

PITFALLS AND LESSONS LEARNED

MY JOURNEY TO SUCCESSFUL MARKETING AUTOMATION

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CHAPMAN BRIGHT
MARTECH FANATICS

Download these slides on: <https://chapmanbright.com/automationday>

WHAT DOES A MARKETING TECHNOLOGIST DO?

Plays a critical role in aligning strategy and processes by managing activities across multiple marketing and non-marketing functions, ensuring that all of the marketing organization's activities run as planned and are able to excel in their commercial efforts.

Whether leveraging **technology**, creating **processes**, productizing **best-practices**, coordinating functions, **training, reporting** on performance, or generating new **insights**, a marketing technologist is at the center of much of the marketing organization's activity.

INTRODUCTION

MARKETING'S EVOLUTION

FROM PUSH TO PULL



THE CUSTOMER CENTRIC AGE

OUR CUSTOMER EXPECT
US TO BE *relevant*
SO WE MUST BE ABLE TO *understand*



Current technology enables to better – and more affordable – understand buyers and to engage with them - in an automated way.



Source: <https://chiefmartec.com/2018/04/marketing-technology-landscape-supergraphic-2018/>

MY JOURNEY TO SUCCESSFUL MARKETING AUTOMATION

LET ME TAKE YOU ON A JOURNEY



THE JOURNEY BEGINS

I STARTED AT QUINTIQ

Software supplier

for Supply Chain Planning & Optimization

- Started as employee 600.
- Within 3 years employee 1,000 was hired.
- Complex sales with long sales cycles and large decision making units.
- Big ticket deals.



+2 MONTHS

NEW LEAD MANAGEMENT PROCESS

Lessons Learned:

- Automated dispatching solved with lead behavior rules.
- Many souls meant many opinions for the new process.
- Many souls also meant different interpretations of the old 'process' to overcome.
- New to Quintiq, so I had limited knowledge on current processes and politics.
- Without a proper lead management process, it's impossible to do proper lead nurturing.



