



5 Marketing Automation Success Factors

For New Zealand marketers wanting to get the
most from marketing automation

Qrious



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Introduction – What is marketing automation?

Marketing automation is both a software platform and methodology that enables companies to send highly personalised, timely and relevant communications that convert prospects into customer, and turn customers into delighted and valuable promoters.

It allows organisations to more effectively market via multiple channels throughout the customer life cycle and automate repetitive tasks.

The promise of marketing automation is that it improves effectiveness through delivering the right content to the right customer at the right time. It means less time running one-off campaigns, giving marketers more time to do other things. Ultimately the promise is that automated programmes help build incremental value, and by purchasing a marketing automation solution all the complexities of multi-channel marketing will disappear.

The reality, however, can often be painful, complicated, have limited effectiveness, and result in poor ROI and over-investment. This is often the result of organisations that don't understand the requirements that a technology solution like marketing automation requires to be successful.

To help you avoid these pitfalls we've put together the five critical success factors for New Zealand marketers looking at marketing automation, taking into consideration the uniqueness of the New Zealand market.



Marketing automation is here to stay and continues to hold a lot of promise for marketers to create more personal and relevant engagement with their customers.

In this guide we explore the opportunities and challenges of successfully implementing a marketing automation solution.

Drawing on in-depth experience from the local market this guide focuses on the key factors New Zealand marketers should consider to deliver value from marketing automation.



1. Start small and build

All of the evidence suggests that a carefully planned approach that builds incrementally is the path to success. Starting simple and building out as you go allows you to actually learn, adjust, and tweak your efforts based on experience.

One of the beauties of 'always on' programmes is the ability to test, learn and modify. By starting with a simpler programme of activity and building on that, you ultimately deliver more value.

But where do you start?

1. Build a plan and business case

Don't implement automation just because everyone's doing it. Make sure it supports what you're trying to achieve for your business.

Ask yourself:

- How will your programmes drive marketing and business objectives?
- Which parts of the Customer life-cycle will deliver the biggest benefits?
- What metrics will you use to measure success?

- What are you doing now as campaigns that could be automated into ongoing programmes?

By having a clear idea of what you want marketing automation to help you achieve, you'll have a better understanding of what you require from the platform, and how to approach building programmes.

It's easy to feel the pressure and jump on the latest trend.

Focus first on the outcomes, before you start looking at technology.



2. Pick programmes that can become blueprints

While you can get as elaborate as you like, the point is to have a standard, repeatable system or process. You can then use marketing automation to amplify the effect of the system, as well as make the whole process seamless.

This could include programmes like:

- Lead nurture flows that can be tweaked to fit different audiences, but follow the same structure.
- On-boarding communication for new products or customers.
- End-to-end processes, such as an event or webinar, which usually follows a basic structure.

This allows you to create an efficient automated solution. When you next want to

run a similar campaign or programme you can easily copy all of the elements and tweak the content to fit the topic.

