

Picking the Right Marketing Automation Deployment Strategy

Raab
associates, inc.
730 Yale Avenue
Swarthmore, PA 19081
www.raabassociatesinc.com
info@raabassociatesinc.com

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Introduction: One Size Doesn't Fit All

We all know that “one size fits all” isn’t really true when it comes to clothing. But one set of “best practices” are widely accepted as fitting all marketing automation deployments. Specifically, marketers are told that the only way to ensure success is to carefully plan and execute a complete transformation of their business. Results are judged by how many system features they employ. Projects that use only a few system features are considered a failure.

The real world isn’t so simple.

Companies have different needs which are best met by different types of deployment. Sometimes a full transformation isn’t necessary; in fact, sometimes marketing automation itself isn’t appropriate. Rather than blindly following a checklist of one-size-fits-all best practices, companies need to assess their own situations, identify appropriate goals, and pick a deployment approach that fits their needs like a custom-tailored suit.

Start by Setting a Goal

In most companies that sell to other businesses, the main role of the marketing department is to deliver qualified leads to salespeople. In recent years, this role has expanded as leads are turned over later in the buying process and as leads interact with marketing content on Web sites and social media even after the official hand-off. Marketing automation systems support this role with standard features including sophisticated email, landing pages, Web behavior tracking, lead scoring, CRM integration, automated workflows, and a database of lead profiles, messages sent, and responses received. Some add Web advertising, blogging, social media posting and tracking, content libraries, Web site personalization, budgets, forecasts, revenue analysis, and project management. The most comprehensive systems go still further to include full CRM and Web site management.

A modern B2B marketing department does everything these features imply, so it’s easy to see why successful deployment is often defined in terms of using them. But many departments have adequate solutions in place for some of these needs and have decided to forego others entirely, at least for the moment. As a result, marketers often end up with a system that does things they don’t care about. This is particularly true at larger organizations, which must purchase powerful systems to get sophisticated functions, even though those systems include other functions they have no intention of using.

In short, project goals are defined first in terms of business objectives, and then in terms of the features that support those objectives. The business objectives also determine which parts of the organization are involved, which, as we’ll see shortly, has a major impact on deployment methods. Here are some common goals and their implications:

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- **New names:** marketing wants to attract new prospects to enter the sales funnel. The focus of these deployments is on advertising, blogging, social media, Web site content and search engine optimization, and prospecting emails. These functions are generally part of marketing, although social media and Web site management sometimes report elsewhere.
- **Nuture campaigns:** marketing wants to do a better job of converting existing prospect names into qualified leads. The focus is on multi-step nurture flows that include email, landing pages, and Web personalization to send targeted messages, gather information, and monitor lead behaviors. These are also managed mostly within marketing.
- **Sales alignment:** marketing wants to work more closely with sales to identify and distribute qualified leads and to deliver appropriate messages throughout the purchase cycle. The focus is on lead scoring and sharing data between marketing and sales systems. This requires close coordination between marketing and sales departments.
- **Marketing efficiency:** marketing wants to do a better job managing its internal operations, to reduce costs, run more programs, or both. The focus is on planning, budgeting, cost tracking, project administration, content management, and workflow. These are primarily handled within marketing, although finance and corporate planning groups are also sometimes involved.
- **Results measurement:** marketing wants to show the value of its efforts by linking marketing programs to revenues. The focus is on attribution and data integration. This requires cooperation among marketing, sales, and finance.

Some functions are present in nearly all scenarios. These include content creation, CRM integration, data quality, database maintenance, and user rights management. These require cooperation among marketing, sales, and IT.

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Project Difficulty

Business goals determine the marketing automation features and organizational scope of your project. But other factors affect how difficult it will be to succeed, and thus how tightly the project needs to be managed. These include:

- **Complexity:** bigger changes require more careful management. Complexity depends on the number of people and departments involved, the number of processes that are changing, and the number of steps within those processes. Businesses with long, complicated sales cycles, more personas to market against, more channels to manage, and more information to communicate are inherently more complex. One reason that many “best practices” for marketing automation deployment include detailed, formal techniques is that most best practices are created by consultants who primarily work on complex, complex projects. If your project is relatively simple, you may be able to use a simpler deployment approach.
- **Skills Gap:** new skills require new training, so changes involving many new skills require more extensive deployment projects. As experience with marketing automation becomes more common, deployment will become easier: people working on their second or third marketing automation system have much less to learn than people who are grappling with their first. Note that’s what’s important here is the gap between current and existing skills, not the sophistication of the skills themselves. Even simple tasks can be difficult for people who have never done them before, while deeply experienced users often find it relatively easy to learn even a complicated new system.
- **Technical Requirements:** most marketing automation systems are sold as a vendor-operated service which requires no local software installation. Even on-premise software is usually easy to load and start running. But many marketing automation deployments still require significant technical support to import existing data, manage data quality, integrate related systems, and provide general support. Greater technical effort requires more detailed planning and may call for outside resources. On the other hand, your IT department may provide experts in system implementation, training, and change management, reducing the burden of your deployment effort.
- **Urgency:** every marketing automation project is important, but some are more mission critical than others. True urgency may result when there’s no other way to perform core functions, such as send emails or transfer leads to CRM, when the system is supporting a new product or region, when old systems are no longer available, when marketing generates a large share of total business, or when systems are so tightly interconnected that failure in marketing automation causes cascading problems elsewhere. When the cost of failure is high, it’s worth investing more to ensure success.

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Deployment Tools

Different deployment projects face different challenges. Let's now look at the tools marketers have available to meet them.

- **Strategic training.** The marketing automation deployment may be part of a change in fundamental business or marketing strategy. If so, the new strategy needs to be carefully worked out and all affected groups need to understand their roles, responsibilities, and success measures in the new environment. Marketing automation will probably be a key enabling technology for the new strategy, so training in marketing automation should be integrated with training for other changes.
- **Process redesign.** Marketing automation deployment may be accompanied by changes in existing business processes, both within and outside of marketing. The new processes need to be developed, tested, and incorporated into marketing automation training. Greater changes from existing processes require the more detailed and formal process change management.
- **System training.** Even if business processes remain roughly the same, users will need to learn the new system. The amount of training needed will depend on the existing skills and differences between the old and new systems. Skimping on training is one of the most damaging mistakes you can make and among the easiest to avoid, so be sure to allow adequate resources and to test users for competency before declaring training complete. Remember to include training for sales users who will access the marketing automation data.
- **Management support.** Changes within a single team can be managed by the team leader; changes within a department can be managed by the department leader. But changes that span marketing, sales, and other departments require senior management support: either by a single manager in charge of all the affected groups or by a team of department managers working together, usually under the guidance of a chief executive. Large organizations often require formal support structures such as a coordinating committee that in turn appoints a project leader. If the deployment is a major project, its success should be built into the leaders' performance reviews.
- **Integration planning.** Nearly every B2B marketing automation deployment requires integration with a CRM system. Many – especially at large organizations – also require integration with other systems including order processing, accounting, and Web site management. When the marketing automation vendor provides prebuilt connectors with the appropriate systems, the integration effort can be minimal. If custom connectors are needed, integration usually requires considerable joint planning, testing, and maintenance with the corporate IT department.

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- **Data governance.** Data quality is critical to marketing automation success, especially when data is shared between marketing and CRM systems. A small organization may be able to monitor and improve quality informally, but a large organization will need a governance program to define standards, monitor compliance, and identify opportunities for improvements. Governance for marketing automation may be independent or part of a broader corporate governance effort. As with leadership, larger organizations are most likely to need more formal approaches.
- **Project management.** Larger projects require more formal project management. This is especially important when crossing organizational boundaries. Large enterprises often have project management experts who can help project leaders put together a plan and track its execution. Smaller organizations may rely on the project leader's own management skills or, especially for complex projects, bring in external consultants to help.
- **Outside resources.** Instead of training their own staff, some organizations choose to use outside resources for specialized deployment tasks, on-going marketing automation operations, or both. This can speed deployment, reduce risk, and improve results, although the out of pocket cost is often higher. Organizations can use outside resources on a short-term basis as their internal staff learns the new skills required for the marketing automation project. Long-term outsourcing is based on a strategic decision about which competencies to maintain in-house. Outsourcing is easier for functions that don't interact with outside departments.
- **Phased deployment.** A small marketing automation project can be deployed in one step, but projects involving many changes or multiple goals are best executed in stages. The challenge with phased deployment is maintaining momentum over time as priorities change and new opportunities appear. This requires starting with a long-term plan and continuing to measure progress against it. It works best in large organizations with mature management processes. Smaller organizations may be able to deploy marketing features incrementally without a formal plan if a key manager continuously seeks opportunities to expand use of the system. But this approach runs a high risk of failure because other projects often intervene.
- **Measurement.** All deployment plans need a way to measure results. This includes measuring use of the system itself and measuring value the system creates. Use is relatively easy to measure; metrics can be as simple numbers of active users or emails sent. Value is harder to measure, but if actual revenue is not available you can track intermediate measures such as numbers of leads generated or change in response rates. Small organizations may be able to rely on informal measures but large organizations will want to define success metrics in advance and track actual performance closely.

