

The Truth About Marketing Automation

**Conversations with Successful
Marketers Who Are Realising the
Potential of Marketing
Automation**

By David Sloly
HarveyDavid Ltd

**Created by
HARVEYDAVID**

HarveyDavid is a pragmatic and commercially minded marketing agency that applies its unique Funnel Vision methodology to optimise clients' sales and marketing performance.



**THE PRESSURE
ON MARKETING
TO DRIVE
REVENUE
IS GREATER
THAN EVER**

Mary Wallace

Director of Marketing Technology UBM

INTRODUCTION

I have had the pleasure of interviewing more than 30 marketing automation practitioners from all over the world. Each of them have faced and overcome significant challenges. I hope you find their stories engaging and more importantly, useful, wherever you are on your marketing automation journey.

WHY WRITE ABOUT MARKETING AUTOMATION?

A great deal has been written about the benefits of marketing automation as well as guidance on campaign strategy and technical set-up. But what about the less obvious questions? For instance, what sort of team do you need to successfully implement marketing automation? And how do you introduce marketing automation to the rest of the business?

There isn't much information out there on these 'softer' subjects. So I thought the best thing to do was to speak to senior marketing practitioners who are 'at the coalface', solving these problems on a daily basis.

A COLLECTION OF VALUABLE IDEAS

These conversations brought to light some common themes and valuable ideas. It struck me that this sort of hands-on experience would be perfect for people who are considering marketing automation, or for those who want to compare how they are using it with others.

I hope this document will help you make the right decisions based on the lessons learned by people who have already walked this path.

DAVID SLOLY

Co-Founder HarveyDavid

We optimise marketing at every stage of the funnel to increase revenues and margins.

**MAKE THE
RIGHT DECISIONS
BASED ON
THE LESSONS
LEARNED BY
PEOPLE WHO
HAVE ALREADY
WALKED THIS
PATH**

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01.

**GETTING
THE C-SUITE
TO BUY INTO
MARKETING
AUTOMATION**



**TRYING TO
SHIFT AN
ORGANISATION
FROM 'BATCH
AND BLAST'
TO PERSONAL
COMMS IS VERY
CHALLENGING**

Mary Wallace

Mary Wallace is the Director of Marketing Technology at UBM plc, a market-leading B2B media and events business. As well as being a marketing technologist, Mary is serious about figure skating. A sport that balances every moment of grace with the risk of a fall.

I wanted to find out from Mary how she persuaded UBM's senior management to adopt marketing automation and engage with customers on a more personal level. It turned out to be a story of incremental steps and calculated risk.

11 | “Many in the business felt that batch and blast had worked for the last 10 years, so why should they change? Trying to shift an organisation from ‘batch and blast’ to personal communications is very challenging. And trying to convince the leadership team that personalised communications based on relationships could work, is not a change that happens overnight.

As marketers we all know that personalised, value-based communication works. But to get leadership to buy into that idea is tough because it is a risk. As a media and events company, email was seen as a tool closely associated with revenue. This means a lot of pressure on any change to the status quo.

As much as our marketing automation has grown and matured, we are still in our infancy in terms of what we can accomplish.”

BALANCING THE PRESSURE TO DRIVE REVENUE WITH THE NEED TO EVOLVE

“The pressure on marketing to drive revenue is greater than ever. When you have that level of need, it means change can be very slow as you turn on not only the technology but the strategies, people and processes around that technology.

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Hailing the wins along the way helps drive change. For example, a ‘wake up’ campaign to previously dormant contacts that is personalised depending on need. Talking to the leads about what they are interested in results in higher conversions. And that opens any company up to the idea that we need to do more of this.

I’m used to taking steps that most people find terrifying. One of the ways I do this, is by visualising myself ice skating.

In ice skating, the more you practice the better you get. You get a stronger edge, a better curve and most importantly greater flow. The same holds true for marketing automation – the more you work at it, the further you evolve. There is an edge in ice skating. Similarly, there is an edge in business. Both are a thin line between success and a mishap. You must work hard to understand that line and how to get the most from improving it. You must practise. The stronger the curve, the better the edge and ultimately, the better the flow.”

02.

