PITFALLS AND LESSONS LEARNED

MY JOURNEY TO SUCCESSFUL MARKETING AUTOMATION

Diederik Martens | Marketing Technologist
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Download these slides on: https://chapmanbright.com/automationday

WHAT DOES A MARKETING TECHNOLOGIST DO?

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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***

TECHNOLOGY BOOM!

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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/

LET ME TAKE YOU ON A JOURNEY

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

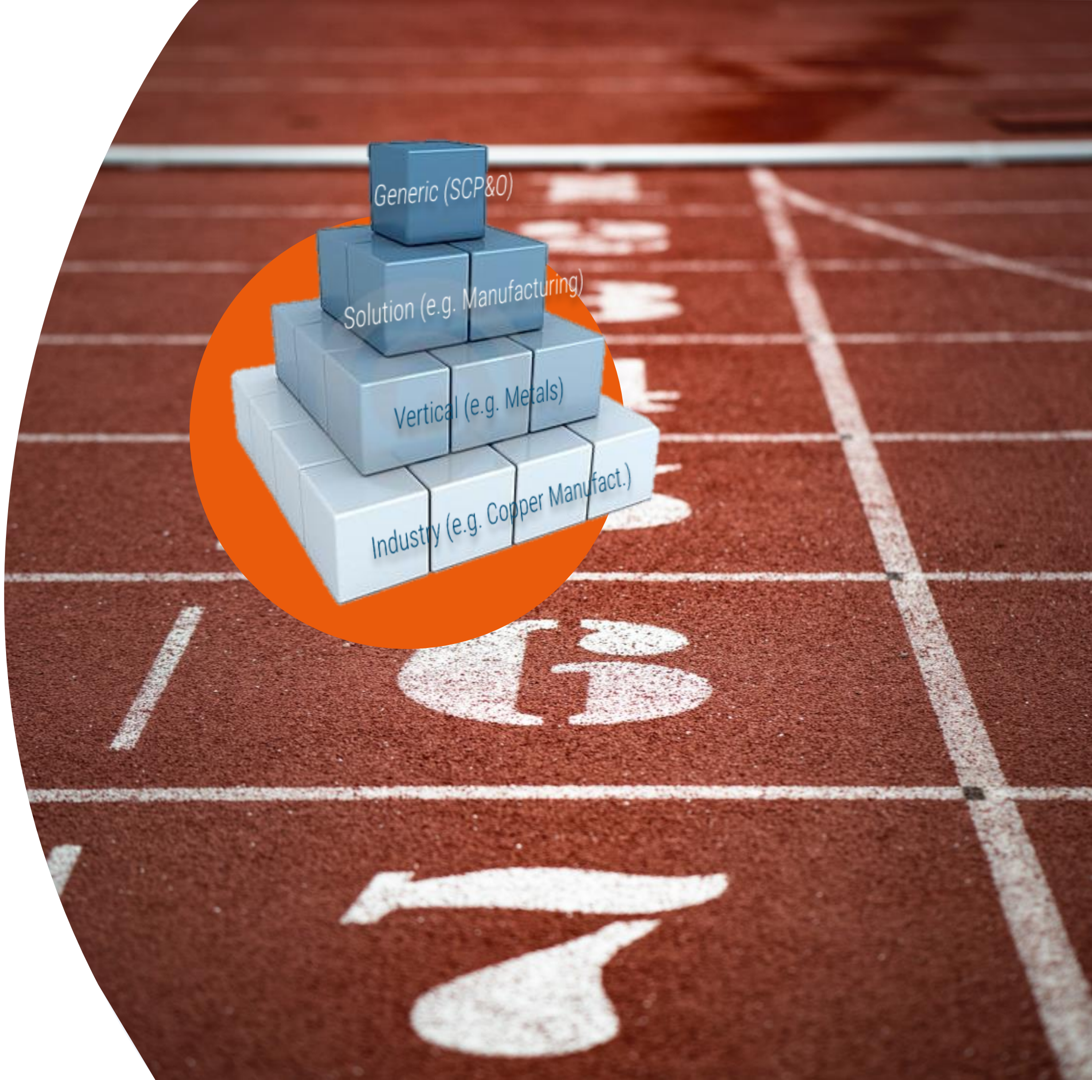
NEW LEAD MANAGEMENT PROCESS

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.

