Marketing automation

Key success factors for marketing automation

5 ways to champion set-up and management

About this guide

Significant growth in marketing automation platforms over the last 10 years means there are more automations, workflow processes and integrations for activating and managing prospects and customers than ever before.

But the machine can't do all the work. Marketers need to put in just as much effort and thought to achieve optimal efficiency. Without this, you'll lose control, the machine will become a mess and you'll fail to see value from your investment.

This guide will highlight the key factors to consider with marketing automation platforms, whether you have one already or are planning to purchase one.

The guide is broken down into 5 sections that focus on common challenges that cause issues and stall management and set up. Quick link to the sections here:

1. **Taming the data beast**
2. **How to avoid limited use of functionality**
3. **Getting Sales excited about your MAP**
4. **Show ROI through robust tracking and reporting**
5. **Create a solid set up**

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We're not here to scare you away from your MAP – they're incredibly powerful, amazing tools!

Getting started

Business should heed this warning: Any marketing automation platform (MAP) will not work exactly as you require straight out of the box. This is no fault of the MAP itself. Any software platform will have certain, basic functionality that works – at a textbook level. But if you want a customised platform that compliments your business processes (and who doesn't) then a bit of upfront work is required.

In the context of B2B

» There are still significant opportunities within B2B with new innovations coming to the forefront to tackle some of the typical challenges seen in B2B digital advertising.

» In this guide, we set out to make clear some of the "dangers" you can fall into with your marketing automation platform if you fail to take the time to consider, set up and maintain appropriately.

» We're not here to scare you away from your MAP – they're incredibly powerful, amazing tools! And by educating yourself on the common areas where negligence can cause headaches, we hope you'll avoid just that.

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Taming the data beast

Feed your MAP with the right data to make it work for you.

Get visibility of your data

At the heart of any MAP is data. It's the fuel that keeps your marketing activity alive and thriving. Despite being such a crucial part of marketing automation, it is the most common area that we've seen our clients struggle with. Typically, the issues faced are one, or a combination, of the following:

Data isn't visible in your MAP

A lot of assumptions tend to be made when implementing a marketing automation platform, and one of them is that all the data you have in your CRM will be readily available in your MAP.

Out-of-the-box, most MAPs will have a selection of "standard fields" that are pre-connected to your CRM. But beyond this, it is your responsibility to add and configure custom fields that will make data from your CRM available in your MAP.

Fields aren't being populated

For companies with a complex CRM structure, field mapping between the CRM and marketing automation platform is not always straightforward.

Some MAPs will have restrictions on the types of fields which it can map to, and in those cases, you need to get creative in how you bring that data into your MAP.

For example: *Lookup fields cannot be mapped to Pardot. If you rely on a lookup field for capturing key data about leads or contacts in your CRM, you want that information available in Pardot. You may also populate lookup fields via webforms, and if you plan to switch to Pardot forms, then this adds an extra twist.*

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Listen out for key signals. A small problem can quickly turn in to a big one.

Always check for errors

Sync errors

With any MAP that is linked to your CRM, the CRM is always the dominant party. It's the bouncer of your exclusive nightclub and has been configured with numerous validation rules, processes or restrictions to keep the nightclub (aka your CRM) running smoothly.

When your MAP attempts to sync with the CRM, if the data in your MAP doesn't pass the test then it's rejected by the CRM, and usually ends up in a Sync Error queue.

It may not seem the most *glamorous* part of a MAP but it's very important as the system is telling you:

"Hey – we gotta problem here! Someone forgot their tie."

When left unchecked, sync errors just build and build, until suddenly you are looking at thousands of sync errors.

The best approach is to organise your sync errors and see if there are ones which are higher in numbers than others. Focus on those first, as they will have the greatest impact on your data.

Top tip: *99% of sync errors originate from your CRM. When you start tackling these, look at the CRM first for the source of the error.*

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Duplicates can negatively affect reporting, attribution and your communications.