**FINDING THE
MARKETING
AUTOMATION
SHAPED
PERSON IN
YOUR
BUSINESS**



**A LOT OF
PEOPLE GOT
INTO MARKETING
FOR THE ART.
NOW IT'S ABOUT
TECHNOLOGY**

Lauren Kincke

Lauren Kincke has spent nearly a decade working as a Marketing Automation Consultant with deep expertise in Oracle Marketing Cloud. During her time as the Practice Manager for the Pedowitz Group, Lauren was responsible for their Marketing Automation management and strategy.

Lauren is a specialist in training internal resource with no automation experience as well as managing outside consultants. This puts her in a unique position to understand who is best placed to lead marketing automation across the business.

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THE IDEAL QUALITIES OF A MARKETING AUTOMATION LEADER

“I don’t think that the CMO or CIO could lead your marketing automation efforts. Both of these roles have importance but the marketing automation person has to be unique.

This person is there to ensure they have all the ducks in a row across the entire business and that function is bigger than marketing. The marketing automation person needs to live outside of the C-Suite. Their goals are different, and they don’t have a single master.



**ONE OF THE THINGS
WE'VE SEEN IN
COMPANIES WITH
LEGACY PROCESSES
IS THAT SOME PEOPLE
CAN GET IN THE WAY**

They need the autonomy to function with their own budget and report to the same person as the CMO/CIO. For example, the CEO or COO.”

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What are the two key things that Lauren would recommend every business looks for when selecting someone to lead their marketing automation roll out?

1 – DIPLOMACY

“One of the things we’ve seen in companies with legacy processes is that some people can get in the way. We know all these roadblocks exist, but we need to break them down one by one in order to install the technology. Others know they need it, but they can’t get out of their existing habits to make it happen. The Marketing Automation Lead needs to be able to know how to get results, create alignment and prevent everything grinding to a halt. Getting agreement on the basic things requires a lot of diplomacy.”

2 – EXPERIENCE

“A lot of people got into marketing for the art. Now it’s about technology. IT team members tend to be too rigid. Sales people want to focus on closing deals. The gap between those with marketing automation skills and those without is huge right now. You need an experienced marketing technologist to fill this gap.”

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THE PERSON LEADING MARKETING AUTOMATION NEEDS TO WORK ACROSS THE ENTIRE BUSINESS

“The person in charge has to be a marketing sales technologist. It’s a game of musical chairs using a three-legged stool. Sales, IT and marketing. All three departments have very different motivators. Sales concentrate on doing the next deal. IT cares about technical functions and risk mitigation. Marketing wants to move people to take action. In fact, you can break the desire down even more:

SALES = MONEY

IT = PROBLEM SOLVING

MARKETING = CREATIVE

I think that the person in charge of marketing automation has to be a marketing sales technologist. There will always be more weight on the sales side than marketing. At the end of the day the sales number hits first and hardest. It takes a really enlightened C-Suite to sit down and say marketing needs to lead.”

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**THERE ARE A HANDFUL
OF CERTIFIED PARTNERS
WHO ARE VITAL IN
HELPING YOU IMPLEMENT
MARKETING AUTOMATION**

HOW TO BUILD THE REST OF THE MARKETING AUTOMATION TEAM

“In my last job we were like a SWAT team. Give us a problem, we’ll solve it. Under your Marketing Automation Lead, you should put together a SWAT team with a member from each department.

If they choose to accept, they become a unified front with the single aim of improving the buyer experience.

From IT, hire a good communicator, someone open to ideas, a person who is good at bridging the gap between business and technology.

From sales, hire someone who is an early adopter. They need to be more advanced in the use of applications (not the Rolodex), metrics-oriented and understand the art and science of sales.

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From marketing hire a bridge builder, someone ready to help and explain concisely how marketing automation benefits the business. They can bind the whole thing together – they are the glue between the pieces.

You also have to become friends with agencies to do the job. There are a handful of certified partners who are vital in helping you implement marketing automation.”



**THE MARKETING
AUTOMATION LEAD
UNDERSTANDS THE
MARKETING GOAL,
SALES GOALS AND
THE TECHNOLOGIES
AVAILABLE TO
REACH THEM**

WHAT HAPPENS WHEN YOU DON'T HAVE A MARKETING AUTOMATION LEAD?

“There are a lot of marketing automation instances in companies that are being used to little effect.

