

BUSTING COMMON MYTHS OF MARKETING AUTOMATION



The Reality Of The
Marketing Technology Journey



INTRODUCTION

Across industries, marketing automation is quickly moving from early adopter use to a competitive necessity for many organizations. Despite widespread use among some companies, many marketers are just beginning to adopt marketing automation within their own organizations. According to Demand Gen



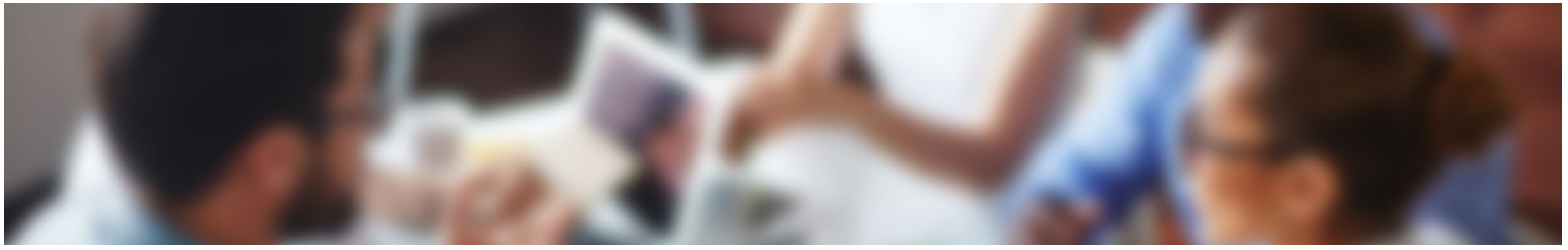
Report's 2016 Demand Gen Benchmark Survey, 42% of B2B marketers identified marketing automation as a tool they plan to test or deploy in 2016.

Further illustrating the continued activity, marketing automation ranked higher than any other tool in a list of a dozen tools that includes predictive analytics, account-based marketing (ABM), lead nurturing and scoring, and attribution modeling.

42% OF B2B MARKETERS IDENTIFIED MARKETING AUTOMATION AS A TOOL THEY PLAN TO TEST OR DEPLOY IN 2016.

Marketing automation solutions are designed so marketers can attract, engage and convert buyers across all marketing channels. The best of these solutions integrate with customer relationship management (CRM) systems, salesforce automation (SFA) platforms, and web content management (WCM) systems, while enabling a range of marketing capabilities.

Beyond the obvious benefit of automating key marketing-related activities, these include support for a streamlined workflow, social monitoring, content management, data activation for audience targeting, and embedded Business Intelligence (BI), to name a few. Just as important as the core of a marketer's ecosystem, most leading marketing automation solutions are based on open technology that allows organizations to integrate the tools with existing systems. These include CRM and content management systems (CMS), as well as emerging technologies, such as predictive intelligence and account-based marketing.



However, in its *Marketing Technology Survey*, Ascend2 found that 59% of companies do not fully use the technology they have available. In other words, companies that have not yet deployed marketing automation — or that have deployed, but are only using basic functionality — are in good company. Even those that have already implemented the technology are not as advanced as is often portrayed.

80% OF MARKETERS SAW AN INCREASE IN LEADS BY USING MARKETING AUTOMATION.

According to Spear Marketing in *The State of Marketing Automation Maturity*, "...the average marketing automation user has a long way to go before utilizing the software in a way that would help him or her achieve the most business value." This jibes with Forrester Consulting's conclusion in its report, *B2B Prospecting Goes Digital In The Age Of The Customer*, that most B2B marketers feel they have not yet mastered marketing technology. That means it's not too late to get started.

Industry benchmarks illustrate the value that organizations are realizing by implementing marketing automation. [Consider these findings from VentureBeat's recent report on use of the technology: 80% of users saw an increase in leads and 65% saw their leads increase by at least 10%. Twelve percent of users increased leads by an impressive 50% or more.](#) 

That said, some B2B marketers seek guidance in driving the most value from their investments. A study by Forrester Consulting found that just 10% of marketing professionals surveyed feel they are able to fully execute mature marketing automation strategies.

