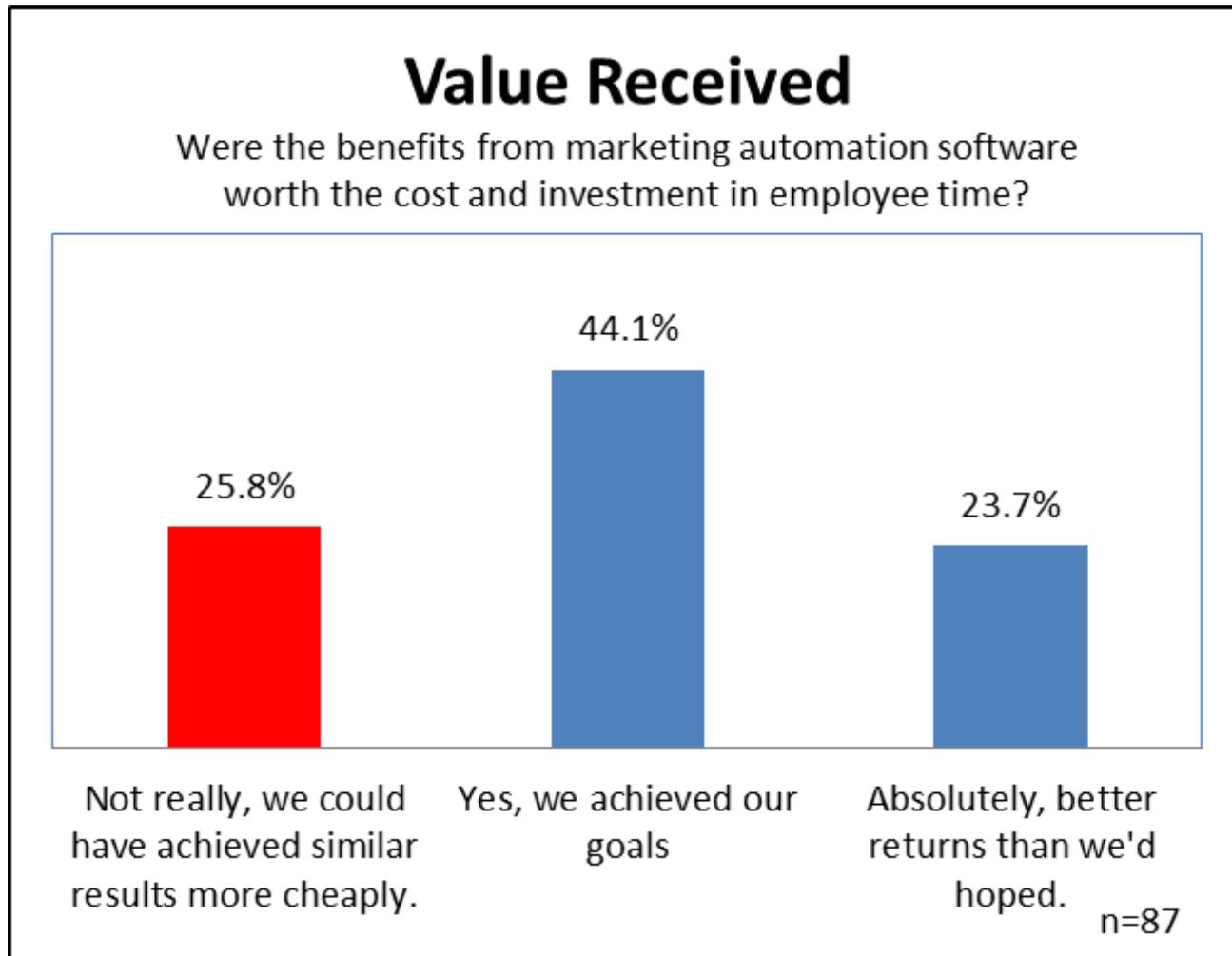


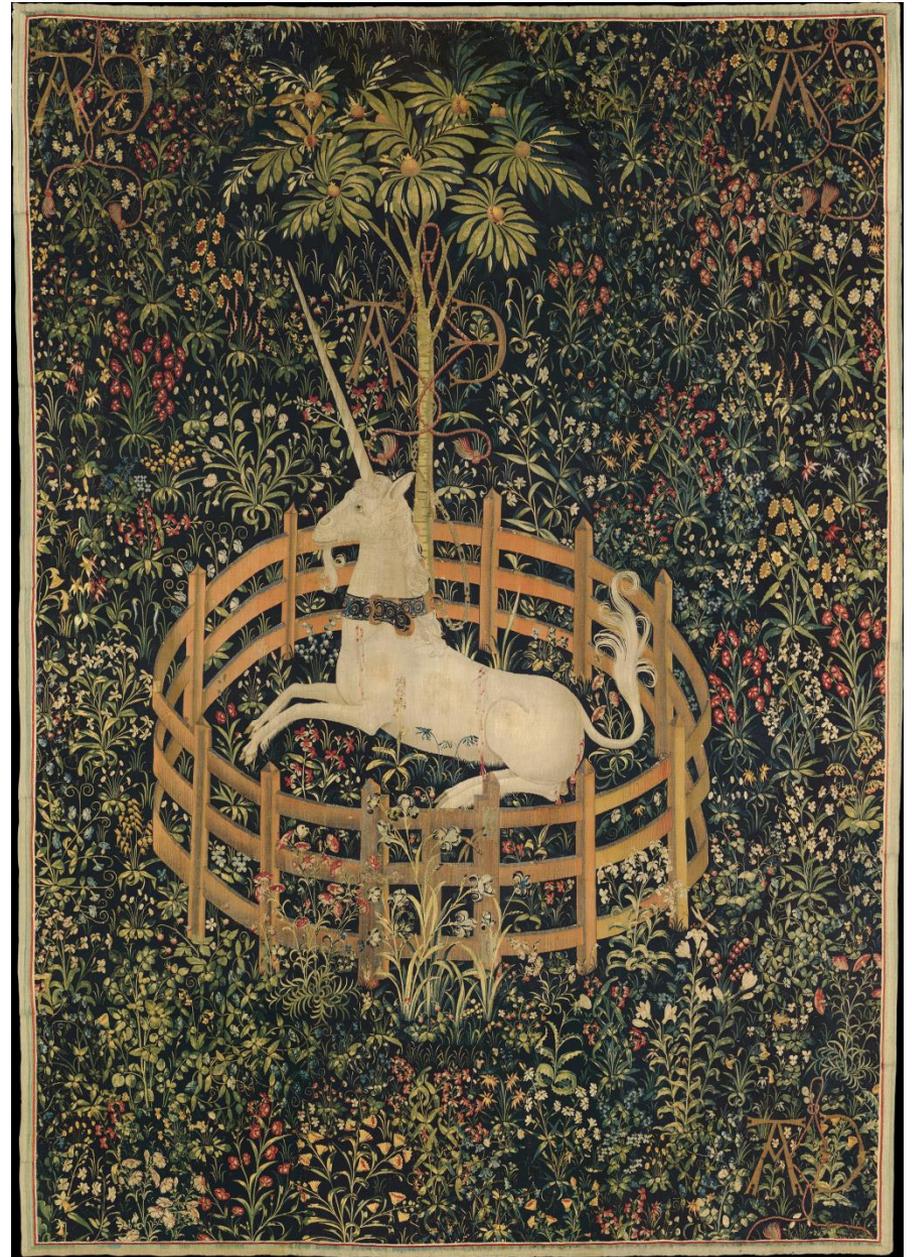
Marketing Automation Myth Busting

David M. Raab
Raab Associates
Milwaukee BMA
November 13, 2014

25% Dissatisfied Buyers

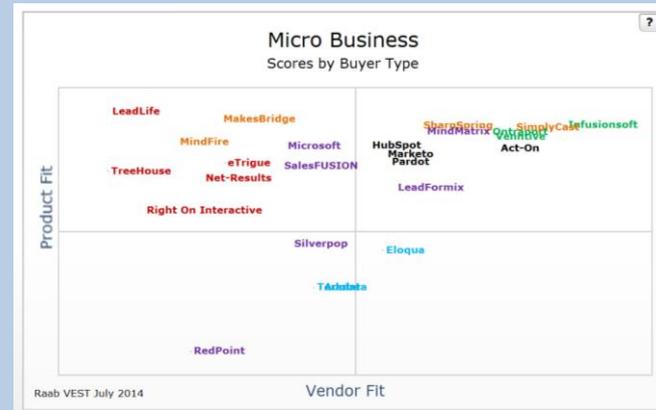


Myth:
All systems
are the same.