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This is why you need to create this new role. The Marketing Automation Lead understands the marketing goal, sales goals and the technologies available to reach them. It gives one person the ability to see that single view that no one else seems to have.”



**I THINK THAT THE
PERSON IN CHARGE
OF MARKETING
AUTOMATION HAS
TO BE A MARKETING
SALES TECHNOLOGIST**

03.

**GETTING
THE WHOLE
BUSINESS
TO ADOPT
MARKETING
AUTOMATION**



**A LOT OF
EFFORT GOES
INTO SELECTING
THE MOST
EFFECTIVE
SOLUTION.**

**RARELY DOES
IT FOCUS ON
HOW THE
WORKFORCE
WILL EMBRACE
THE CHANGES.**

Sarah Hulme

Sarah Hulme has been helping organisations from HP to the Ministry of Defence implement change management strategies for almost fifteen years. She knows a thing or two about getting teams to embrace new software.

As we have already heard from previous contributors, introducing advanced marketing automation software requires full participation from everyone involved. Only once you have their buy-in, will the business reap the full rewards.

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WHAT ARE THE PITFALLS AND HOW CAN YOU AVOID THEM?

“The biggest mistake I see companies make is they set into motion a plan before they have mapped out a strategy.

We’re all creatures of habit and simply announcing change doesn’t mean the change will happen. People are busy, they have deadlines, meetings that overrun and people asking them to deliver the impossible. So what do they do? They revert to type. They go for the path of least resistance. And that is usually the way they did things before the change was announced.

A lot of the senior decision-makers' effort goes into selecting the most effective solution for the business. Rarely does it focus on how the workforce will embrace the changes. With a solution like marketing automation it will potentially disrupt an entire marketing department and beyond, and no one likes that, so it may be met with resistance.

20 | People will use the bare minimum of features. Usually, just enough to be able to tick the 'I'm using it' box. Others will just continue with business as usual and not touch it at all. Parts of the business that rely on marketing may hear about the new platform and start asking to run campaigns through it. And depending on who they ask, they will get very different levels of support.

These inconsistencies mean the business has no unified process. Add to that people leaving and new people joining, and you end up with siloes of people doing it their way, be that best practice or otherwise."



**A TECHNICAL RESOURCE
MANAGING CHANGE
IS THE WRONG TYPE
OF PERSON**

HOW TO ENCOURAGE TEAMS TO SUPPORT CHANGE

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“You start by clearly defining who owns the adoption. In larger organisations it would usually be the business change division or the business change manager. Failing that it could be the customer service manager or a dedicated project manager. The key is they need to be accountable for making the change happen. It is not the role, as people often think, of the technical department. A technical resource managing change is the wrong type of person.

Technical teams can implement the software as that is a very rational process, but they are not usually best suited to delivering the softer skills required for adoption. That’s the job of someone used to implementing change and appreciates the nuances that exist when it comes to asking people to change the way they have been doing something for the last 10 years.”

HAVING A CHANGE MANAGEMENT STRATEGY IS VITAL

“True change begins with a clear strategy. Once you have a strategy you will be able to create a plan that helps people to embrace change.

You need to look at it as a project for change, not software adoption. You can put the software on a person's laptop and give them a password, but you need to get the person using it and using it well.

The key is having someone own the plan for change and manage it across the business. To do this, they need to produce the following:

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1. Communication plan for the change (out to the stakeholders)
2. A training plan
3. A 'champions' plan (how you will manage your champions across the business)

BUILDING A CHAMPIONS NETWORK

“One of the key successes of any business change is to build a champions network. The champions are a group of people across the business who champion the change. They are positive people who understand the reasons for change and are excited by it. They are also the ones who can be approached for advice. Getting the right champions is so important. I run a workshop just on how to choose and build your champions network. Done correctly the champions become the conduit for change.

When the strategy and plan are in place, change will be accepted and embraced within the organisation and everybody will be well informed. They will understand why the change is coming, how the change will help them and what adjustments they will need to make to ensure the change is successful. Different departments will be following the same consistent best practice and be able to get the most out of new software and deliver on business objectives.”

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CHANGE HAS TO BE LED FROM WITHIN

“Business change isn’t something you can hire an outside company to deliver for you. The change needs to be led from inside your organisation.

An outside company can support by running workshops, sanity checking your strategy, or help measure the ongoing success of adoption across the business.