+3 MONTHS

UNIQUE NURTURE PATHS… AND…



Lessons Learned:

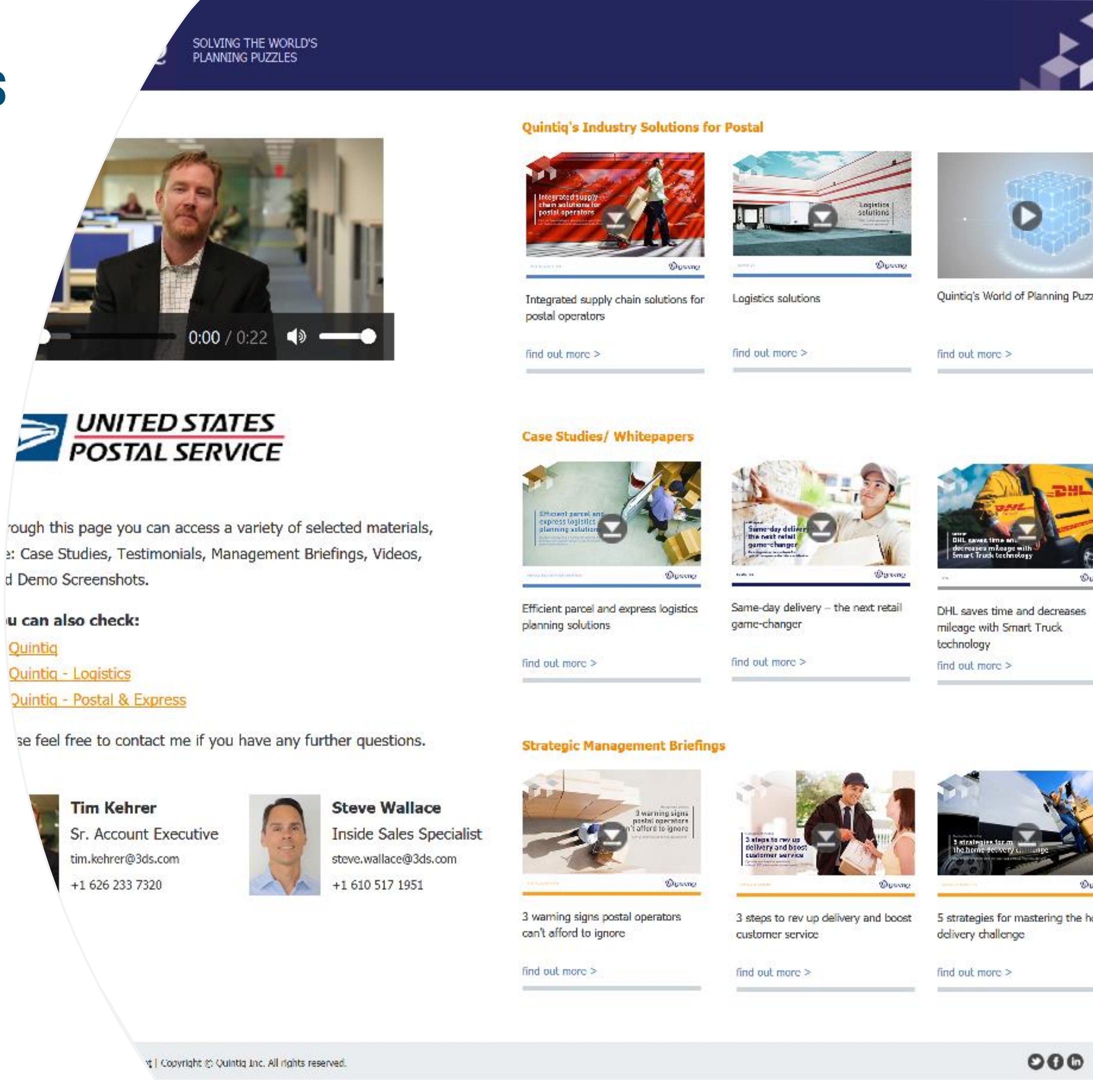
- The occasional rebranding is always there to ‘ruin’ your planning.
- Layer your content for scalability.
- Layer your nurture programs too.
- Use solution scoring to determine a best-fit nurture program for a lead.