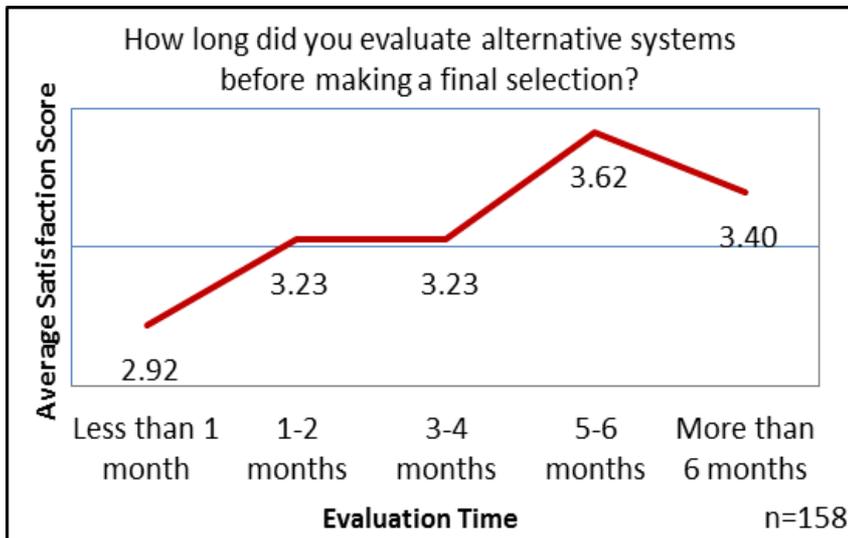
Reality: Variations Matter

VEST Vendor Matrices by Customer Type

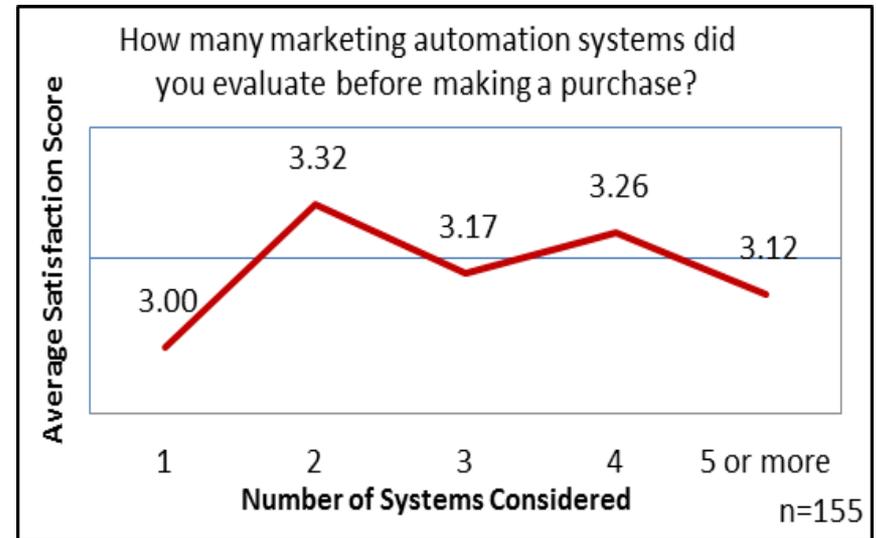


Consequences: Careless selection

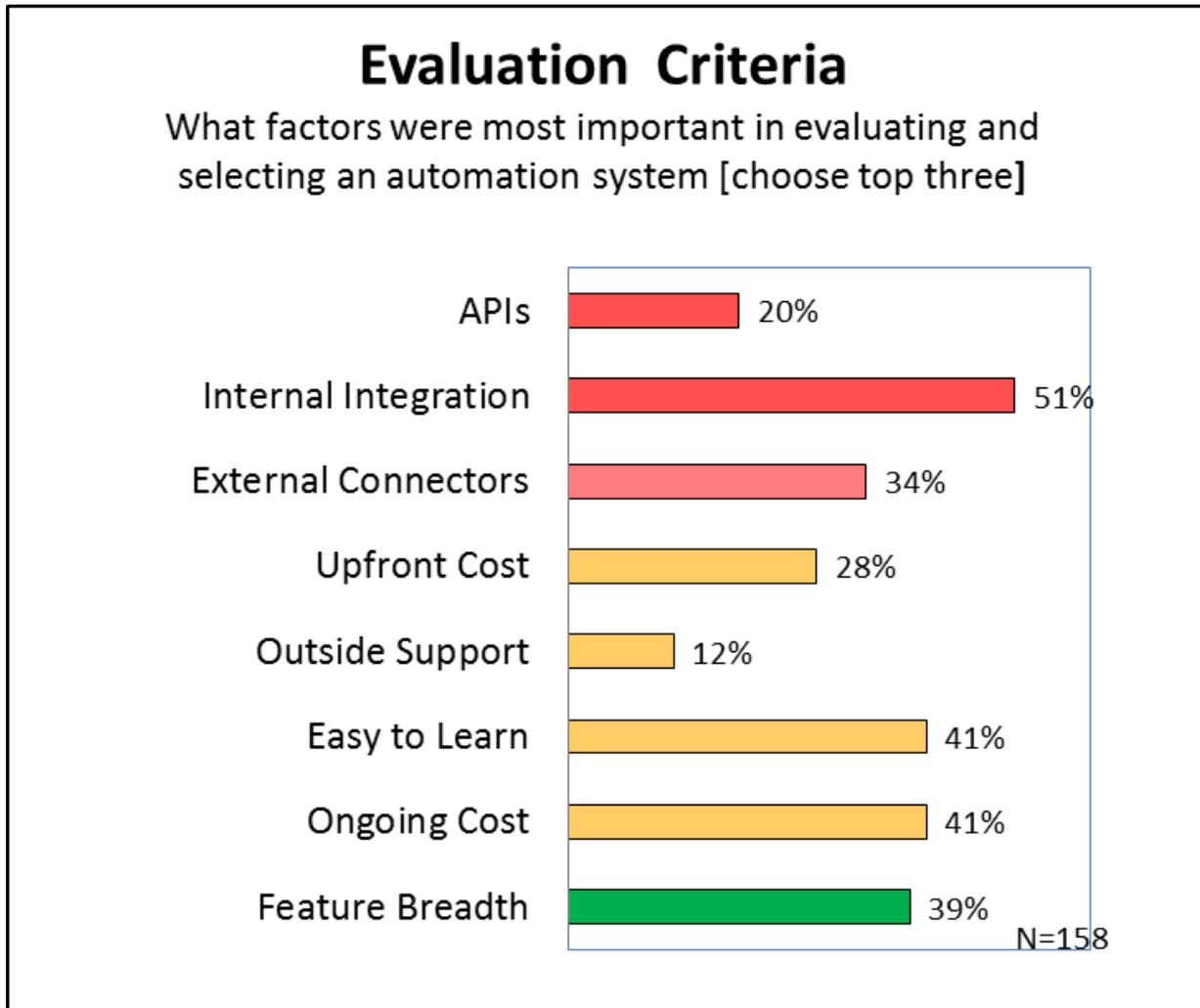
Selecting Too Quickly



Considering Too Few



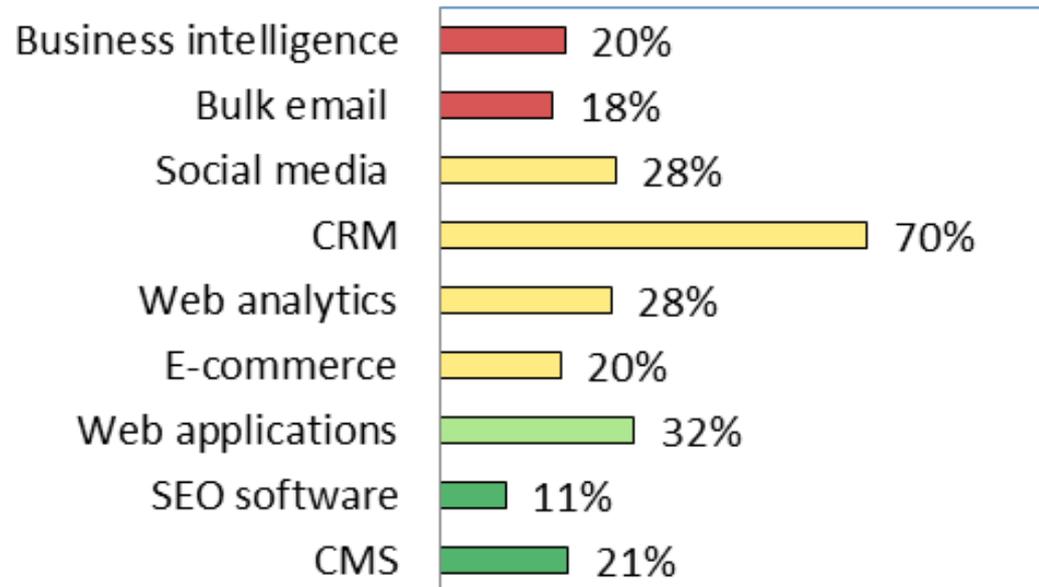
Consequences: Wrong Criteria



External systems are a poor substitute for internal functions.