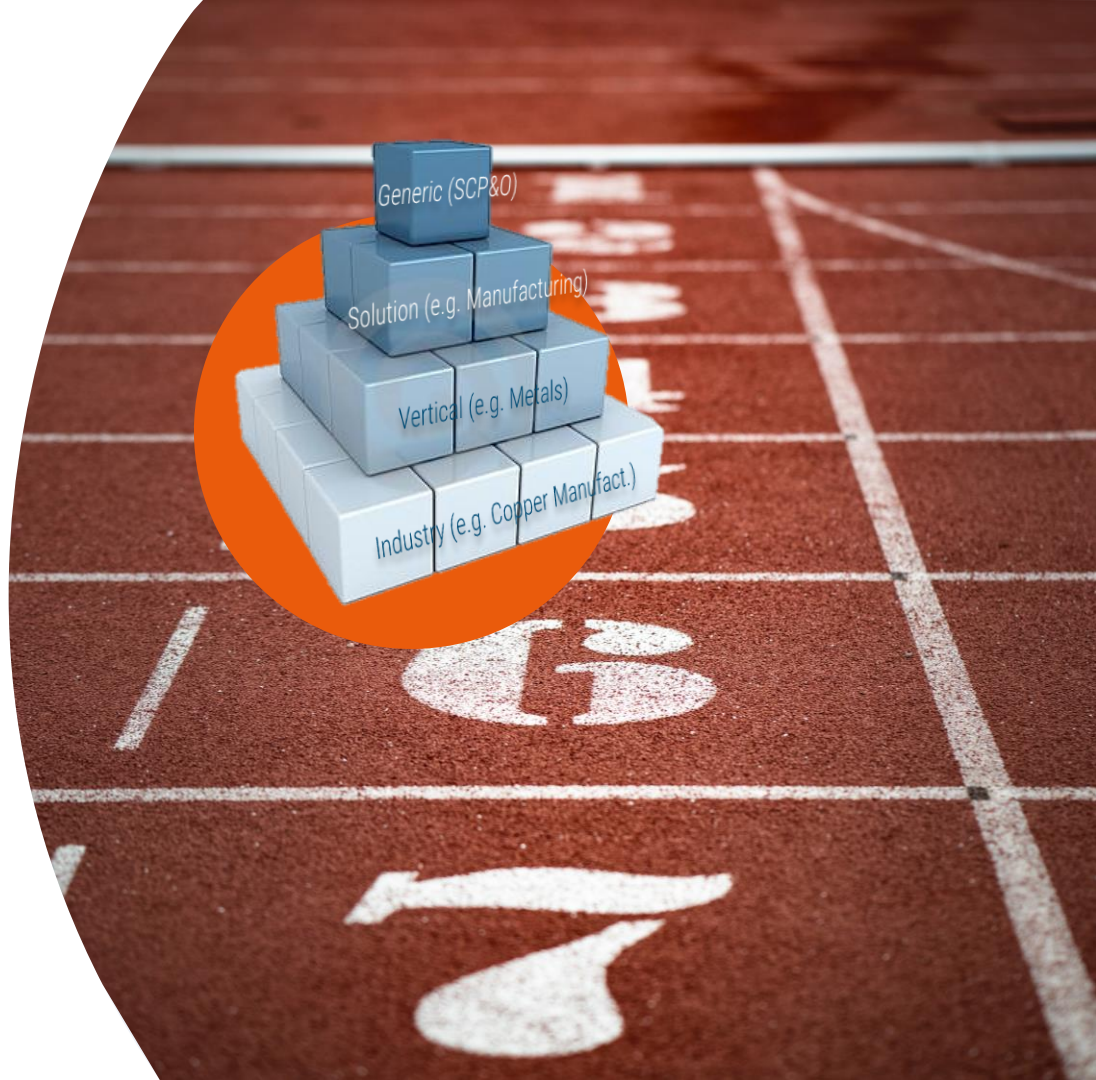
8x More
Deals per
1,000
Inquiries

+3 MONTHS

UNIQUE NURTURE PATHS... AND...

Lessons Learned:

- The occasional rebranding is always there to 'ruin' your planning.
- Layer your content for scalability.
- Layer your nurture programs too.
- Use solution scoring to determine a best-fit nurture program for a lead.



+5 MONTHS

OUR FIRST SALES ALIGNMENT SUCCESS

Closing a 99% deal:

- Prospect Portals
- Account Portals



Through this page you can access a variety of selected materials, including: Case Studies, Testimonials, Management Briefings, Videos, and Demo Screenshots.

You can also check:

[Quintiq](#)

[Quintiq - Logistics](#)

[Quintiq - Postal & Express](#)

Please feel free to contact me if you have any further questions.



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SOLVING THE WORLD'S
PLANNING PUZZLES

Quintiq's Industry Solutions for Postal



Integrated supply chain solutions for postal operators

[find out more >](#)



Logistics solutions

[find out more >](#)



Quintiq's World of Planning Puzzles

[find out more >](#)

Case Studies/ Whitepapers



Efficient parcel and express logistics planning solutions

[find out more >](#)



Same-day delivery - the next retail game-changer

[find out more >](#)



DHL saves time and decreases mileage with Smart Truck technology

[find out more >](#)

Strategic Management Briefings



3 warning signs postal operators can't afford to ignore

[find out more >](#)



3 steps to rev up delivery and boost customer service

[find out more >](#)



5 strategies for mastering the home delivery challenge

[find out more >](#)