This may have to do with the fact that some organizations have bought into fallacies about marketing automation, namely that a select set of power users is realizing great success while the masses are left behind.

This white paper shares insights gleaned from Demand Gen Report's own research, along with interviews with industry experts, to dispel five common myths associated with marketing automation. In doing so, it highlights the benefits of using this type of system, explores what it takes to unlock its range of potential, and explains how to apply marketing automation for personalized, buyer-centric marketing.



MARKETING AUTOMATION IS TOO DIFFICULT TO DEPLOY AND USE

Understandably, the more sophisticated a solution and the more systems it connects with, the more powerful and valuable it will be for an organization. While marketing automation systems feature a range of powerful functionality, marketers can realize value without rolling out all capabilities from the start. Spear Marketing contends that “use of more basic marketing automation functionality is becoming the norm.” Organizations can rapidly deploy marketing automation and then consume the functionality they require in a phased approach.

“THE TOP REASONS COMPANIES UNDERUTILIZE THEIR MARKETING AUTOMATION SYSTEM IS LACK OF FOCUS AND AGILITY.” 

- DAVID LEWIS, DEMANDGEN INTERNATIONAL

Just as they would with any advanced software, marketers should zero in on and take advantage of the marketing automation features they truly need. Put another way, rather than try to “boil

the ocean” so-to-speak, and jump on all available features, smart marketers should concentrate on functionality that helps them achieve their goals. As SiriusDecisions underscores in their description of marketing automation, “Organizations must consider their individual requirements when selecting a MAP [marketing automation platform], and match them to a specific platform’s unique features.”

Even enterprises with the resources to support a range of marketing initiatives and activities are often best served by first establishing core objectives and focusing on the marketing automation functionality that addresses those goals. Hand in hand with this, businesses need to establish a solid foundation for succeeding with marketing automation. It starts with taking advantage of the following basic functionality:

- Email marketing
- Web forms
- Landing pages
- Lead scoring
- Measurement and reporting



“IT’S CRITICAL FOR ORGANIZATIONS TO DEFINE THEIR LEAD MANAGEMENT AND NURTURING PROCESS, AND DOCUMENT ALL SYSTEMS FEEDING INTO THAT. THAT FOUNDATION PAVES THE WAY FOR SUCCESSFULLY LEVERAGING THE MARKETING AUTOMATION TECHNOLOGY TO MATCH AND SUPPORT THE BUSINESS PROCESS.”