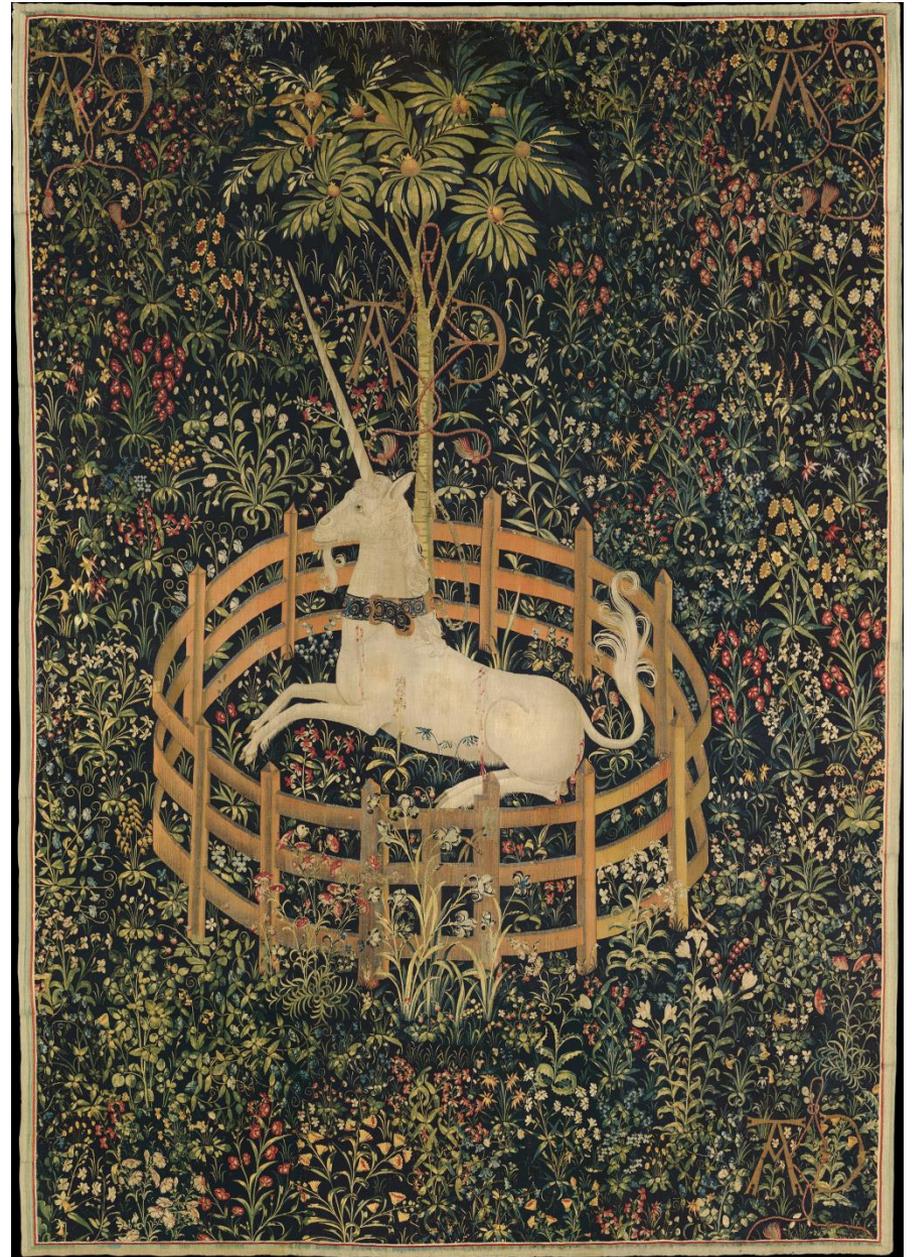
Systems Integrated

What other systems and/or databases have you integrated with your marketing automation platform?

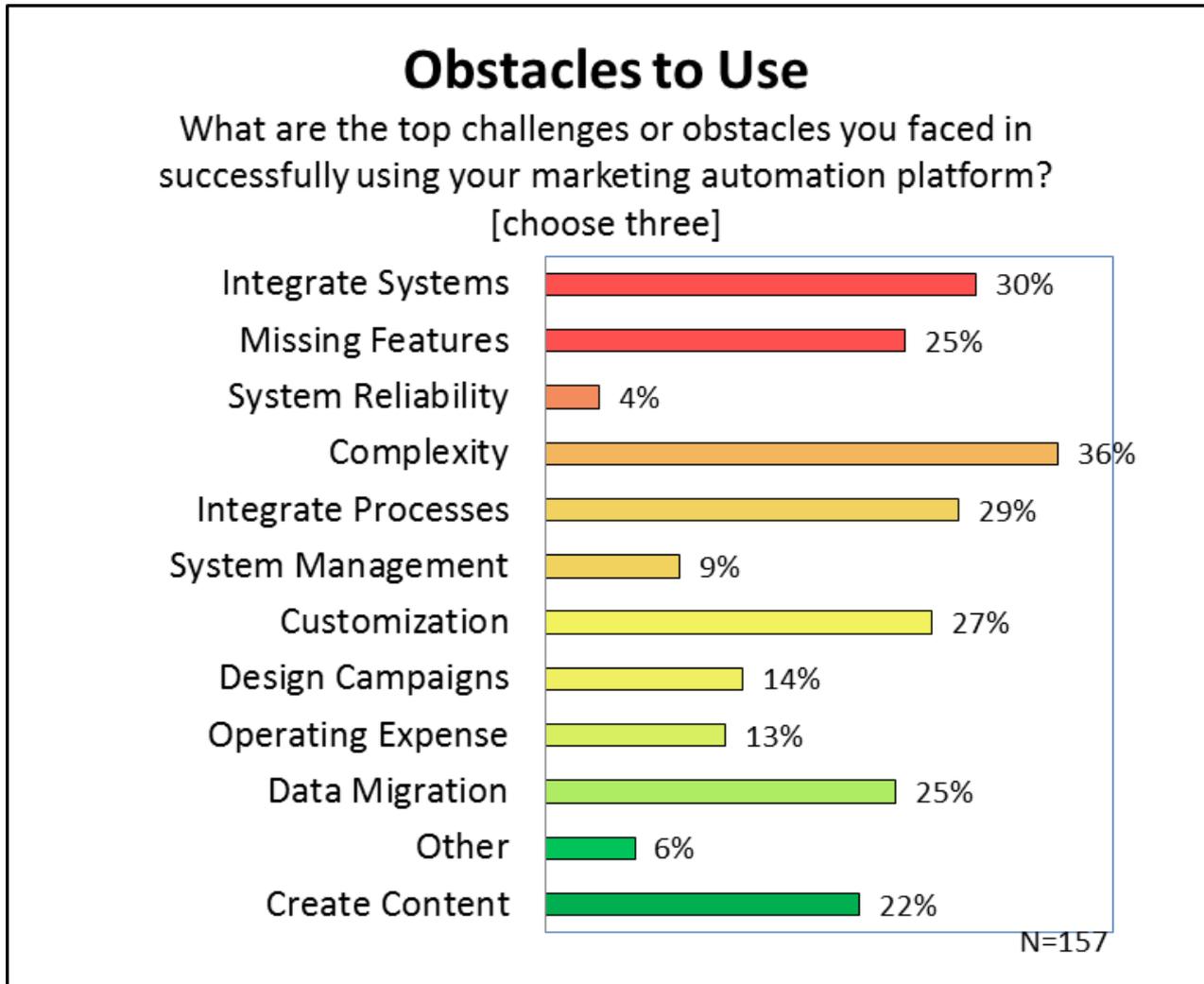


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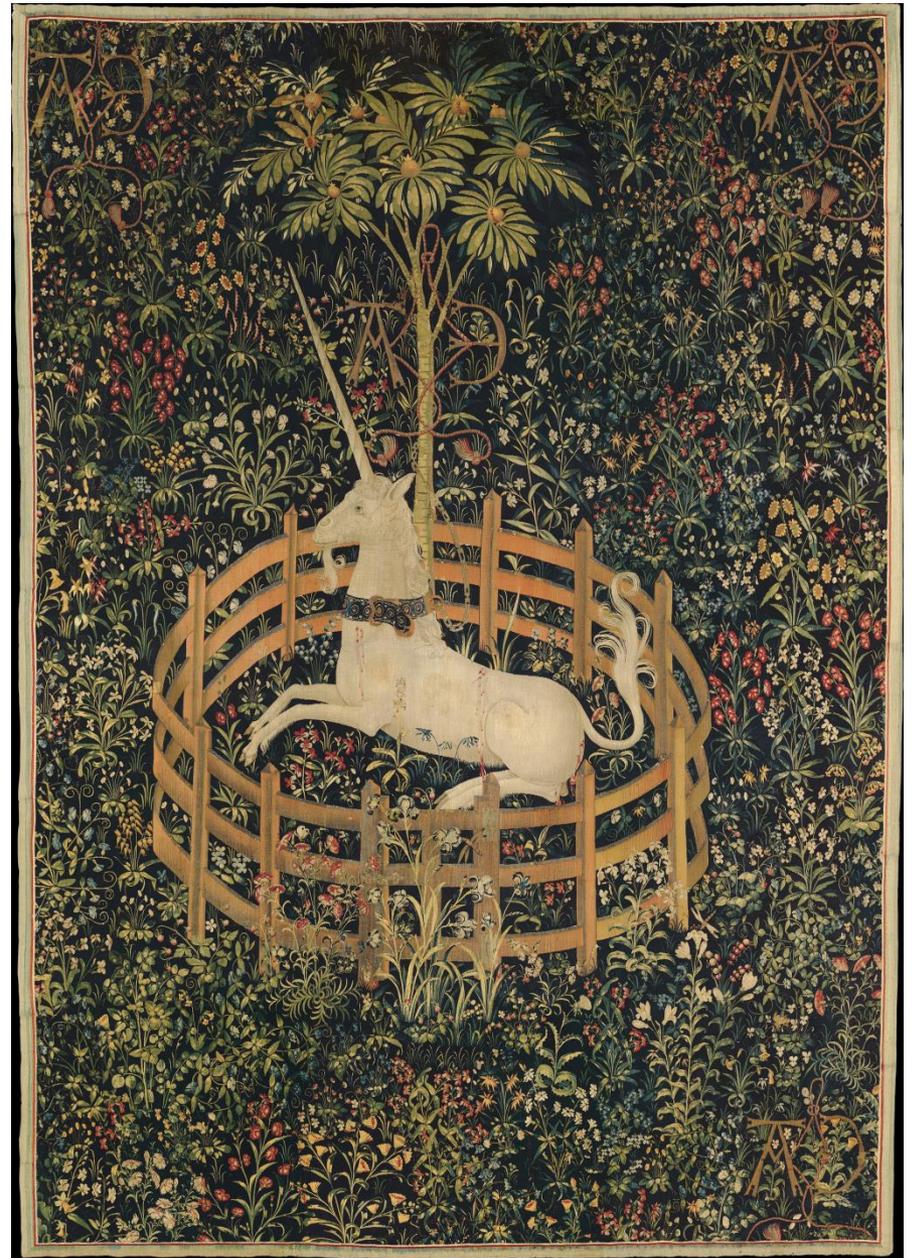
Myth:
Integration
is easy.