+5 MONTHS

OUR FIRST SALES ALIGNMENT SUCCESS

Closing a 99% deal:

- Prospect Portals
- Account Portals

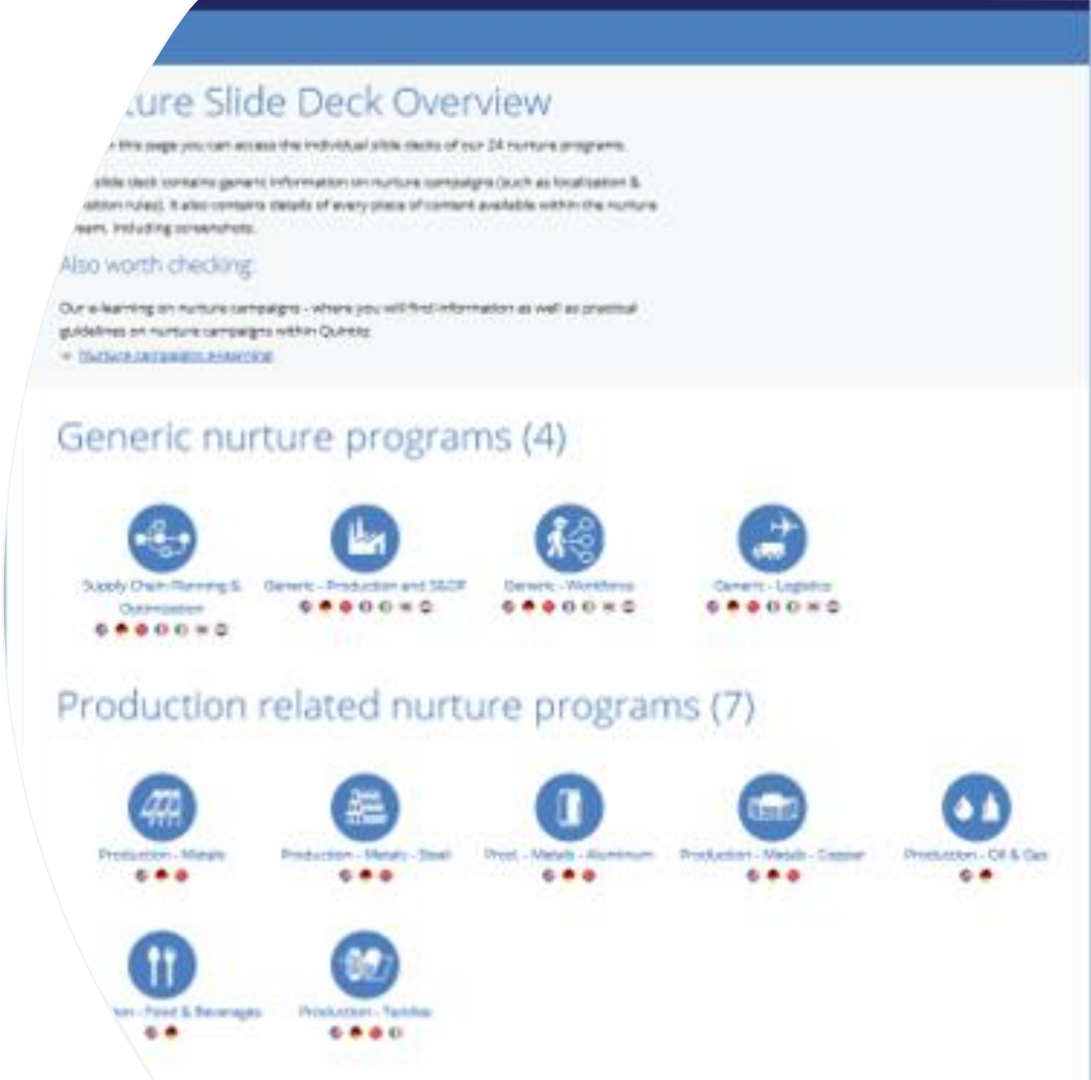


+1 MONTH

MULTILINGUAL NURTURING

Lessons Learned:

- 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.

