

2021 MARKETING TECHNOLOGY **SUCCESS GUIDE**



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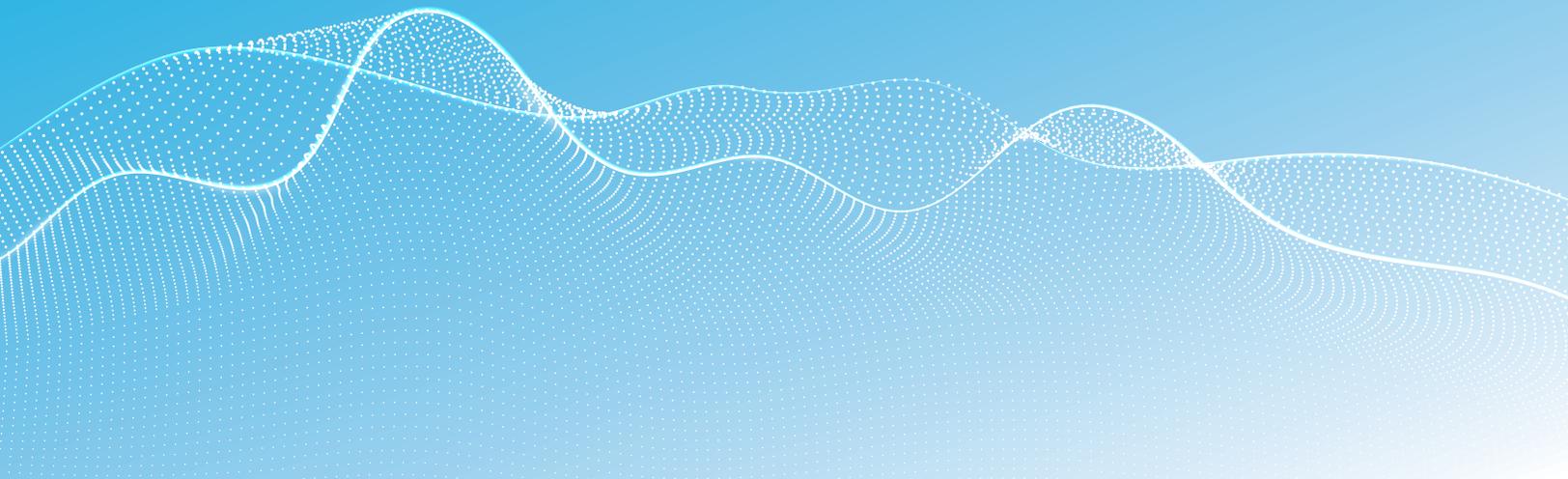
Few roles within an organization have changed as much as that of a marketer.

Caught between the mandate to generate revenue growth and a changing strategic landscape — with more distribution channels, significant technological transformation, greater customer expectations and increased advertising costs — successful companies are re-imagining the role of marketing. Gone are the days of traditional marketing that focused solely on marketing-specific objectives like brand awareness, content creation and generating impressions.

The landscape has shifted from brand to customer experience, where revenue targets are tied to success. To stay ahead of their competition, marketing leaders must increase cross-functional collaboration and harness customer data for new insights while amplifying the customer experience and investing in the technologies that address customer needs in real-time.

First, the good news. You've succeeded and been able to build the expertise needed to get where you are today. However with that success comes increased responsibility, more oversight and higher expectations. Sometimes it feels like there aren't enough hours in the day or that you are stretched too thin to make the same level of impact. So how are you supposed to continue to reinvent yourself as the rate of change continues to accelerate?

While this guide won't solve every challenge that comes across your desk, it will chart your course to capably lead your organization to a more prosperous future through the effective application of marketing technology. So stick with us to learn how to optimize the effectiveness of your messaging, resources and processes and find success in a new, ever-changing marketing landscape.



INTRODUCTION TO ZIROUS

WHO IS ZIROUS?

For over 30 years, Zirus has been the solutions partner of choice for marketing technology, machine learning and artificial intelligence, identity and access management, application integration, cloud and development in the Midwest and beyond.

Our marketing technology practice specializes in crafting customer centricity through data and insights. We enable clients to overcome the paradigm shift in marketing driven by new technology and customer demands to thrive in the new marketing landscape. Our expertise in technology, data, performance marketing, analytics and marketing automation helps create customer-first organizations. This results in faster growth, higher return on investment and improved operational efficiency for our clients.

We leverage our expertise to drive value for clients:

- Uncover Hidden Demand
- Attribute Revenue to Spend
- Scale Communication Cross Channel
- Optimize Marketing Effectiveness

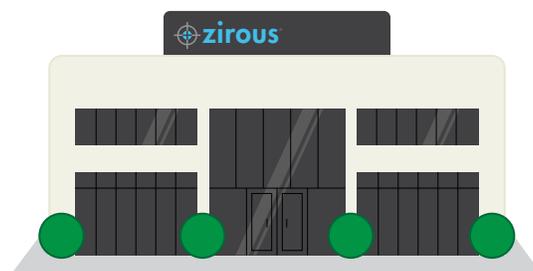
WHY ZIROUS?

Our clients love us for three resounding reasons:

- We provide local and accessible experts that fit company culture.
- We're a partner who understands their business even better than they do.
- We are strategy-focused and not afraid to challenge the status quo.

We know these are true - because we asked! Our clients tell us that we're an essential part of their team and their success because we work **with** them to reach their goals.

All of these things align with our values, which makes this even better news. We're not an in-and-out, one-size-fits-all provider working through as many clients as possible as quickly as possible. We are truly custom solution providers, working through your specific business problems to provide the answers and resources you need to do your job best and boost your bottom line.



WHY MARTECH MATTERS

According to Accenture¹ 90% of organizations view marketing as the connective tissue between different lines of business — sales, technology, service and product — based on its ownership of customer data and insights. That means marketers are uniquely positioned to champion a 360-degree view of the customer within the company, as well as the execution strategy needed to communicate different messages to each user wherever they are in their customer journey.

If marketing connects a company to its customers, then [marketing technology](#) is the engine driving customer value. Martech operationalizes and maintains demand across your product lineup through your various channels — sales, marketing, customer service and e-commerce.

For most companies, technology expenditures related to growing revenue continue to increase. Research by WARC and BDO² estimates global spend on marketing technology eclipsed \$120 billion in 2019. In the U.S. alone, the additional spend has accelerated over the past decade³ from around \$2 billion in 2010 to about \$35 billion in 2019. During that time martech has accounted for nearly 30% of the economic growth in total marketing due to its effectiveness and reduction in manual work to fill in data and operational gaps.