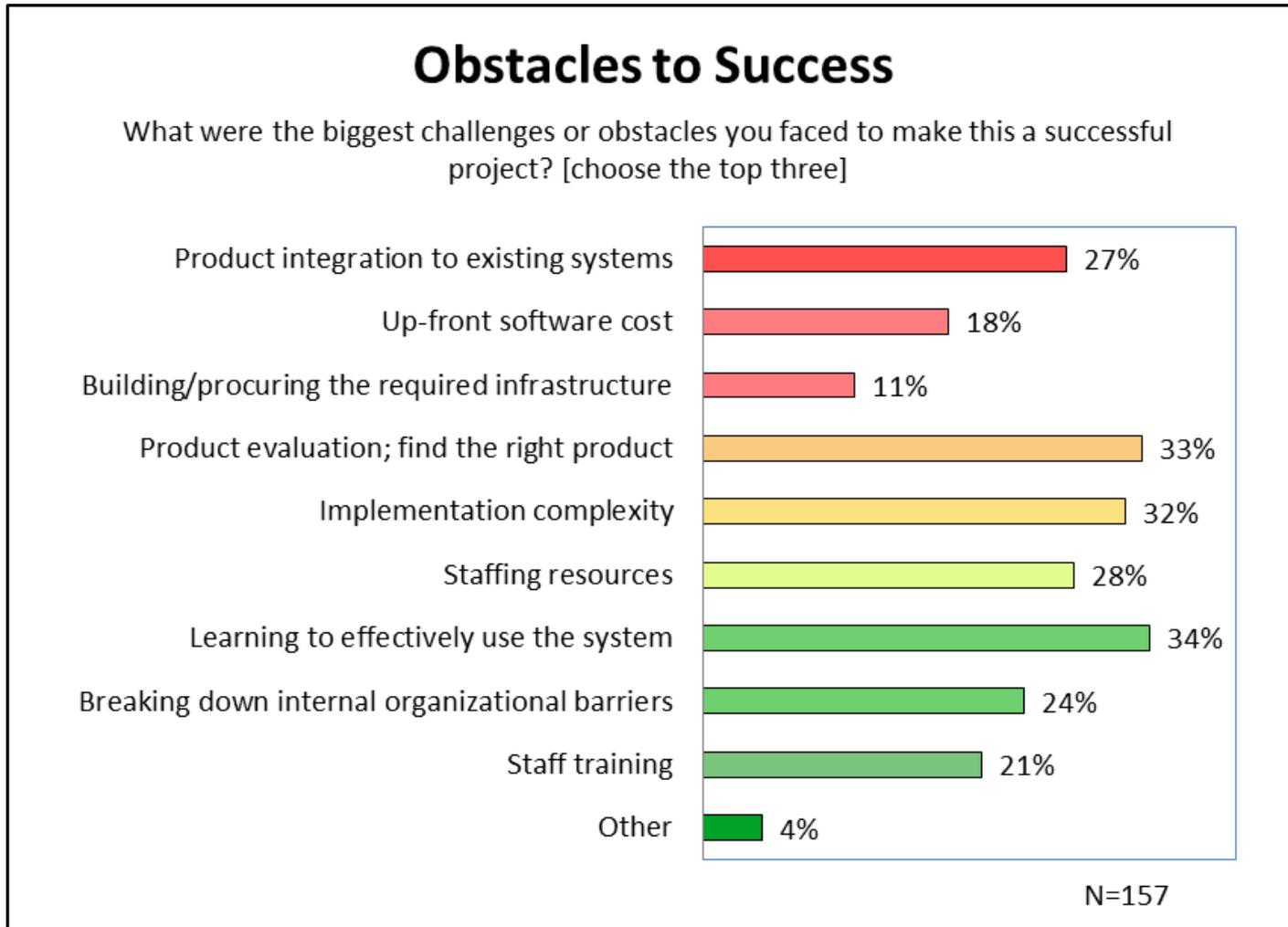
Reality: Integration ranks above missing features as a problem.



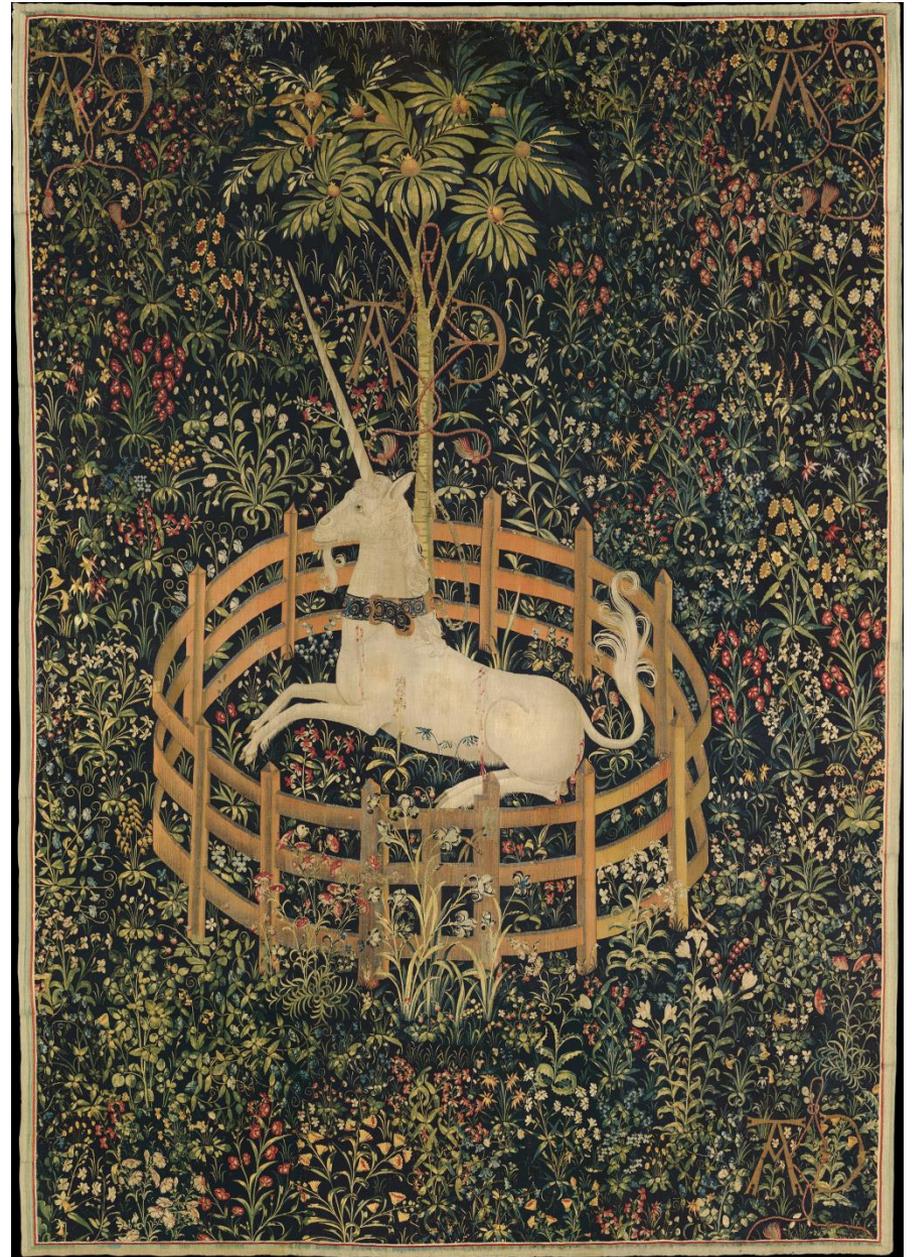
Myth:
Failure is the
user's fault,
not the
system's.



Reality: Obstacles that matter are beyond user control.