The challenge of duplicates

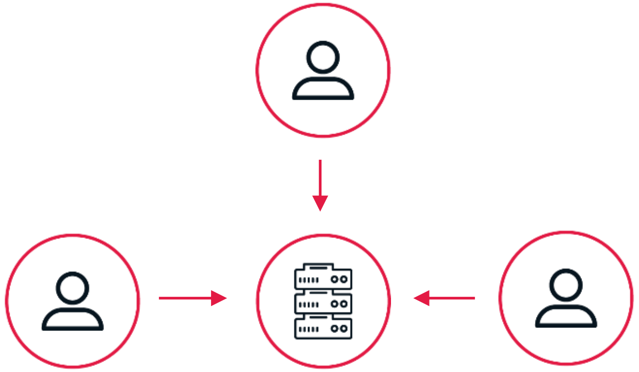
Data accessibility and visibility may not be your problem, but perhaps duplicates are?

This is a challenge for all businesses, regardless of size or industry. The root causes of duplicate data will boil down to a few factors:

» **Poor duplication management process** *(or complete lack of one!)*

» **Poor lead management process**

» **Purchased data**



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Set up a routine data health check to avoid problems getting out of hand.

No one way of managing duplicates

Sometimes the CRM itself can lead to duplicates being created

For example: *Salesforce webforms, and certain 3rd party webforms, will create a new lead for every submission made. Regardless of whether the same name or email has been entered.*

Management of duplicates

Some businesses will develop a lead management or duplication process to help identify and remove duplicates where appropriate; or you may come to rely on these lead records as a means of tracking your marketing activity, regardless of whether they are duplicates.

Where this presents a problem (aside from the glaring obvious) is that with certain MAPs, duplicates are handled differently.

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Keep track of duplicates to avoid a clash between CRM and MAP records.

Duplicates in Pardot

In Pardot, for those with older versions where the platform uses unique email addresses to identify a person, it means Pardot will only connect its own record of John Doe with one record of John Doe in the CRM, even if he's present as a contact and lead. If you are not managing duplicates correctly, then you risk having marketing and sales working from different records.

For those with the newer version of Pardot, or if you've enabled AMPSEA, then you are relying on the Salesforce CRM ID as the unique identifier, which means duplicate records are recognised and brought into Pardot.

The downside is the amount of Prospects in Pardot will rise significantly if you are not keeping duplicates in check, which ultimately impacts costs against the number of mailable prospects.

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How to avoid limited use of functionality

85% of B2B companies are not using the full potential of their marketing automation platforms.

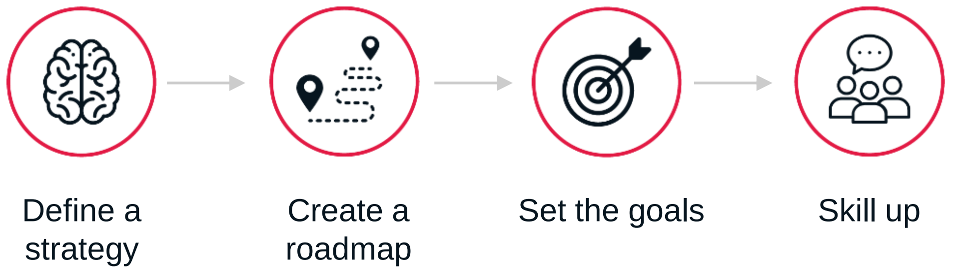
SiriusDecisions

Master the basics and move forward

Another source of aggravation for companies is that they put a huge amount of investment into a new marketing automation platform but the marketing team only seem to be using very basic features and functionality.

Marketing teams will send simple, one-off emails, but there are no nurture sequences or workflows, and emails may even lack personalisation.

This results in a MAP becoming an over-priced email tool – which is not what it was intended for! To get the most from your MAP a few things need to happen.



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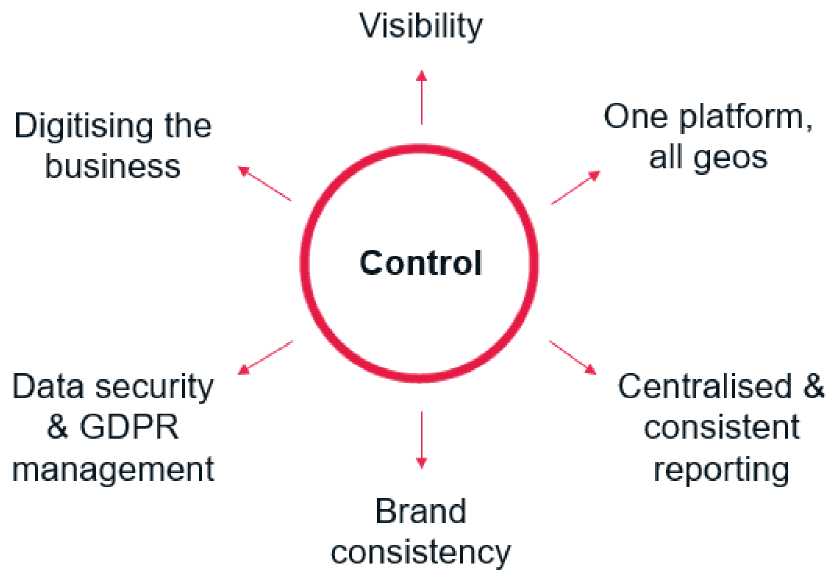
Always remember; strategy before technology.