Unfortunately, the sheer number of providers, as well as martech's sometimes-awkward positioning between marketing, technology, sales and other functional units, means that marketing technology can fail to live up to its potential. In some organizations martech can even feel more like something that constrains growth instead of powering it. If even some of that rings true, don't worry. It doesn't have to be that way.

We are going to break down the components and tools of a finely tuned [marketing technology](#) stack. In doing so, we'll show how they can work together and how to create synergy between your entire ecosystem.

GLOBAL
SPEND ON
MARKETING
TECHNOLOGY
ECLIPSED
\$120 BILLION
IN 2019



MARTECH WORLD

Modern marketers must combat two critical forces in order to chart the right course.

1 The pace of change is faster than most companies and marketers are willing or able to adapt.

2 The number of solutions continues to grow (surpassing 8,000 in 2020⁴), which leaves leaders to piece together the right ecosystem.

For organizations to move ahead, humanizing the digital revolution is essential. Realizing a [full 360-degree view of the customer](#) is difficult, especially in a world bogged down with legacy systems and siloed, stand-alone products. Existing tools and systems are ingrained in virtually every aspect of an enterprise's day-to-day processes and cultural habits.

Even understanding that there are more advanced tools available, organizational leaders may find the thought of democratizing customer data from legacy systems, SaaS applications and analytical tools scary.

Successful organizations must establish the processes, technology and culture that revolves around their customers and delivers the experience that is expected. The customer journey should be seamless, regardless of how customers interact with the brand. Companies must develop the ability to:

- Improve the quality of customer interactions.
- Provide personalized and relevant omnichannel communication to customers.
- Increase the perceived product value for customers.
- Use automation to scale communication across platforms.

This must be accomplished while reducing key barriers⁵ to success, including:

- Integrating disparate systems.
- Attributing revenue (direct and indirect) to marketing (spend.)
- Increasing marketing ROI.
- Improving decision-making.
- Improving marketing efficiency.

The Chief Marketing Technologist Blog⁶ has been cataloging martech vendors since 2011 (a time that has seen an expansion from 150 to over 8,000). Not all vendors and technologies are equal, but we do believe in taking an agnostic approach to a technology stack — what's right for one company might not be right for another company. There are no silver bullets, platforms or vendors that have everything that you need.

The goal of this resource isn't to compare and contrast the different tools. Rather, it is meant to give you a framework to build an effective stack for your unique situation. To that end we will discuss technologies, their importance to your overall ecosystem, the general cost, implementation timeframes, when to consider the technology, when you will start seeing value and your potential ROI. A key to define each of these can be found on [page 9](#).

As an illustration of how these platforms work together, we use the analogy of a national park. While all parks have key areas of interest, a park's true value comes from the wide variety of scenery and activities that meet the requirements for different visitors.

**THE GOAL IS TO
GIVE YOU A
FRAMEWORK
TO BUILD AN
EFFECTIVE STACK
FOR YOUR UNIQUE
SITUATION.**

DATA FALLS



SALES & E-COMMERCE MOUNTAIN



OPERATIONS DEPOT



SERVICE LOOKOUT



ANALYTICS STATION



WEB FOREST



ENGAGEMENT LAND

Tool Scope

The scope of the tool relates to its importance to an organization's overall ability to meet revenue goals. The definitions of each listing are as follows.

HEADLINER: Required for a successful mid-market or enterprise organization to compete with its competition.

MAJOR: An important aspect of the marketing technology stack that shouldn't be overlooked.

MINOR: Applicable to many situations but not all. When relevant these tools can have an outsized impact.

Cost

Every category has tools for different budgets. The estimated costs include the software licensing and implementation costs. The price listed is for the major players in the market who have the predominant share of the market.

\$\$\$\$: Organization-wide initiative or major purchase that will need C-suite sign-off, potentially by multiple members.

\$\$\$: Strategic initiative needing CMO and/or CIO budgetary sign-off.

\$\$: Tactical initiative needing department or team-level sign-off.

\$: Local initiative needing individual or team budget or a proof concept in order to move forward.

Implementation Time

This category refers to the time from sign-off to when the tool is effectively being leveraged by its users.

SHORT: Days or weeks

MEDIUM: One to three months

LONG: One or more quarters

Time to Value

While different products produce returns more quickly and have widely divergent costs, this will be the average time for the tool to return positive cash flows (return is greater than the monthly cost of tool + cost of labor). For the purposes of this guide we will not evaluate tools that take more than a year to create a positive return.

IMMEDIATE

THIS MONTH

THIS QUARTER

THIS YEAR

Potential ROI

The ROI takes into consideration how this tool category compares to other potential technology investments that can be made by the company.

CRITICAL: High probability for return.

IMPORTANT: Strong value for the organization.

SOLID: Decent value for the cost.

SPECULATIVE: Could produce a return in the right situation but carries higher than average risk.

DATA FALLS



A study by Forbes Insights⁷ found that only 13% of companies are leaders in leveraging customer data. Additionally, 89% of executives surveyed see a moderate to high risk of digital disruption likely to occur in the next three years.

A [unified view of your customer data](#) can lead to better outcomes for your customers and business. Unfortunately, most companies require multiple applications, like CRM, marketing automation, internal databases, customer service platforms, digital ad platforms and more, to manage customer interactions.

This means companies are reliant on Frankenstein-like marketing technology stacks with disconnected core systems, causing challenges and inefficiencies that impact the customer experience. This disconnect also leads to frustration for the marketing team, as a recent study by Deloitte found that only 38% of companies strongly agree that they know where all of their customer data is stored. This presents not only huge headaches and missed revenue potential but also risks the possibility of financial penalties being assessed due to noncompliance.

The goal of data governance should be to get marketers the data needed to drive revenue while reducing the risk for technology teams and the wider enterprise.

There is a better way to harness customer data — one of the greatest assets your company owns. Let's review the different technologies that will help turn your data into a competitive advantage.

CUSTOMER DATA PLATFORM

DESCRIPTION: At its foundation, a [CDP is a data-as-a-service infrastructure](#) that unifies and persists customer profile and other data, from any source, legally and securely into a single database with a comprehensive view of all customer activities or behaviors. Those activities are given rules-based attributes to create personas in real time that can be activated for any customer-facing communication in every customer channel. This data can also be utilized for analytics, reporting and data science, including machine learning and AI.

