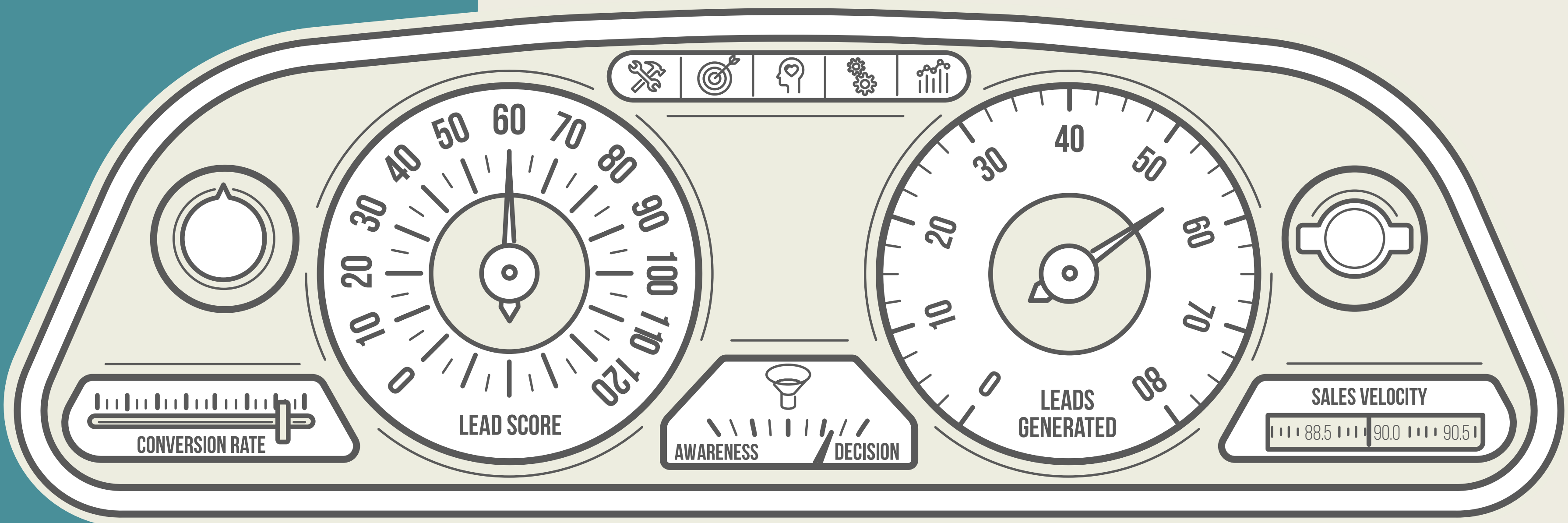
THE MARKETING AUTOMATION OWNERS MANUAL



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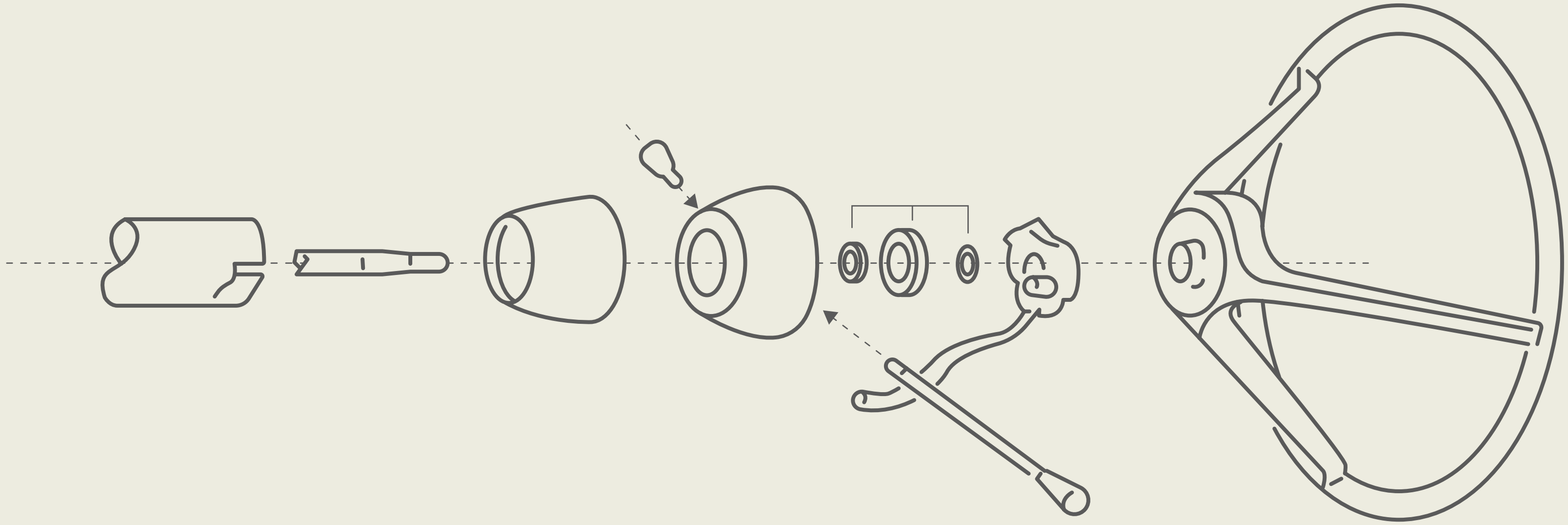
Using a full-featured marketing automation platform (MAP) for generic campaigns is like driving a Ferrari to the corner grocery store. Sure, you'll get there, but you've barely scratched the surface of what it can really do for you. With the ability to set up complex behavior-based workflows, manage campaigns, and track discrete activities across multiple channels, your MAP can help you market smarter. You just need to know how.



BEFORE YOU GET BEHIND THE WHEEL

If your business or business unit is brand new to marketing automation, and you've decided to take the leap (after asking yourself some important questions), you're probably going to be having a lot of meetings. You'll need to gather requirements from several different teams—anyone who has a vested interest in sales, marketing, software licenses, marketing budget, and information security will likely need to weigh in on the decision. In some businesses, this might be a committee of two; in others, it might be 20 people or more.

At Yesler, we recommend a formal requirements documentation process, even if your committee is quite small. To start, gather "user stories" from each team the marketing automation platform (MAP) will affect. User stories are used by Agile software development teams and are simple, short sentences that distill what an end user hopes to get out of the system. You can also use a more formal business requirements document (BRD), which will guide you to lay out a plan for several key areas like "business case" and "change management." Even if your company doesn't require a formalized document, taking the time for this step can help immensely down the road, when you're in the thick of implementation and must make decisions that will affect the people who use the system.

Find a BRD template and examples of user stories in the Toolbox.

HOW TO AVOID BUYING A LEMON

Once you have recorded business requirements and user stories, it's time to do your research. Sites like G2 Crowd or TrustRadius can cut through the marketing noise and get you to user reviews, which can help narrow down your choices. At some point, it's time to call a salesperson for a demo. You can use your user stories to ask questions from different user perspectives. This will help guide the demo to address your needs.

A few things to remember while you're selecting a MAP:

THIS IS A LONG-TERM COMMITMENT.

Don't go into a software relationship thinking, "I'll use this lower-cost alternative to what I think we really need until I prove its value, then move over after a year." You'll lose money migrating from one platform to another after just one year. When it's time to launch, get the funding for what matches all (or most) of your business requirements.

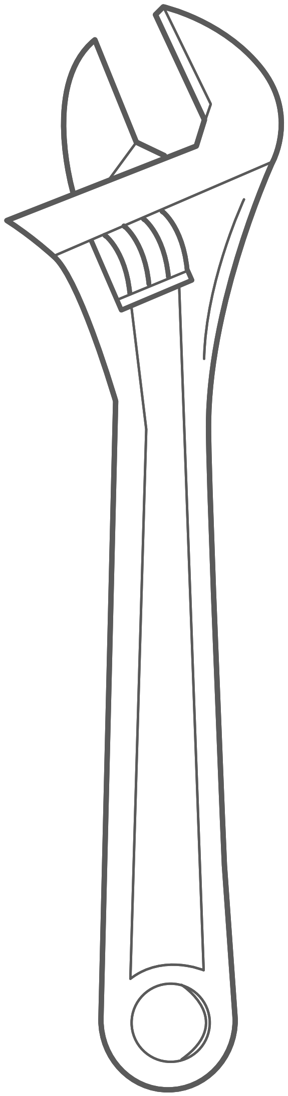
THE COST OF THE SOFTWARE IS JUST PART OF THE COST.

The system connects (usually) to your CRM, so make sure you've worked out how much the integration is going to cost on the CRM side. For example, Salesforce charges for API calls that exceed your daily limit. If you have more than a MAP integrated with your CRM, you might exceed your limit.