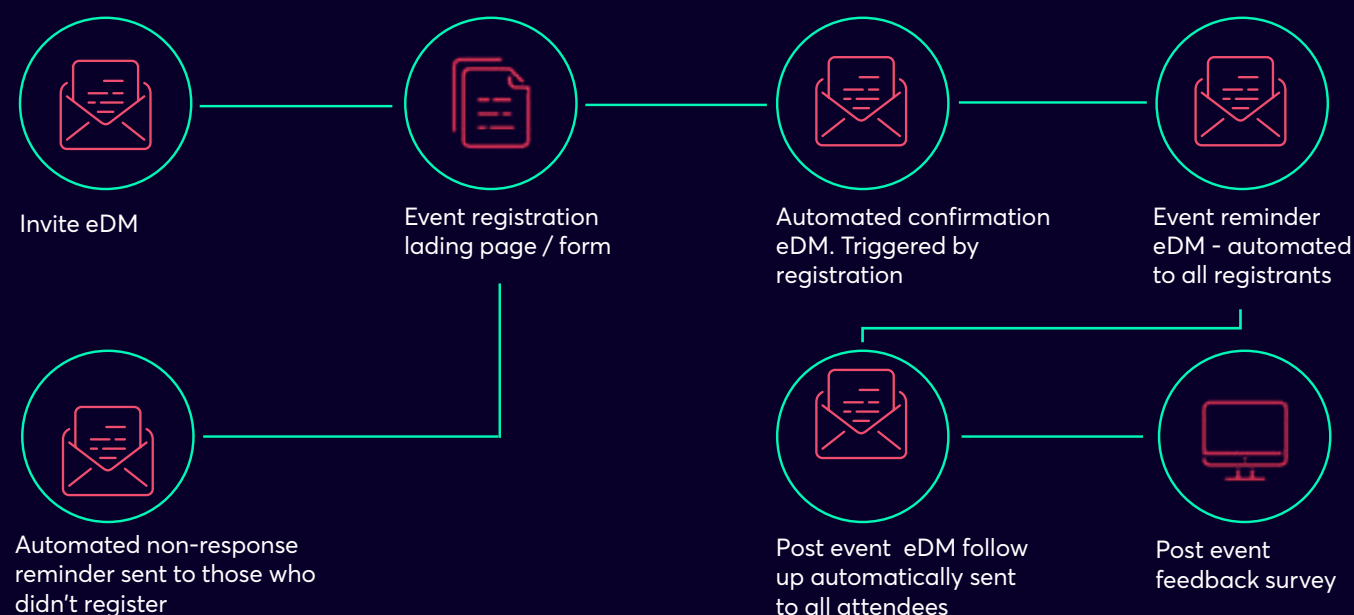
3. Reap the benefits

Marketing automation has the potential to reduce the cost to serve. When you identify triggers that require marketing comms, automation takes away the need for manual action and the time associated with this. There's also a greater opportunity to personalise with dynamic content using predetermined criteria that decides what content someone should receive that is most relevant to them – if not completely personalised.

Ultimately marketing automation is a valuable tool for addressing business process issues, increasing efficiency, and reducing costs by removing the need for expensive manual intervention.

A 'typical' event programme blueprint

Many campaigns, like webinars, have many moving parts. There are invites, reminders, follow-up emails, landing pages, forms and workflows. With an efficient automated solution, when you next want to run a webinar you can copy all of these components with a simple click, and then simply fill out fields to adapt all the content across the board at once.





2. Get your data foundation right

While you're doing your planning and building your business case, it's critical to look at your existing customer data. You need to get this right before you can implement automation or personalisation and really reap the benefits.

Data is your foundation

Organisations often have data systems that weren't designed for marketing – CRMs or data stored in inaccessible silos – which effects automation.

Processes for campaigns would typically follow a pattern of pulling data, cleaning it, then checking proofs to ensure the data is correct. With automation this process should be eliminated, but it's important to get your data sorted first.

If you are automating with existing customer data, you'll need to integrate your marketing automation platform with those other systems. So planning your integration paths is important.

And when data is stored in various silos you'll want to knit this all together to create a single view of customer. You might get core customer data from one system and transactional information from another.

Think about how these various data points can be combined into a single customer view, as this richness of data is what will drive highly targeted programmes.

When combined, data often surfaces two issues:

1. **Duplication** – caused by data structures that are based on accounts rather than individuals. As a marketer you typically want to talk to individuals, but understand that they have multiple product holdings or accounts.
2. **Dirty data** – at its simplest level this could be something like company names in first name fields. If this is the case you can't automate due to the risk of getting it wrong.

These issues can be identified by a data audit and solved by creating a data cleaning processes, then overlaying these across the automated data feeds from other systems.

Expert Tip



To avoid data complexity and delays, understand your data and integration requirements. Work with a provider who has experience with this and can design your integration with external systems to ensure that data is usable for marketing.



Centralise your marketing data

It is not just the quality of data that is considered an issue, but also the quantity of data. Marketing automation enables high personalisation, but you need enough data to drive this.

Sometimes there are challenges around getting data from external systems. Other times you just don't have much to begin with.

What matters is having the data that helps solve a problem or address the questions you have.

If you have a shortage of data, think about what you can do to get more. Can you ask customers for it? What can you infer about customers from their behavioural data like email or website interactions they have had? What other data can you overlay for richer insights?

Once your framework is in place, data is flowing automatically, and your programme is running, adding in additional components can be achieved with very little additional investment - but deliver BIG results.

What data types do you have available?



Customer data - personal data relating to the customer, like name or location.



Transactional data - look at what products or services they've purchased or used.



Customer expressed preferences - things they indicated they like (or don't). This can either be through surveys and forms, or inferred from website pages visited, or previous purchasing behaviour.



Interactions with previous communications - look at what emails have they read and clicked vs which ones they haven't.



Website interactions - what pages have they visited or which forms have they filled out?



Survey responses - if they've responded, how can their answers help you understand more about them?



Other - your business may collect other data you can then use for marketing purposes.



3. The human element

Regardless of how sophisticated and powerful marketing technology becomes, the fact remains that people are the ones who make great marketing happen - technology simply enables it.

A lack of internal experience at an operational level is a key obstacle to deploying and deriving value from data driven marketing initiatives. Effective marketing automation requires experienced people who understand your customers, your marketing objectives, and your technology.

This is especially a challenge in New Zealand.

New Zealand businesses tend to have smaller marketing teams, making it hard to justify in house experts. Those who can justify it, find it hard to recruit for and retain these experts, as there's a small pool of people with the experience required.