Once correctly implemented, non-technical teams should be able to utilize data within applications using configuration or low or no-code technology. This means marketing, sales and customer service teams can own the outputs from the CDP within applications they use every day — CRM, marketing automation, customer service systems and ad platforms — with minimal IT involvement.

SCOPE: Headliner

COST: \$\$\$-\$\$\$\$

WHEN TO EVALUATE: When you need a 360-degree view of your customer from multiple data sources

IMPLEMENTATION TIME: Medium to long

TIME TO VALUE: This year

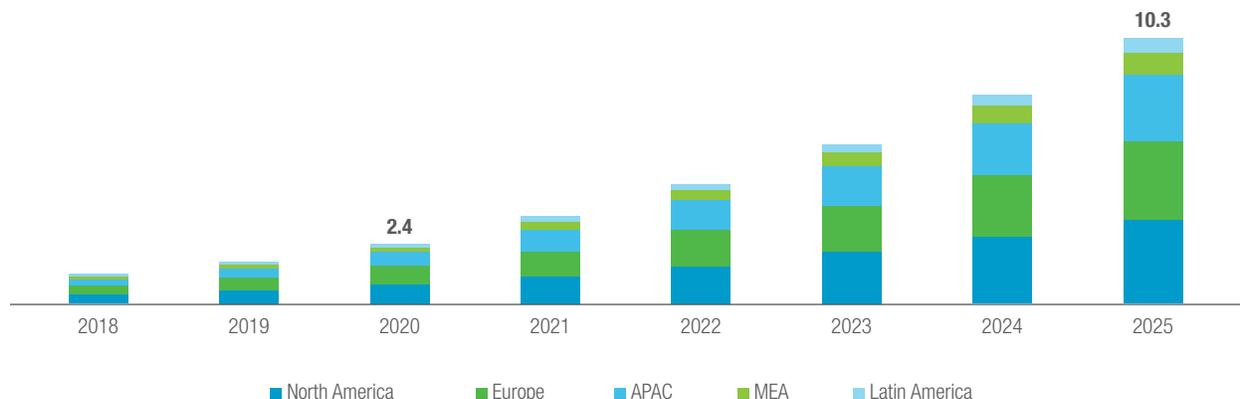
ROI POTENTIAL: Critical

VENDOR EXAMPLES: Tealium⁸, Arm Treasure Data⁹

ANALYSIS: The first reference to a customer data platform (CDP) can be traced back to 2013. Since that time the concept has grown in popularity and is on the cusp of being considered a major component of a marketing technology stack, on par with CRM, marketing automation and content management systems. While the theory of connecting customer activities in an integrated manner has been around for years, it wasn't possible until recently, at least not in a scalable manner.

More companies are looking into this customer data framework. This type of platform will become mainstream in the near term, at least for enterprise and SMB companies. CDPs look to be the next big marketing technology wave and are where CRMs were 10-15 years ago and marketing automation 3-5 years ago. A recent analysis by Markets and Markets¹⁰ estimates the CDP market will grow from roughly \$2.4 billion in 2020 to \$10.3 billion by 2025 — a compound annual growth rate (CAGR) of 34% during the forecast period.

CUSTOMER DATA PLATFORM MARKET, BY REGION (USD BILLION)



Source: MarketsandMarkets Analysis¹¹

CUSTOMER DATA PLATFORM (CONT.)

Here are some signs your company might be ready to consider a CDP system:

- You need a complete and consistent customer view.
- You want to personalize the experiences of your customers in real-time (sub-200 milliseconds).
- You need to tie offline and online customer data together.
- You have technology evaluations underway for CRM, email, tag management, etc.
- You've had issues integrating customer data to CRM, email, ad tech, cloud providers, etc.
- You have an upcoming website redesign.
- You lack the resources and skills to manage your data.

Not all [systems advertised as a CDP are equal](#); however, by doing your due diligence or working with a trusted partner you can find the right solution for your company.



DATA WAREHOUSE / DATA MART

DESCRIPTION: Amazon Web Services (AWS) defines a data warehouse as “a central repository of information that can be analyzed to make better informed decisions. Data flows into a data warehouse from transactional systems, relational databases, and other sources, typically on a regular cadence. Business analysts, data scientists, and decision makers access the data through business intelligence (BI) tools, SQL clients, and other analytics applications.”¹²

SCOPE: Major

WHEN TO EVALUATE: When adding new data sources or tools and/or when considering moving data to the cloud

IMPLEMENTATION TIME: Medium to long

TIME TO VALUE: This quarter

ROI POTENTIAL: Important

VENDOR EXAMPLES: AWS¹³, Azure¹⁴

ANALYSIS: Organizations of every size in every industry are starting to realize that data matters and it’s quickly becoming one of today’s most valuable resources. The [data environment](#) is changing rapidly, and we now have data coming at us from all directions in the form of IoT, sensor data, social media activity, geospatial, logs, operational data — the list goes on and on.

Organizations must understand what they need to stay competitive. It’s imperative to leverage as many of these data channels as possible to achieve operational efficiency and create competitive advantages. Ask yourself these questions:

- Do you have an integrated view of your customers?
- Do you know what your customers and competitors are saying about your company?
- Can you analyze your customers’ behavior to influence their future behavior?
- Can you apply business rules to detect abnormalities and take action?
- Can you support business decisions with information derived from historical data?

Companies say they are doing analytics, but the questions above can highlight whether or not they’re doing them effectively and efficiently. Often we find that analytics is fragmented across the enterprise and tools like Excel, R or Python are used by users or business specialists or analysts using data from multiple enterprise data sources.

These are the efforts that need to be supported and automated by the enterprise instead of by individuals. Organizations need to understand existing capabilities and identify gaps in supporting current and future business needs and then start to modernize or enhance their existing data architecture to meet these needs.

INTEGRATIONS

DESCRIPTION: Microsoft Azure defines integration services as bringing together API management, logic apps, service bus and event grid as a reliable, scalable platform for integrating on-premises and cloud-based applications, data and processes across your enterprise.¹⁵

SCOPE: Major

COST: \$\$-\$\$\$\$, depending on the quantity of data

WHEN TO EVALUATE: If you are considering moving data to the cloud or adding a new technology/data source. Otherwise this should be an ongoing conversation that occurs on a regular (at least monthly) basis. We've found that a cross-functional governance team that joins technical leaders with business leaders creates the most optimal outcome for businesses.