THINK ABOUT WHO WILL ADMINISTER THE MAP AND ITS CRM INTEGRATION.

What are their skills and where would their work be strongest? If you need to hire, what skills do you need to run the MAP so that your marketing works? (Need more advice on putting together a rockstar marketing automation team? Read our blog post on how to grow your own).

UNDER THE HOOD



THE RIGHT MAP FOR YOUR CRM

Even if you're in a company or business unit that hasn't launched a MAP, you probably have a CRM system in place. This will be a factor in choosing a MAP.

We've put together a vendor comparison chart for you to use. It assumes that you're using Salesforce as your CRM.

- **If you use Salesforce:** Marketo's integration is the best and easiest on the market—yes, even better than Salesforce's own product, Pardot. That's because Pardot was an acquisition. But keep an eye on it: As Pardot strives to ensure a more native feel to its integration, it may edge out Marketo.

- **If you use Microsoft Dynamics 365:** Marketo and IBM Marketing Cloud integrate best of any full-featured system. Other MAPs struggle to integrate with Dynamics, so it might take you a little longer to find the best fit. ClickDimensions was built to run with Dynamics—it's worth a look.

- **If you have a niche CRM, or one with a lot of customization:** Get the most robust API integrations with Oracle Eloqua.

TRADING IN FOR A NEW MAP

Maybe you did your homework, worked through your business requirements, and selected a MAP that you thought would fit your needs. After several years, things have changed and it's apparent that you need a different model.

Is it time to migrate? Maybe. To know for sure whether you need to change MAPs, you'll need to follow a lot of the same steps for selecting a new MAP—with the added step of sizing up your MAP to your new criteria. (We've written about how to do that.) The good news is, your business requirements will be a whole lot clearer now that you've been working with a MAP and understand where your challenges are.

We recommend you start with a systems audit. This can help crystallize pain points and the gaps that are causing frustration with a MAP you've likely put a lot of blood, sweat, tears, and money into. An audit is simply a discovery and documentation process, and it's something you'll want your marketing operations staff (or whoever is most familiar with your system) to do and bring back to you.

Here's a checklist Yesler uses to help kick off the audit process for our clients. It's specific to Marketo, but it can help you get started.

BUCKLE UP

Alright, so you've done the work, you've chosen the system, you've got the staff, you're ready to launch.

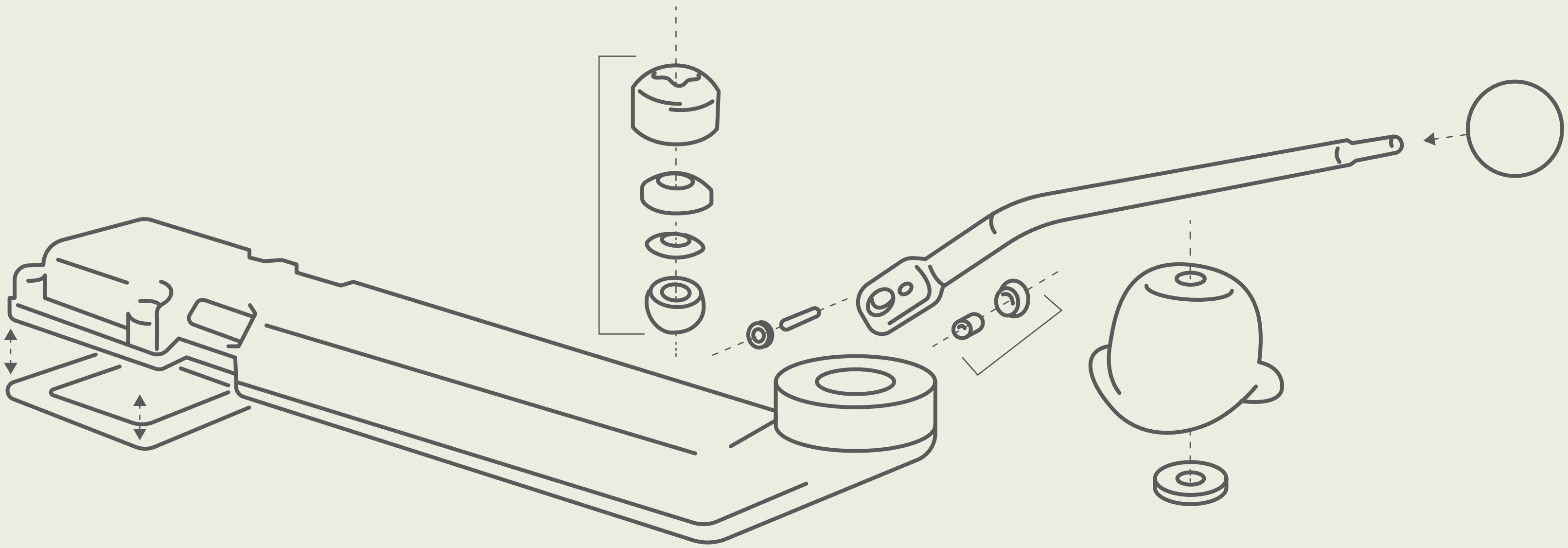
Right?

Yes … but let's make sure you have a plan in place to measure the great success you're about to have.

We'll go into more detail on how to measure marketing success in the chapter on proving value. For now, think about the pain points you identified in your audit process and among the user stories you gathered. How can you measure success against those?

Some of these concerns might be subjective and the way to measure them isn't obvious. You'll have to think of some way to quantify them. For example, if you identified that it is critical that your regional field marketers can access different sets of leads in your MAP, you could measure how often field marketers need to manually reconfigure their lists to find the right leads. Or, if you ditched your old MAP and went through a painful migration process to give your sales team a tool they could use to send marketing email to prospects (like what's available in Marketo Sales Insight or Salesforce Engage), you could measure how often they use the tool and in which contexts.

Measuring success and holding yourself and your department to a few key results will ensure that you drive the adoption of your new technology—and that it's not taking you for a ride. Ready to talk shop?



SHIFT INTO GEAR

You have a MAP that meets your business needs. You have a team in place. You are ready to get this show on the road.

What first?

Programs to score and source leads are the foundation your MAP infrastructure is built on, so it's important to get them going first. Sourcing, in particular, is critical for the long-term health of your marketing analytics. Here's how we like to do things at Yesler.

LEAD SCORING

A basic lead-scoring setup uses two types of scores. (In in some MAPs, like Pardot, “ ” are used in place of some scores, so we use “score” as a rubric.)

BEHAVIORAL SCORING	DEMOGRAPHIC SCORING
Helps measure a prospect’s level of sales readiness and offers a sense of the channels that generate the best prospects.	Helps measure how well you’re targeting your marketing. For example, certain channels might generate leads that are consistently underqualified—something that can help you decide whether to continue using those underperforming channels.

But lead scoring in B2B marketing is often, unfortunately, a series of wild guesses. When using marketing automation, treat lead scoring as a science so you can get an accurate indicator of both sales readiness and sales fitness. By doing this, you can prioritize leads efficiently and measure marketing effectiveness.

Here are a few rules of the road to remember when you set up lead scoring in your marketing automation system.

TALK TO YOUR SALES TEAM

They know who the right prospects are—that's their job. They are also, ultimately, the consumers of the lead-scoring data. Whether they are actually seeing the score in CRM or receiving the MQL resulting from the score, the sales team needs to have buy in on the project.

KEEP THE BEHAVIORAL & DEMOGRAPHIC SCORES SEPARATE

Many lead-scoring systems lump the behavioral and demographic scores into one sum and call it a "lead score," but this can present problems. For example, when the scores are lumped together, a student might visit 20 pages and qualify as a lead. Some individuals, no matter how interested they are in your company and your content, will never become customers because they'll never fit the definition of your target audience. The scores must remain discrete so you can eliminate false positives.

USE THE DATA YOU ALREADY HAVE

If you've been using a CRM to track purchases, or have easy access to your customer database, run some basic regressions on your most valuable customers to determine the criteria for your demographic score. Don't rely on anecdotes from the sales team about who the best potential customers are—you likely already have the data to figure it out. But do include them when finalizing the scoring model.

Coming up with an initial model for the behavioral score is somewhat trickier if you're implementing a MAP for the first time, so it's best to work from industry best practices and refine from there.