- CARI BALDWIN, BLUEBIRD STRATEGIES

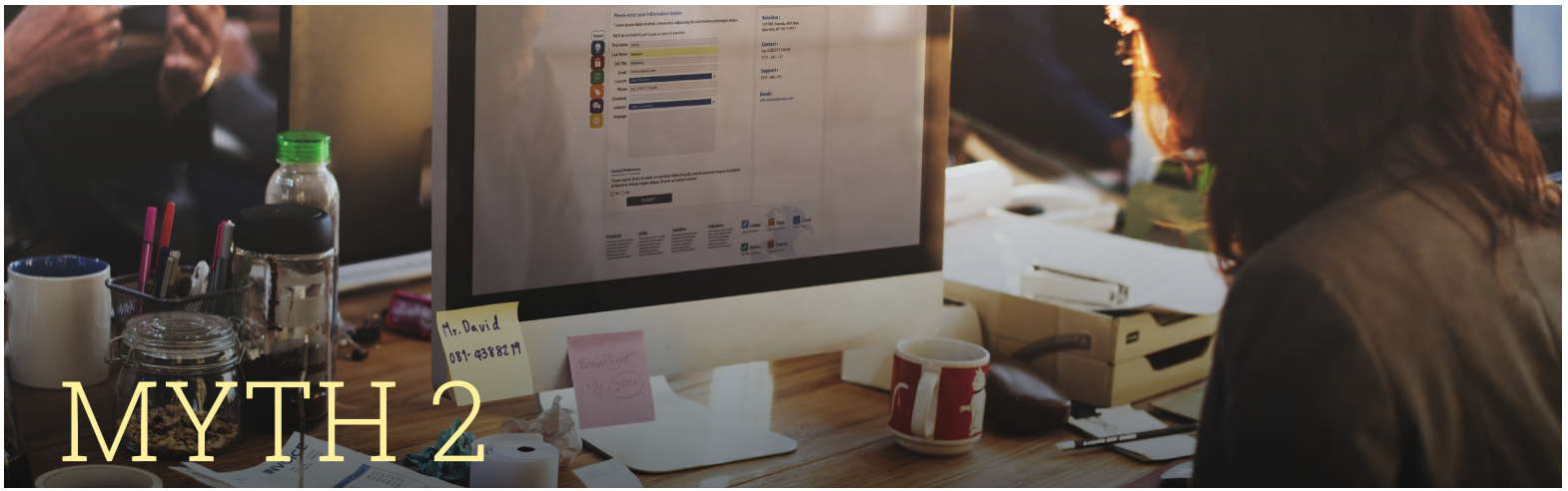
By focusing first on the basics, the marketing team can get comfortable with and master the features that will satisfy the majority of their everyday needs. Over time, as they progress up the maturity scale, they can then call upon more advanced features in support of sophisticated initiatives such as lead nurturing, personalization, account-based marketing, retargeting and progressive profiling.

A “crawl-walk-run” approach gives all involved parties the chance to learn about and embrace a new mindset and system, while also empowering marketing to quickly demonstrate the value of the solution to others throughout the organization. Over time, the marketing group can tap into more and more functionality to support increasingly sophisticated, multi-dimensional programs and campaigns.

This “crawl-walk-run” approach might take the following shape:

- **Crawl:** Gain basic mastery of marketing automation. Run single-channel campaigns, both in standalone fashion and simultaneously. Be sure to incorporate priority landing pages and offers into these campaigns. Set up lead scoring to automatically drop leads into relevant campaigns.
- **Walk:** Start segmenting the overall contact database based on campaign responses. At the same time, clean the database by removing duplicate records and enriching valid records with additional information to enable more sophisticated targeting and personalization. Run multi-channel campaigns.
- **Run:** Advance to sophisticated usage. Integrate with other key systems to drive a seamless flow of information and enable further automation. For example, automate lead management by tying into a webinar system, and dynamically insert content into email campaigns and landing pages through integration with a content management system. Unify campaigns for a true, multi-channel approach, employ long-term nurture and score leads across channels to drive maximum conversion.

By adopting this phased approach, marketers stand a much greater chance of immediate adoption and long-term success. In fact, numerous companies have realized tremendous success with such an approach.



MARKETING TECHNOLOGY IS OVERWHELMING AND THERE ARE TOO MANY CHOICES

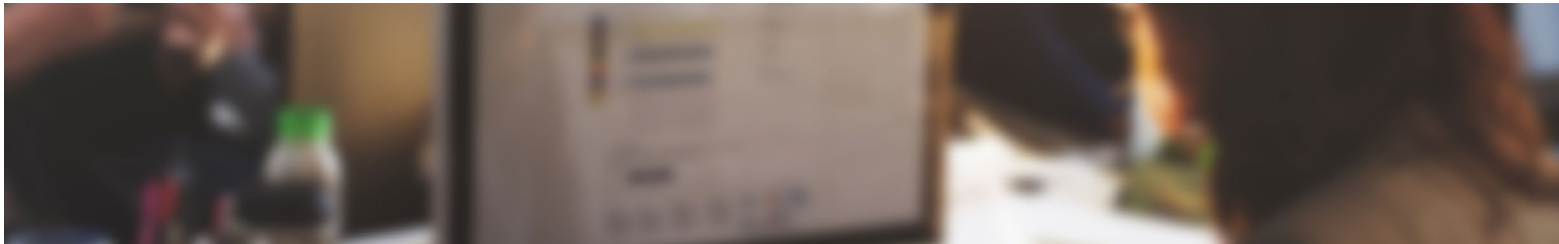
According to Forrester Consulting, the vast majority of B2B marketers — more than 80% — consider it a core requirement of their jobs to comprehend and use marketing technology. The problem is that too many of them are getting dazzled by the latest-and-greatest tools before first developing a solid mastery of the core.

