TOMORROW'S MARKETER

The Road To Successful Marketing Operations



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The Road To Successful Marketing Operations



0.1 FTE 1

New Lead Management Process

Lessons Learned

- The project allowed me to position higher in the organization.
- 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.

Takeaways

- Without a proper lead management process, it's impossible to do proper lead nurturing
- SiriusDecisions, amongst other research firms, offers lead management models (e.g. Demand Waterfall). Companies with a proper lead management process generate up to 8x more deals per 1,000 inquiries.
- Examples: <u>diederikmartens.com/summit01</u>

 DEC 2012
 FEB 2013

 First markening automation specialist
 First markening management process

 0.1 FTE
 1 FTE

Unique Nurture Paths,.... And Rebranding!

Lessons Learned

- The occasional rebranding is always there to 'ruin' your planning.
- Layer your content for scalability
- Layer your nurture programs too

MAY 2013

Rebranding +

• Use solution scoring to determine a best-fit nurture program for a lead.

Takeaways

Layer your content for scalability!

Generic (SCP&O) Solution (e.g. Manufacturing)

Vertical (e.g. Metals)

Industry (e.g. Copper Manufact.

 automation specialist
 management proces
 Every test has unique number

 0.1 FTE
 1 FTE
 1.6 FTE

DEC 2012

First marketin

FEB 2013

Our First Sales Alignment Success

Examples:

Prospect Portal





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OCT 2013

success with

prospect portals

Sales alignment

Account Portal



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In-depth blog post on: diederikmartens.com /summit02

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DEC 2012 FEB 2013 MAY 2013 First marketing 1st lead Rebranding + automation management Every lead has specialist process unique nurture

Diederik Martens - © 2016

Multi-lingual Nurturing

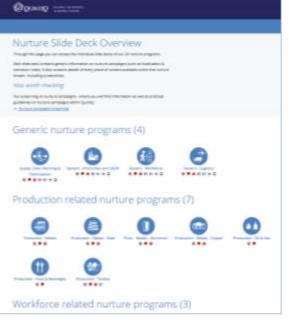
Lessons Learned

- We thought it would be a lot of work, but it was even more than we expected.
- A/B-testing revealed >40% more conversion when a lead has a 100% local language experience.
- Creating segments with languages, and the use of tokens, allowed for quick delivery and scalability of new 'content programs'. But using segments for languages limits personalization, as nested segmentation is not possible at the moment.
- Using programs over emails in engagement programs allows for more customization. But using programs in engagement programs doesn't work well with engagement scoring.



Multi-lingual Nurturing

- 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.
- Using programs over emails in engagement programs allows for more cu engagement programs doesn't work well with engagement scoring.





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Out-Of-The-Box Programs

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.

MAR 2014

Growth due to

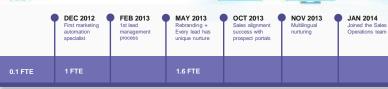
marketing

successes

2.6 FTE

• Emails auto-scheduled relative to webinar date.

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Sales And Nurturing

Lessons Learned

- Sales didn't trust the new nurture programs. 0 What will be sent to my contacts?
- Sales had no insight in which of their contacts 0 and accounts are being nurtured.
- Sales had limited control over the nurture \bigcirc programs.

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success with

Takeaways

New main e-learning. A page to navigate all 0 available nurture programs. A slide deck for every nurture program with details.

Example on: diederikmartens.com/summit03

- SFDC campaigns to "add to", "remove from", 0 "switch to", or "pause from" nurture programs.
- SFDC reports per account owner with nurture 0 coverage per account.

	DEC 2012	FEB 2013	MAY 2013
	First marketing	1st lead	Rebranding +
	automation	management	Every lead has
	specialist	process	unique nurture
TE	1 FTE		1.6 FTE

nurturing prospect portal

NOV 2013

JAN 2014

Joined the Sales

Operations team

MAR 2014 Growth due to marketing successes

MAY 2014 More alignment by involving sales in nurture

2.6 FTE

Increased Nurture Complexity

Lessons Learned

- A/B-testing learned 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.
- Winning an award is great for team spirit! But it also raises the bar very high for the next performance evaluation cycle ;-)

- Don't start complex. Start easy, but take scalability into account. Start with a welcome program.
- Why did Quintiq win the award? Check the report on: <u>diederikmartens.com/summit04</u>

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0.1 FTE	1 FTE		1.6 FTE				2.6 FTE		3 FTE	

New Lead Management Process Needed?