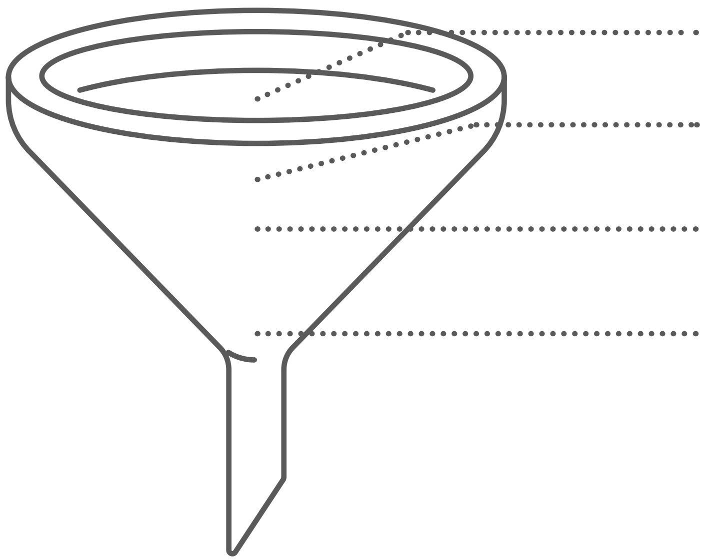
FINE-TUNE

Lead scoring is an iterative process, not a set-it-and-forget-it action. Because behavioral scoring is really a proxy variable for sales readiness, it changes depending on how people interact with your website, emails, and other content. Your schema won't be perfect the first time you set it up. It requires quarterly or annual retuning. Craft campaigns with this in mind—make them scalable (will this setup be easy to replicate?) and robust (will this setup be replicable tomorrow?). Aim to create campaigns that can be used more than once.

BUYER-CYCLE SCORING

Buyer-cycle scoring is a way to determine where prospects are in the buying cycle based on how they think and behave. Unlike lead scoring, which tracks how much content prospects engage with, buyer-cycle scoring tracks the kind of content they consume. To do it right, you need to know the stages your prospects go through on their way to buying your product, solution, or service.

Marketers define the buying cycle in different ways. Some use four stages, some use three, and everyone has smart names for the stages. In this example, our stages are defined in the following way:



Awareness. The buyer is aware that a problem exists.

Research. The buyer is working out how to solve the problem.

Consideration. The buyer is thinking about purchasing a solution to address the problem.

Evaluation. The buyer is evaluating potential solutions that meet their business requirements.

Once you've defined the stages of your buying cycle, you can apply buyer-cycle scoring to see where your prospects are in the purchasing process.

PIT STOP

Setting up buyer-cycle scoring

Lead scoring is a must-have. Buyer-cycle scoring takes it to the next level.
Here's a blog to help you get a jump-start on setting it up in your MAP.

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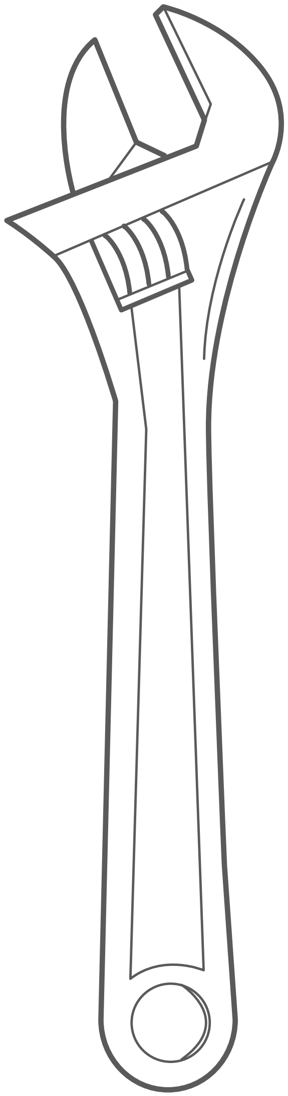
LEAD SOURCING

If we can offer once piece of advice to anyone who is looking at launching or revamping a MAP, it's this: Consider your lead-sourcing model thoroughly and thoughtfully. We've seen many, many organizations fail to implement a lead-sourcing model or govern the lead-sourcing model once it's launched. In one case, an organization had 107 options in the "lead source" field! That's way too many to uncover any useful data about the sources that are driving your demand.

REMEMBER:

LEAD **SOURCE** IS THE FIRST-TOUCH WAY A LEAD ARRIVED AT YOUR WEBSITE. (A YESLER PET PEEVE: "WEBSITE" IS NOT A LEAD SOURCE. "ORGANIC SEARCH" IS.)

Sit down with a spreadsheet, write down all possible lead sources in the marketing mix you have in market (or are planning to launch) and start bucketing them—because the only good lead-source value comes from a picklist.



UNDER THE HOOD

LEAD-SOURCING FIELDS

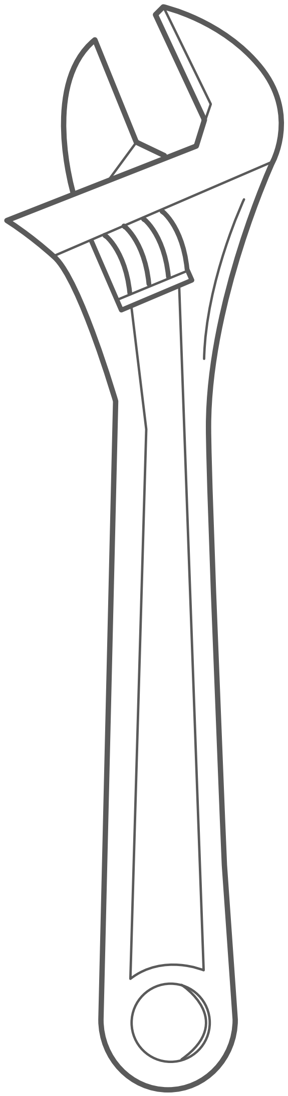
Got that spreadsheet of sources? Good. You're going to need it.

Deciding how to run your lead-sourcing programs starts with the question, "What do I want to measure?" In most cases, the answer will be those groupings that drive demand at three or four levels. The table below shows what these levels might be and how they correspond to fields in your MAP or CRM.

Setting up each of these fields requires some automation in your MAP. For the Team value, for example, any lead that originates in your MAP gets a value of Inbound, while any lead that originates in your CRM gets a value of Outbound. These decisions are all highly dependent on the way your marketing and sales teams work. For example, if there's an in-person event and leads are loaded manually, are they loaded into the CRM or MAP? And who gets credit for those leads? So make sure you talk it through.

Level	What it is	MAP or CRM field
Team	The team that originated the lead. This is important to capture if your marketing department is measured on how much revenue it generates.	This depends on how you define your revenue-responsible teams. "Marketing/Sales/Customer Success" might be one way of doing it, or "Inbound/Outbound" another. This will be at most a 4-item picklist.
Channel category	Broad groupings of one or more similar channels, such as "events," "webinars," "SEM," "paid social," or "organic social." Useful when you align the categories to your budget framework, making it easy to assess ROI by channel category.	Keep this as short and sweet as possible, and make it a picklist. This should be no more than 6 or 7 picklist options.
Channel	A single channel relevant for reporting, like "Facebook" or "Google Retargeting," or "Bing SEM."	A longer picklist, but be sure to standardize it. Rarely add to it—only if you absolutely need to.
Campaign	The precise campaign initiative, sometimes encompassing multiple channels and channel categories. Useful for assessing the performance of multichannel, integrated campaigns toward your business goals.	If you aren't using Salesforce campaigns to measure this, or you want an additional failsafe, this will be a free-text field that inserts the name of the original campaign where the prospect converted from.

UNDER THE HOOD



For other values, things get a bit trickier, and you need to ensure good governance across different aspects of your marketing and sales teams.