All companies, however big or small, struggle with resourcing. They never have enough to do all the things they need to in a given week. To be successful using marketing automation requires dedicated commitment and resources. Often times, employees are wearing multiple hats and scrambling to finish a variety of tasks. They don't have the time to invest in using the platforms to their full potential.

Make sure you don't overlook the human element by thinking that technology will take over and make everything happen.

It won't.



The rise of the Fat T marketer

The traditional T-shaped marketer holds breadth and depth of experience in a core area. More recently we're seeing the emergence of the Fat T Marketer – someone who has a deeper level of expertise in more areas.

This doesn't mean specialists go away, but this is increasingly the profile of a marketer – allowing them to be more interchangeable and flexible.

Marketers need to be prepared to learn at an accelerated rate and embrace change. Today's professionals are learning more every three months than they did in four years of undergrad study.

The market is changing all the time - with new technology, and disruptive forces change is a constant. It's important for today's marketers to invest in their career and not assume that their company will train them on everything that they need.

The rise of the Marketing Technologist

It's important for marketers to understand technology, and the industry should be focusing on attracting and upskilling people in this area. There is a rise in the need for marketing technologists, but these are few and far between in New Zealand.

The importance of partnering

The most successful organisations using marketing automation use a combination of some in-house management of activity combined with access to expert partnerships.

You wouldn't consider implementing a CRM system without hiring a consultant to help, and while marketing automation is perhaps a less complicated process, it does require knowledge, skills and experience that many organisations

simply don't have in-house.

The process of automating your marketing begins with buying into a marketing automation solution, but it certainly doesn't end there. Even with the best plan, it can be helpful to have a skilled partner available to help you through the numerous sticky points that are part of implementing the platform.

A qualified partner can not only provide the expertise and guidance needed for planning and implementation, but can also help you with ongoing strategy, content and campaign development along the way.

If you make choosing an implementation partner part of your pre-implementation planning, you'll be able to draw on knowledge and expertise from someone who has been there before. Include your partner in your planning process. This will result in a smoother, more effective implementation, and avoid time-wasting and expensive mistakes in your implementation

For this reason it's good to be wary of international vendors pushing tech solutions with limited ability to provide the support required for successful implementation and ongoing operation.

Find the right partner



Don't underestimate the value of the right partner to provide the expertise and guidance for planning and implementation.



Consider also how they might support you for ongoing strategy and execution.



Marketing automation is not just a technology play – make sure you can access services to support your internal resource.



4. Review your processes

Many marketers don't realise that technology and process go hand in hand. Often, they think the new technology will replace or eliminate key processes or make them less important.

The reality is that technology rarely eliminates process. But it does force processes to evolve. When new technology is introduced, all of the related processes need to be examined and aligned. Accordingly, marketers need to look at their business from an end-to-end perspective.

It's not set and forget

Moving from a campaign approach to programme development requires a change in processes. Those structured around one-off campaigns no longer apply, and the traditional post-campaign approach to reporting won't work anymore either. So, there needs to be a shift to more fluid testing and optimisation processes.

For example; historically you would have waited six weeks and run a post-campaign review. With automation you get real-time reporting data and need to have a process to regularly review results.

This real-time data provides opportunities to test, change, tweak and optimise elements of your programme to achieve the best results.

Your marketing automation processes do not operate in a vacuum. It's critical that you continue to monitor them and assess the results you get from the investment. The analytics you get will guide you toward any changes that need to be made, and will serve as the benchmark to grow your sophistication in the future.

Ideally automation helps free you up from the mechanics of running campaigns to spend your time strategising, reviewing and optimising results.



Expert Tip

Look to implement an ongoing review process, and continually review results from the marketing automation effort, to see what's working and what can be improved.



Take an agile approach

Marketing automation lends itself to an agile approach. Agile marketing adapts management methodologies from agile software development and project management and applies them to marketing teams.

Overall, it's based on the simple fact that projects, marketing, business, life, etc., are dynamic, not static. You make plans, but things change. The best teams and organisations are able to respond quickly to such change and capitalise on it.

You should still be driven by an overarching vision, mission, and strategy — which provides clarity in how you react to change — but your tactics are adaptive and responsive.

Marketing automation is great for agile marketing as you're constantly able to expand and refine nurture programs or automated flows along the buyer's journey. You can break out new audience segments to target on an experimental basis, and adapt and change as you learn from your efforts.

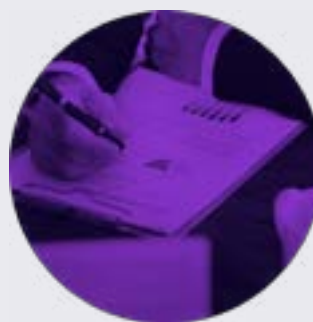
"The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency.