IMPLEMENTATION TIME: Medium (single data set) to long (for multiple)

TIME TO VALUE: This year

ROI POTENTIAL: Important

VENDOR EXAMPLES: MuleSoft¹⁶, Scribe¹⁷

ANALYSIS: If you are like most companies, there [isn't one tool or even a suite of tools](#) that can handle all of your marketing needs. In fact, Okta¹⁸ (a Zirus partner) estimated that the average large business (greater than 2,000 employees) used more than 120 applications, while the average small- to mid-size business (fewer than 2,000 employees) employed over 70 applications by the end of 2018.

But all of these different applications require companies to accept the challenges and inefficiencies of a Frankenstein-like marketing technology stack where core systems like CRM, marketing automation, CMS and digital platforms are not connected. While integrations come in many forms, using extract, transform and load (ETL) tools to integrate data sets and APIs to access and call data from different systems. While there are lots of available solutions, it starts with having [master data management](#) and [data governance](#) strategies to support how you utilize data within your organization.

DATA GOVERNANCE / MASTER DATA MANAGEMENT

DESCRIPTION: The Data Governance Institute defines data governance as “a system of decision rights and accountabilities for information-related processes, executed according to agreed-upon models which describe who can take what actions with what information, and when, under what circumstances, using what methods.”

SCOPE: Major

COST: \$-\$\$\$

WHEN TO EVALUATE: As mentioned in the previous section this should be a regular occurrence that happens at least monthly after the initial strategy is created and executed upon.

IMPLEMENTATION TIME: Medium to long. This is variable by organization based on the amount, complexity and number of sources of data. The initial strategy requires the right cross-functional team, and rollout across the organization can be time consuming. Once set this should be an ongoing evaluation.

TIME TO VALUE: This year

ROI POTENTIAL: Solid

VENDOR EXAMPLES: N/A (more of a process or strategy component and multiple technologies, from CDPs to cloud infrastructure products or SaaS products, are a part of this global approach to data)

ANALYSIS: Government regulation related to customer data privacy — GDPR, CASL and CCPA, among others — has increased in recent years. This has led many technology teams to push back against their marketing peers on the utilization of marketing technology tools and SaaS applications.

In fact, Deloitte and Forrester conducted a survey¹⁹ in late 2019 that found only 38% of companies strongly agree that they know where all of their customer data is stored. This presents not only huge headaches and missed revenue potential but also risks the possibility of financial penalties being assessed due to non-compliance.

The goal of [data governance](#) should be to get marketers the data needed to drive revenue while reducing the risk for technology teams and the wider enterprise.

COMPLIANCE / PRIVACY

DESCRIPTION: [Compliance and privacy tools](#), as defined by Tealium, should “help companies manage the data that flows between their customers or users and their digital properties (such as their website, mobile apps, etc.). This helps companies better understand you as an individual, so they can tailor their communications, marketing, and experiences to serve you better.”²⁰

SCOPE: Important

COST: \$-\$\$ (Cost generally is directly tied to the cost of labor; however, there are tools that can be purchased as part of another system (CDP) or individually.)

WHEN TO EVALUATE: Any time you enter a new market or as laws are passed/amended. Be sure that your legal team stays on top of any adjustments and that these are communicated to the data governance team to make updates as needed.

IMPLEMENTATION TIME: Short to medium

TIME TO VALUE: Immediate

ROI POTENTIAL: Important

VENDOR EXAMPLES: One Trust²¹

ANALYSIS: Arguably, the most stringent privacy regulation is the General Data Protection Regulation (GDPR), which governs customers and companies that do business in the European Union. It requires the following things:

- Consent must be obtained from customers to use their information. This could entail using cookies to track web behavior or to send customers marketing materials.
- Customers have the right to be forgotten. If a customer requests to have their data purged a company must do so “without undue delay.” This includes communicating to the requester the steps the company plans to take within 30 days.

Markets outside of the EU do not have consent policies that are quite as stringent. However, gaining opt-in from customers is crucial not only from a compliance standpoint — it also pays dividends from a customer experience perspective.

If you know what your customers want and can send them personally relevant messages it builds trust with your brand. Infosys²² found that 78% of consumers are more likely to buy from retailers with targeted ads. Furthermore, if you understand the interests of your customers and how frequently they want information you can better target your communications and reduce disengagement.



ANALYTICS STATION

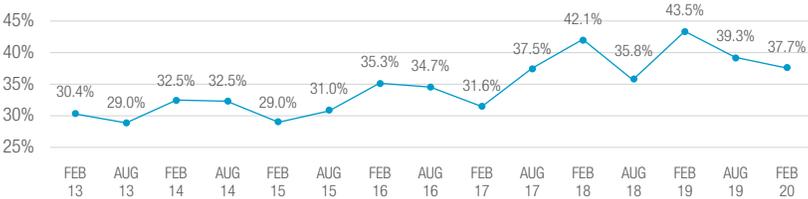
A recent survey by McKinsey found that only 20% of respondents say their organizations excel at decision-making. And a majority say a significant percentage of the time spent on decision-making is ineffective. This blind spot extends from the boardroom to the marketing department, according to a CMO survey²³ released in February of 2020. That survey of chief marketing officers found that CMOs use marketing analytics less than 40% of the time to make decisions.

How are these results possible when there is more customer data science available than ever before for leaders to make decisions? For example, most CMOs should have access to some, if not all, of the following data sources: web analytics, CRM, email marketing, social platforms, paid search, paid social, events, webinars, e-commerce and financial systems.

Our hunch is this blind spot results from the inability of most companies to collect, aggregate, standardize and attribute their customer data pipelines. This disconnect leads to lost revenue due to stock outs, failing to solve a customer’s need or increased costs due to operational inefficiency. We believe this shouldn’t be accepted as a cost of doing business. And know your data holds the key to unlocking this trapped revenue.

COMPANY USE OF MARKETING ANALYSIS IN DECISIONS CONTINUES TO SLOW

Percent of time marketing analysis is used in decision making



ECONOMIC SECTOR	INSIGHTS
B2B Product: 34.0%	As companies increase in revenue and level of internet sales, they increasingly rely on marketing analytics in decisions making
B2B Service: 27.3%	
B2C Product: 46.4%	
B2C Service: 58.6%	

Source: Source²⁴



DASHBOARDS

DESCRIPTION: [Customer data visualization dashboards](#)

connect decision-makers to quick and digestible insights from the entire organization, allowing for:

- Company-wide visibility into key performance indicators (KPIs) and business-critical information to help strengthen the company's strategic vision.
- Process improvement and people improvement.
- Access to timely information without expending time or labor to manually pull and combine reports from various systems.
- Self-service and real-time information.
- The ability to layer information across business units for more advanced analytics and insights.