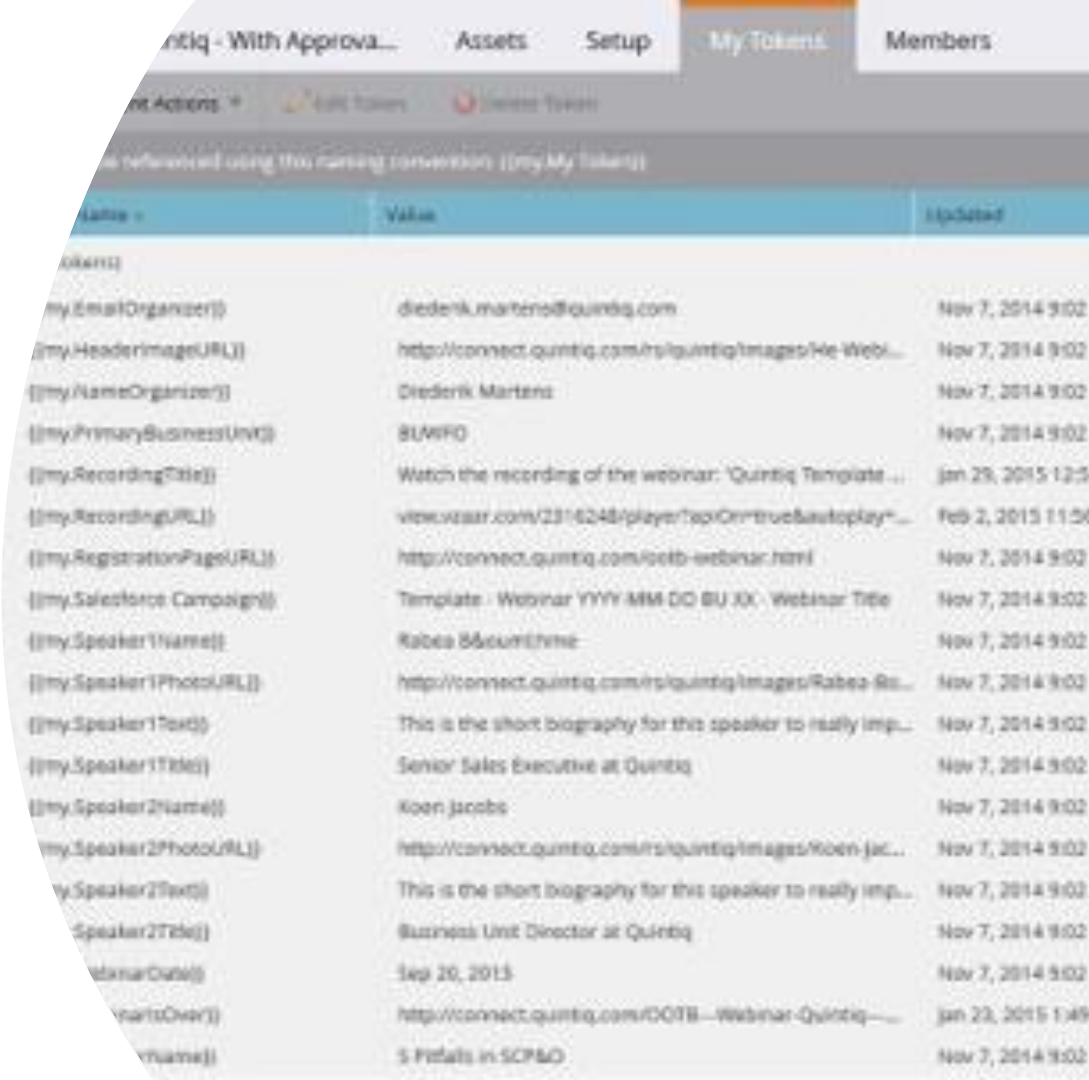


+6 MONTHS

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.



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.

+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:

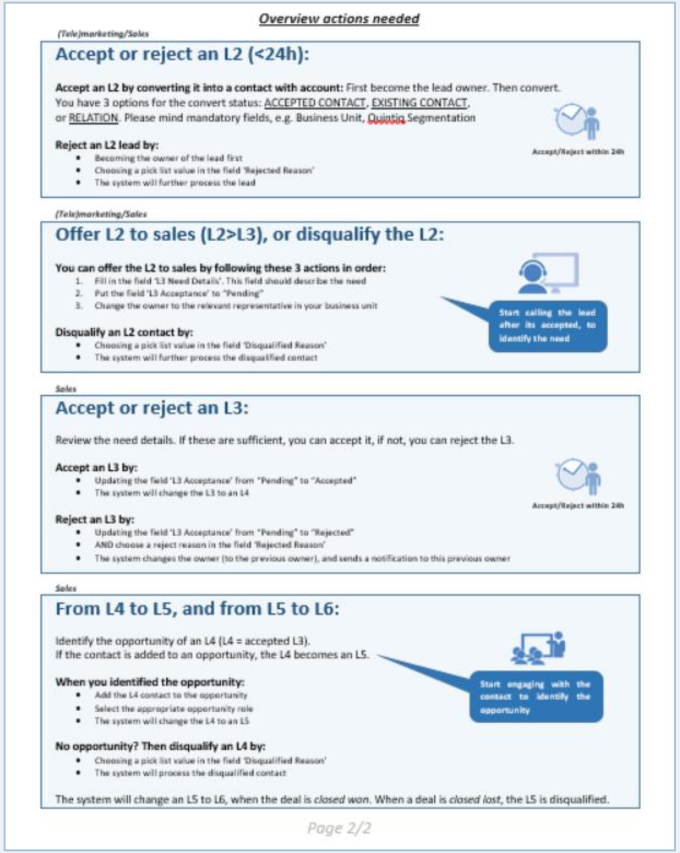
- Not able to correctly measure the contribution of marketing programs to the bottom line.
- First-touch and multi-touch attribution metrics are not easy to understand for all colleagues.
- We weren't able to pin-point bottlenecks in lead management well enough.
- We weren't able to do forecasting with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

+2 MONTHS

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.



Overview actions needed

(Tele)marketing/Sales

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, Quintiq 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

(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

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

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

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

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+2 MONTHS

ADVANCED REPORTING

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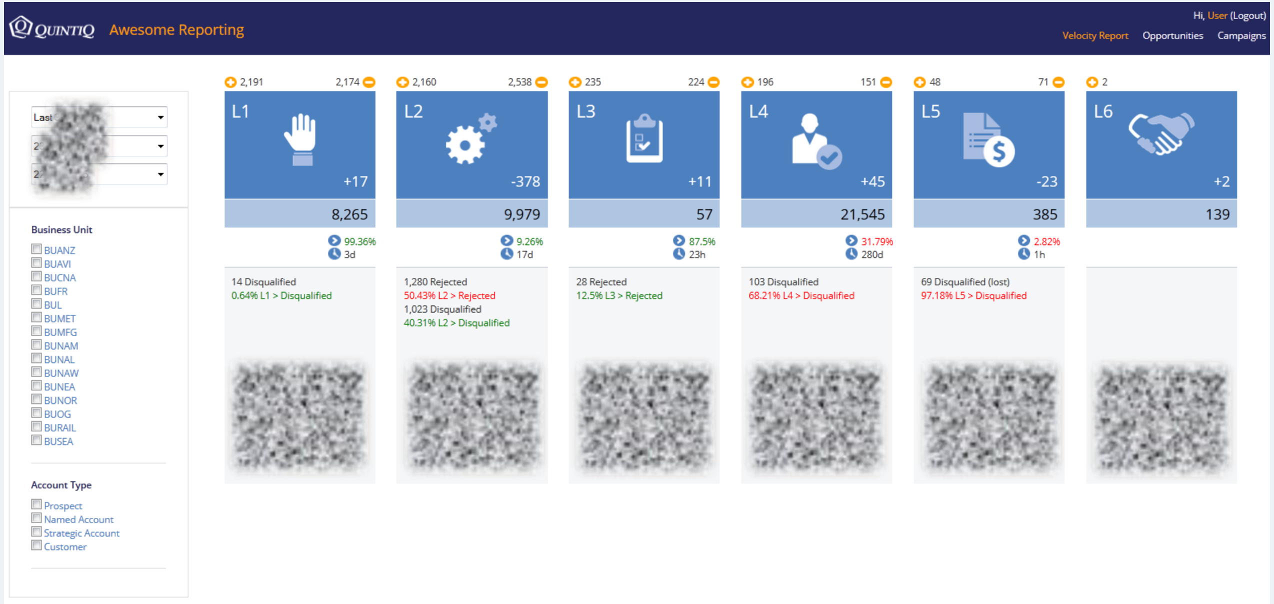
Velocity reporting

Completely custom, based on data extracted from the API.



THE FUTURE?

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- 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.

ANY QUESTIONS?

thank you!