Marketing automation can make a fundamental difference to a company’s bottom line. But if it is not strategically thought through then it can end up as an expensive icon on someone’s desktop.”

04.

**MAKING THE
TRANSITION
FROM AN
EXISTING
PLATFORM
TO A NEW
ONE**



**THE CHALLENGE
WAS THAT
WE HAD ONE
EXECUTION
TEAM GLOBALLY
HAVING TO
WORK ON TWO
SYSTEMS WITH
AN INCREASE
IN VOLUME
OF CERTAIN
SERVICES**

Miles Blomfield

Miles Blomfield heads up Global Marketing Automation Strategy and Innovation at Cisco. He recently led their transition from an existing marketing automation solution, Unica, to Eloqua. For a company as large and multi-faceted as Cisco, this was no mean feat.

MOVING FROM EMAIL TO ‘OMNI-CHANNEL ORCHESTRATION’

26 | “We first had to press pause to be able to move forward. Transition is all about effective change management communication, because otherwise people will always get left out of the loop. We knew who was going to do what, but we needed to ensure all our communications were effective. The impact was going to affect 5,000 people, and that’s just a conservative guess.

Our legacy marketing automation tool was a database marketing platform. It was working well. But it was not the right platform to enable us to transform both for ourselves and for our customers. I don’t know if it was the word marketing automation, but most people made associated it with email, and we needed to show everyone that the shiny new toy was much more than just another email tool.

And that it wasn't something that you could pick up and use with a few clicks of a mouse.

I began by talking about it as being more than just an email tool. Concentrating on it being an always-on, customer centric, omni-channel orchestration platform. What helped is that this was communicated by the senior management all the way down.”

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**I BEGAN BY TALKING
ABOUT IT AS BEING
MORE THAN JUST
AN EMAIL TOOL**

HOW TO COMMUNICATE THE PLAN TO THE REST OF THE BUSINESS

“We paid for the legacy marketing automation license through a couple of different departments, with different end dates. So, I set a target date of 31st December 2016 for the ramp down plan and brought that to the attention of those that would be affected. I started sending emails with minimal information, including imagery that would grab attention. I sent this to anyone who may be placing an order with the existing solution.

I also had an internal web page that was regularly updated with information and progress reports as well as a visual of a Gantt chart to show all of the work that needed to be done by IT, my team and others. People were concerned about what would happen to the data, so I had to explain that data would be warehoused on its own CRM and that would not change. I didn't want to create panic or loss of service or leads."

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THE IMPACT WAS GOING TO AFFECT 5,000 PEOPLE, AND THAT'S JUST A CONSERVATIVE GUESS

SETTING UP ACCESS PRIVILEGES AND CHOOSING WHICH CAMPAIGNS TO MIGRATE

"Layers of access were created, from 'view only' to full campaign admin. And within the company we also had our own certification to ensure people were confident and able to use the tool at the level they required.

There were more considerations too. If it was a successful campaign journey that fed inbound, then we would transform it into our new platform, but otherwise it would be a clean start. No lift and shift. The challenge here was that we had one execution team globally having to work on two systems with an increase in volume of certain services. For example, list pulls of data and requests for tracking code creations within the outgoing system.”

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MANAGING THE GLOBAL TRANSITION AT SCALE

“I’m a huge believer in Google trackers, and for every part of the project I set up a Google tracker, with everything recorded. This allowed me to monitor and gather everyone’s input globally, prioritise the work and manage the transformation. I allowed for timelines to move. We started with 31st December 2016 as a date, it seemed realistic, but in the end, we adjusted to relieve pressure on everybody. For example, because of the ISP whitelisting in China for the API region, we had to allow them to continue using the legacy platform. There were some other technical country issues, so it wasn’t an immediate cut off, but everyone was by now, working towards a common goal.”

REMEMBER TO CREATE A SENSE OF POSITIVITY

“If people think they are going to a meeting with IT about marketing automation, they will normally feel uninspired. I needed to shift that perception.


30 | I remember joining a meeting that I knew may be a bit tricky, so to break the ice I put on a Christmas jumper with flashing lights. You can't get mad at a man in a novelty Christmas jumper! I sometimes get my dogs on video calls and behind me on my office wall I have vinyl album covers which people try to guess. It all helps to make the call memorable and fun. I did whatever I had to do to make it light and get the work done.”