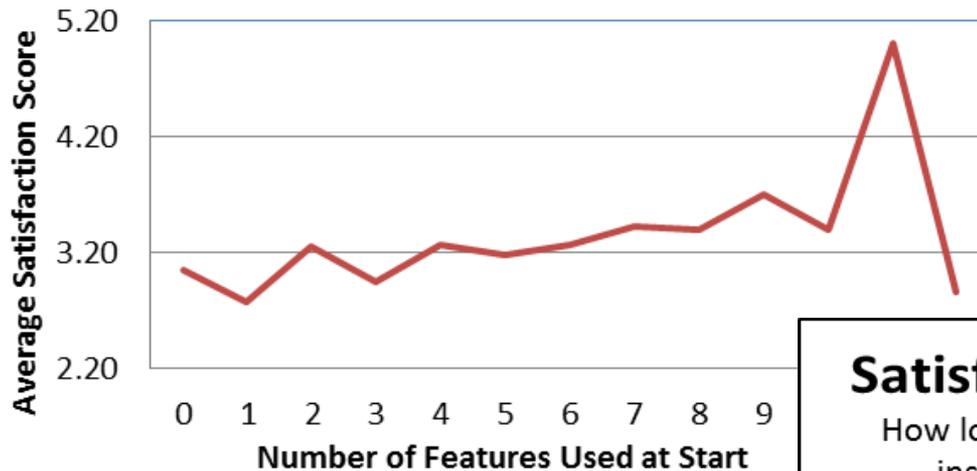


Myth:
New users
should
crawl, walk,
run.



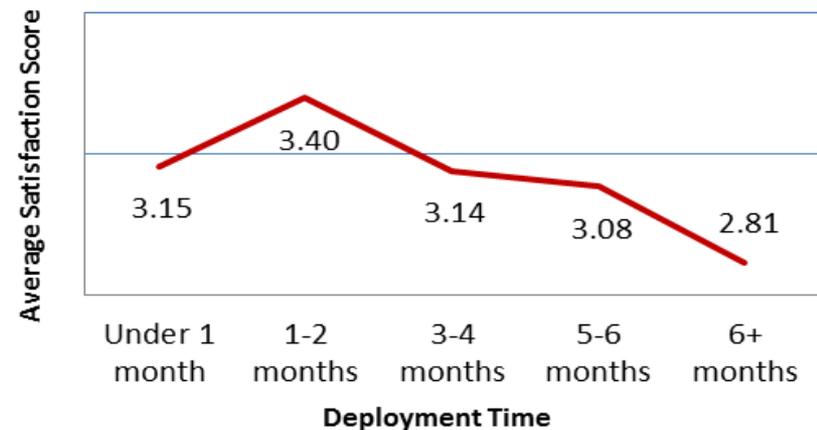
Reality: Best to hit the ground running.

Satisfaction by Number of Features Used at Start



Satisfaction by Deployment Time

How long was your deployment process from initial installation and testing to complete rollout?

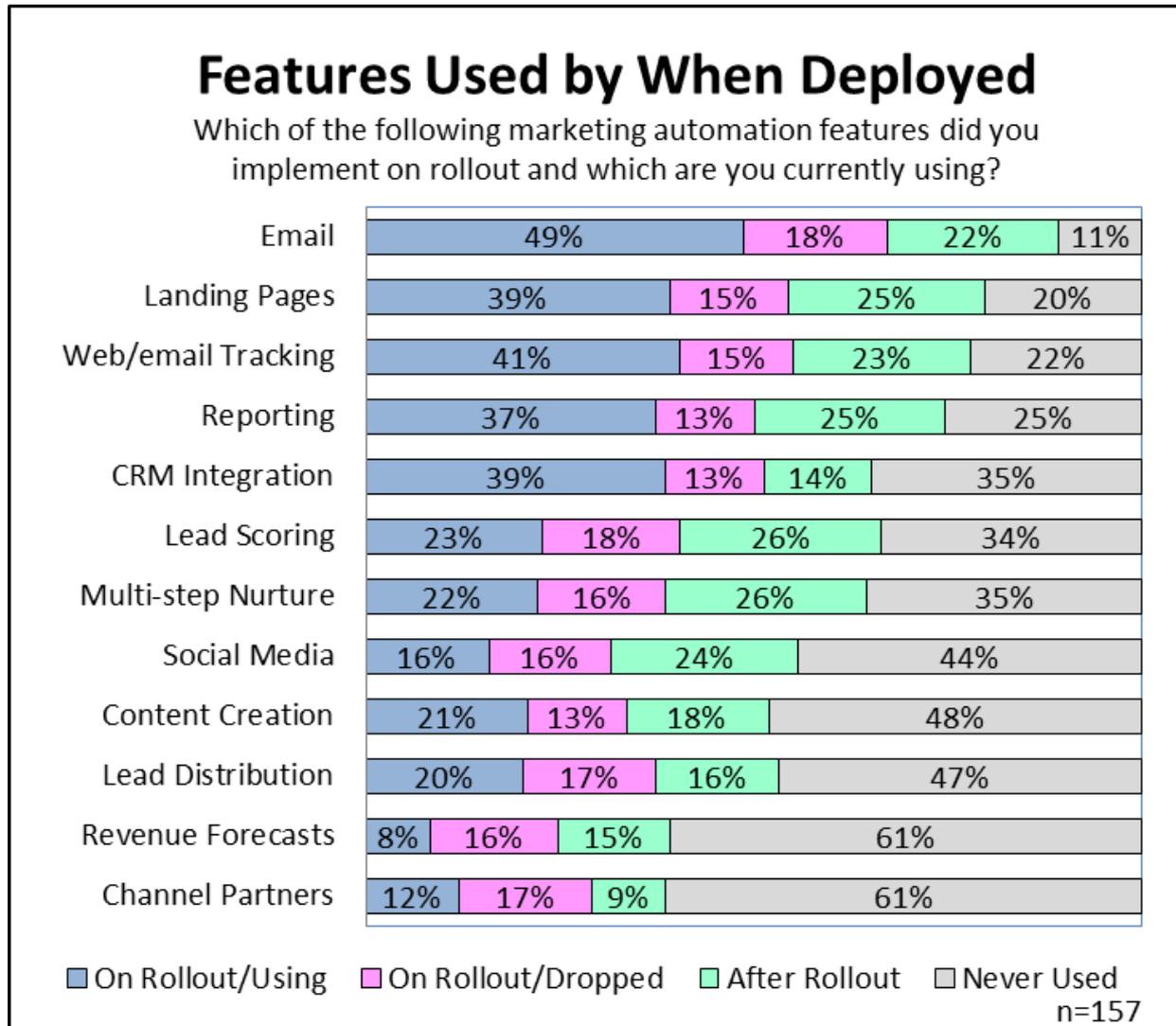


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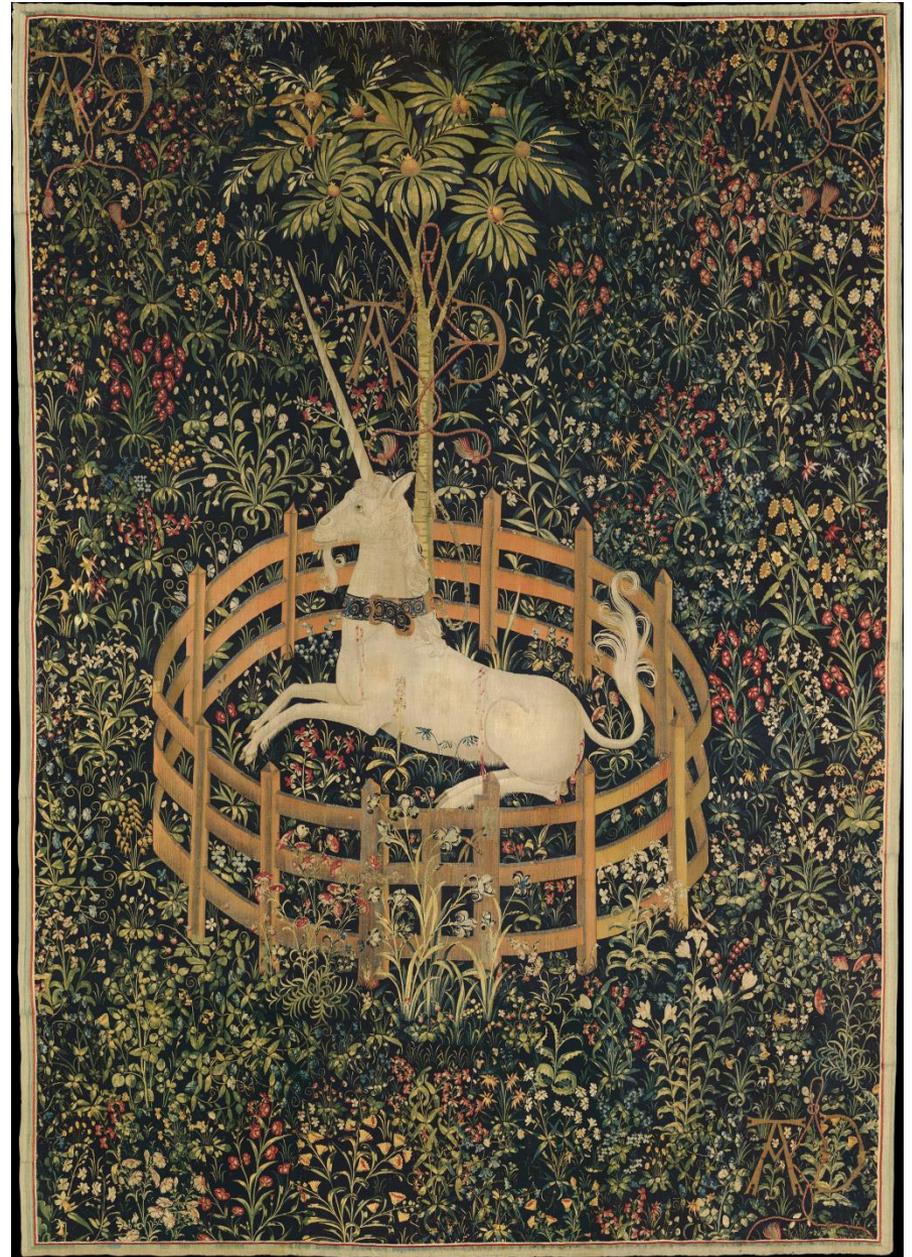
Reality: Preparation drives satisfaction.