Typically, we recommend that whoever is running your digital campaigns has an agreed-upon campaign tracking framework, so you can align data captured in automation to reflect the same (or at least similar) campaign tracking from other systems. Often this means aligning to your primary web analytics platform. In the case of Google Analytics, this will likely mean your UTM parameters and framework. For example:

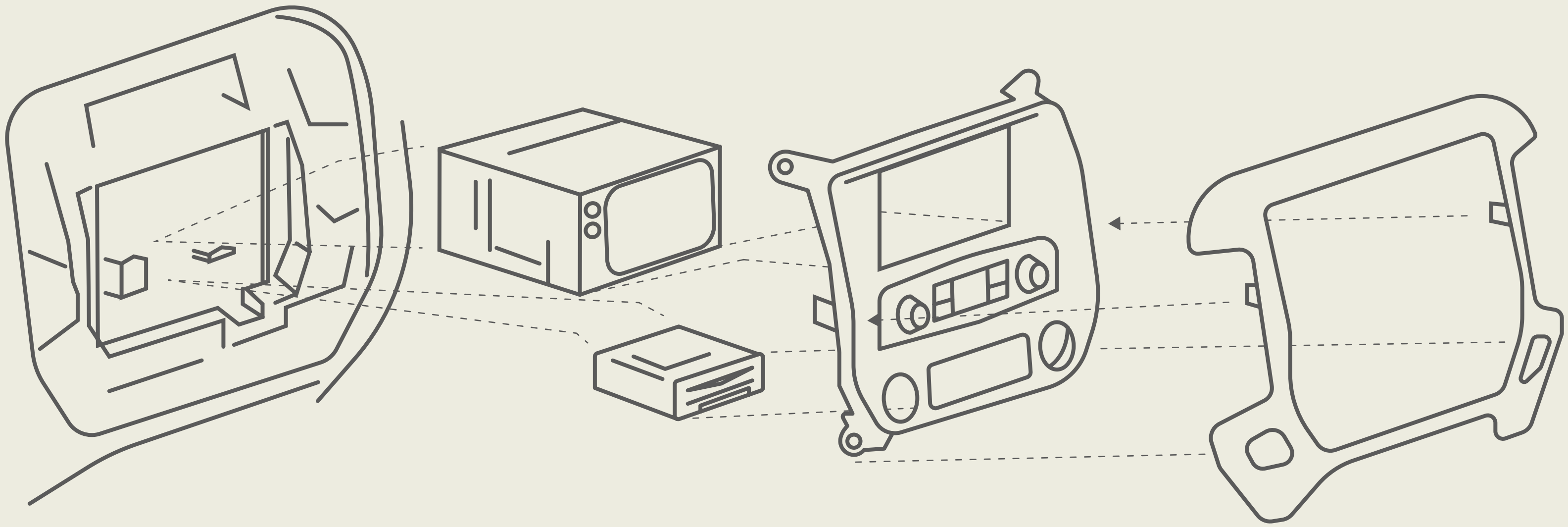
If utm_medium=cpc, then change field "Lead Source Type" to "Paid Media"

Then, you can use exclusions to try to set a reasonable lead source as well. If you require specific UTM parameters in all your media campaigns, and no UTM parameters were captured with the lead, it's probably not a media lead. It's more likely, then, to be an organic search lead.

The order in which your MAP is processing each of these pieces of logic matters. Things that are easy to spot (like paid media leads with an agreed-upon UTM framework model) should run first. Then, if the lead is still sourceless after being checked by the automations that look for UTM parameters, you'll need to look for clues on the lead or in its referrer link (if your MAP captures that) to determine how the lead got into your system.

We like to use requestable Smart Campaigns in Marketo to set an ordered flow to our lead-sourcing campaigns, but there are many ways to do this. The most important thing is to get the overall framework right first.

Obviously, there's a whole lot more to measure than just lead sourcing, and we'd be more than happy to talk to you about how to use Google Analytics and other web analytics tools effectively, how to integrate third-party measurement tools like Domo or Tableau into your marketing technology stack, or how to take things to the next level with multitouch attribution. But it's so important to get your lead-sourcing fields right—from the start—or none of those cool reports your execs are asking for can be built.



ONBOARD NAVIGATION

You already know the key to a successful lead-nurture campaign: Reach prospects with the right messages at the right times. But what sounds simple isn't: Not all prospects are the same, so the right messages and right times are different for different buyers.

Lead nurturing begins with solving a specific problem, and in most cases, that problem is "How do I move prospects more quickly through the buyer journey?" There are other problems lead nurturing can solve, of course, but when we talk about doing lead nurture, we're talking about presenting content to captured leads based on factors like what they've already consumed or the channel in which they were captured.

In this chapter, we'll explore how to use buyer personas and other segmentation that you're already doing to make your lead-nurture programs more effective.

USE YOUR BUYER PERSONAS TO CREATE INTELLIGENT LEAD NURTURE

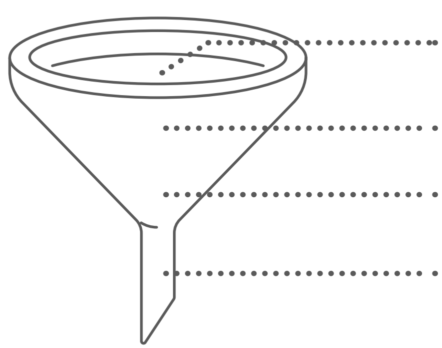
For clients who are just beginning to create truly dynamic, responsive lead-nurturing programs using their marketing automation platform, we recommend writing nurture emails so that the content guides prospects along the learning journey toward solving their specific problem.

REMEMBER:

WHEN SOMEONE IS BEGINNING THE BUYING JOURNEY, THEY DON'T CARE ABOUT YOUR PRODUCT. THEY ARE LOOKING FOR A SOLUTION TO THEIR PROBLEM. THIS IS THE CONVERSATION YOU NEED TO LEAD, NOT "MY PRODUCT IS GREAT," BUT "MY PRODUCT CAN HELP YOU SOLVE YOUR PROBLEM."

Start with just one or two buyer personas. B2B technology companies usually create personas for a business buyer and a technology buyer. These different buyers approach the process of solving a problem uniquely. To capture and keep their attention, you must understand what motivates each individual role in the purchasing process and how they interact with the other people involved in the decision. Determine how they move through the decision-making process, from identifying a problem to making a decision.

Create a buying journey that lays out the process for each persona into four stages of the buying cycle:



Awareness of a problem (early-stage)

Research to fully understand the problem (mid-stage)

Consideration of which solution is best for their situation (mid-stage)

Evaluation of partners for best fit (late-stage)

LET CONTENT LEAD THE WAY

At each point in the cycle, your content needs to educate and inform prospects about their challenges and how to solve them. Think about the nature of their problem and why it exists. How can they start fixing it? Your goal is to anticipate the questions that prospects have with content that answers their questions.

A buyer persona content map is a way to categorize all the content available on your website by persona and buying stage. This map can then be used to pick and choose the content you'll link to from your nurture program to lead a prospect along the buying journey, and to inform scoring programs that calculate where a buyer is in the journey.

Buyer persona	Awareness	Research	Consideration	Evaluation
IT decision maker				
Business decision maker				

Using the content map, enter the questions you anticipate your prospects will ask at each stage. Then showcase your carefully crafted content with emails that reflect the same attention to detail. Ask yourself:

- Does the subject line grab attention?
- Is the email easy to read?
- Does it get to the point quickly and elegantly?
- Will it help prospects answer a FAQ or address a knowledge gap?

If done right, your lead-nurture strategy will lead the way: Prospects get the information they need while you facilitate the sales cycle from awareness through research, consideration, and (hopefully) evaluation toward a decision to purchase your solution.

CHOOSE-YOUR-OWN ROAD MAPS

Once you have version 1.0 up and running, expand your nurture streams to match your segmentation. When a prospect shows interest in a specific product, geography, or other segment, you can set up a lead-nurture track that provides a more specific path for that buying journey.

Think of this as a choose-your-own-adventure road map. As prospects select the emails to open and act on, the areas of your website to visit, and which offers to accept, you'll learn more about what they are looking for. You can then tailor your lead-nurture program to their road map.

The direction you take from here depends critically on making sure you are capturing the right data—more on that in the chapter on data hygiene.

MEASURE THE DISTANCE TRAVELED

Lead-nurture metrics are all about the journey from "Hey, I'm interested!" to "Yes, I'm ready to talk to sales!" While it's too much to expect all those glorious leads you've gathered to beat a hasty path to sales acceptance, you still need to understand what's working, what's not, and how to course-correct along the way. Here are just a few metrics to keep in mind.

PIT STOP

Advanced lead-nurture programs that drive demand

Thinking about nurture by persona, nurture by lead stage, or just want more instruction on how to operationalize nurture by buyer journey stage? We've got you covered.

FUNNEL METRICS

Over time, a good lead-scoring program should generate a higher percentage of leads that move from the middle to the bottom of the funnel as your program logic gets smarter about tuning out the leads that don't fit your target. If your funnel continues to look top-heavy, it's time to review lead scores and perhaps other components of your lead-nurture setup to identify potential areas for improvement.

Because you need to be keenly aware of funnel metrics to track the success of your overall marketing programs—and to set up your MAP and CRM accordingly (more on that in the chapter on proving value)—your funnel metrics should serve as your frontline health check. The metrics that follow can help you dive deep into your nurture program's performance in specific ways.

RESPONSE RATES

Nurturing is all about keeping the conversation going. If your leads aren't opening your nurture emails, clicking on the links in them, or garnering more sales-ready opportunities, that spells trouble. Not sure what's acceptable? Benchmark your performance against an industry average to figure out where you stand.