**TO BREAK THE ICE I PUT
ON A CHRISTMAS JUMPER
WITH FLASHING LIGHTS.
YOU CAN'T GET MAD
AT A MAN IN A NOVELTY
CHRISTMAS JUMPER!**

05.

**STRIKING
THE BALANCE
BETWEEN
CREATIVITY
AND
TECHNOLOGY**



**YOU DON'T
WANT SOMEONE
AT THE TABLE
WHO IS PURELY
TECHNICAL,
OR YOU
WILL HAVE
A TECHNICAL
IMPLEMENTATION**

Greg Wilson

Greg Wilson is never happier than when he's whiteboarding complex concepts in order to provide clarity. Which is handy as in his current role at Sage, Greg finds himself sitting between the marketing and the technical delivery teams. As a result, he's used to balancing the needs and preferences of creative and technical personalities.

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WHY YOU NEED TECHNICAL AND CREATIVE SKILLS TO SUCCEED

“Like many when we first implemented our instance, we provided logins to anyone in marketing who needed them. For the first few months that probably worked, but over time it became clear that this approach doesn't work at scale, as you expand across borders or become more sophisticated in your approach.

You don't want someone at the table who is purely technical, or you will have a technical implementation. But if they are purely creative and don't understand how you build programmes you will also have issues. You need a combined DNA with both technology and creative dimensions.”

TEMPLATABLE CAMPAIGNS THAT UPHOLD CREATIVE AND TECHNICAL STANDARDS

“At Sage, when marketing requires something they submit a request. 80% of the requests are for webinars, events and the like. We have a standard play for all those things with all the templates laid out in advance. We’ve already considered the marketing and technology requirements and baked it in from the start.

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For those types of executions field marketing creatives deliver the idea, the copy and any images. And with our new tooling they can choose to self-build the emails or have the team build them. But you cannot deliver plays at speed and scale, with consistent user experience, without having standards. To make this happen we had to create more detailed brand guidelines. The standard brand guidelines did not get into the detail required to build an on-brand email and landing page experience.

What we ended up with is an approved set of modules and layout designs that are completely aligned with the brand guidelines and web UX. Life became easier – no complicated discussions about image types, pixel size and resolution. Plus, if you use the templates and approved image builder tools, you don’t need to send it for brand approval.”

BUILDING MORE SOPHISTICATED CUSTOMISED CAMPAIGNS

“The other 20% of work we do is custom work: typically, global segment or category campaigns, or customer onboarding and lifecycle comms. In these cases, we work with the campaign creative teams to design and build out the omni-channel, multi-touch and always-on programmes.

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Marketing already knows the product, the customer and their requirements. But they may not know how they will orchestrate this across channels. They may just think ‘let’s drive them to a landing page’.

Our job is to ask: And then what? What are the data points we want to capture over time? What are the true signals indicating they are moving forward in the buying cycle?

And do we know when or how we pass the lead to sales, or pause the journey because a quote has been sent to the customer? These are the considerations that the technical marketer will consider up front. What we sometimes refer to as the ‘in, about and out’ of any given programme or canvas.

Now that these enhancements have been embedded, we are better positioned to examine how we can give the marketer more involvement in the process, even providing self-serve for simpler tasks, if that’s what they want.”

06.

**IF YOU
WANT TO
BUILD AN
EMOTIONAL
CONNECTION,
DATA CAN
ONLY TAKE
YOU SO FAR**



**HUMAN,
EMOTIONAL
CONNECTIONS
ARE WHAT
DRIVE NEW
OPPORTUNITIES,
WHATEVER
BUSINESS
YOU'RE IN**

Ryan Rijken

Ryan Rijken is a marketing automation specialist who describes himself as a Campaign Creator and Digital Janitor. He has spent years helping companies tell their stories through marketing automation and understands what it takes to pull together a great content strategy. Today, he works at one of the world's leading elevator companies.

THE IMPORTANCE OF STORYTELLING

38 | “I believe that the best marketers are great storytellers. They understand that telling an organisation's story well is the best way to draw new business. And keeping that story alive is the best way to maintain customer loyalty.

In order to tell a story well, you have to understand your audience. For us, understanding our audience begins with data. The organisations that are winning right now are those that understand the value of data integrity.

