gaps you want to fill in. Then based on that, plan what functionality and training you need."

Marketers also need to consider how an automation system will integrate with other platforms already in place, he says. Know what value you'll get from the system, and how you can leverage the tool. "Report-

ing tools are evolving—it's really about helping people get insights and using dashboards to track over time," he says.

Marketing tech and advertising tech are colliding, says Dholakia. "Third and first party data is blending and advertising as we knew it is dying. Things are shifting and marketing automation and engagement is on the rise—now, you need to treat everyone like you know them."

Dholakia feels that marketers need to have a longer range view when it comes to marketing automation. "I see too many people think about solving a problem that is three to six months out—and then run out of gas. They choose tech to simply get them going, but then they want to run multiple campaigns or webinars and they don't have the capability with the tech they've purchased."

Companies that have a strong alignment between sales and marketing will make the most of marketing automation investments, he says. "Rifts begin when

Continued on page 3

OOPS—THEY DID IT AGAIN

COMMON MISTAKES MARKETERS MAKE WHEN IT COMES TO MARKETING AUTOMATION

Marketing automation can solve a lot of problems for marketers—if they use it properly. But that of course doesn't always happen.

"You can't use it as a broadbrush tool without much segmentation," notes Andy MacMillan, CEO, Act-On Software.

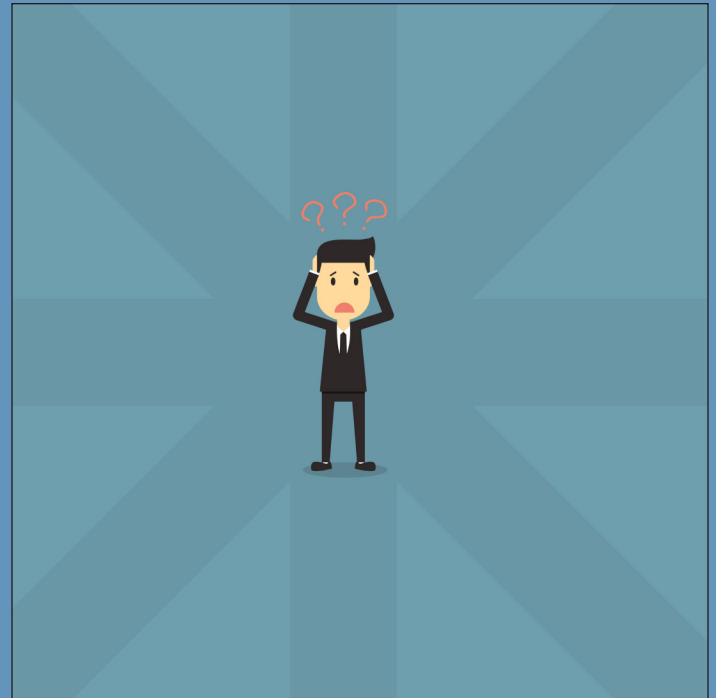
For many organizations, the real challenge comes when it is time to incorporate campaign management, says Kipp Bodnar, CMO, HubSpot. "A lot of people run into hurdles when it comes to telling their 360 marketing story through different touchpoints across the web. It takes thoughtful strategy and real work to make it happen."

Many organizations start to rely too heavily on marketing automation and utilize it in an old school fashion, and that isn't in the spirit of what marketers should be doing today. "You need to focus on quality over quantity," notes Chris Lynch, senior director and head of product marketing, Oracle Marketing Cloud.

Everyone wants to be customer centric, he says, but business pressures get in the way. Marketers can score on a variety of behaviors, products and services. It's key to focus on the quality of leads you bring in, versus just the number of new prospects.

Many mistakes can be avoided if people start small in marketing automation, and understand the data before they jump into a project, says Jackie Palmer, senior director, product strategy & marketing, Teradata Applications. "Take one channel or a small group or department first and start small. Then use the ROI from the first implementation to fund the next one."

Take advantage of industry best practices, she urges. "There is so much great technology out there and so many successful implementations. Trust your vendor and use their knowledge. Learn from those who have gone before."



Anyone who moves into marketing automation will immediately see a lift in efficiency from what they were doing before, notes Adam Blitzer, executive vice president/general manager of Sales Cloud, Salesforce. The trouble starts when people take on too much.

"They'll come up with a 'perfect plan'," he says. "A much better approach is to start simple, measure, and they layer on to the next piece."