SCOPE: Minor

COST: \$

WHEN TO EVALUATE: Anytime

IMPLEMENTATION TIME: Short to medium

TIME TO VALUE: Immediate

ROI POTENTIAL: Solid

VENDOR EXAMPLES: Tableau²⁵, Power BI²⁶

ANALYSIS: The realization that data can help make better decisions has never been higher. However, due to numerous factors (including the sheer amount of data, data silos within organizations, poorly designed business processes, talent shortages and even the lack of real-time dashboards) few firms have been able to fully leverage the value of their data. This means opinion-driven decisions — and not data-driven decisions — still account for many if not most decisions within an organization.

The first step for any organization is to set up a strong data foundation (see Data Falls) to connect systems together, map data elements between systems and standardize data.

The second step involves a change in mindset for most organizations. Companies must be willing to embrace the democratization of data, meaning that data is freely shared between different platforms and business units. This doesn't mean that the data is less secure — role-based security should be used to determine who gets access to what information. This creates more complexity but it also creates more value, with the right people having access to data that impacts their role.

Finally, shift from a centralized reporting model to a more decentralized self-service strategy. There should be a centralized team that connects, manages and validates data from different systems, creating a single source. However, that team should not be responsible for creating reports for end users. In a self-service BI reporting model, users take responsibility for proactively managing and manipulating data relevant to them.

ATTRIBUTION

DESCRIPTION: Salesforce defines²⁷ attribution as “the way in which marketers assess the value or ROI²⁸ of the channels that connect them to potential customers. In other words, it’s the means by which the customer came to know and buy your product or service.”

SCOPE: Minor

COST: \$

WHEN TO EVALUATE: Anytime a new campaign begins

IMPLEMENTATION TIME: Short

TIME TO VALUE: Immediate

ROI POTENTIAL: Important

VENDOR EXAMPLES: Bizible²⁹, Datorama³⁰

ANALYSIS: With multiple touch points over different lengths of time, marketers need to understand what assets or mix of assets drive value. It’s just like in sports, where it’s important to understand who gets credit for a score. Individual statistics don’t just determine who wins and loses a game — it impacts who gets a bonus or a new contract. And who gets cut or traded.

The same is true in your company. While the salesperson closes the lead and gets the commission for a B2B sale, there was an in-person event that generated that lead. There was an on-demand webinar that drove the prospect to sign up for the event. There was a newsletter that highlighted the webinar and led to the registration. There was a paid retargeting campaign that led to the prospect signing up for the newsletter. And there was the organic search ranking that first got the person to the site to learn about the brand and be entered into the retargeting campaign.

It is doubtful that our example sale would have occurred without the combination of the other five activities. Determining how credit is shared within an organization determines what channels are used for future spend, as well as how to allocate resources to run different campaigns.

DATA SCIENCE / AI / MACHINE LEARNING

DESCRIPTION: Every piece of data you collect should be used to [provide business insights and inform solid decisions](#). AI is positioned to transform our world³¹ in the same way electricity did 100 years ago. With more data available than ever before, with the proper tools and expertise, you can use this data to create intelligence that simplifies, accelerates, augments and transforms your business and decision-making processes.

SCOPE: Minor

COST: \$-\$\$

WHEN TO EVALUATE: As your organization matures in its capabilities these activities have the ability to take you from good to great.

IMPLEMENTATION TIME: Short to medium

TIME TO VALUE: This quarter

ROI POTENTIAL: Important

VENDOR EXAMPLES: Azure³², AWS³³

ANALYSIS: Today's strategic marketing departments are looking to do more with the data that's available to them. But for anyone who has [started down this journey](#), you soon realize that having a lot of data doesn't automatically result in a lot of actionable information.

Consider leaning on [machine learning technology](#) to pull out some of that actionable information. That idea might have already crossed your mind; in fact, a joint study³⁴ by Google and MIT found that 74% of marketers believe their organization's current goals would be better achieved with greater investment in machine learning and automation.

Here are three ways that AI and machine learning help customers do more with their data.

- **PERSONALIZATION:** Increase conversion rate by personalizing experiences based on what you know about the customer.
- **A/B TESTING:** Create user flows that maximize conversions.
- **OPTIMIZE SPEND:** Focus on the core activity and journeys that are more likely to produce revenue.

WEB ANALYTICS

DESCRIPTION: Web analytics tools sample web traffic to give you information about visitors and sessions, including demographic data, location data, device data, content viewed, time on the page, channel-related metrics, goal conversions and more.

SCOPE: Major

COST: \$-\$\$

WHEN TO EVALUATE: When creating or updating a website

IMPLEMENTATION TIME: Short

TIME TO VALUE: This month

ROI POTENTIAL: Important

VENDOR EXAMPLES: Google Analytics³⁵, Adobe Analytics³⁶

ANALYSIS: Web analytics are critical to understanding how consumers are interacting with your brand online. There are both paid and free versions of analytics tools with the main difference being the amount of sample obtained and the amount of data that can be used with users. Any company with a website should have a web analytics tool in use. This data can be extended by using other tools such as tag management or personalization tools.



SALES & E-COMMERCE MOUNTAIN

Misalignment between [marketing and its counterparts in sales or e-commerce](#) is a very real problem. It results in decreased revenue, poor customer experiences and higher marketing costs.

A recent Marketo study conducted with Reachforce³⁷ found that half of a sales team's time is spent on unproductive prospecting, with 80% of marketing leads ignored. That equals not only wasted time but also wasted dollars. From abandoned cart emails to retargeting to content that drives SEO and paid channels, the role of marketing in driving e-commerce sales is arguably just as important as its role in B2B sales.

Any missteps between messaging and technology become more pronounced in the e-commerce channel. A reduction in traffic, conversion rates or both directly affect both revenue and costs. Small changes can have a large impact on the profitability of your e-commerce business.

When [evaluating technology](#) in this space three considerations should be front of mind.

- How do these tools help create synergy across the different functional teams within your organization? For example, the availability of sales data for marketing and marketing data for sales is critical.
- Do your systems allow you to segment or break customers into different groups? In a B2B framework this might be lead scoring to determine which leads are sales ready and which ones should be nurtured. In a B2C framework this might be bucketing users by interest or value.
- How does your technology stack enable your team to personalize communications based on a user's stage in the customer journey? Some customers need to learn more about your products and services. Other customers need to be shown your competitive advantage. Another set of customers might be ripe for up-sell or cross-sell. Your tools need to be able to delineate where the customer is and how to maximize the impact of your communications.

