



Delivering on the Promise of Marketing Automation

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Two trends are forcing organizations to approach sales and marketing differently.

1. Today, customers sit in the driver seat in the discovery and buying stages, and they have more channels available to them as entry points. As a result, identifying and managing qualified opportunities can be more confusing and complex for marketers, and the pipeline bottleneck has shifted further upstream. With buyers driving the purchasing process, it's critical that Sales and Marketing be **aligned** and that processes be integrated to effectively manage the **customer** buying process.

2. Organizations are trying to take a more scientific, data-centric approach to marketing, especially in segmentation, customer engagement, lead nurturing, and lead scoring. Companies are focused on improving targeting and profiling, response rates, cross-channel coordination, and campaign effectiveness and efficiency.

Those two trends are motivating many firms to invest in marketing automation platforms (MAPs). Why? Because companies count on MAPs to help address Sales and Marketing alignment and integration. Also, MAPs enable organizations to effectively address the new buyer behaviors. Marketing organizations rely on those platforms to automate repetitive tasks, optimize the marketing-sales opportunity pipeline, increase efficiency, and reduce human error. At a minimum, organizations expect MAPs to be able to quickly and efficiently capture, score, and route leads appropriately.

The selection and implementation of a MAP is often viewed as software technology purchase and deployment, but that view can create problems. When the purchase is perceived from a technology perspective, the entire marketing workflow may not be taken into consideration. Overlooking those aspects could result in slow, and sometimes painful, adoption and usage. You can alleviate or avoid that problem if you establish selection criteria, map the marketing and sales workflow, and focus on some pre-implementation and post-implementation processes.

MAP Selection and Evaluation

The number of MAP solutions has mushroomed in the past few years. Nearly every MAP supplier delivers on the basic category promise. Therefore, you need to drill down to what you specifically want to improve and do differently—in campaign and lead management, cost reduction, process efficiencies, etc.—by implementing a MAP solution.

If you don't establish your requirements beyond the basic batch-and-blast campaign management before exploring all your options, you may find yourself like a kid in a candy store: overwhelmed by myriad choices and options.

Therefore, start with your functionality criteria. Establish what you need in the following five key functional areas:

Planning and management (plan management, resource management, budget management, and project management)

Campaign management (tracking costs and managing the process of campaign planning; design and implementation; multi-step campaign, rules-based campaign, or event-driven campaign capabilities)

Lead generation and management (capabilities related to customer segmentation/clustering, campaign offer development, management and treatment, lead scoring and analysis)

Channel management (delivering content from multiple communication channels, such as online, offline, and mobile)

Performance measurement, management, and reporting (setting performance targets, tracking campaign results and costs, tracking performance over time, and configuring a dashboard)

Once you have clarity about your functionality requirements, create a cross-functional evaluation team that comprises Marketing, Sales, IT, and Finance to help with the evaluation process. Consider evaluating each prospective supplier by assessing the viability, capabilities, and responsiveness of the company; the breadth and depth of the platform's functionality; and the strength of the underlying technology and its compatibility with your processes and systems. Companies should at least examine the platform's ease-of-use, data-management, analytics, and workflow capabilities.

Evaluating a platform would be easier if the supplier were to use your data in its demonstration.

In your RFP, ask for information related to implementation, integration, support, maintenance, and training costs. In addition, learn what kind of professional services are available (either directly or via partners) to support process mapping, system configuration, and metrics development and reporting.

Prior to selection, make sure you have your own house in order. At a minimum, aim to achieve clarity regarding the following five critical areas:

- Your marketing and sales processes, especially opportunity-pipeline management processes
- Your customer segments and their buying processes—preferably behavior-based, to support stage configuration
- Your definition of a qualified lead
- Your lead-scoring schema
- Your lead-nurturing processes

Plan for MAP Adoption

Marketers understand that when they launch a new product into the market, they need a plan to support product introduction, launch, engagement, adoption, and ongoing communication. Surprisingly, though, few marketing organizations drink their own champagne. It's important to develop and execute such a plan for your MAP.

MAP adoption requires user involvement, communication, and satisfaction of individual and group concerns and needs prior to and during implementation. To gain user support, users need to understand and agree that change is needed.

The following eight steps will make all the difference in gaining MAP adoption:

- **Gain agreement.** Change itself is often a scary proposition. Many people are willing to continue doing something that doesn't work to avoid the uncertainty and ambiguity of change. As a result, it's imperative that stakeholders understand the rationale behind the change, support it, and most important, feel some sense of ownership. If people feel that the change is for change's sake, or that the system was thrust upon them, they will be reluctant to adopt and they may possibly even undermine adoption.
- **Communicate** how things will be better and different once the system is implemented and adopted. Be upfront about the process and what, if anything, will be difficult.
- **Establish and share** the rollout, onboarding, and training aspects of the plan. Develop those aspects of the plan collaboratively with users.

- **Determine and communicate** (in advance) measurable milestones of success for adoption.
- **Provide** an incentive to be a pilot group.
- **Publicly acknowledge** and reward early adopters.
- **Identify and secure** champions who can help engage users and encourage adoption.
- **Share** the project plan, and communicate your progress regularly.

Common Pitfalls to Avoid

OK, you've established your selection criteria, evaluation team, and implementation and adoption plans. Murphy's Law nearly guarantees something will go awry. Watch out for the following "gotchas":

- Recognize the MAP is merely a tool, not the Holy Grail. You still need to have the marketing strategy, skills, processes, and capabilities.
- Be prepared for deployment to take longer than expected, and manage expectations accordingly.
- Double- and triple-check your costs. Be sure to factor in costs beyond the system itself, such as training, third-party consulting, etc.
- Allocate the people resources needed to support the effort. (This isn't one of those initiatives that will require a strong project manager.)
- Understand how the MAP fits into the large technology systems, overall marketing infrastructure, and business strategy.
- Start with clean, quality data.
- Include the time to inventory, and reengineer processes if necessary.

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Finally, note that this type of work falls under the auspices of your marketing operations person or team, who should have the skills and capabilities to successfully shepherd such an initiative.

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