Connect analytics to your website, lead gen forms, etc. and then layer on lead scoring and nurturing, Blitzer suggests. "This will give you the chance to see what is happening with fewer variables going on at once. If you do too much at once it becomes tricky to see what is truly working."

Continued from page 2

marketing sends 10 leads to sales and the sales team says that only one was good. The truth is that they were both right—nine of the leads just weren't ready to buy now. Marketing automation can make sales more efficient and nurture those nine until they are ready to buy."

"We're going to see more cross pollination between advertising and marketing activities and budgets, says Jackie Palmer, senior director, product strategy & marketing, Teradata Applications. "Marketers will have the ability to understand the transition of unknown browsers to buyers, including activity on unbranded sites and channels."

"There's lots of data available and people who leverage it will be well positioned for the future to take action and execute in real time."

An investment in marketing automation doesn't

mean that all of your other marketing tech is suddenly going to go away, notes Chris Lynch, senior director and head of product marketing for Oracle Marketing Cloud. "Make sure all the other pieces of your infrastructure work together to drive your customer experience out into sales, services and beyond."

Great content is essential to effectively execute great campaigns using marketing automation, says Lynch. "If you don't have great content, marketing automation will only have limited value. Then, you need to be able to pull this content together and leverage it across channels."

In the early days of marketing automation, email and lead scoring based on interactions was the focus. Now, people are trying to engage in more anonymous channels, and you need to be able to reach out to them, says Lynch.

Continued on page 4

A GOOD INVESTMENT

AUTOMATION IMPROVES ENGAGEMENT FOR TRUITY CREDIT UNION

Implementing marketing automation helped Truity Credit Union craft a more targeted approach to engage members and increase email engagement.

Truity is a co-op financial institution with branch and ATM locations in Oklahoma, Kansas, Texas and Arkansas. Products offered include traditional savings and checking accounts, as well as loans, credit cards and mortgages; members can join through their employers.

The credit union has approximately 71,000 members. It began working with Act-On to implement marketing automation in early 2015.

Email is the primary online marketing vehicle for Truity on a day to day basis, used to share account notifications, announcements and promotions. Members can set their email preferences in the company's online portal if they wish only to receive certain messages, notes Kyle Dahlgren, assistant vice president of ecommerce, Truity Credit Union.

Marketing automation has allowed Truity to create more targeted email messaging, he says. In the past, lists were created outside of the email management software, because the system they were using didn't support the necessary data manipulations. "Now we have dozens and dozens of segments that help us connect with people at the right time."

While Truity of course wants to increase its membership numbers, because it is a credit union the primary focus is



working with existing members. Each is at a different stage in their account, based on their age or point in their life, so they need different communications.

"New segments were born out of insights that we didn't have before," says Dahlgren. "Email and website activity can be linked and allow us to connect the dots and then marry that information with what products they are looking at, and then offer ways to assist."

Facebook and Twitter promotions are used to create engagement for members at different lifestages. "We strive to help people through different experiences, like offering them information on what they need to consider when they are buying a house," he says. "It helps build trust."

Email open and clickthrough rates are used to gauge the success of the marketing automation efforts, as are actions taken by member accounts. "We've been able to see where we are moving the needle and where we can continue conversations," Dahlgren says.

Continued from page 3

Marketers are trying to build centralized hubs within marketing automation to leverage data and engage customers across paid media, he notes. "This needs to be done carefully to respect privacy—you need to understand barriers around what they've given you permission to do."

What's next? Predictive analytics will factor more into marketing automation, as systems begin predicting what marketers could do, and the likelihood of conversion from those initiatives to certain segments, says Dholakia.

More and more, marketing automation will make sense as a way to increase post sales engagement. "We'll see greater focus on retention as well as acquisition," says Lynch.

Lynch feels that marketing needs to take more ownership of the customer relationship, working in tandem with service and sales.

"It's a compelling concept," he says. "Say you were a company that sold routers and you wanted to run a cross- or up-sell campaign. If customer service can show you that a customer had an issue, this may not be the best day to target them with that campaign."



Beth Negus Viveiros
Managing Editor, Chief Marketer
bnegus@accessintel.com
[@CMBethNegus](https://twitter.com/CMBethNegus)

ABOUT CHIEF MARKETER

The Authority on Measurable Marketing: Our mission is to seek out the best in measurable marketing intelligence—and then analyze, summarize and organize it for marketing and C-level executives.