PROGRESSION PERCENTAGE

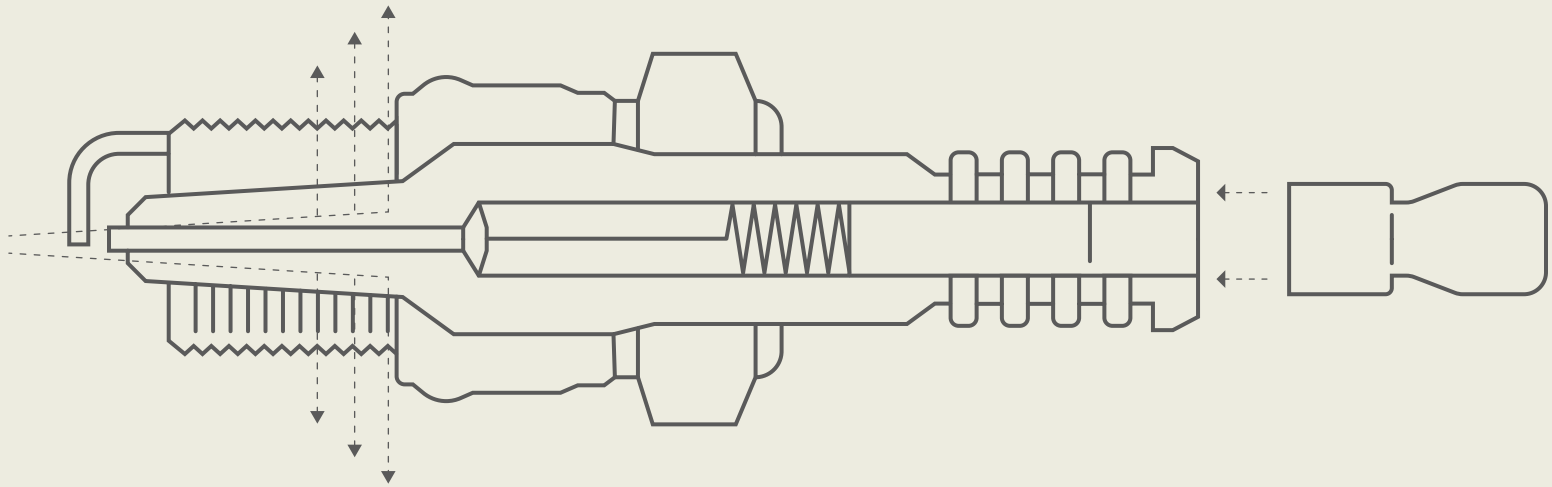
There's a reason it's called a funnel—it's natural to have more leads at the awareness stage than the consideration phase, for example. But the progression percentage, which measures how many leads move from one stage to the next, can reveal where some of your leads are getting stuck in the process and pinpoint where to troubleshoot.

UNSUBSCRIBE RATE

It's normal for some of the leads in your database to opt out, but if too many say "no thanks" it indicates that what you're serving them doesn't meet their needs or that your nurture tactics are disruptive rather than informative.

DURATION RATE

With lengthy B2B sales cycles, slow and steady really does win the race. But over time, a good lead-nurture program will shorten the overall time it takes a qualified lead to move from the top to the bottom of the funnel, particularly as you get savvier about qualifying leads and moving them from stage to stage. First step: Know what the average sales cycle is for your business and then continue to monitor how lead nurturing affects that time span. If it's not getting shorter, find out why.



PERFORMANCE TUNING

You've spent a lot of time and money on your MAP and CRM, maybe just to get them working and set up. How do you prove the value of this investment?

Dashboards show you how your new processes are performing. But you also need to make sure sales has a view into these metrics so they can see the value of the investment firsthand. And of course, you need a tight team to efficiently carry out and fine-tune the operations of your CRM and MAP to support ongoing performance.

INFORMATION AT A GLANCE

You're going to have a lot of data and you need a dashboard to organize and simplify it. A good dashboard offers a single, easily accessible, and real-time view into the health of your marketing programs and allows you to respond quickly to correct problems or run new A-B tests if your programs aren't performing as expected. You can even use that information to steer conversations and the direction of your business.

Every major MAP offers the ability to build dashboards. The best dashboards display the most important trends in campaigns, sales, and performance at a glance and make it easy to run a one-off report to share with higher-ups. Well-designed dashboards show everyone at any level in your marketing and sales organization the data they need to know—yes, it is possible to fulfill everyone's wish list for regular updates on important metrics and KPIs without spending hours digging through the system.

Ensuring a good edit of data for those who consume it is important, especially if you have a particularly data-driven organization. You don't want executives to get hung up on how many people clicked on one of the 17 emails you send in a week. Likewise, you don't want field marketing managers to stress over a revenue indicator that they may not be accountable for or have much control over.

PIT STOP

How do you measure marketing horsepower?

Setting up your MAP and CRM to properly track funnel metrics and campaign attribution is one of the most important things you'll do. Whether it's full-blown intelligent lead nurturing or running an ABM pilot or both, you must accurately measure how well the programs are driving demand to prove the value of your hard work and your investment in your CRM and MAP.

Before you start measuring performance, though, decide what you're going to measure. At Yesler, funnel and revenue metrics are the first measures we look at. Social reach, email clicks and open rates, and leads generated are secondary. Here's a cheat sheet to get started.

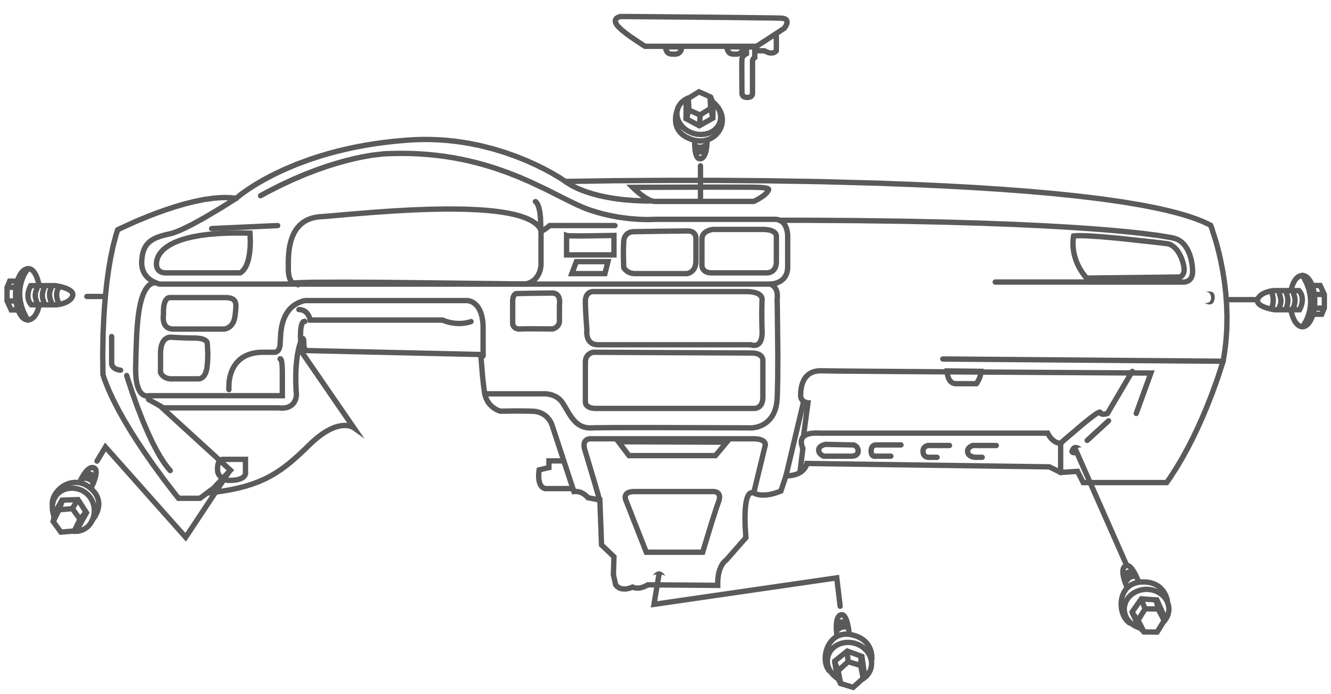
DASHBOARDS FOR EVERYONE

You're not the only one in the car—everybody else with a stake in marketing and sales is going to want to roll their own windows down. So you need controls everyone can reach. Are they in your MAP or your CRM? Somewhere else?