80% OF MARKETERS CONSIDER THE COMPREHENSION AND USE OF MARKETING TECHNOLOGY TO BE A CORE REQUIREMENT OF THEIR JOBS.

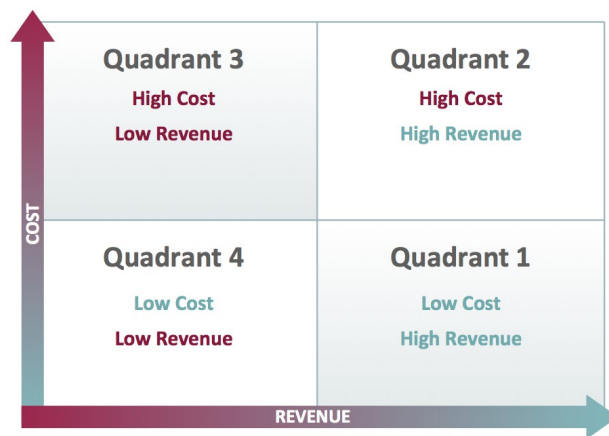
Without a doubt, it's an exciting time to be a marketer: The view of marketing has shifted from one of practitioners handling tactical execution

to a vital group playing a strategic role in helping organizations achieve their high-level goals. Hand in hand with this, software companies left and right are developing with marketers in mind. Scott Brinker — who first developed and maintains the [Marketing Technology Landscape Supergraphic](#) — estimates there are currently 3,874 marketing technology solutions worldwide.





While it's encouraging to know there's a technology solution to support every marketing process and even new market approaches, it's easy to be led astray by every new application and vendor clamoring for attention. As a result, marketers are being distracted by everything from attribution modeling to account-based marketing and predictive analytics. Though these technologies can help organizations continually evolve their marketing capabilities, losing sight of the core can lead marketers down the wrong path.



A SIMPLIFIED DECISION TOOL HELPS PRIORITIZE TECHNOLOGY PURCHASES

“BEAR IN MIND THE BIGGEST LIMITATION TO INNOVATION AT MOST FIRMS IS THE AMOUNT OF TIME THAT MARKETERS HAVE TO TRY NEW THINGS. THEY NEED TO BE SURE THE POTENTIAL RETURN ON TIME INVESTED IS HIGH.”

- DAVID M. RAAB, RAAB ASSOCIATES

To prioritize their technology choices, marketers need to assess how well any given technology supports their goals. While these goals can be numerous, arguably revenue impact is the most strategic goal. With that in mind, marketers can apply a prioritization model to first narrow down technology choices, and then zero in on vendors within the category. By embracing this approach, they can tame the chaos of the marketing technology landscape and more quickly identify and select the technologies likely to yield the most measurable impact.



MARKETING AUTOMATION IS ONLY FOCUSED ON OUTBOUND CAMPAIGNS

Today's buyers are conducting a good portion of research before reaching out to a possible solution provider. According to Demand Gen Report's *2015 B2B Buyer's Survey Report*, web search is one of the top three methods used to gather information about a possible solution. This buyer-empowered shift has triggered the need for marketers to become adept at both inbound and outbound campaigns. In other words, it's vital for marketers to engage with prospects in a bi-directional manner — both by reaching out proactively and by responding accordingly when found online. In spite of thoughts to the contrary,



marketing automation can support the full spectrum of engagement scenarios.

