

BUYER'S GUIDE

How to Find the Right Marketing Automation Agency for Your Business





Introduction

Here's the situation: Your marketing team has blown away expectations on customer database growth. It's generating and attributing quality leads. Email campaigns are reaching the right prospects. Webinars are drawing more registrants. Social media and website interactions are increasing. And the last time a C-level executive asked for an update on marketing campaign ROI or a progress report on new business opportunities, you shared some impressive numbers for lead acquisition, closed business and revenue generated.

Your CMO was impressed. But now, you're tasked with taking things up a notch, so marketing can make an even bigger impact on the overall business.

Your marketing automation may be performing well, and you may have your campaigns down to a science. But sometimes, it helps to get an expert's perspective on new trends and best practices, and to get some more labor to help you execute on these trends.

Smart companies are integrating partners that help drive revenue, create high-impact lifecycle models and connect marketing, operations, sales and the C-suite. The end result is higher performing campaigns, more engaged customers and more compelling brand experiences that capture more customers.

Hit the Road

How can your team get there? The road to selecting a partner for B2B marketing automation solutions brings the promise of delivering more revenue from high-impact metrics. It's also filled with hazards that can throw your journey off course. At each key intersection, you'll encounter green lights, cautions and warning signs.

Here are six intersections your company will face in its search for the right marketing automation solutions partner:



Intersection 1

Cloud-based Technology

Storing, accessing and securing data in the cloud are table stakes at this point for any marketing automation solutions partner. The caution light should go on, however, if a partner lacks the architecture and strategy to be proactive about data usage. The best partner will understand and articulate strategy and tactics. Any partner will need to be an expert in cloud-based data and security.

Caution lights should also blink if the partner has a data-management platform (DMP) that doesn't connect across channels. It may produce data as you're evaluating them but lack the ability and understanding to produce detailed insights, which should be an advantage to cloud-based software. The rise of customer-data platforms, using big data and machine learning in the cloud,

The best partner will understand and articulate strategy and tactics. Any partner will need to be an expert in cloud-based data and security.

//////////

makes it easier and faster to create microsegments and proactively see the patterns that can indicate an opportunity for content, sales collateral, personal contact or any other sales and marketing option. That core set of unified data sits at the hub of the modern marketing capability, but it still requires an [agile execution capability](#) and the right people working together to make it all happen.



Intersection 2

Traveling Beyond Technology

Beware of partners who say that current technology is limited or will not enable better measurement and attribution. That's a limited, short-term view. The right partner will reach beyond technology and into more impactful metrics that will help you prove your marketing strategy. They will have an elevated conversation when discussing technology (cloud-based) and metrics. That conversation has advanced over the past year and will continue to change. Baseline data (acquisition, response rates and revenue) has evolved into constant refinement of both the data and the campaign, constant measurement of individual channels and constant alignment of attribution methodology.

Expectations of B2B marketing departments are progressing, just as the conversation around technology and data are changing. Generating MQLs isn't enough to measure success. Assigning simple attribution to those MQLs won't close a deal. The bar has been raised, and marketing departments will measure (and be measured on) having data about what impacted an account, and eventually what will retain that account.

Marketing measurement is expanding its spectrum. Some potential partners will see that. Others will be focused on acquisition alone. When marketing and sales teams take the conversation to a new level, their impact rises. The right partner will spark that conversation and deliver more impactful results.



Intersection 3

Artificial Intelligence and Machine Learning

Marketing technology, at its core, answers the question: “Why are we doing this?” The advanced state of AI and machine learning data doesn’t cancel that question. The right marketing automation solutions partner has AI experience and a vision for its future. Caution lights should go on if a partner overpromises on AI. AI complements and constantly evolves the current data set. It will only be effective if the current database is accurate and clean. Companies that have had experience in working with AI and marketing automation know that without good underlying data, AI will not produce impactful results.

Experience with AI is critical. Combined with the right technology and expertise, it can improve many impactful marketing

measurement elements, lead generation, and then the elements that move a lead through to conversion. For example, data analytics guru and *Competing On Analytics* author [Tom Davenport](#) has called for an opportunity to develop “much-more-data-driven approaches to sales and marketing.”