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Deployment Strategies

Deployment strategies can range from “just do it” to highly structured. Each strategy involves a different combination of the tools listed above. The right strategy for your deployment will depend on your project goals and situation. Here are some common strategies and when to apply them.

- **Informal implementation.** Small projects within the marketing department can be managed like any other departmental change: that is, the department or team managers can work directly with their staff to implement them. Goals including new names, nurture campaigns and marketing efficiency would qualify, since none require much cooperation from staff outside of marketing. “Small” in this context means relatively low complexity, few new skills, minimal technical resources, and low urgency. Core tools for these projects include system training and measurement. They may extend to phased deployment if there are multiple goals. Slightly more complex projects could add more formal process redesign and project management.
- **Process improvement.** Projects that involve multiple departments can sometimes be managed relatively informally if their scope is limited. These might include initiatives within sales alignment or results measurement, such as refining the lead distribution process or changing how new leads are connected to existing CRM accounts. This approach uses formal process management to define the required changes and work directly with relevant employees to implement them. Managers in each department must approve the project but extensive support or engagement isn’t needed so long the impact on their department is limited. Tools for these projects include process redesign, system training, and measurement. They may extend to light data governance, integration planning, and project management.
- **Outsourcing.** A major change within marketing can sometimes be handled by outsourcing some or all of the new work. This makes the most sense when there is a major gap in the skills or resources available to do the work in-house. Common examples include delegating operation of a new marketing automation system to an agency, hiring specialists in search engine optimization, or creating large volumes of new content. Outsourcing is harder when multiple departments are involved because the coordination needs are much higher. Tools to support outsourcing include process redesign, project management, outside resources, system training, and measurement. Phased deployment, integration planning, and strategic training may also be needed.
- **Formal management.** Major projects require the full set of formal management tools to succeed, especially when they involve multiple departments. This is the classic “best practice” approach that calls for management support, project management, process redesign, integration planning, data governance, system training, and measurement. Strategic training and outside resources may also be involved.

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The following table suggests which when to use each strategy. It uses two dimensions: organizational scope (i.e., whether the project involves departments outside of marketing) and difficulty (a combination of complexity, resources, skills, and urgency). Each strategy fits with a different combination of those factors. Of course, this is a simplification – the real world contains many grey areas where the best strategy is far from clear.

Scope	Project Difficulty	
	Low	High
	• Low complexity • Existing skills • Available resources • Low urgency	• High complexity • New skills • Limited resources • High urgency
Marketing Only • New names • Nurture campaigns, • Marketing efficiency	Informal	Outsourcing
Multiple Departments • Sales alignment • Results measurement	Process Improvement	Formal Management

This table shows which tools apply to each strategy, either always (X) or sometimes (?). Again, your own deployment plan may use whatever combination is appropriate.

Tools	Deployment Strategy			
	Informal	Outsourcing	Process Improvement	Formal Management
• Strategic training		?		
• Process redesign	?	X	X	X
• System training	X	X	X	X
• Leadership structures				X
• Integration planning		?	?	X
• Data governance			?	X
• Project management	?	X	?	X
• Outside resources		X		
• Phased deployment	?	?		X
• Measurement	X	X	X	X

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Putting It All Together

Marketing automation projects have different goals and different difficulty levels, which call for different deployment approaches. This paper has presented four distinct deployment strategies and situations where each might apply. These are only examples: you may have other goals, find other tools, or employ a different combination. What's really important is that you actively assess your own situation and choose an approach that fits your own needs. In marketing automation deployment as in clothing, one size truly does not fit all.

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About Raab Associates Inc.

Raab Associates Inc. is a consultancy specializing in marketing technology and analytics. Typical engagements include business needs assessment, technology audits, vendor selection, results analysis, and dashboard development. The company also consults with industry vendors on products and marketing strategy. It publishes the B2B Marketing Automation Vendor Selection Tool (VEST), the industry's most comprehensive independent guide to B2B marketing automation systems.

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