

# ALIGNING MARKETING TO BUSINESS RESULTS

## THE SITUATION

Founded in 1993, Safe Systems is a national leader in providing IT solutions exclusively to financial institutions. As a technology partner managing hundreds of clients representing more than \$61 billion in combined assets, 1,100 locations and over 25,000 network devices nationwide, banks and credit unions rely on Safe Systems capabilities to significantly decrease costs, increase performance, and improve compliance posture.

Salina Wuttke, Vice President of Marketing and Communications, joined Safe Systems six years ago to develop the marketing and communications function for what at the time was a 40-employee organization. During this initial period, Salina rebranded the company and addressed many of the general marketing needs, particularly the client-facing vehicles such as the website, key events and product collateral. She and her team focused heavily on demand generation efforts that helped the organization triple annual revenue and double its customer-base.

Salina and the leadership team, under the guidance of Darren Bridges, the president, proactively enhanced its

technology infrastructure and doubled its employee headcount to accommodate this growth, shifting its business philosophy from a primarily small business opportunistic approach to a more strategic mid-sized company. "We created a vision and a plan for growth," said Darren. "We realize marketing must play a critical role in the implementation of this growth plan. Success requires that marketing is aligned to the business and that we can accurately measure marketing's impact."

## THE NEED

The marketing organization reflected the entrepreneurial spirit of the company. It operated primarily as a service provider to the organization and a fulfillment center for the sales team. "We were activity driven, operating without alignment to clearly defined business goals," recalled Salina. "The metrics we used conveyed our marketing activities but didn't help the executive team truly understand how marketing was affecting the business. Our dashboard for senior management captured a variety of marketing numbers and data, but didn't fully communicate marketing's contribution or support decision

making." Salina began to explore how to develop a customer-centric marketing plan with well-defined marketing objectives and metrics that would demonstrate marketing's value.

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Over the course of a month, Salina conducted an extensive online search including researching marketing associations' membership and peer recommendations to identify possible resources, tools, and experts. She wanted a firm that had domain experience in both IT and financial services, provided well-defined processes and proven tools, and who could work seamlessly with her executive team.

## **THE DECISION**

Salina reviewed several peer recommendations and third party videos and read online articles as part of her research. The evaluation led Salina to

the VisionEdge Marketing (VEM) website, where she downloaded a number of white papers and several workbooks. These helped Salina clarify her vision and eventually she requested a free consultation. As she explored her various options, she engaged in several conversations with the VEM team. As part of her due diligence, Salina connected with a few of VEM's customers which reinforced her decision to bring VEM onboard.

## **THE PROCESS**

After the kick off meeting, VisionEdge Marketing began the discovery phase of the project which included conversations with members of Salina's executive team and a review of numerous business and marketing materials. This phase engaged everyone in the process, from the CEO, President, and Sales VP to the finance and R&D leaders. "The buy-in developed during this phase was extremely valuable in preparation for the next step, the onsite working session," said Salina. "It helped the leadership team understand the value of the upcoming session." "This initial step helped clarify how important it is for the marketing function, plan, and activities to be aligned to well-defined business goals," added Darren.

"The onsite working session was one of the most impactful and impressive meetings I've participated in," commented Salina. The session enabled everyone to collectively create well-defined and specific customer-centric

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business goals, and articulate marketing’s role in the achievement of these goals. “We now have a set of quantifiable outcomes on which to build a more strategic, measurable marketing plan,” relayed Salina. The marketing team then began using VisionEdge Marketing’s proprietary mapping technology, the Accelance® application, to create a visual blueprint that links marketing activities, metrics, and budget directly to the business outcomes defined in the working session.

## **THE RESULTS**

- For the first time, the marketing department’s budget is now directly tied to business outcomes making conversations with the finance leader more positive, and enabling faster funding decisions.
- Every marketing objective, program, tactic and activity has measurable performance targets and the Accelance® online application enables marketing to define the metrics relationships.

“We now have agreement on how Marketing’s success and “And we have a set of metrics for the dashboard that more clearly communicates Marketing’s impact.” Salina added, “Even more, on a professional level, this process enabled me to add another dimension to my expertise and capabilities as a marketing leader. This engagement has changed my approach to planning and how I interface with the executive team when it comes to discussing marketing programs, metrics, and budget.”

- The entire marketing team is on the same page and each person understands how their work relates to the business. “We’ve moved from producing activities to focusing on producing results,” said Salina.

## **PARTING ADVICE**

Looking back on this initiative, Salina “wishes she had implemented this program sooner” and offers the following advice:

1. Start now. Every marketing organization can benefit from fine-tuning their alignment and accountability. Having a well-defined process and an application really made what seemed like a daunting task manageable.
2. Leverage a proven process and tool. Theories and experience are nice but having a package with deliverables that are tangible and an application really matter.

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3. Engage the leadership team. Having an executive sponsor for this type of work goes a long way toward securing support and buy-in.

## **ABOUT VISIONEDGE MARKETING**

VisionEdge Marketing ([www.visionedgemarketing.com](http://www.visionedgemarketing.com)) is a data-driven metrics-based strategic and product marketing consulting firm recognized as a trusted authority in the area of marketing performance management.

The company excels at helping companies strengthen their competitive advantage, accelerate their ability to acquire, keep, and grow profitable customers, and measure Marketing’s contribution to business goals. Founded in 1999, VisionEdge Marketing is located in Austin, Texas.

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