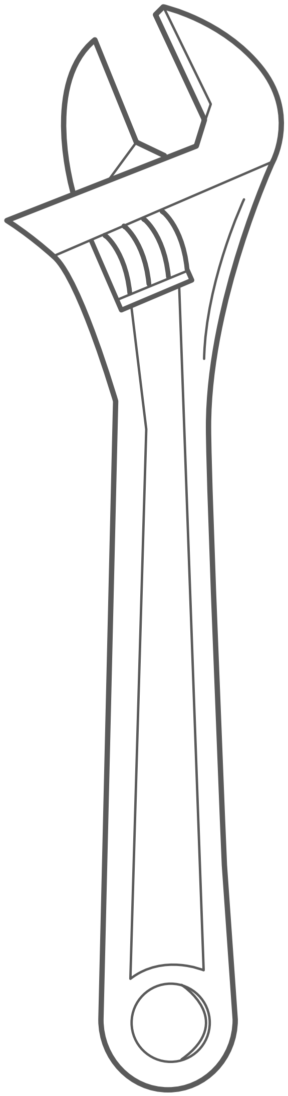
The answer is simple: wherever your teams are already looking. Usually this is your CRM, but if you have a product like BrightFunnel or Domo, it might make more sense to direct curious executives there.

If you have extenders in your MAP like Marketo Revenue Cycle Explorer, you might want to be more strategic about where you put your data because it could be easier to build your full-funnel dashboards in your MAP (for reasons detailed in the next section). But your executives and sales team, who aren't usually keen to poke around in a marketing system, also will want access. This shouldn't be a problem, but you'll need to review how your user permission settings are governed.

Dashboards help make the value of your MAP and CRM tangible to executives and sales teams. Marketing can also boost the value of the MAP to sales teams by creating and training them on sales nurture and sales enablement using the MAP.



UNDER THE HOOD



HACKING PERIOD-OVER-PERIOD REPORTING IN SALESFORCE

The question, “How many MQLs did we create in January?” shouldn’t be that hard to answer, but you won’t find it out of the box in Salesforce. It’s the biggest groan we hear about Salesforce—that its default reporting can show only what the lead status is not, not the status of the lead two weeks ago. More often than not, our clients need funnel and waterfall reporting, but they don’t see how their Salesforce instance can deliver the data they need.

Luckily, the solution for this is easy, if a bit of a hack.

Create date fields for activities you want to report period-over-period. You can keep these fields hidden in Salesforce, but they do need to be visible to your MAP. (In some cases, this is available by default; in others, you’ll need to put these fields on the layout accessed by your MAP sync user.)

To answer the question above, create a field called “MQL date” and use your MAP to time-stamp each lead as it transitions to an MQL. Then, you can create a report from that field to show how many leads were qualified each day, week, month, and quarter.

PUTTING SALES IN THE DRIVER'S SEAT

Part of proving the value of the investment in your MAP is being able to demonstrate that value to teams outside of marketing. The best way is to do that is by ensuring a solid rollout of the sales enablement tools your MAP came with, such as Salesforce Engage library or Marketo Sales Insight. Using these tools, your MAP can be something your sales team regularly uses and gets a lot of value from, helping you break down silos between sales and marketing and making you a hero to the sales team.

Lead nurturing, when done right, shows how powerful marketing campaigns can be. The goal of nurturing is to take cool prospects and slowly warm them up with a well-planned series of touches and meaningful content. Too often, though, nurturing ends when the marketing team hands off a lead to sales. But not so with sales nurturing!

Sales nurturing extends lead nurturing down the pipeline. With the sales team's blessing, marketing can—and should—continue with targeted campaigns, tracking, and scoring tactics that nurture sales-ready prospects to purchase. Sales nurturing is more than engagement. It builds the relationship between prospect and sales rep.

From a rep's point of view, it's empowering to find a lead in the CRM and manually enter it into a targeted sales-nurture track. Salespeople want—and deserve—control of sales leads in the CRM.

When a sales rep enters a lead into a sales-nurture track, the rep should be confident that the following will happen:

- The lead will continue to receive relevant content.
- All communication will occur in text-based (not HTML) email that appears to be coming from the sales rep.
- Whenever the lead advances in the pipeline, it will be removed from the track so the rep can correspond directly.

Sales nurturing can be automated or it can be a series of emails sent manually by sales at regular times in their cycle.

PIT STOP

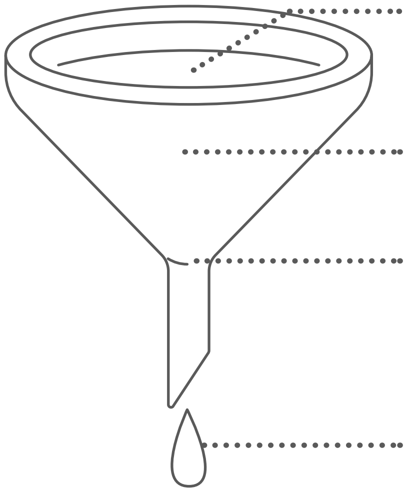
Sales and marketing alignment

Speaking of sales teams and dashboards, want to know the must-have metrics for sales and marketing alignment? Read about the metrics that are going to help your sales teams see not only the value of your MAP, but the value of the marketing team.

YOUR SEASONED PIT CREW: SALES AND MARKETING OPS

We've included this in the section about proving value for a reason: Your MAP and CRM will never live up to their full potential without the right people and the right internal goals set for them. While you can certainly grow your own rockstar marketing automation team, it's important to ensure that everyone is working toward the same goals, whether your ops team is a team of two or 50.

Some larger companies organize their sales and marketing ops team around funnel stages, which ensures alignment to goals and KPIs throughout the entire sales and marketing funnel. In this model:



A top-of-funnel team is responsible for loading lots of leads at the top of the funnel (this would be the team in charge of your web SEO, web optimization, and paid media. Their KPI is the number of MQLs.

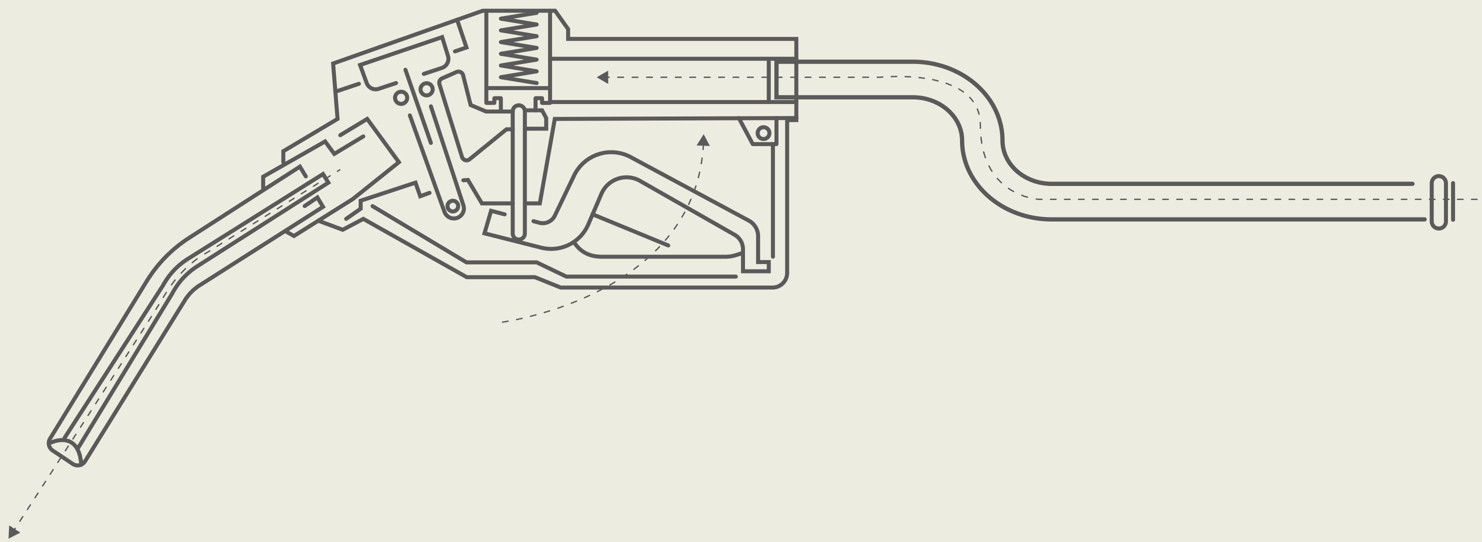
A middle-of-funnel team is made up of the current demand-generation team and marketers who are working on nurture campaigns that target a higher sales qualification rate.

A bottom-of-funnel team who are your account reps and a marketing team focused on accelerating the pipeline and helping your closers create good relationships with their opportunities. Their KPIs are all related to closed-won volume, average order size, and deal velocity.

A customer loyalty team, made up of account managers and renewal and customer marketing teams. They are responsible for reducing churn.

Larger companies or those with complex technical systems need robust internal IT support. A task force made up of sales ops, marketing ops, and internal IT should work toward this. A ticketing system can be helpful and the task force should evaluate each ticket and discuss how feature requests affect each system.