Again, the right partner will answer the question “why?” The answer: AI algorithms can identify, categorize and gather user-defined data elements more specifically. That new data opens doors for the dataset to become more impactful and identifies patterns in data that provide the basis for predictive sales and marketing models. Then another even more impactful set of data appears, as AI can be used for scoring, forecasting and classification capabilities.



Intersection 4

Customer Experience

Customer experience is a new destination for B2B marketing. It was a goal of several marketing services companies for several years, but the technology was not up to the task. Not anymore. Red lights should flash if a potential partner doesn't present CX as a priority on the same level as achieving more impactful revenue metrics. The intersection of CX and marketing automation is personalization and accuracy. The goal is to make sure that every interaction with a prospect is relevant and data-based. The right partner will have a vision to implement a marketing automation platform that has the technology to execute end-to-end customer experiences

Just as the conversation has changed around marketing teams and the expectations of their performance, CX has changed. Technology and your agency partner's expertise can impact acquisition rates and prove the impact of customer loyalty. Marketing measurement and attribution can provide an element of control over the experience and drive new experiences.



Intersection 5

Integrating for Impact

Here, the roads of legacy software, disparate systems and onboarding new technology meet. The right partner can be essential toward creating data-driven marketing strategies. According to [a McKinsey Report](#) 300 CEOs worldwide, across 37 sectors, expected advanced data analytics to help them compete for customers. The CEOs worried that, “companies from other industries have clearer insight into my customers than I do.”

Integrating more impactful marketing measurement will be aggressive in adopting new concepts like personalization. As stated in a recent [Harvard Business Review article on B2B](#) marketing impact, integration is

important as “companies measure leading indicators, such as meetings secured through social engagement and time spent on social media preparing for interactions, as well as lagging indicators driven by social selling, like impact to bookings, win rates, and average selling price. This typically requires integration with the CRM system.”

Aiming toward more impactful metrics will require your team to undertake an entire digital transformation, dealing with a lot of siloed data, siloed business units, and massive operations. The right partner will integrate the technology and the right team with urgency and accuracy.



Intersection 6

Innovation and Process

The right partner will know how to travel from lead to acquisition to attribution and through to customer value and loyalty. The right partner will live and breathe innovation throughout this process. It will have the experience and expertise to translate the people and process that complement the technology. The formula: Technology, innovation, people and the process to take advantage of it.

It also requires a new perspective on traditional business models. Smart marketers are looking at sales funnels and seeing that the process doesn't stop at acquisition or top-of-the funnel

activity. Marketing automation can help push what started out as a lead further down the funnel into customer retention.

A multi-touch attribution strategy – another essential conversation with a potential partner – requires a new perspective on relationships, as well. That relationship starts with the first touch and continues to ongoing loyalty and retention. And then the partner should answer these key questions: How can marketing's skill set benefit this partner relationship? How can sales benefit this partner relationship? And how can customer success benefit this partner relationship?

The Destination

At first look, the numbers are daunting. How do you navigate thousands of marketing services companies? The road to success should end with an experienced and stable partner that will provide expert navigators and will have the best technology that is tested and validated.

The best vendors must prove their ability to impact all facets of sales and marketing.

The right partner will be with your company for its entire journey. It will have solid financial backing and partners of its own to help execute your strategy. It will help you think strategically rather than just tactically. It will focus on accelerating your success metrics and prove

the impact of marketing as it expands its responsibilities and meets new expectations.

Get started today. Learn how an end-to-end approach can help marketing teams innovate.

TAKE A DEEPER DIVE



PERFICIENT/digital

Perficient Digital blends the creative imagination of an agency with the strategic insight and technical capabilities of our marketing automation experts. We orchestrate, personalize, and optimize exceptional cross-channel customer experiences for the world's biggest brands. As an Adobe Premier Partner with deep expertise in marketing automation and engagement technologies, we support you by delivering end-to-end, integrated marketing technology platform solutions. Our full-service offering is designed to tackle your ever-changing, ever-increasing business challenges. End-to-end is just the beginning.



info@perficient.com

855.411.PRFT