Map out the steps

Create a marketing automation strategy

It’s not enough to have purchased a MAP, hook it up to your CRM and “hope for the best”. At a higher level, a strategy must be in place which outlines the role your MAP will play in supporting your marketing strategy, and ultimately the wider business strategy. From here, you’ll have the blueprint of what expectations the MAP should be meeting, and therefore the areas of functionality your marketing team need to be utilising.



Learn more about MAP strategy

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Invest in your team through training, one-to-ones and embracing a learning culture.

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Support the team

Set aside dedicated training time for your team

Most MAPs have available a wealth of online resources which marketing teams can use to self-train. And while you may verbally agree with your team that they should set aside time for training; the reality is that work will crop up and push training time to the wayside. Help your team by blocking out training time for them in their calendar as a meeting.

You may even find that holding a team meeting, where everyone brings their laptop and spends the hour working through the training material on their own, is useful.

Give the team definitive goals

Along with helping your team carve out training time, give them goals they can work towards. Agree that by X date everyone will have completed a particular training topic and will have an example to demonstrate their knowledge of the topic in the MAP. Or for those of you transitioning from one email platform/MAP to another, tell your team that by X date their access to that other platform will be turned off. Nothing creates motivation like the removal of a crutch (i.e. the old platform).

Invest in training

You may have a team full of clever, self-starters but unless you've made it their job to become experts in your new MAP then it's best to seek out certified trainers who can support in bringing your team up to speed. There will be no shortage of training options available, from in-person group formats to online or bespoke one-to-one sessions. Each will have its own pros and cons so shop around and select one that aligns best to your team in how they want to learn.

Getting Sales excited about your MAP

Sales productivity is increased by 14.5% after the use of marketing automation.

Nucleus Research, 2020

How MAPs contribute to sales

Believe it or not, marketing automation platforms play a significant role for a salesperson. Depending on how your set up is, the MAP could be used for routing leads, scoring them, sending notifications to sales, and presenting a whole new world of information about prospects.

When MAPs are introduced to a business, the sales side of the equation can often get overlooked. And it's understandable, MAPs are predominantly used by marketing, but their impact on sales cannot be ignored. If you want your sales teams' buy-in and cooperation, then they need to be part of the conversation where it pertains to them.

Lead assignment

One of the key benefits of most MAPs is their ability to help automation processes, and lead assignment is a top contender. Your organisation may have relied on manual or other automated processes for lead assignment, but with your MAP you need to see how it can fit in. Is it possible to automate everything from the MAP? Or does there still need to be a level of manual/human screening?

When asking these questions, be sure to confirm with sales how their side of the lead assignment process works. Are they expecting automated notifications or emails from the marketing team? By having a clear understanding of the current process can you then identify areas for improvement and where the MAP can play a role.

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How can you make life easier for your customer and for sales?

Keep Sales in the loop

Lead management process

As a marketer, you may have crafted a variety of new workflows and campaigns for leads and customers to enter based on certain criteria or actions they take. This is probably one of the “funner” parts of a MAP, being able to design and build automations that allow you to take leads and customers on various journeys. Inevitably, along these journeys are automations which will be directed at sales.

If your sales team have no visibility of the automations you’ve created and why, then it’s hard to expect sales to understand why they’re suddenly getting all these automated notifications, let alone to treat them with importance.

Important information from the MAP

During set up and configuration, you may be surfacing certain data from your MAP into your CRM. This could be activity history, engagement scores, or custom fields that were created to help bring data from the MAP to the CRM.

With any of these CRM-side changes, your sales team need to be made aware of them and trained on what it all means to them. Sales are already overloaded with data and will only skim a record looking for key information they know to look for. Make sure they can leverage all the great information and data coming from your MAP (i.e. all your marketing activities) as this will help them make better, data-informed decisions with their prospects.

