



Maximize the ROI on your Marketing Automation Implementation

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INTRODUCTION



After months (or years), you and your marketing team finally have the green light to modernize your marketing and drive real demand generation results. You have sold the concepts to your bosses, gained alignment with your co-workers in sales and have your IT team ready to put your new marketing automation tools in the mainstream of your company's digital war chest. You have seen demonstrations, attended conferences and read dozens of articles that encourage you and your team to transform marketing in a demand generation machine.

So.... Why do you have this feeling that you just bought a race car, but only know how to drive a sedan?

Taking on a digital transformation that truly aligns marketing and sales and provides your marketers and sellers with a platform to find, and nurture prospects into and through your sales cycle is achievable. And the results are well worth the effort.

According to B2Bmarketing.net and Circle Research "Benchmarking Report of Marketing Automation" (2015) 40% of companies that have stayed consistent in fully deploying their market automation technology for two years or more see a measurable impact on revenue.

That is awesome! Troubling; however, is that the same report indicates that only 8% make that claim within the first six months. That is probably about the time your executive managers and colleagues are going to start asking to see some results!

Getting the most out of this investment, quickly, takes more than just turning it on and expecting the funnel to fill. Now that you have selected your marketing automation technology supplier, you need to lay out a plan that aligns your marketing and sales teams, gets the attention of your prospects and provides you with hands on controls that give you feedback on results so that your team can continue to refine, improve and drive results.

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START HERE. THE BIG 'A' OF MARKETING: ALIGNMENT



For demand generation to be truly transformative and drive high impact business results, the alignment between marketing, sales, IT, and others in your value chain must be foundational and embedded into all aspects of its implementation, usage and measurement.

An important step is simply listing out the key stakeholders that need to be part of your implementation team. Implementation planning should be as much as a social gathering as it is a technology implementation. So, it is imperative that your stakeholder community are truly stakeholders that have much to gain or lose in this transformation. A core implementation team is crucial. The implementation team should be made up of the key stakeholders in marketing, sales and IT and it may include other stakeholders in product management, client services, or other departments. Other organizations in your company may need to be informed or kept aware, these organizations and their needs for information and consensus should also be mapped out.

Once you have organized your core team, the next crucial step is to establish a governance model that will drive how the team conducts the work of the implementation. Setting up an organizational reporting cadence with an implementation team is a great idea.

The best implementation teams are cross functional. Consider establishing a steering team that includes VP Sales, CMO, and CIO that the implementation team can report to for on-going management reviews, progress reporting, metric alignment and ultimately gate keeping for additional resource allocations.

The core team ultimately will have the charter of planning the implementation work, developing action plans and putting those plans into action. Like any other project, the effectiveness of the implementation team is important to the project's overall success.

Achieving alignment in this early stage is the most important indicator of how successful a marketing automation implementation will be, but it is also difficult to measure. One tool that is effective in achieving solid alignment is an implementation playbook.

The implementation playbook documents the entire scope of the team's activities. It documents the scope of the implementation, the go-to-market business goals that the team is chartered to achieve, key content that describes the operating rules that govern the implementation and the agreed to action plans. Great playbooks lay out in detail the communications strategy for involving the stakeholders and larger organization prior to the implementation, as well as the communications strategy for launching the solution and the post launch communications.

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PILOT | LEARN | GO



A key best practice is to start with a well-defined pilot. The pilot should be clearly scoped and be large enough to establish a foundation and operational learning, and confined enough to clearly measure effectiveness.

With the core team already identified, drive to find the right pilot scope. Your pilot is intended to give your team a solid foundation to build a full scale roll out and adoption of your digital demand generation engine, so do not take defining an appropriate pilot scope lightly. Defining your pilot scope, requires 3 crucial elements. First, work to develop a CLEAR scope definition. Second, define what the pilot deliverables look like. Third, and most importantly, define your end game. What does a successful pilot look and feel like when complete?

So, what should the pilot consist of? If possible, design your pilot to include enough elements and complexity to exercise all the social and technical aspects of a complete implementation, but not so complex that it becomes an unsolvable puzzle. Tip! Develop a flow chart of the process, with the required inputs and outputs and the key stakeholders impacted along the way. If you cannot do this – you probably have the wrong pilot.

