

a platform for organizational alignment

how marketing automation
implementations can drive buy-in



by jherod bauders

in brief

- 37% of marketing leaders at B2B organizations have a short-term goal to implement a new marketing automation tool
- Implementing a new marketing automation tool presents a unique opportunity for marketing leaders to drive organizational alignment
- Reflect on eight key considerations to make the most of your marketing automation implementation

I'm sure you've heard a story of a fellow marketing leader struggling to implement their vision and what it took for them to finally make the progress they sought. While my particular story is specific to higher education, its themes are common across industries.

In a recent conversation with a marketing leader from a four-year public university on the west coast, we discussed her plans for the institution's recruitment marketing efforts. Her vision was innovative and represented real change for the university. She had the major components of her strategy clearly defined, but she couldn't quite identify the steps necessary to get there.

As we continued talking, my excitement grew. Among the principal elements of her vision was the implementation of a marketing automation tool. We discussed the various times I've seen marketing automation implementations serve as a catalyst for positive organizational change – in higher education, at financial services firms, and in B2B organizations. As we talked, I saw something click for the marketing leader. In that moment, she was seeing the potential implementation in a whole new light: an opportunity to align her organization around her vision.

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an implementation done well: eight key considerations

Are you a marketing leader considering a new or updated marketing automation tool? If you said yes, you aren't alone. Spending on these tools is expected to grow 120% from 2017 to 2023, reaching \$25.1 billion globally. In fact, 37% of marketing leaders at B2B organizations have a short-term goal to implement a new marketing automation tool.

If you're among the 37%, I encourage you to learn from the story I shared and use the tool and its implementation as catalyst for cross-functional alignment and positive organizational change. To go a step further, marketing leaders not using their marketing automation implementation as a launch point for strategic and tactical shifts are leaving significant potential revenue growth on the table.

So how do you ensure you're leading an implementation that does more than introduce a new marketing automation tool? I offer the following considerations as you define your implementation strategy.

Develop a strategic vision

Organizations often fall short when they're focused on implementing a tool rather than the vision the tool will help them achieve. Create a strategic vision that starts with the implementation and includes considerations for training a cross-functional team. Use the vision to align key stakeholders before the onset of the implementation, making it easier to move past any hurdles that arise during the effort.

Start simply and enhance over time

It sounds like an obvious point, but I can't tell you how many times marketing leaders reach out to us to triage an implementation gone wrong from tackling too much, too soon. Phase in big areas of functionality – like dynamic content or behavioral triggers – so each one gets the full attention and care to launch successfully.

Have a training plan

Marketing automation is more than a tool, and successful adoption entails a shift in skills and mindset. A robust training program is necessary for sustained success. Building this training plan into your strategic vision allows you to keep end users and stakeholders engaged throughout the process.

Set clear expectations

Under-promise and over-deliver to your stakeholders. Communicate your expectations prior to rolling new features and campaigns out. Include your plans to correct course if it doesn't go as planned. Remember, this is an iterative process to launch and pilot a new way of delivering a customer experience.

Communicate proactively

Change management is essential. Having a communication plan around releases, campaign launches, and strategic milestones can go a long way in sustaining the energy and investment into your marketing automation program.

Don't expect perfection on Day 1

The implementation of a marketing automation tool is a learning process. You learn the new technology, you learn about your prospects' motivations and interests, and often, you learn about your organization's operational limitations. Wholesale shifts in strategy and delivery take time; allow yourself the space to build the necessary muscle memory to operate with consistent excellence.

Revisit the vision throughout the process

If the vision remains unchanged throughout the implementation, you're not reacting to new information. Marketing automation tools provide a wealth of behavioral data about your prospects, so be prepared to adjust your vision to suit their needs as this information becomes available.

Share the opportunity

The capabilities of marketing automation tools aren't limited to the realm of marketing. Recruitment, sales, HR, retention, admissions – share your tool's capabilities with your business partners and identify how you can help with its adoption across your organization.

My team has helped guide marketing leaders through implementations that not only follow best practices but facilitate digital transformation through organizational alignment, customer engagement, and marketing intelligence. If you would like to have a more in-depth conversation on the opportunities to seize and pitfalls to avoid, please reach out.

resources

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[Marketing Automation Technology Forecast](#)

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