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Marketing and Sales need to work together consistently to establish a fully optimised process.

Actions for success

1. Before using Pardot to notify sales about prospects, let them know what you are doing! Send them a dummy notification so they can become familiar with how emails from Pardot look, as they differ to how automated notices from Salesforce look.
2. When planning a campaign that will involve Pardot notifying sales, make sure you let them know about it. Explain the who, what, where, when and why of your campaign so sales can be prepared and aware of actions coming their way.
3. Make sure you've agreed on an escalation process with your sales team. Some teams may want to be notified for every report or whitepaper download, while others are only interested in "high intent" engagement.

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Show ROI through robust tracking and reporting

Relinquish your efforts by reporting on your results.

Plan your reports in advance

Which platform will be used for reporting

Before you spend a lot of time configuring reporting in your MAP or CRM, know which platform will be used to pull reports from. Then work on getting the necessary data into that platform.

Figuring out how you’re going to leverage your MAP to aid in reporting may not be a top priority when starting out but it’s best to not leave it too long before you start looking into it. Sooner rather than later, the business will be asking for these reports and you’ll save yourself the headache of scrambling to create them by giving it some thought, and configuration, early on.

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76% of companies that implement marketing automation see ROI within the first year.

G2, 2020

How to show ROI

Marketing automation platforms are no small investment, and businesses want to know that they're getting a good ROI from it. It's no surprise then that one of the key selling points of MAPs is that they'll help marketers attribute their activity against revenue. MAPs allow for enhanced tracking and reporting, however this is not something that will come out of the box ready to go.

Why? Because every business is different, and what each one will deem important to report on will be different.

It's necessary to spend time considering what's required for your business and configure your MAP to capture the right data to achieve the desired level of reporting.

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Personalised reports will lead to invaluable insights and a well-informed strategy.

Nailing your reporting process

Understanding the sales/opportunity process

By knowing this you'll be able to identify where in your CRM it's necessary to indicate marketing touchpoints and influence.

Decide how to report on revenue against marketing activity

No doubt you'll be running various campaigns and marketing programmes, and you'll want to see clearly which ones are contributing to business revenue so you can focus more on expanding those activities and scaling back, or changing up, ones that are not delivering.

Know what data is required and how you are capturing it

Surfacing the right data is only going to be possible if you know what data is necessary from the MAP, that you can capture it and pass it through to the CRM correctly.

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Create a solid set up

MAPs don’t come ready straight out of the box. Set up takes careful thought and consideration.

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What to address from day one

Ironically, we’re talking last about the part of your marketing automation platform that happens early on – the set up and configuration.

It’s painful to speak with businesses whose core frustrations with their MAP are things that could have easily been avoided from day one, like the following examples:

Organisation and governance

It sounds simple, and it is, but so many businesses don’t consider how they are going to organise their MAP in terms of creating a folder structure and naming convention. This becomes even more important for businesses where more than one country or division are sharing a MAP.

Your marketing teams need to be able to identify what is theirs and what isn’t, in case someone sends an email to the completely wrong group of people or attaches a document with sensitive information.

When left unchecked, the result is a very messy MAP, with a marketing team spending more time trying to find things than get work done.

Respect your customers wishes by perfecting the opt in/out process.