MARKETING AUTOMATION CAN SUPPORT THE FULL SPECTRUM OF ENGAGEMENT SCENARIOS.

Used as intended, marketing automation systems empower marketers to connect with and engage prospects based on the behaviors and preferences they share on their path to

purchase. As Christopher Penn, VP of Marketing Technology at SHIFT Communications, explains, "inbound marketing automation is used to score and assess the potential quality of a prospective customer based on their buying signals. Outbound, good marketing automation software combined with well-curated data makes it possible to identify and segment for dedicated, focused campaigns."

Let's walk through the steps a company takes using its marketing automation in support of a coordinated outbound and inbound campaign.

Outbound component:

1. The company reaches out to its database of contacts using its marketing automation to send an initial email suitable for consumption on a desktop, laptop and smartphone. The email encourages recipients to visit a landing page offering an E-book.
2. Those that visit the site to download the asset are asked to share some basic details — including their top priorities — in exchange for the download.



3. In addition to providing a link to the download, the “thank-you” page provides a link to a page tailored to those top priorities.
4. A follow-up email displays other assets the visitor may find useful based on these priorities.

Integration between marketing automation and the web content management systems enables marketing to ensure a relevant, contextual experience as the recipient responds to an outbound email and makes an inbound visit to the website in response. Both the email and web page can reflect an understanding of the prospective buyer.

“THERE IS A VERY LARGE GAP BETWEEN THE PERCENTAGE OF COMPANIES SAYING THEY PRIORITIZE THE CROSS-CHANNEL INTEGRATION OF MARKETING ACTIVITIES (67%) AND THOSE THAT UNDERSTAND THEIR CUSTOMERS’ JOURNEYS AND ADAPT THE CHANNEL MIX ACCORDINGLY (43%).”

- ECONSULTANCY

Inbound component:

1. For its email campaign, the marketing team creates and displays pay-per-click ads on relevant third-party sites to drive traffic to a dedicated landing page.
2. Once site visitors respond to these ads and land on the dedicated page, they are offered a download in exchange for information.
3. They also receive a follow-up email highlighting additional content assets that may be of interest.

Marketing automation can glean insights from campaign reporting and the information captured via the web content management system with each subsequent site visit — such as topics searched, content consumed and links clicked. In fact, as these prospective buyers continue to interact with the company’s emails, landing pages and other digital touch-points, the marketing automation system would be fed details about their preferences and behaviors. This would in turn be used to fuel further interactions that trigger response and movement along the path to purchase.



MYTH 4

MARKETING AUTOMATION ENABLES THE *MARKETER* TO DICTATE THE *BUYER'S* JOURNEY

There's lots of talk these days about the "path to purchase" and the "buyer's journey."

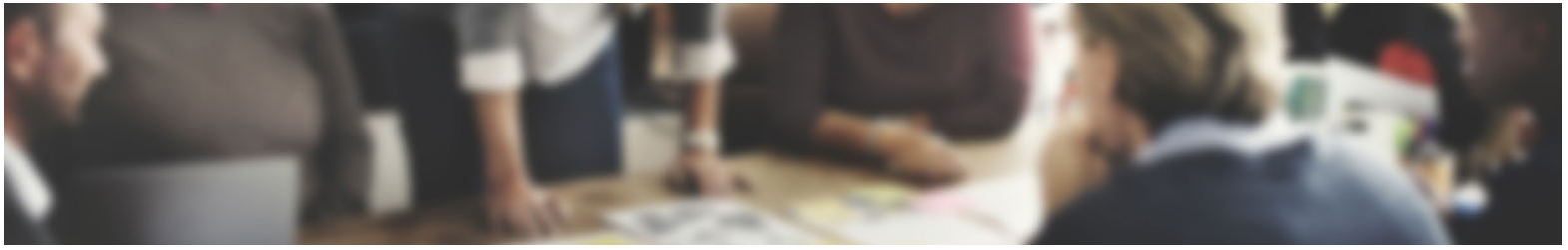
Almost without fail across industries, organizations are being forced to adapt to the empowered buyer. As today's prospective customers approach the buying process in new ways, marketers need to adapt their approach. This is a dramatic shift for many organizations, and marketers accustomed to defining the marketing and sales "funnel" and controlling, so-to-speak, a prospect's movement through it. While marketing and sales may still coalesce their efforts around the so-called "funnel," it's imperative that they embrace the concept of the buyer's journey and all its implications.