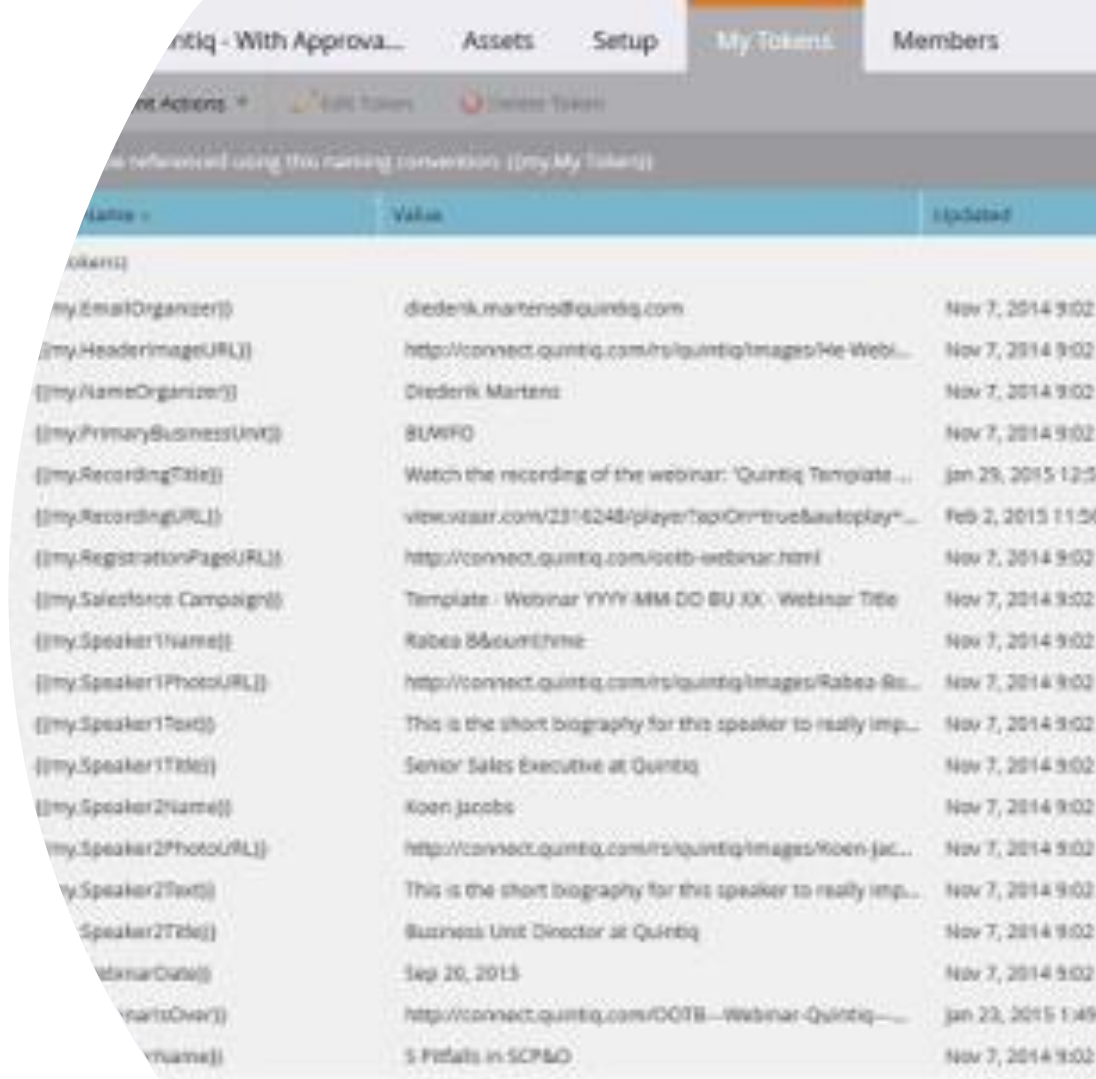
- Proper documentation will increase trust and usage of your lead nurture programs.
- A simple landing page that lists all the programs per category and availability per language can do the trick.

+6 MONTHS

OUT-OF-THE-BOX CAMPAIGNS

Example: Webinar With Approval

- Pre-build program with emails, smart campaigns, landing pages, etc.
- Always include the latest best-practice.
- Fully based on tokens. This means no assets need editing after cloning. Only tokens will have to be updated.
- Emails auto-scheduled relative to the webinar date.



The screenshot shows a software interface with a table of tokens and their values. The table has three columns: Name, Value, and Updated. The tokens are listed in the Name column, and their corresponding values are in the Value column. The Updated column shows the date and time when the token was last updated.