CRM

DESCRIPTION: A customer relationship management system (CRM) is a tool used, primarily by sales teams, that catalogs customer interactions with clients and prospects. The tracking of relevant interactions throughout the sales process helps the company better understand its potential revenue pipeline while enabling its employees to navigate through the different stages of the sales cycle.

According to Salesforce the [value of a CRM](#) stems from its ability to “help sales focus on your organization’s relationships with individual people — including customers, service users, colleagues, or suppliers — throughout your lifecycle with them, including finding new customers, winning their business and providing support and additional services throughout the relationship.”³⁸

SCOPE: Headliner

COST: \$\$\$-\$\$\$\$

WHEN TO EVALUATE: Annually or when it is time to renew the software license

IMPLEMENTATION TIME: Medium to long

TIME TO VALUE: This year

ROI POTENTIAL: Critical

VENDOR EXAMPLES: Salesforce³⁹, Microsoft Dynamics⁴⁰

ANALYSIS: While CRM systems are considered table stakes for any business that sells in the B2B space, we’ve found that [few businesses use them effectively and even fewer are able to depict a complete view of customer interactions](#) — between sales, marketing and customer service — in a discernible way for their employees. The hallmark of a visionary CRM system is less platform-based, though the tool must be user friendly. Rather, it is more focused on how it aligns your people, processes and systems. Key CRM success factors include:

- Formally aligning on what constitutes a lead between sales and marketing, along with a clear understanding of the roles and responsibilities of each functional unit.
- Lead scoring that dictates which leads go to sales and which continue to be nurtured.
- The ability to tailor communications, based on the user’s context or stage in the journey, that are both on point and on brand.
- The ability to promote accountability — the tool is only as good as the information in the system. If users aren’t required to log interactions, contact attempts or follow a sales process, the value of a CRM as a leading indicator or sales forecasting tool is greatly diminished.

E-COMMERCE PLATFORMS

DESCRIPTION: E-commerce platforms empower businesses to sell directly to consumers online. They include the ability to integrate with your website to merchandise, cart, transact payments, apply taxes and shipping, and kick off the fulfillment of the purchased product or service. According to an analysis of U.S. Department of Commerce data⁴¹, e-commerce accounted for 16% of total retail spend in 2019, which is likely to continue to grow as a percentage of purchases in 2021 due to COVID-19.

SCOPE: Headliner

COST: \$\$\$-\$\$\$\$

WHEN TO EVALUATE: When standing up a new e-commerce site, as regulatory changes occur and on an annual basis

IMPLEMENTATION TIME: Long

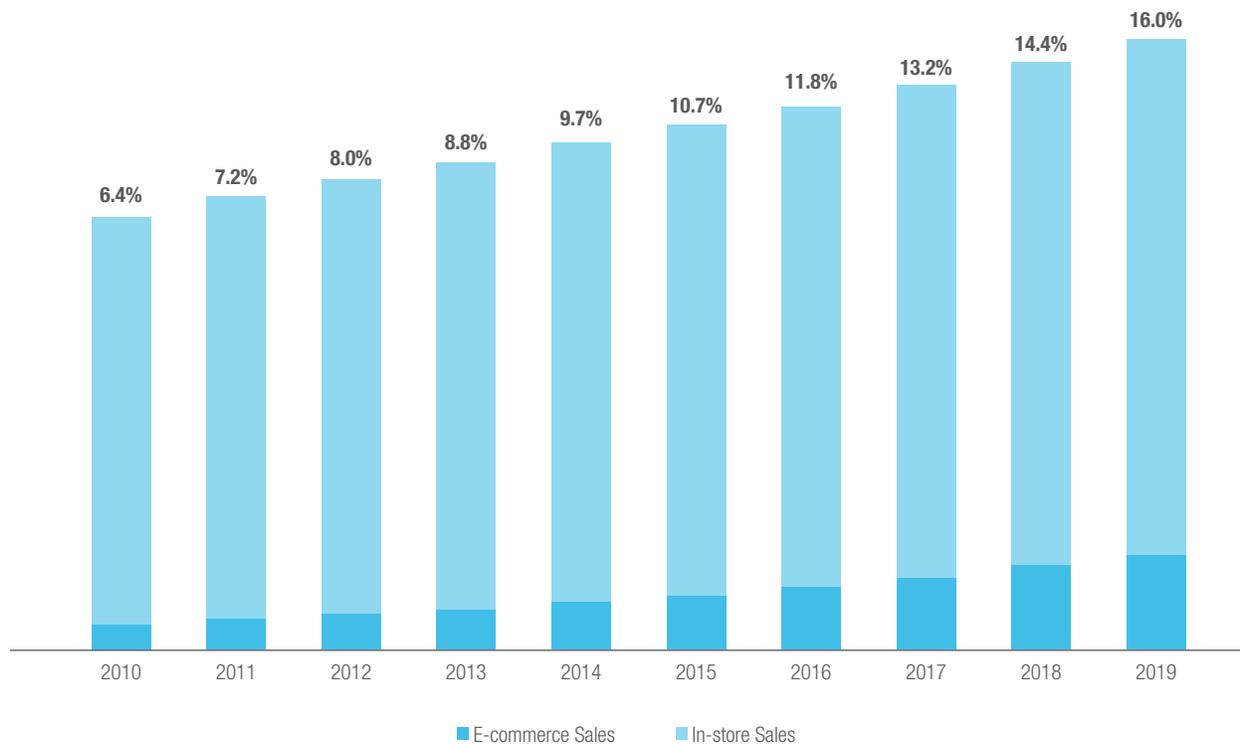
TIME TO VALUE: This year

ROI POTENTIAL: Critical

VENDOR EXAMPLES: Magento⁴², Shopify⁴³

U.S. E-COMMERCE PENETRATION

Online and in-store sales as a % of total retail* spend, 2010-2019



Source: Digital Commerce 360 (formerly Internet Retailer) analysis of U.S. Department of Commerce data⁴⁴

*Total retail figures exclude sales of items not normally purchased online such as spending at restaurants, bars, automobile dealers, gas stations and fuel dealers



CPQ

DESCRIPTION: A configure, price and quoting tool that allows B2B businesses to standardize the selling process by offering salespeople the ability to configure quotes based on standardized rates, apply appropriate discounts and send quotes to prospects. In addition, many tools might incorporate the ability to collect a digital signature and kick off fulfillment activities post-sale.