Buyers now define their own journey from awareness to purchase. To effectively engage them, marketers can take advantage of marketing automation technology to gather intelligence — or "digital footprints" — that buyers leave behind on their journey. This intelligence powers follow-up interactions with these buyers.

It's important to understand that the use of marketing automation does not equate to pre-setting programs that drive desired behavior. Rather, marketing automation makes it possible for marketers to offer up and respond with relevant messaging to prospects' questions and areas of interest when and in the channel that buyers prefer. In this way, marketers are empowered to support and educate buyers throughout their journeys, in a way that keeps them top-of-mind as prospects narrow their short lists and ultimately make a purchase decision. Moreover, marketers can take advantage of this capability at a pace that suits their level of maturity and needs as outlined in the "crawl-walk-run" approach.

Carlos Hidalgo, CEO of ANNUITAS and author of "Driving Demand," insists that "marketers must first take a multifaceted approach to uncovering buyer insights and comprehending the buying journey. With this understanding in place, they can develop a content architecture





that aligns with the entire journey for each of the stakeholders on the buying committee.” Based on his firm’s experience helping B2B marketers devise winning demand generation strategies, Hidalgo feels these steps are critical in order to use marketing automation to effectively engage prospects throughout that journey.

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- CARLOS HIDALGO, ANNUITAS

Just as important is recognizing what marketing automation can — and cannot — help organizations achieve. While this technology can free marketers from many mind-numbing tasks — and actually reduce required resources — while supporting the full spectrum of engagement scenarios, it cannot change the new buyer-seller dynamic. Those marketers that accept this fact can effectively use marketing automation to best attract ideal buyers, engage and nurture them at every stage of the buying journey, and pass them off to sales when they are primed to make a purchase.



MYTH 5

ORGANIZATIONS NEED AN EXPANSIVE CONTENT MARKETING TEAM AND RESOURCES TO USE MARKETING AUTOMATION EFFECTIVELY

The final misconception ties back to a belief that marketing automation is only for the largest and best funded of organizations. It's true that companies must create the right content and identify the right person and the right channels for reaching the ideal buyer in order to get the most from their investment in marketing automation. But it's a fallacy that this requires

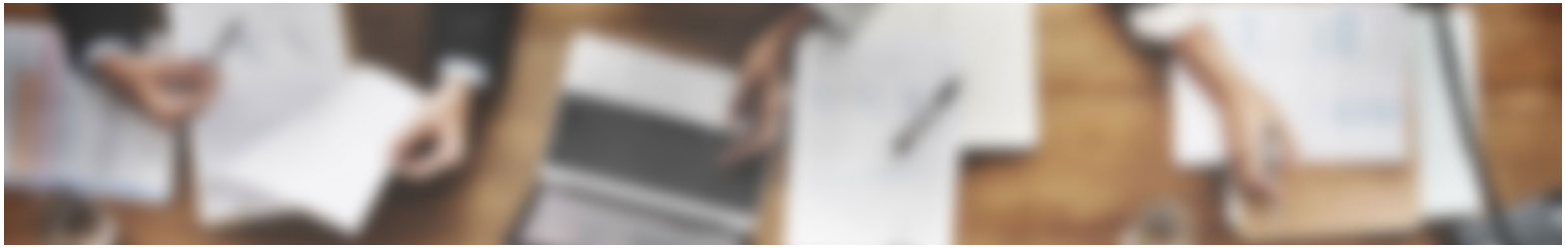
a massive team and budget. In fact, marketing automation by definition reduces resource requirements by automating many of the tasks associated with attracting, engaging, and nurturing prospects and customers. Moreover, by doing so, it frees those previously relegated to the tactical to spend more time on the strategic elements of marketing.