Name	Value	Updated
{{my.EmailOrganizer}}	diederik.martens@quintiq.com	Nov 7, 2014 9:02
{{my.HeaderImageURL}}	http://connect.quintiq.com/rs/quintiq/images/He-Webi...	Nov 7, 2014 9:02
{{my.NameOrganizer}}	Diederik Martens	Nov 7, 2014 9:02
{{my.PrimaryBusinessUnit}}	BUWFO	Nov 7, 2014 9:02
{{my.RecordingTitle}}	Watch the recording of the webinar: 'Quintiq Template ...	Jan 29, 2015 12:5
{{my.RecordingURL}}	viewxsar.com/2316248/player?on=true&autoplay=...	Feb 2, 2015 11:50
{{my.RegistrationPageURL}}	http://connect.quintiq.com/isctb-webinar.html	Nov 7, 2014 9:02
{{my.Salesforce.Campaign}}	Template - Webinar YYYY-MM-DD-BU-XX - Webinar Title	Nov 7, 2014 9:02
{{my.Speaker1Name}}	Rabea Börthme	Nov 7, 2014 9:02
{{my.Speaker1PhotoURL}}	http://connect.quintiq.com/rs/quintiq/images/Rabea-Bör...	Nov 7, 2014 9:02
{{my.Speaker1Text}}	This is the short biography for this speaker to really imp...	Nov 7, 2014 9:02
{{my.Speaker1Title}}	Senior Sales Executive at Quintiq	Nov 7, 2014 9:02
{{my.Speaker2Name}}	Koen Jacobs	Nov 7, 2014 9:02
{{my.Speaker2PhotoURL}}	http://connect.quintiq.com/rs/quintiq/images/Koen-Jac...	Nov 7, 2014 9:02
{{my.Speaker2Text}}	This is the short biography for this speaker to really imp...	Nov 7, 2014 9:02
{{my.Speaker2Title}}	Business Unit Director at Quintiq	Nov 7, 2014 9:02
{{my.WebinarDate}}	Sep 26, 2015	Nov 7, 2014 9:02
{{my.WebinarURL}}	http://connect.quintiq.com/OUTB-Webinar-Quintiq-...	Jan 23, 2015 1:49
{{my.WebinarTitle}}	5 Pitfalls in SCP&O	Nov 7, 2014 9:02

SAME MONTH

SALES & NURTURING

Lessons Learned

- Sales didn't trust the new nurture programs.
What will be sent to my contacts? Sales had no insight into which of their contacts and accounts were being nurtured.
- Sales had limited control over nurture programs.
- New main e-learning. A page to navigate all available nurture programs. A slide deck for every nurture program with details.
- SFDC campaigns to "add to", "remove from", "switch to", or "pause from" nurture programs.



SFDC reports per account owner with nurture coverage per account.

+4 MONTHS

INCREASE NURTURE COMPLEXITY

Lessons Learned

- A/B-testing found that more personalization leads to more engagement, but more complexity results in more maintenance.
- 3X multi-touch attribution achieved with more personalization, but multi-touch attribution is hard to sell to the 'common' people.
- Don't start complex. Start easy, but take scalability into account. Start with a welcome program.
- Winning an award is great for team spirit!



+4 MONTHS

NEW LEAD MANAGET PROCESS NEEDED?

Lessons Learned:

- Not able to correctly measure the contribution of marketing programs to the bottom line.
- First-touch and multi-touch attribution metrics are not easy to understand for all colleagues.
- We weren't able to pin-point bottlenecks in lead management well enough.
- We weren't able to do forecasting with marketing (e.g. Potential profit from current leads in stock.
- Our previous model was based on consensus and was just not good enough.



NEW LEAD MANAGEMENT PROCESS

Takeaways

- Next to training materials, like online training videos, we created laminated fact sheets with the most basic tasks on it.
- I've seen many (lead lifecycle) triggers in Marketo that are based on data change. Don't forget leads can also be created with the value. So also add an additional trigger when the lead is created and add an additional filter for the value.

(Tele)marketing/Sales

Overview actions needed

Accept or reject an L2 (<24h):

Accept an L2 by converting it into a contact with account: First become the lead owner. Then convert. You have 3 options for the convert status: ACCEPTED CONTACT, EXISTING CONTACT, or RELATION. Please mind mandatory fields, e.g. Business Unit, Quota Segmentation

Reject an L2 lead by:

- Becoming the owner of the lead first
- Choosing a pick list value in the field 'Rejected Reason'
- The system will further process the lead

Accept/Reject within 24h

(Tele)marketing/Sales

Offer L2 to sales (L2>L3), or disqualify the L2:

You can offer the L2 to sales by following these 3 actions in order:

1. Fill in the field 'L3 Need Details'. This field should describe the need
2. Put the field 'L3 Acceptance' to "Pending"
3. Change the owner to the relevant representative in your business unit

Disqualify an L2 contact by:

- Choosing a pick list value in the field 'Disqualified Reason'
- The system will further process the disqualified contact

Start calling the lead after its accepted, to identify the need

Sales

Accept or reject an L3:

Review the need details. If these are sufficient, you can accept it, if not, you can reject the L3.