SCOPE: Minor

COST: \$\$-\$\$\$

WHEN TO EVALUATE: When you are looking for efficiency and standardization of the sales process

IMPLEMENTATION TIME: Medium to long

TIME TO VALUE: This year

ROI POTENTIAL: Solid

VENDOR EXAMPLES: Vendavo⁴⁷, Salesforce⁴⁸ (formerly Steelbrick), Oracle CPQ⁴⁹

ANALYSIS: Gartner⁵⁰ expected the CPQ market to grow by 20% annually between 2016 and 2020, driven by the need for sales teams to reduce the sales cycle time, quickly roll out new products and prices, streamline the sales process for the client and sales team, and increase the accuracy of pricing and the ability to manage commissions in real time.

CPQ systems can be especially effective for companies with a standardized product offering and sales process. While they do have the ability to customize quotes, some of the value is lost when there is too much flexibility. Using a CPQ in conjunction with online signature capabilities helps add value to the purchase of a CPQ tool.

CONTRACT MANAGEMENT

DESCRIPTION: Contract management solutions enable sales professionals to complete deals more efficiently while providing a better customer experience for new and existing clients. These online tools allow users to review contract terms and conditions and ultimately sign the agreement.

SCOPE: Minor

COST: \$

WHEN TO EVALUATE: When looking for ways to compress the sales cycle

IMPLEMENTATION TIME: Short

TIME TO VALUE: This month

ROI POTENTIAL: Solid

VENDOR EXAMPLES: DocuSign⁵¹

ANALYSIS: For companies that sell in B2B channels a contract management solution can provide excellent efficiencies, not just for the sales organization but also for the legal and fulfillment responsibilities of the company. When integrated with CPQ, CRM, marketing automation and other downstream tools that deliver on the customer experience this tool can be the catalyst that begins the process of transforming a buyer into a dedicated customer.

ACCOUNT-BASED MARKETING

DESCRIPTION: ABM is a strategy that focuses on key accounts to build out engagement within the account and ultimately close deals. It includes cross-collaboration between sales and marketing to present the right messages at the right time to the right contacts within the targeted account. While ABM has been a hallmark of successful B2B sales for years, recent tools have helped amplify and automate the customer engagement process.

SCOPE: Minor

COST: \$\$-\$\$\$

WHEN TO EVALUATE: When looking for solutions to synthesize your customer journey

IMPLEMENTATION TIME: Medium

TIME TO VALUE: This quarter

ROI POTENTIAL: Solid

VENDOR EXAMPLES: Demand Base⁵², Leadspace⁵³

ANALYSIS: Unpacking ABM systems requires three things.

The first is the strategy of account-based marketing, which gets to the heart of how sales and marketing work together to [target high priority accounts](#) in an integrated manner. This might involve the sales representative running a top-down approach while the marketing team more widely targets bottom up to produce demand within the organization.

As far as B2B strategies are concerned there is significant merit to this approach. This is because it harnesses communication to the right individuals at the right companies and is likely to drive value and better return on investment than traditional marketing initiatives.

The second is the ability of ABM systems to join data. Historically this has been more third-party data, but increasingly ABM systems are trying to integrate with first-party data sources as well. Third-party data helps keep first-party data up-to-date and allows for prospecting. As regulation continues to discourage third-party data sharing services, the value of these tools could diminish. Many are therefore increasingly focused on first-party data.

While systems handle first-party data differently, these are often point-to-point integrations, requiring significant data mapping and data cleaning. A better option might be a CDP tool, which excels at stitching together broad data points into a unified record.

The third thing to consider is how these systems orchestrate journeys. Look for native integrations which allow the ABM system to connect directly with the channel tools (email, ad tech, CRM, etc.) That will allow updates to be managed by the vendor and not by your technology team. Also look to see how often data is shared to see if they are truly a “real-time” or “point-in-time” system.

MEETING SCHEDULING

DESCRIPTION: These tools integrate with your teams' calendars to allow customers to schedule appointments. Many also have the ability to take appointments on web pages or social ads and route those conversations through to the appropriate person.

SCOPE: Minor

COST: \$

WHEN TO EVALUATE: When looking to improve salesperson or service rep efficiency

IMPLEMENTATION TIME: Short

TIME TO VALUE: Immediate

ROI POTENTIAL: Solid

VENDOR EXAMPLES: Time Trade⁵⁴, Calendly⁵⁵

ANALYSIS: These tools are remarkably cost effective for their value. It's hard not to think of how much time can be saved by reducing the back and forth to schedule a meeting, as well as the increased likelihood of a meeting when barriers are eliminated for the customer. Meetings scheduled via these tools tend to be highly qualified and usually convert at a higher level than other lead channels.

PROSPECTING / LIST BUILDING

DESCRIPTION: List segmentation tools have been part of the sales prospecting playbook for quite some time. These third-party services aggregate data by scraping the web, employing reps to do data verification or building lists of users within their network. This could be on a global level like LinkedIn or a regional or industry-specific vertical like a state board of education or trade group.

SCOPE: Minor

COST: \$-\$\$

WHEN TO EVALUATE: When outbound prospecting is required to build your sales pipeline

IMPLEMENTATION TIME: Short to medium

TIME TO VALUE: This month to this quarter

ROI POTENTIAL: Speculative

VENDOR EXAMPLES: ZoomInfo⁵⁶, Dun & Bradstreet⁵⁷

ANALYSIS: Most sales teams require some form of outbound sales efforts, which means almost every company will use at least one prospecting tool. In addition to having sometimes sketchy data quality these systems do carry added risk, specifically pertaining to email privacy law.

Be sure to create and communicate policies surrounding the use of these tools that comport with your internal legal guidelines, the contract with the vendor and any applicable regulations. Look for tools that integrate with core systems like marketing automation and CRM to maximize the return on your investment.

INBOUND SALES

Content designed to draw customers to you



- Blog posts
- Articles
- Videos
- Social media
- SEO

OUTBOUND SALES

Directly reaching out to prospects



- Phone calls
- Emails
- Radio and TV adverts
- Forum research
- Billboards



WEB FOREST

In our increasingly digital world, early customer journey sales, connections and e-commerce sales are frequently generated by email, online ads or on your website. Even though salespeople are often removed from the equation, a personalized customer experience still matters.