Lessons Learned

- We weren't able to fully and 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. what's the potential profit from current leads in stock. Something we were able to do for opportunities further down the cycle).
- Are previous model was based on consensus and just not good enough.

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0.1 FTE	1 FTE		1.6 FTE				2.6 FTE		3 FTE		

The Newest Lead Management Process

Lessons Learned

- o Make sure reports to monitor adherence are ready before launching
- The most work is after the launch.
- o It takes anywhere from 6 tot 12 months before the new process is fully used without questions.
- o Top-down roll-out ensures adherence. So does adherence reporting.
- All the scenario testing in the world won't prevent bugs.
- Though the overall process is easy to explain, the technical implementation details often are clear to only one person... The architect. Don't expect your implementation colleagues to understand you flawlessly from the start.
- Don't expect to be nominated for Mr. Popular that year ;-)

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0.1 FTE	1 FTE		1.6 FTE			2.6 FTE	3 FTE			

The Newest Lead Management Process

- Next to training materials, like online training videos, we created laminated fact sheets with the most basic tasks on it. See image ->
- Full size image available at: diederikmartens.com/summit05
- 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 with lead is created and add an additional filter for the value.

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Advanced Reporting

Examples

- Velocity reporting through API
- Field formulas needed for 'Days-to-nurture-success' (and lead score decrease by %, instead of just + or -).

Learn about formula tricks: diederikmartens.com/summit06



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0.1 FTE	1 FTE		1.6 FTE				2.6 FTE		3 FTE				4 FTE

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Training & On-boarding

Lessons Learned

- New marketing hires already have a lot to take in about the company, culture, and solutions. New marketing concepts are hard to bring across in the first weeks. The same applies to new technologies.
- Productize your training materials.

- Marketo or marketing operations team welcome landing page for newly hired marketers.
- A landing page that lists all custom created courses in order.
- Examples of both landing pages can be found on: <u>diederikmartens.com/summit07</u>

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0.1 FTE	1 FTE		1.6 FTE				2.6 FTE		3 FTE				4 FTE	5 FTE



Campaign operations

Enables effective and efficient campaign deployment

Campaign deployment (incl. review & Marketing KPIs Performance management activate) Campaign support (for the field) (Campaign) reporting Best-practice syndication Reporting tools Portals (e.g. account portals and prospect Planning portalel Duidoets MAR 2014 OCT 2014 DEC 2012 FEB 2013 **MAY 2013** OCT 2013 **NOV 2013 JAN 2014** MAY 2014 AUG 2014 Scope for new First marketing 1st lean Rebranding + Sales alignment Multilingual Joined the Sales Growth due to More alignment Increased lead automation management Every lead has success with nurturing Operations team marketing by involving sales nurture lead mot process specialist process unique nurture prospect portals successes in nurture complexity. 2.6 FTE 0.1 FTE



Marketing performance

Is responsible for performance reporting, targets, budgets, and planning.

Dashboards



Marketing processes

Formalizes, proposes, monitors, and trains on marketing processes and tools.

Formalize all marketing processes and

- . procedures (e.g. Playbook) Propose new marketing processes and
- procedures
- Monitor and manage marketing processes (e.g. lead management process) Deploy and train audience on new processes

JUL 2015

onboarding.

certification

Training,

AUG 2015

department

Full-blown Mistration

. (e.g. e-learnings) tification)

APR 2015

Advanced

reporting

requests

DEC 2014

Plan to split

MktOps and

SalesOps

FEB 2015

management

process live

New lead

Key Takeaways

 Make sure you have a proper lead management process, before you think about anything else (e.g. nurture). It's the foundation for your growth.
 Lead management examples: diederikmartens.com/summit01

• Layer your content and nurture programs for a quick start with optimal scalability. Lead nurture slide decks: <u>diederikmartens.com/summit03</u> | Why Quintig won the nurture award: <u>diederikmartens.com/summit04</u>

- Achieve your first sales alignment success with something simple and small to open the doors. Lead management examples: <u>diederikmartens.com/summit02</u>
- Consider the effects of your choice for a centralizing or decentralizing the marketing operations function.
- Adopt the 'scalability' mindset for rapid growth of your business and your career!

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0.1 FTE	1 FTE		1.6 FTE				2.6 FTE		3 FTE				4 FTE	5 FTE		

TOMORROW'S MARKETER

Thank You!