- Most satisfied considered only 2 systems
 - > value is in prepping for the comparison
- Most satisfied deployed quickly
 - > because had prepared in advance
- Most satisfied did not use outside resources
 - > because trained their staff
- Training spend has little impact
 - > users spend what's needed
- Ease of learning criteria has little impact
 - > users learn what's needed

Caution: Some phasing still needed.



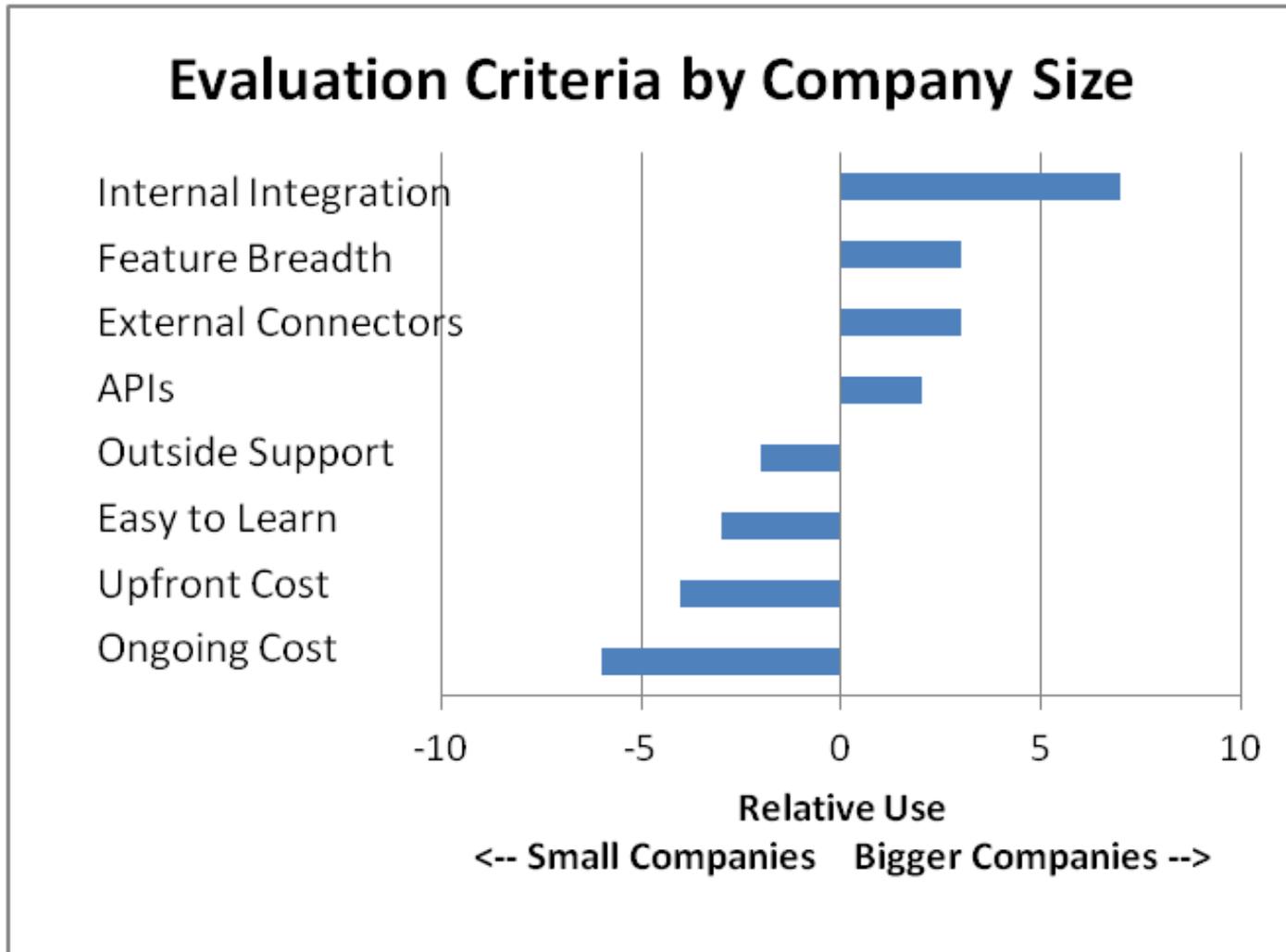
Myth:
Bigger
companies
do it better.



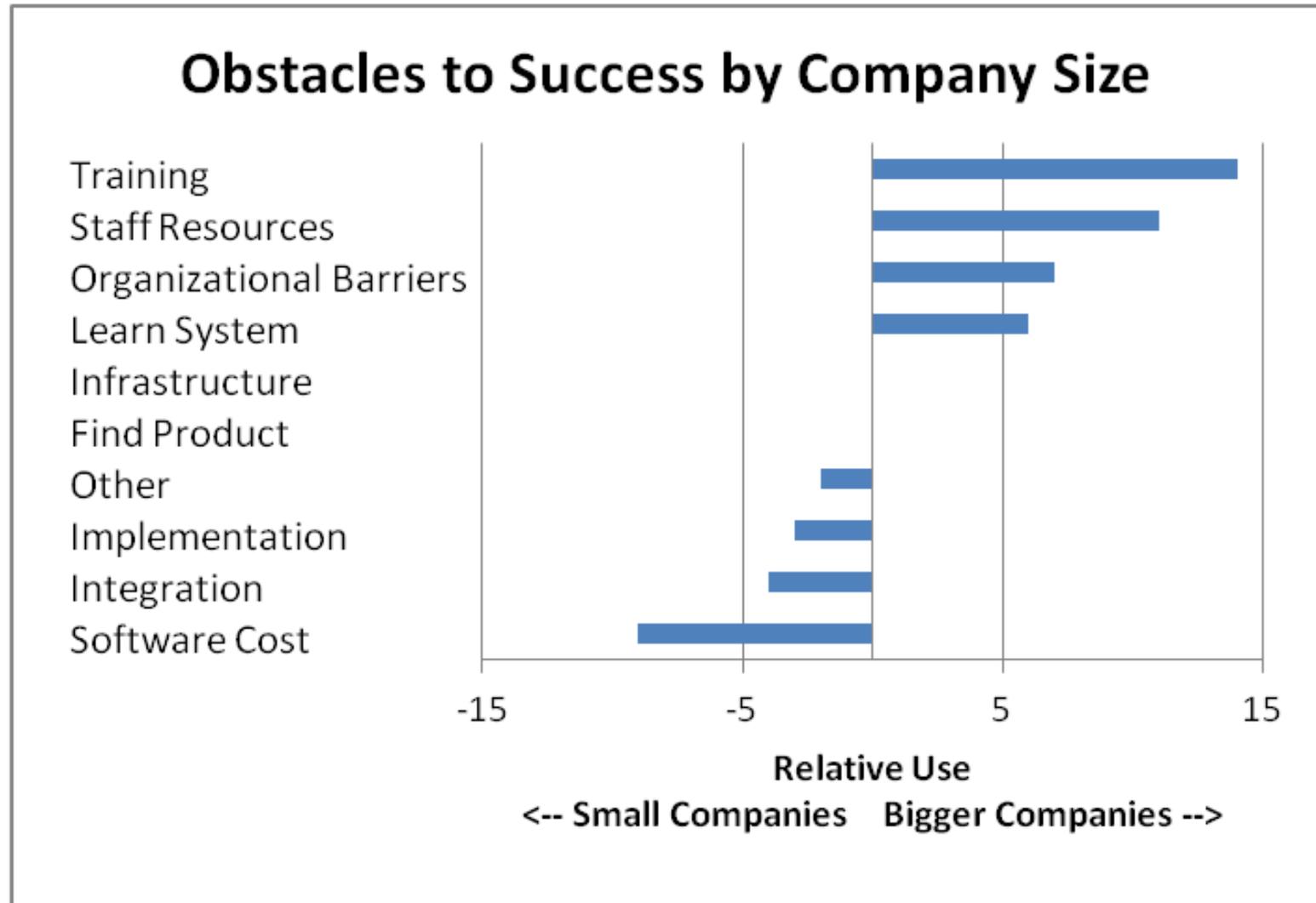
Reality: Satisfaction is similar for all sizes.