At smaller companies, it works well to have a single strong administrator for both the MAP and the CRM—a sales and marketing ops team of one, in other words. But it's important that the single administrator have a very clear and distinct process for making major changes and logging those changes, both for the redundancy (do you really want your organization to be completely without any systems knowledge if your admin quits?) and to support the administrator when saying no to requests that might adversely affect systems operations. For example, if you have a list of seven lead sources, and that's what you base a lot of your reporting on, a request by a sales director to add an eighth lead source has real repercussions across your reporting. Make sure that a structure is in place so the admin can adequately review, respond, and say no to requests—or at least require requesters to complete a business requirements document.



DO-IT-YOURSELF SERVICE

The mantra of any good data system is “garbage in, garbage out.” At Yesler, we work with many clients who have abandoned some of the more complicated functions of their MAP because of the state of their data. None of the exercise of setting up a MAP, integrating it, building dashboards, or creating a revenue model is even a little bit worth it unless you proactively create a way of ensuring that your data gets and stays clean. Similarly, making sure you set up some ironclad opt-out and email preference rules will ensure that you don’t have to sweat any legal grey areas around whether you can market to all the prospects you worked so hard to collect.

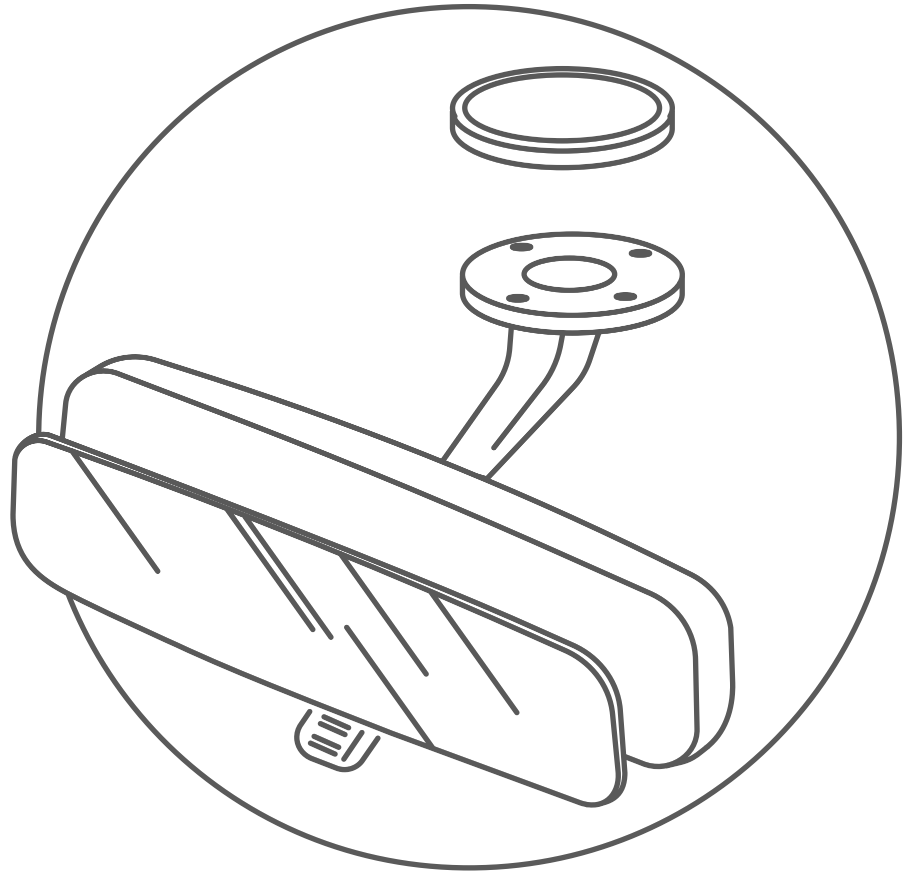
These are business-level decisions, and they should be made by business-decision makers at your organization. How long can we market to our prospects? Do we want to purge the database of inactive or unmarketable leads after they sit for a year? Two years? How can we stop garbage from getting in? These are the questions you need to answer at a high level before you can delve into the tactics of *how* to keep the data clean.

DON'T LET DATA BE YOUR BLIND SPOT

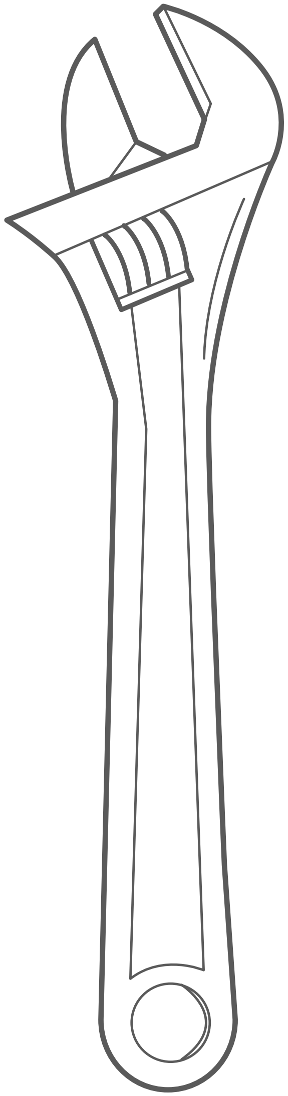
You might believe you have more important things to do with your time than worry about how clean your database is. After all, isn't it better to focus on creating content, building landing pages, running campaigns, and measuring the results of all your hard work?

Not if you don't put first things first. Think of it this way: If you're going to drive across the country, you simply can't start without a fresh oil change and checking the air pressure in your tires.

Keeping your data clean is usually done in two places. First, do everything possible to verify that new records in your MAP are accurate—no fake names or email addresses allowed. Second, revisit your CRM database on a regular basis to scrub away the spots.



UNDER THE HOOD



MULTIPOINT DATA INSPECTION

1. Don't let bad data in

The best way to ensure clean data is to keep bad records out of your database. When new contacts fill out a form, whether it's to download a new piece of content or sign up for a newsletter, send a confirmation email in real time. If that confirmation email doesn't reach the lead, don't let the lead into your database.

We're not saying you need to make the new lead click anything once the confirmation email has been received (most of our clients choose to send prospects directly to a piece of content from the landing page). You just need to make sure it's deliverable. This is a great opportunity to say hello and thank your new prospect for signing up.

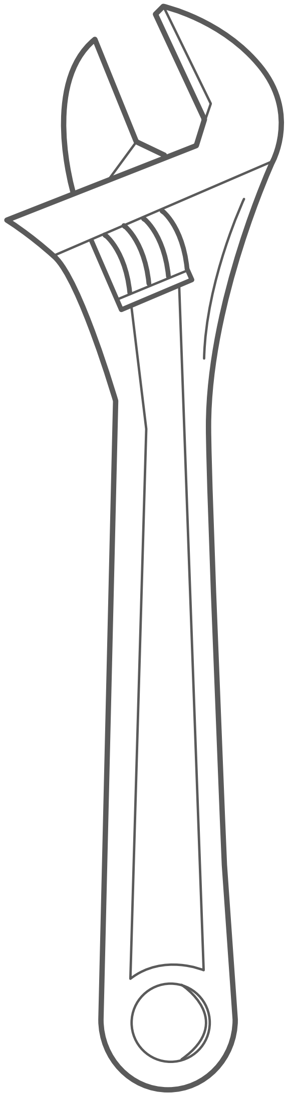
Aside from leads that give bad email addresses, it's worth thinking about who else to close the database doors to. You can use third-party data enrichment tools like InsideView or ReachForce to broaden the exclusion criteria. Here are a few categories to consider excluding entirely:

- Competitors
- Completely unactionable leads—for example, someone whose email address can be verified, but who works at a company too small for you to sell to
- Partners
- Leads with a personal or free email address

Keeping bad leads out of your database will look a little different depending on the MAP and CRM systems you have. If you decided to sync only qualified or quality leads during design of your intelligent lead sync, you can avoid sending these bad leads to your CRM and then set up a regular purge of them from your MAP.

If you are syncing one to one, and every lead from your MAP goes into your CRM, you can assign junk leads to their own queue, to the sync user, or to a marketing user and purge regularly from there.

UNDER THE HOOD



2. Clean records regularly

Time to clean up! An occasional scrub should remove bad records and leave you with a sparkling contact list. We recommend performing a good sweep once a quarter. You should review your database for:

- Global unsubscribes
- Hard bounces
- Duplicate contacts and accounts
- Inactive contacts

Once you've cleaned your records, you should feel confident that all addresses are accurate, unique, current, opted-in, and deliverable. Remember, contacts are a lot like your email campaigns. It's not about quantity—it's quality.