Aim at finding quick wins that solve major pain points in your sales and marketing organizations. Remember – the key to alignment is stakeholder buy in. Finding early quick wins and running effective internal and external communications programs is the fuel that will fire commitment, especially as the pilot moves beyond the “honeymoon” phase.

GET READY TO MODERNIZE YOUR CONTENT THINKING



Now that you have made a commitment to a digital demand generation methodology, it is inevitable that your entire content strategy will need to be re- evaluated and modernized. Your content delivery is about to become faster, much faster, and intentionally aimed at specific buyers at different stages of their buying journey.

Static content, delivered by conventional non-digital means, will become outdated quickly and will become more of a novelty approach than your core marketing strategy.

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The successful content strategies in your new digital future must become more synergized, more aligned to customer needs and easier to curate, sort and link into message maps that will drive the design of your digital campaigns.

A key step often missed is the alignment of your content strategy with your website. Often, the messaging on the website and the messaging delivered in digital campaigns are disconnected in storyline and timing. One best practice is to adopt a single source of truth approach, using your brand on the home page as an anchor that holds all other content in the right context.

Today's consumers are blasted by large volumes of information. Earning their attention, even for a moment, is the first task of a winning digital content strategy. The best content today speaks first from the viewpoint of the customer's needs. Consider this – In a room full of people talking only about themselves, isn't it most likely that the person you would listen to first is the person talking about you?

If you are like most companies, it is likely that you currently have a lot of content. It is also likely that a great deal of that content is rarely used and with little impact. In your digital demand generation process, you could make that even worse.

It is not uncommon to see marketers over drive content simply to have assets to tag into email campaigns. Do not let the “number of emails” you want to send drive your content strategy! Start first evaluating your customer's needs for information, their pain points and then carefully map that into messaging platforms, including both long form and short form assets. This becomes a winning approach to drive downstream content creation and curation methodologies.

The strength of Coffee + Dunn comes from a central methodology called Plan Build Run. This three-phase approach aligns Coffee + Dunn's profound understanding and knowledge of the technology behind the marketing automation tool set with a refined approach for developing a comprehensive planning strategy. This methodology drives beyond just the “how to” of setting up and running digital campaigns and drives to the “why” of delivering measurable marketing results.

A Proven Approach
from Coffee + Dunn

PLAN
BUILD
RUN

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Hands on, intimate knowledge of the technical aspect of the marketing automation tool set is also critical and often, it may be a skill set that is in short supply or that may be beyond your marketing budget. Coffee + Dunn works with solutions from leading suppliers, such as Microsoft Dynamics 365 for Marketing, ClickDimensions, Act-On, Hubspot, and others, often side by side, in the development and piloting of software and training.

The team at Coffee + Dunn believe that implementation of your marketing automation technology is the beginning of a journey to creating simplicity that embraces the realities of the complex worlds we live in today.

If you would like to explore the journey toward marketing fearlessly, contact Coffee + Dunn today at info@coffee-dunn.com or coffee-dunn.com/contact-us.

ABOUT COFFEE + DUNN



Coffee + Dunn is an industry leading connected experience partner uniquely focused on building effective customer engagement through the strong alignment of **technology**, **operations**, and **strategy**.

Our award-winning services enable our clients to drive growth and optimize value. We serve various industries, including financial and B2B professional services, manufacturing, healthcare, education, and not-for-profit and member-based organizations.

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ABOUT THOMAS MANDERS



Thomas Manders is a client-focused leader known for delivering success through integrity, meaningful interactions, and reliable service. He is passionate about implementing practical solutions that drive real impact.

As the leader of Coffee + Dunn, Thomas is responsible for business growth, strengthening the Microsoft Dynamics 365 Channel partnership, fostering client relationships, developing staff, and overseeing the deployment of services and technologies.

With over 25 years of experience, Thomas excels at tackling complex challenges and asking thought-provoking questions to help clients uncover the best solutions. His diverse background spans retail, industrial manufacturing, distribution, education, corporate development, and M&A. For the past two decades, he has focused on enterprise marketing and sales technologies, giving him a deep understanding of the high-stakes decisions Coffee + Dunn clients face. Thomas is committed to guiding them through these challenges with thoughtful and effective strategies.