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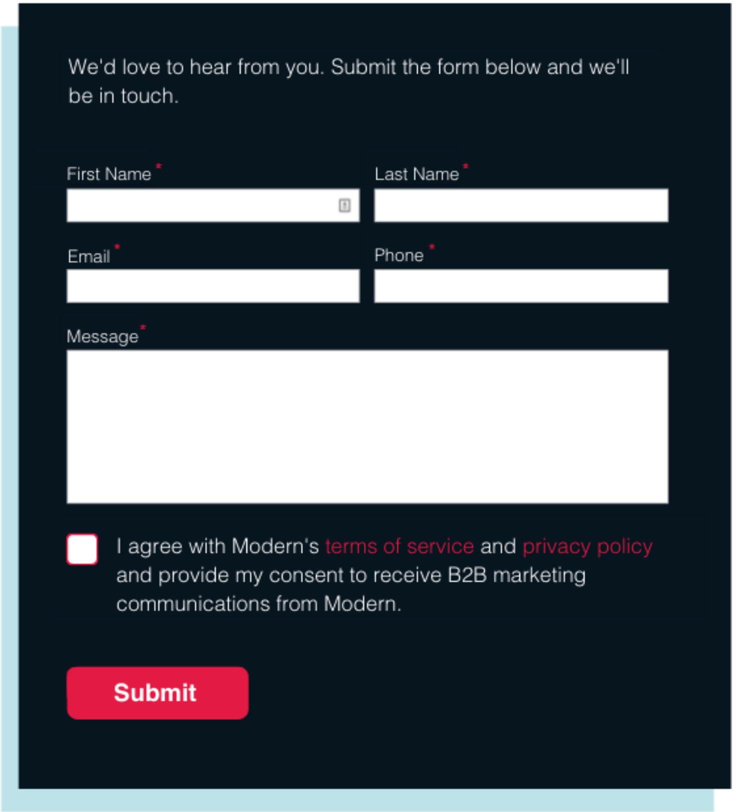
Managing consent processes

Opt-in/out process

How businesses communicate with prospects and clients has come under greater scrutiny in recent years, and no doubt will continue to do so.

Ensuring from the very beginning that your MAP is set up to capture and manage opt-out preferences correctly, and seamlessly with your CRM, is vital.

For some this will be a straightforward set up. For other, perhaps operating in various countries which have different data protection laws, it will get complex. Regardless, take time to understand how your MAP manages opt-outs so you can align it to your own data processes.



Save time by crafting clever automations from the get-go.

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Reduce manual labour

Using automations correctly

The key benefit of a marketing automation platform is the ability to automate certain tasks and processes that would otherwise have been done manually.

Automations cover a wide range of actions – be it actions the MAP performs after someone completes a form or clicks an email link, or actions done to help auto-fill data fields, or to support processes relating to GDPR and managing opt-outs.

While automations are helpful, they can also present a problem when not set up properly or early on, such as:

- » if they are created in a silo (i.e. created by one person with no consideration for how it will impact others using the platform)
- » if one type of automation was used when another is the better choice
- » if an automation is missing from a process that's been ongoing, with potential repercussions to adding it in later

Some of this will come back to training, but often it can be mitigated during set up.

Any of the points mentioned can be changed/improved at any point during your MAP ownership, but when these things are not done properly from the outset, then they become more challenging to alter as time goes by.

Key takeaways

Next actions

Overlooking any of the areas outlined in this guide can wreak havoc on your marketing automation platform's usability, and likability, within your business.

The good news is these issues can all be avoided by spending time at the beginning to plan and strategise how your MAP will integrate with your business.

And even if you've already started your MAP journey and are facing some of these challenges now, adjustments can be made.

The steps to success:

1. Audit your MAP set up and usage. Identify the areas where you think elements aren't functioning as intended or aren't working well.

2. Re-group on how you expect your MAP to support the business. These platforms can be very powerful, but sometimes other tools with similar capabilities are better suited for carrying out certain functions.

3. Work with a strategic partner with expertise in your platform and tech stack. Even if you have an internal expert, a partner can provide an external view and advise on how best to set up and configure your MAP so that it's meeting marketing's, and the business', needs.

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Make a step change today.

What's next?

As a Salesforce Partner we have an in-house team of Pardot Certified Consultants, as well as experience with Eloqua, Hubspot and Marketo.

We combine technical expertise of marketing automation strategy with extensive B2B marketing knowledge to give clients holistic support across digital acquisition, data integration, automation and messaging and communication. We also provide ongoing to support programmes for more complex marketing automation set-ups.

Make your next move in marketing automation. Let's talk.

Email us or call us today on **+44 (0) 117 332 6700**.

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About the author

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Marketing Automation Consultant

As a Marketing Automation Consultant at Modern, Triana works closely with clients in a variety of ways, from set up and best practice consulting, to building programmes and data cleansing.

About Modern

Through our wiser, faster, stronger mantra, we deliver marketing-led business solutions that enable the global leadership teams we work with to achieve their vision for growth.

By collaboration and partnership, from simple, singular campaigns to complex systems integration, our international team of technical, creative and commercial experts provide the perfect hybrid of marketing agency, consultancy and outsourcing partner for the world's most innovative businesses.

Founded in 2011, we work with some of the world's best high-growth innovators to accelerate their growth.

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