The Road To Successful Marketing Operations

DEC 2012
First marketing
automation
specialist

0.1 FTE

1 FTE

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: diederikmartens.com/summit01

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Unique Nurture Paths,….
And Rebranding!

Lessons Learned

o The occasional rebranding is always there to 'ruin' your planning.

o Layer your content for scalability

o Layer your nurture programs too

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

Takeaways

o Layer your content for scalability!

Generic (SCP&O)

Solution (e.g. Manufacturing)

Vertical (e.g. Metals)

Industry (e.g. Copper Manufact.)

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MAY 2013
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Our First Sales Alignment Success

Examples:

Prospect Portal

Account Portal

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

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Multi-lingual Nurturing

Lessons Learned

o   We thought it would be a lot of work, but it was even more than we expected.

o   A/B-testing revealed >40% more conversion when a lead has a 100% local language experience.

o   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.

o   Using programs over emails in engagement programs allows for more customization. But using programs in engagement programs doesn't work well with engagement scoring.
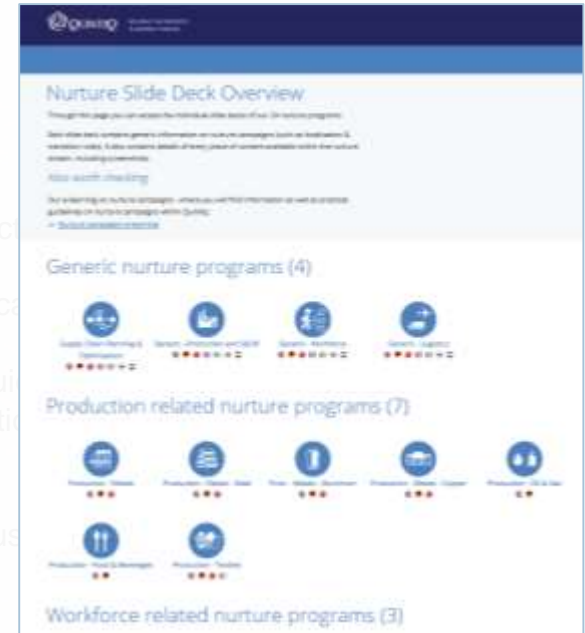
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Sales alignment
success with
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NOV 2013
Multilingual
nurturing

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Multi-lingual Nurturing

Takeaways

- 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.

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Out-Of-The-Box Programs

Example: Webinar With Approval

o Pre-build program with emails, smart campaigns, landing pages, etc.

o Always include the latest best-practice.

o Fully based on tokens. This means no assets need editing after cloning. Only tokens will have to be updated.

o Emails auto-scheduled relative to webinar date.

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Sales And Nurturing

Lessons Learned

o Sales didn't trust the new nurture programs. What will be sent to my contacts?

o Sales had no insight in which of their contacts and accounts are being nurtured.

o Sales had limited control over the nurture programs.

Takeaways

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

Example on: diederikmartens.com/summit03

o SFDC campaigns to "add to", "remove from", "switch to", or "pause from" nurture programs.

o SFDC reports per account owner with nurture coverage per account.

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Increased Nurture Complexity

Lessons Learned

o A/B-testing learned that more personalization leads to more engagement, but more complexity results in more maintenance.

o 3X multi-touch attribution achieved with more personalization, but multi-touch attribution is hard to sell to the 'common' people.

o Winning an award is great for team spirit! But it also raises the bar very high for the next performance evaluation cycle ;-)

Takeaways

o Don't start complex. Start easy, but take scalability into account. Start with a welcome program.

o Why did Quintiq win the award? Check the report on: diederikmartens.com/summit04

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New Lead Management Process Needed?

Lessons Learned

o We weren't able to fully and correctly measure the contribution of marketing programs to the bottom line.

o First-touch and multi-touch attribution metrics are not easy to understand for all colleagues.

o We weren't able to pin-point bottlenecks in lead management well enough.

o 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).

o Are previous model was based on consensus and just not good enough.

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The Newest Lead Management Process

Lessons Learned

o   Make sure reports to monitor adherence are ready before launching
o   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.
o   All the scenario testing in the world won't prevent bugs.
o   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.
o   Don't expect to be nominated for Mr. Popular that year ;-)

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The Newest Lead Management Process

Takeaways

o 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

o 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

o Velocity reporting through API

o 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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Training & On-boarding

Lessons Learned

o 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.

o Productize your training materials.

Takeaways

o Marketo or marketing operations team welcome landing page for newly hired marketers.

o A landing page that lists all custom created courses in order.

o Examples of both landing pages can be found on: diederikmartens.com/summit07

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Campaign operations

Enables effective and efficient campaign deployment

- Campaign deployment (incl. review & activate)
- Campaign support (for the field)
- Best-practice syndication
- Portals (e.g. account portals and prospect portals)
- Nurturing (incl. content programs)
- Templates (e.g. campaign templates, Outlook email templates)

Marketing performance

Is responsible for performance reporting, targets, budgets, and planning.
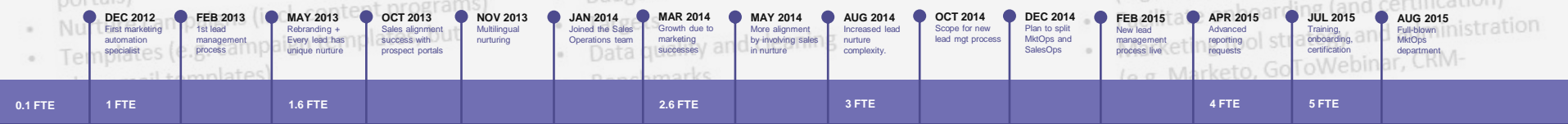
- Dashboards
- Marketing KPIs
- Performance management
- (Campaign) reporting
- Reporting tools
- Planning
- Budgets
- Data quality and Benchmarks
- reachability)

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 (e.g. e-learnings)
- Onboarding (and certification)
- Marketing tool strategy and administration (e.g. Marketo, GoToWebinar, CRM-
- Sales enablement (e.g.

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Key Takeaways

o 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 | Lead management factsheet example: diederikmartens.com/summit05

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

o Achieve your first sales alignment success with something simple and small to open the doors.
Lead management examples: diederikmartens.com/summit02

o Consider the effects of your choice for a centralizing or decentralizing the marketing operations function.

o **Adopt the 'scalability' mindset for rapid growth of your business and your career!**

THANK YOU

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