"MANY OF MY CLIENTS WITH 'SKELETON' TEAMS USE MARKETING AUTOMATION TO GREAT ADVANTAGE. IT'S ALL IN THE APPROACH. COMPANIES END UP ADDING TEAM AND RESOURCES BECAUSE THEY'RE NOT APPROPRIATELY PREPARED TO EXECUTE WITH A MARKETING AUTOMATION PLATFORM." 🐦

- ARDATH ALBEE, MARKETING INTERACTIONS

To truly drive value from marketing automation, organizations should focus on dedicating the right resources, rather than a lot of resources, to it. Again, Penn of SHIFT Communications weighs in: "Marketing automation is like any other tool; the results companies generate by using it depend on their proficiency with the tool."

As Ardath Albee, B2B Marketing Strategist and CEO of Marketing Interactions explains, companies unnecessarily throw resources at their marketing automation platform because they have not put in place the proper strategy and process to support their use of the system. In fact, Albee equates the haphazard approach to the way companies first approached CRM deployments. As she underscores, many early



CRM projects failed because companies hadn't prepared or motivated salespeople to use the technology to their advantage. The same is true when it comes to marketing automation.

Albee exposes another underlying barrier to success: thinking of content as one-offs rather than as foundational, reusable assets.

“WHEN MARKETERS OVERLOOK THE OPPORTUNITY TO REUSE OR REPURPOSE EXISTING CONTENT, THEY ARE LEFT FEELING THE PRESSURE TO CREATE HUGE VOLUMES OF CONTENT FROM SCRATCH. THIS SIMPLY ISN'T NECESSARY IF THEY DEVELOP AND REUSE CONTENT STRATEGICALLY.”

- ARDATH ALBEE, MARKETING INTERACTIONS

Marketers are wise to tie the effectiveness of their marketing automation systems to the core discipline of content marketing. In fact, 88% of B2B marketers are using content marketing as per the *2016 B2B Content Marketing Benchmarks, Budgets and Trends* report published by the Content Marketing Institute.

Both Albee and Cari Baldwin, President of BlueBird Strategies, advise a strategic, measured approach to content. This requires a keen understanding of which information is most vital to buyers and smart ways to provide them with that information. Perhaps that means writing a series of blog posts that ultimately get rolled up into a larger, cornerstone asset — such as an E-book. Or maybe it comes down to determining how a content asset used in a nurture program can also be used in a triggered campaign.

The bottom line is to employ a step-by-step approach to producing and delivering content, aligned with buyers' needs and priorities. 



CONCLUSION

While organizations recognize the value of marketing automation, many more are just getting started in their efforts to make the most of these powerful systems. The good news is that it's not too late to get started with marketing automation. According to Forrester Consulting, only 17% of B2B marketers responding to a recent survey identified themselves as leading in marketing technology maturity, and only 10% believe they can fully execute mature marketing automation strategies.

Being a late adopter of marketing automation is not necessarily a negative. Learning from those who have gone before them can actually position B2B marketers to succeed more quickly than they would have otherwise. Rather than

get hamstrung by misconceptions or misguided approaches, they can determine the most effective approach by calling upon the insights and recommendations of industry experts and experienced users. This allows them to:

- Avoid detours as they traverse the crowded marketing technology highway;
- Align marketing automation features with strategic goals;
- Put in place the right people and processes;
- Understand and master core functionality; and
- Establish a solid foundation for marketing effectiveness.



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