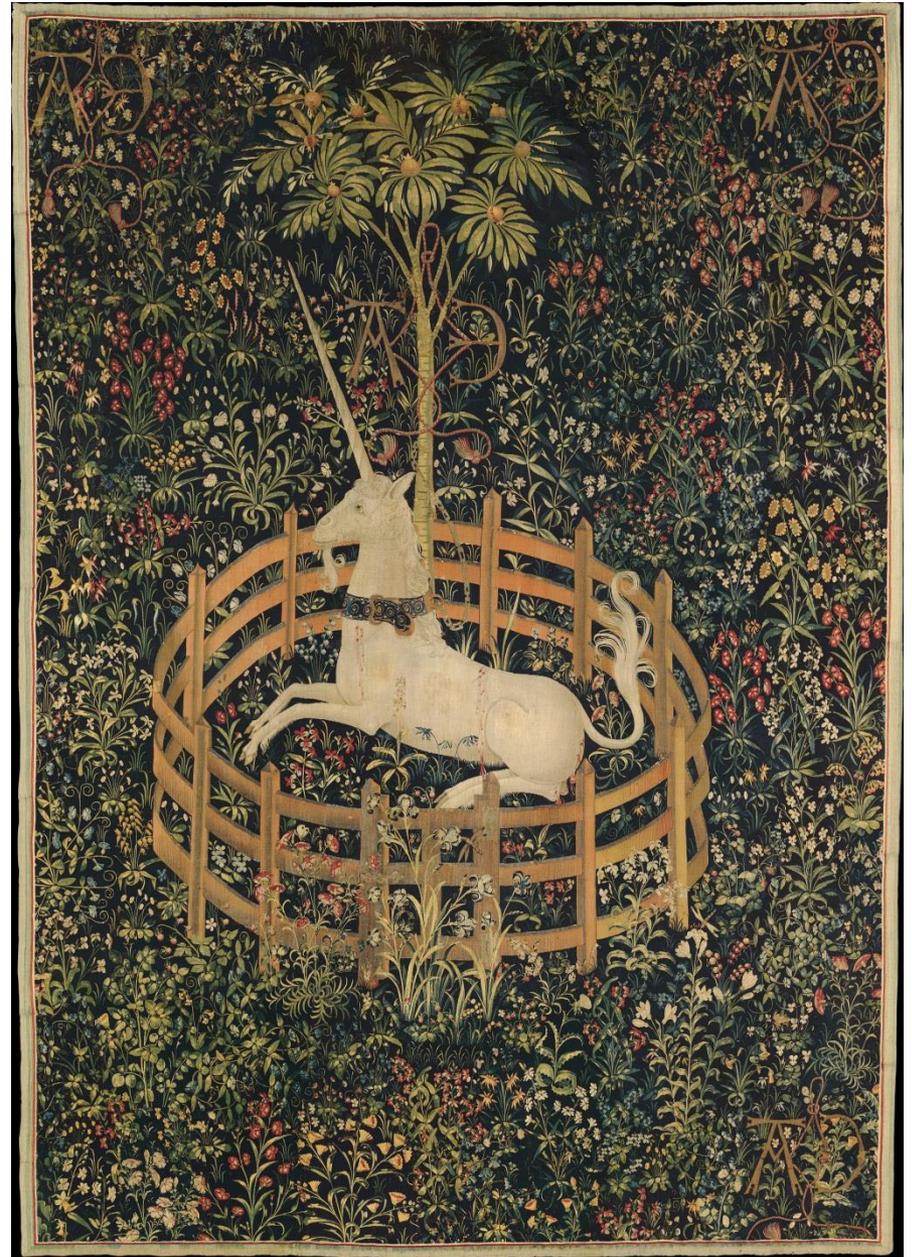
Bigger firms select more wisely...



...but face more business obstacles.



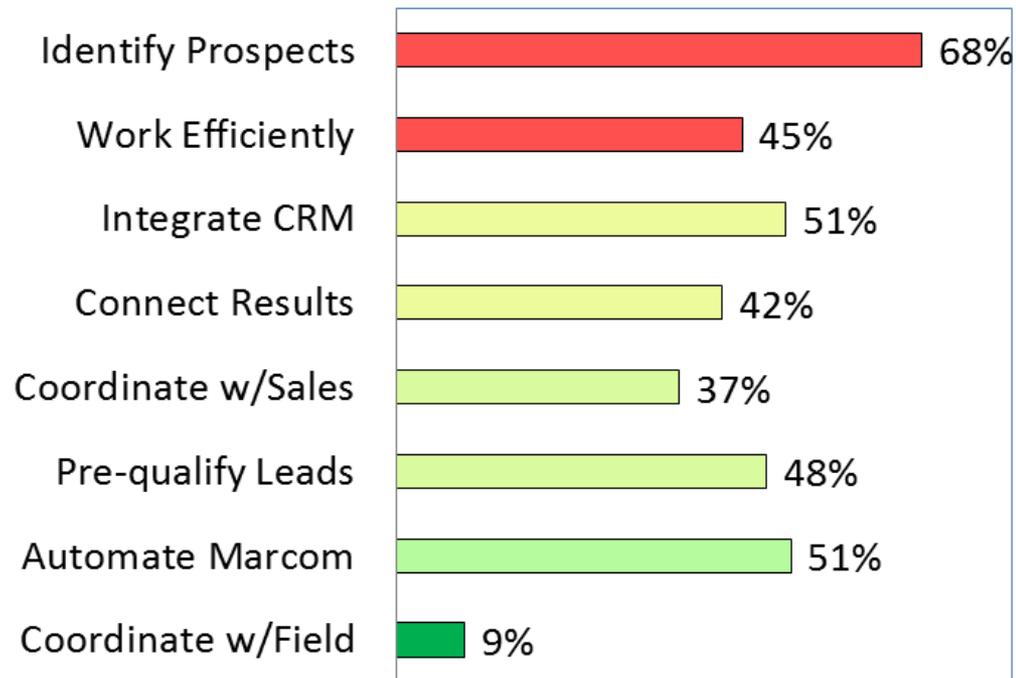
Myth:
Marketing
automation
creates
prospects and
saves money.



Reality: Marketing automation nurtures leads and passes to CRM.

Goals

What are your goals for the marketing automation software you've chosen?
What were you trying to achieve? What problems were you trying to solve?

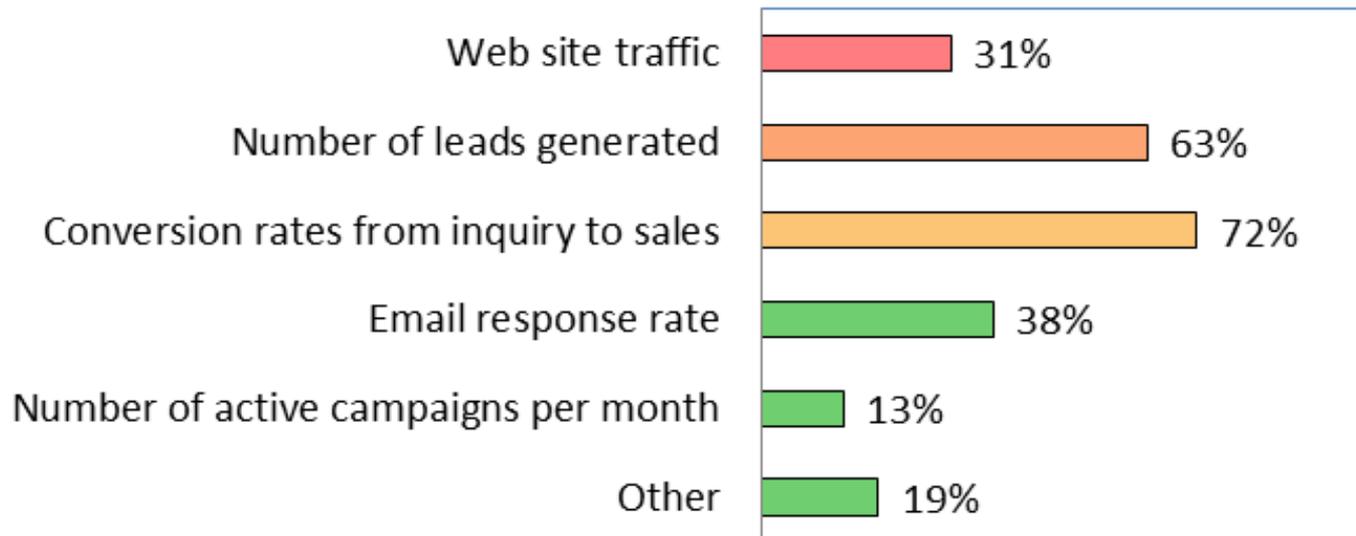


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Reality: Marketing automation doesn't generate traffic or leads.