Accept an L3 by:

- Updating the field 'L3 Acceptance' from "Pending" to "Accepted"
- The system will change the L3 to an L4

Reject an L3 by:

- Updating the field 'L3 Acceptance' from "Pending" to "Rejected"
- AND choose a reject reason in the field 'Rejected Reason'
- The system changes the owner (to the previous owner), and sends a notification to this previous owner

Accept/Reject within 24h

Sales

From L4 to L5, and from L5 to L6:

Identify the opportunity of an L4 (L4 = accepted L3). If the contact is added to an opportunity, the L4 becomes an L5.

When you identified the opportunity:

- Add the L4 contact to the opportunity
- Select the appropriate opportunity role
- The system will change the L4 to an L5

No opportunity? Then disqualify an L4 by:

- Choosing a pick list value in the field 'Disqualified Reason'
- The system will process the disqualified contact

Start engaging with the contact to identify the opportunity

The system will change an L5 to L6, when the deal is closed won. When a deal is closed lost, the L5 is disqualified.

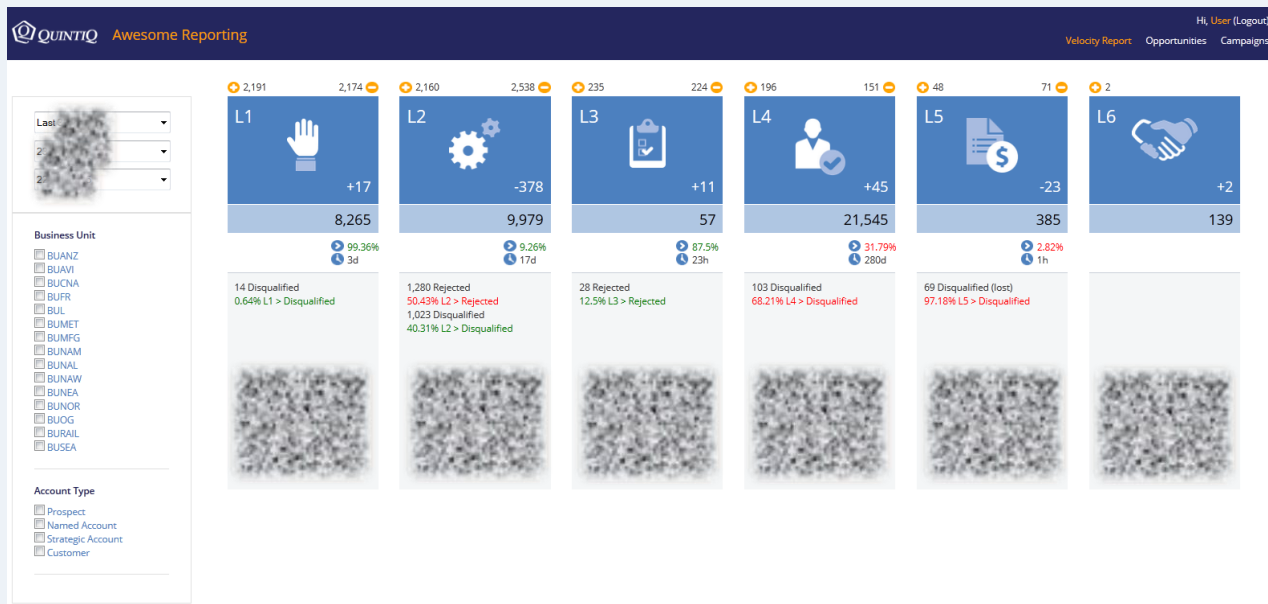
Page 2/2

+2 MONTHS

ADVANCED REPORTING

Velocity reporting

Completely custom, based on data extracted from the API.



THE FUTURE?



- With “Internet of Things” everything will be ‘connected’.
Will we have a Thermostat Marketing Manager? No,
but the demand for “tech-savy” marketers will grow exponentially.
- Marketing technology enables marketers to really understand
the customer and to truly become the “Voice of the Customer”
within companies.
- Companies become more and more “customer centric”. As a result
‘we marketers’ will be at the heart of the organization of the future.

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ANY QUESTIONS?

A close-up photograph of two hands, one from a person with a darker skin tone and one from a person with a lighter skin tone, holding a thick, solid orange cylinder. The hands are positioned as if they are about to release or have just released the cylinder. The background is a soft-focus mix of warm and cool colors. A semi-transparent teal circle is overlaid on the right side of the image, containing the text 'thank you!'.

thank you!