The second is that automation applied to an inefficient operation will magnify the inefficiency." –
Bill Gates

Agile Marketing Emphasises:



Many small experiments
over a few large bets.



Testing and data over
opinions and conventions.



5. Choose the right technology

Marketing automation is more than just a technology. You want to find the right platform partner to help you succeed.

Marketing is becoming increasingly technology-based. As a result, we are seeing a convergence between Marketing and IT.

As marketing becomes increasingly technology based, it's important you foster a close relationship with the IT department, as they will likely have some say in the technology you end up implementing.

So, what will IT ask?

"How and where is the data stored, transmitted and protected?"

Be sure to get relevant information and statistics on your marketing automation vendor's security structure and reputation. Some organisations require that their data is held within New Zealand rather than in offshore data centres for security and privacy reasons.

"What kind of ongoing support does the vendor deliver?"

Responsive so you can move at the speed of marketing, just a technical help-desk, or best practice advice?

Regardless of your requirements, choosing a platform with best-of-breed support is absolutely

paramount. You want to make sure that you select a vendor that stands behind their product and treats all customers—from the smallest entry-level account to the very large enterprise—with the same level of customer service and support.

Note that the key is that they **deliver**, not promise. IT will want to know it can get help when there's an issue.

"If we aren't happy with the solution, what does it take to extract ourselves from it both operationally and contractually?"

There is nothing more frustrating than being locked into a long term contract when the system is not delivering the expected results. Look for a partner that has flexible subscription options - as they realise the onus is on them to ensure they're delivering on their promises.

Gartner once predicted that CMOs will control more of the budget for IT than CIOs. This is a trend we're increasingly observing.



Beyond what IT wants to know:

Look at the feature set

Most automation platforms have a similar set of tools, such as automated programs, website visitor tracking, lead scoring, etc. Look for a solution that meets your requirements, but be sure that you aren't paying for a slew of features you don't necessarily need. You'll want the flexibility to expand as your needs evolve, but in many cases you would use only a fraction of the functionality.

Of those that have bought, on average they are using about 15-20% of the available functionality. Particularly if you are in the earlier stages of your journey.

Pricing - Total Cost of Ownership

The pricing models of marketing automation vendors vary considerably. Some offer pricing that seems considerably less than others, but when you add up mandatory upfront costs for training and implementation - and other features that are "add-ons" - the price can go up considerably.

The point is to be sure you consider all costs involved.

You will need to look for a balance between features and pricing. Remember that the limited scale of New Zealand makes ROI harder to achieve.

Ease of use

Usability is a critical selection factor. You should look for a solution that makes it easy to do the things that you want to do. Each solution has their own way of doing things, so find one that will require the least amount of learning and training, reduce training costs, and allows you to make the best use of the system and advanced features.

Strategic advice

As mentioned earlier in this guide a qualified partner can not only provide the expertise and guidance needed for planning and implementation, but can also help you with ongoing strategy, content and campaign development.

If you're unsure of where to start, or want to improve your programmes, a partner who offers strategic advice can be invaluable in helping you get the most out of your marketing activities.

Key Criteria for your Marketing Automation Platform



Features

You want enough to achieve your objectives, but not too many that you become overwhelmed, and never use them anyway.



Pricing

Consider the Total Cost of Ownership - including subscription, implementation and support costs, and even send and data storage fees.



Ease of use

Can you focus on the marketing objectives rather than the mechanics of execution?



Availability of strategic consultancy & advice

To support you and ensure the technology delivers to your marketing objectives.



Successful Marketing Automation



Implementing marketing automation is a major undertaking that can produce significant ROI. Just remember that despite what many tech vendors might tell you, it's not all about the software, and buying a subscription does not equate instant profit.



The following five points should form the foundations for success.

1. Develop a sound business case, and plan a crawl - run approach.
2. Get your data foundation right.
3. Consider a partner who can assist with implementation and ongoing execution.
4. Remember it's not set and forget and you will need to adapt your reporting processes.
5. Choose the right platform partner to ensure you can deliver to your objectives.



If you invest the time to prepare the implementation, the return on investment will be much more substantial

Data powered marketing combines data and marketing to transform customer engagement

To succeed in the era of the empowered customer you need to unleash the power of all your data sources to unlock insight and deliver personal and relevant customer experiences.

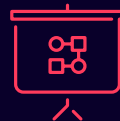
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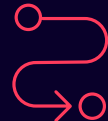
Marketing automation



Marketing analytics



Marketing planning



Multi-Channel marketing



Marketing database



Social sentiment analytics



Customer segmentation



Customer churn modelling

To find out more how your business can benefit from marketing automation, visit qrious.co.nz/services/data-powered-marketing and request a meeting

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