One of the biggest hang ups I've seen in organisations is that they may have great content and great design. But they don't know how to correctly identify their customer base or tailor content for those customers. While account-based marketing is all the rage, we have to remember that data will lead us to customers that are individuals, not just an account.

When we incorporate these individuals into our story it goes beyond what they've purchased from us and builds loyalty.”



**THE ORGANISATIONS
THAT ARE WINNING RIGHT
NOW ARE THOSE THAT
UNDERSTAND THE VALUE
OF DATA INTEGRITY**

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USING DYNAMIC PERSONALISATION TO BUILD AN EMOTIONAL CONNECTION

“Once we can pinpoint our audience we try to frame our story in a way that impacts that particular audience. We utilise dynamic personalisation as often as we can to create a unique content journey.

I want to move to looking at how elevators affect people in their everyday lives, because you don't realise the value of an elevator until it's gone. Being able to tell stories about a couple falling in love, or the daily struggle for success, or even the very real battle against cancer. Framing how we play a role in those stories is going to reveal more about the kind of company we are.

Human, emotional connections are what drive new opportunities, whatever business you're in.”

07.

**CAN YOU
REMEMBER WHY
YOU BOUGHT
MARKETING
AUTOMATION IN
THE FIRST PLACE?**



**MOST
PURCHASES
OF MARKETING
AUTOMATION
PLATFORMS
START WITH
GOOD INTENT**

Harvey Steed

Harvey Steed has been helping organisations get the most out of marketing automation for almost 10 years. Together we co-founded HarveyDavid, a company that optimises marketing at every stage of the funnel to increase revenues and margins. There is one thing that causes Harvey to shake his head in disapproval, and it's an over-reliance on tactical, short-term campaigns which answer the needs of the business but not the customers.

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DON'T LOSE SIGHT OF THE TRUE POWER OF MARKETING AUTOMATION

"We get to work with a number of clients and it's interesting to note the similarities between them, despite operating in different markets and sectors. A common challenge is tapping into the full potential of marketing automation.

Now let me be clear from the outset, this isn't the fault of the platform. Yes, marketing automation is a very powerful and some platforms require a high degree of technical ability to use. However, it's usually the wider organisation losing sight of what they are trying to achieve that derails things.

Most purchases of marketing automation platforms start with good intent. Leadership buy into the promise of a fully-automated, seamless and friction-free customer experience. One which allows marketing

to attract, nurture and then pass qualified leads and opportunities to the sales team to close. They also relish the idea of having detailed reporting and attribution models, so they can make the most of their limited marketing spend.

However, old habits and the pressure to create more demand with dwindling budgets means that these intentions quickly fly out the window. They revert to a hotchpotch of disconnected tactical campaigns and single email sends. The results are certainly not the dream of the seamless customer experience they bought into.”

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SOUND FAMILIAR?

“It’s something that I’ve witnessed time and time again. And when I see clients in this situation, I always ask them the same question: Can you remember why you started using marketing automation in the first place? They usually describe a common set of goals. The ability to nurture leads, improve the customer experience, create a visible pipeline of opportunities whilst at the same time removing repetitive tasks. Once these goals are on the table, it’s much easier for them to see where they’re going wrong. Suddenly, they’re able to see the error of their ways and get back to thinking about personas, CX strategies and always-on nurture flows.

And more importantly, what their customers really want from them, as opposed to what they want from their customers. Right then and there we're able to redefine their campaigns and join them together to create a more effective nurture strategy.

So, my best advice for marketing leaders responsible for demand generation is, every now and again, take a step back and remember why you bought marketing automation in the first place."

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Created by HARVEYDAVID

We optimise marketing at every stage of the funnel to increase revenues and margins

- Implementation
- Integration
- Managed Services
(asset & campaign build)
- Technical support
- Training
- Lead generation & lead nurture strategy

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The stories that I've collected are drawn from across the industry. Some of them may tally with your own experiences, some of them may be totally new. Whatever the case may be, I hope that you found them useful.

As you can see, there is no one-size-fits-all approach with marketing automation. But once you have the platform and your teams aligned, it really can be a game changer. If you are embarking on your marketing automation journey and are looking for expert advice and guidance from a solution-focused partner, then maybe we should talk.

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