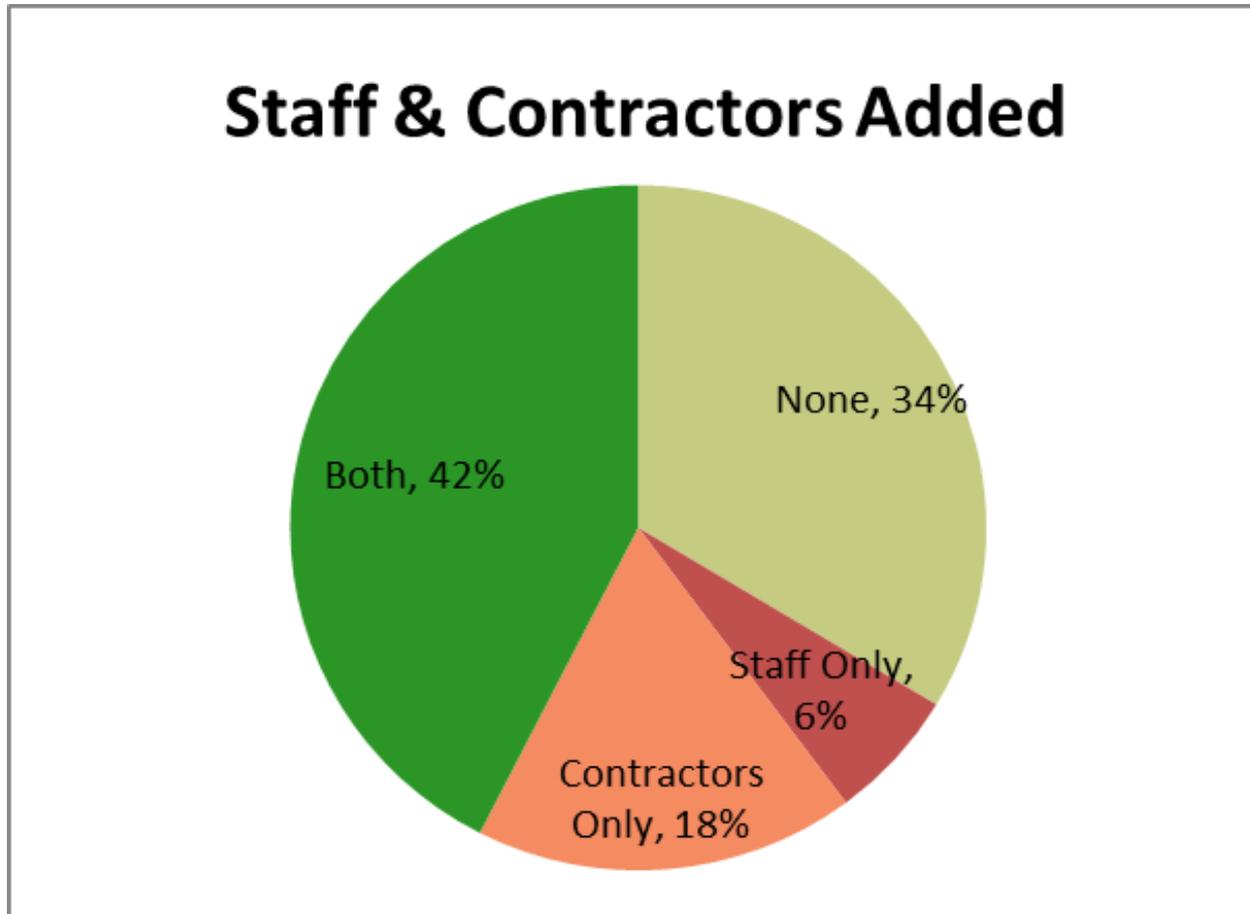
Success Measures

How did you measure the success and effectiveness of marketing automation software? [Choose top three]

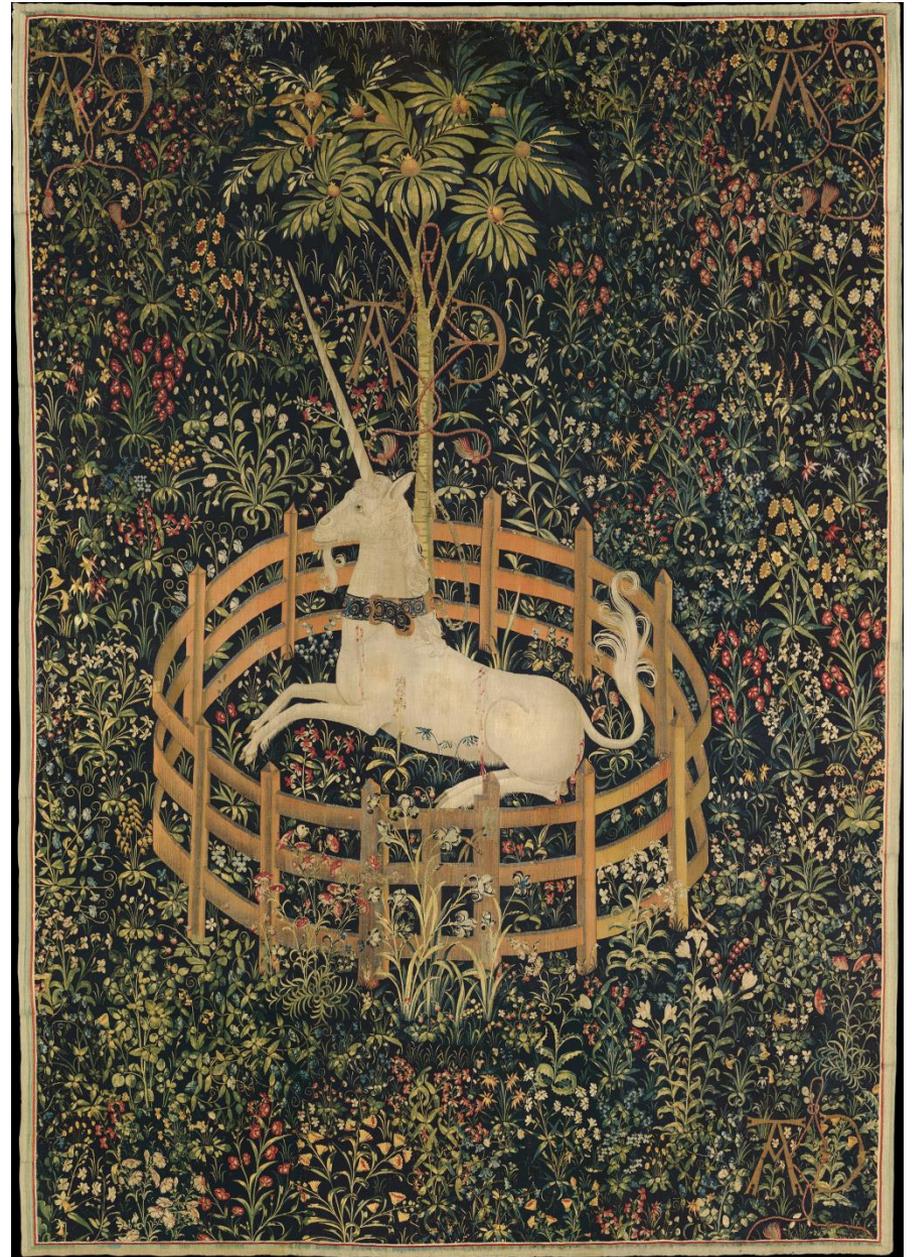


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Reality: Most companies add staff.



Myth:
Marketing
automation
has stopped
evolving.



Reality: Change continues.

- Environmental change
 - IPOs, acquisitions, investments
 - Shift upstream opens market space
 - Growth in B2C may impact B2B
 - Scope expanding to full customer journey
 - Scope expanding to ad tech
 - Scope expanding to external prospects & data
 - Big data adds more analytics
 - Identity resolution via devices, tags, reference sets

Reality: Change continues.

- System change
 - Social marketing & data
 - Content marketing integration
 - Predictive for scoring, recommendations, etc.
 - Mobile formats, apps, targeting
 - Cross-channel execution
 - Unstructured data
 - Advanced attribution



Beyond the Myths

Choosing Well: Basic Features

- Email
 - Builder, templates, personalization, dynamic content, spam scores, reuse
- Landing pages
 - Builder, progressive profiling, question types, next steps
- Behavior tracking
 - Cookies, device IDs, anonymous to known, association
- Campaign flows
 - Branches, test splits, actions, triggers, schedules, real time, contact limits
- Lead scoring
 - Data scope, rule complexity, depreciation, point caps,
- CRM integration
 - Connectors, custom tables, actions, APIs, sales interface
- Analytics
 - Cross-channel, cross-campaign, attribution, forecasting, trends
- Technology
 - Custom tables, APIs, data store, on-premise, data cleansing, enhancement

Choosing Well: Advanced Features

- Social
 - Share to social, tracking, posting
 - Social forms, track influence, external data
 - Monitor & respond, promotions
- Content
 - Builders, external discovery, shared library
 - Classification/tagging, SEO scores, item-level results
 - Multi-format (mobile, video, images, geo, etc.)
- Predictive
 - Built-in or 3rd party
 - Data types, prebuilt connectors
 - Automated set-up & building, model types, self-adjust, user control
 - reports, explanations

Preparing Well: Process

- Systematic process
 - Define real requirements
 - Focus on features
 - Test integration in advance
 - Plan slowly, deploy quickly
- Expect change
 - Look for flexibility as well as features
 - Plan to replace in three years

Preparing Well: Integration

- Assess existing systems
 - Available data, access methods, potential frequency, data quality
- Define your requirements (there's that word again)
 - Data sources, types of data (structured, unstructured, semi),
 - data volumes, speed, scalability
 - batch vs real time, triggers
 - mapping, transforms, process flow, validation
 - tech skills
- Select an approach (or several)
 - System-specific connectors, generic connectors, open APIs, platform systems
- Make part of marketing automation requirements
- Test early and often

If you remember nothing else...

- You can't unchoose the wrong system.
- Success depends on preparation.

Thank You!



David M. Raab

www.raabguide.com

draab@raabassociates.com

@draab