3. Check duplicates

Unless your company is intentionally using duplicates in your CRM or MAP (because of shared instances or other business reasons), ensuring the absence of duplicates is critical for compliance with the CAN-SPAM Act. One of the most common compliance mistakes we see is having one record that has opted out and an accidental duplicate that hasn't, which then gets picked up for campaigns and sent email. Whoops!

MAPs often have tools that reveal possible duplicates (Marketo even has a System Smart List for this). CRMs have tools like RingLead that can prevent and manage duplicates that the sales team might accidentally create.

From an administrative point of view, we also recommend tools like CRMfusion's DemandTools that can schedule mass merges, conversions of leads to contacts, and purges and deletions at regular intervals in your Salesforce instance. This feature is great because it means you can set up global merge and purge rules that you can run at night when no one is working. (Just like charging your electric car!)

EMISSION CONTROL: EMAIL PREFERENCE CENTERS

Email preference centers, like basic data hygiene, are something every MAP can help you create, but are seldom used in the way they should be to aid in delivering relevant, welcomed content to your subscribers.

Make sure you pass inspection

The first thing to do when implementing or re-implementing your MAP is to ensure that you have the components in place to comply with antispam laws wherever your leads are. Here are a few quick tips:

- Antispam laws in Canada (CASL) are now the strictest in the world. You could, if you want, engineer your whole database to comply with them and you'd (generally) be in compliance almost everywhere else. This is quick and easy, but it will also cause rapid attrition from your database because the law requires obtaining additional consent to send messages if the last request for information was more than six months ago. This may not necessarily be a bad thing. After all, do you really want to keep marketing to leads that requested a piece of content six months ago and have done nothing since?
- You could also split out leads from Canada, the European Union, and the United States and create different opt-in and opt-out requirements for each. This requires a little more work but will, in the long run, give you more access to more leads.
- While most MAPs take care of unsubscribe requests for you, ensuring that you have the right legal components in your email footer is another piece of compliance to pay quick attention to—from when you first set up your email templates. (Keep those components hard-coded in the template so marketers can't accidentally alter them.)
- When in doubt, ask a lawyer! While it's relatively easy to comply with antispam legislation and give your leads a good experience as subscribers to your content, penalties for violating antispam laws are significant. If you have a complex lead database or procedures for sending email, it's better to check than be sorry.

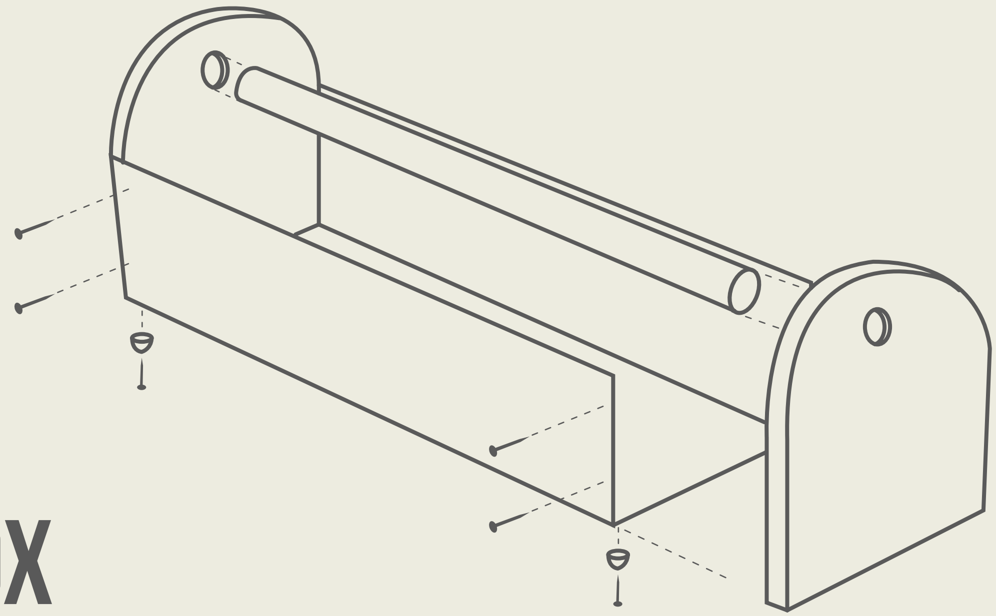
Beyond handling unsubscribe requests and basic legal compliance, setting up an email preference center can help your email marketing be more successful. An email preferences center allows leads to tell you the kind of content they want to receive by selecting from a list of content categories, and it ensures that your marketers are always bucketing messages in one of those categories.

THE NO-SURPRISE EMAIL PREFERENCE CENTER

The best email preference centers do a few key things:

- Allow prospects to understand and choose from a range of types of communication ("I want to hear only about webinars" or "I want to know everything your company does!").
- Understand what those options are and how they map to what they receive from you. In other words, you don't want someone enthusiastically saying they want to receive emails about webinars, then getting emails about webinars that are actually your newsletter, which contains a lot of other content.
- Understand the frequency of communication they are signing up for. Again, this is part of a more general no-surprises rule.

There are several ways to accomplish all the above, but as you design your system, be sure to involve the person who is in charge of developing your marketing content and those who will write the emails when you create the email preferences center. By involving content creators, you'll hear them describe the type of content they are distributing, and you can better align your list descriptions with what is actually being marketed.



TOOLBOX

PLATFORM SELECTION

Three questions to consider before investing in marketing automation

Grow your own marketing automation rockstar team

Is it time to break up with your marketing automation platform?

Business requirements document template and user stories example

Systems audit checklist

SCORING & SOURCING

How to get sales buy-in on lead-scoring models

Setting up buyer-cycle scoring in marketing automation

INTELLIGENT LEAD NURTURE

Five data sources for building buyer personas

Setting up buyer-cycle scoring in marketing automation

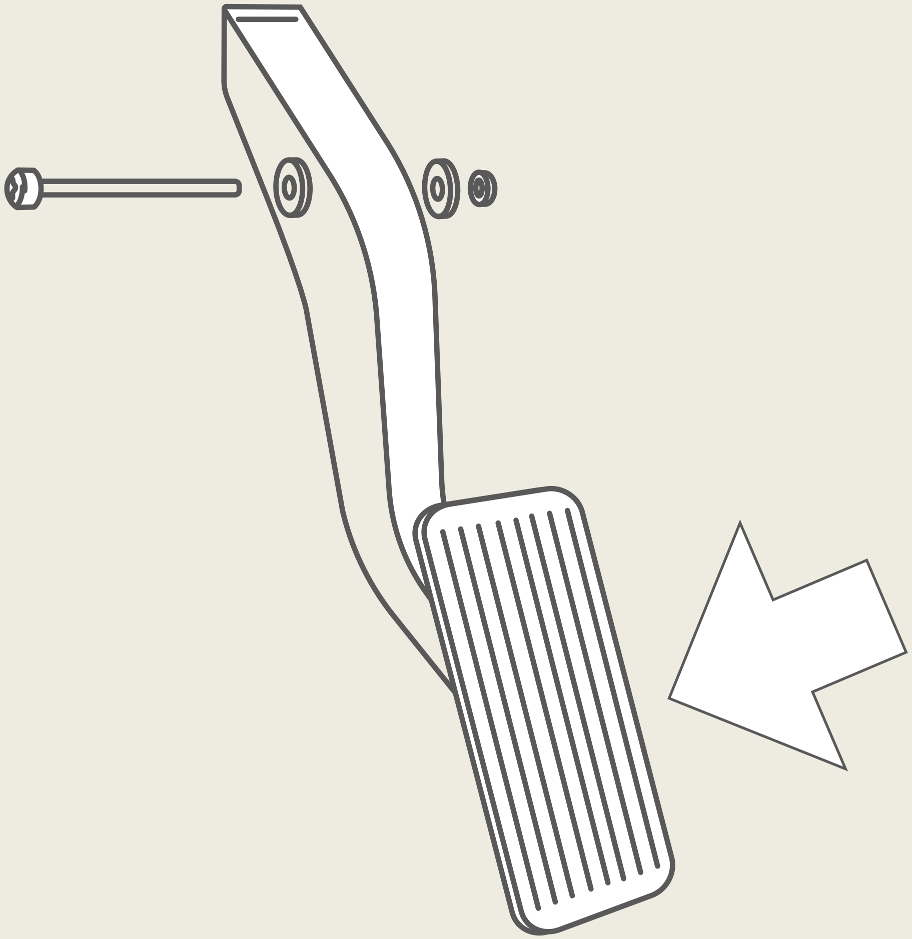
PROVING VALUE

B2B marketing analytics cheatsheet: making sense of marketing metrics

4 must-have funnel metrics for sales & marketing alignment

DATA HYGIENE

Canada’s anti-spam legislation



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Pedal to the metal!