In fact, in 2017 Accenture⁵⁸ estimated that U.S. organizations lost three-quarters of a trillion dollars per year, with over 40% of consumers switching companies due to poor personalization and lack of trust.

Have you ever received an email with irrelevant content? Been forced to endure a poor e-commerce experience while attempting to purchase a product? Attempted a self-service resolution to a problem, only to be forced to jump through numerous hoops? If so, that statistic shouldn't surprise you.

While getting personalization right isn't easy, investments do pay off and can be a competitive advantage for your company. A 2019 study by Monetate⁵⁹ found:

93%

of companies with an “advanced personalization strategy saw revenue growth as opposed to 45% without a personalization strategy saw equivalent growth.”

Companies with an ROI of

2x or more

said they spent at least 20% of their marketing budget on personalization.

Brands with the

highest ROI

(3x or higher) focused on loyalty as their top KPI.

We've found that nearly all marketers believe in the concept of personalization. However, many struggle to execute on these initiatives because they lack data on consumers or resources to create content for personalization. We found that the firms who do personalization best follow these rules.

- Democratize data: Data from all sales, marketing or service sources or platforms — online transactions (e-commerce), in store transactions (point-of-sale), sales transactions (CRM) — should be shared.
- Real-time streaming capabilities: This requires stitching together a unified record from devices under a unique identifier like an email address or account ID and then making that data available to technology that touches customers in real time (web site, email, ad platforms, etc.).
- Track results against strategic objectives: Social likes, sessions or page views are great, but if they don't track toward your KPIs their value is suspect at best.



SEO (search engine optimization)

DESCRIPTION: SEO tools help marketers optimize their website and individual pages for organic search on search engines like Google, Bing or Yahoo. These tools range from pay-by-the-month tools to annual contracts that include SEO strategy consulting.

SCOPE: Major

COST: \$-\$\$\$

WHEN TO EVALUATE: SEO should be evaluated at least monthly

IMPLEMENTATION TIME: Short

TIME TO VALUE: This month

ROI POTENTIAL: Important

VENDOR EXAMPLES: SEMrush⁶⁰, Conductor⁶¹

ANALYSIS: One of the foundational elements of any marketing strategy should be SEO. This should be one of your most important channels to drive customer traffic to your website. Search engine algorithms look at the content on your website, accessibility, page load times, code and more to determine where you rank on searches. By optimizing how your site performs, more of your potential customers will end up on your site as opposed to your competitors'.

The nice thing about these tools is they are available for almost any budget. Some of the monthly subscription tools are very cost effective and generate solid value. The more expensive tools tend to give more data and generally a better user experience. Many come with consulting to offer suggestions to boost your search rankings. Very few tools within your entire stack carry as much value as an SEO tool.

CONTENT MANAGEMENT SYSTEM

DESCRIPTION: A content management system (CMS) is to your content teams what your CRM is to your sales team. This tool is responsible for not just rendering your content on the page but also for indexing your content for search engine consumption.

Many of these tools do require development skills, which could be as simple as Javascript or tag management on a page, more complex like HTML or CSS (front-end development) or sophisticated back-end development to bring data in from various databases.

However, the majority of work done in a CMS should be able to be done by low-code or no-code users using WYSIWYG (what you see is what you get) editors to deploy and manipulate content on your website(s). Depending on your needs, CMS systems run the gamut from open source to home built to more commoditized platforms with plug-ins.

SCOPE: Headliner

COST: \$\$-\$\$\$\$

WHEN TO EVALUATE: On a multiyear basis, such as every three to five years

IMPLEMENTATION TIME: Long

TIME TO VALUE: This year

ROI POTENTIAL: Critical

VENDOR EXAMPLES: Wordpress⁶², Drupal⁶³

ANALYSIS: A content management system is a reflection of your technology and marketing culture. What is right for one company might miss the mark for another.

The main consideration should be the fit for your team. Does your system grease the wheels of productivity or does it keep your team stuck in first gear? Does it allow you to support the needs of your customers or is it an obstacle to customer communication? Does it allow your team to configure content within a framework or do you require custom development for all new updates?

Think of your CMS like a factory with automation. When done right it should reduce your per unit cost (of producing content) and allow your content teams to scale. It should allow some flexibility through configurations (low or no code) to adjust to users' demands on the fly or to quickly capitalize on A/B testing. If you need to take the assembly line down every time you need to make a change or require development for every update you might want to consider modernizing your infrastructure.

CHAT

DESCRIPTION: As more things move online from sales to support some of the context between the salesperson or customer service representative and a customer has been lost. Chat is a way to provide for a more [personalized and real-time experience](#). Just because the conversation happens in real time doesn't mean it needs to involve a human on both sides of the conversation. High volume use cases can often be automated to provide answers for routine questions.

SCOPE: Major

COST: \$-\$\$\$

WHEN TO EVALUATE: As your conversations move more online versus face-to-face

IMPLEMENTATION TIME: Short

TIME TO VALUE: Immediate

ROI POTENTIAL: Important

VENDOR EXAMPLES: Drift⁶⁴, Zendesk⁶⁵

ANALYSIS: A few years ago these tools would have had limited use cases and may have been considered a diversion. However, as more customers move online these tools have the ability to not just react to customer needs but drive real value for customers. Think of sales or customer service chat as marketing automation but in real time. When you look at the cost for most automation tools, which also have strong value, chat tools tend to be a bargain. From a sales perspective they help with conversion rates (e-commerce and lead capture) by automating the customer's journey based on predefined steps to guide the customer down your desired path. On the service side these tools help customers troubleshoot before opening a support ticket while also allowing your customer service team to intervene in real time for service recovery.

PERSONALIZATION & TESTING

DESCRIPTION: Testing allows brands to see what messages, designs and user flows best [convert to revenue](#). By utilizing tools for A/B testing within an overall demand generation framework, companies can boost conversion rate optimization on their site and collateral pieces, which directly impacts growth targets.

Key steps for successful testing include defining the testing hypothesis, isolating the right variables, enabling tracking, monitoring results and standardizing outcomes into the overall marketing strategy.

The foundation of personalization starts with the ability to collect, aggregate, optimize and flight data to customer platforms in real time. Unfortunately, realizing a full 360-degree view of the customer is difficult. Existing legacy systems are ingrained in virtually every aspect of an enterprise's processes and cultural habits. And stand-alone products only serve as Band-Aids to one-off business problems.

True personalization requires a paradigm shift — not just for marketing but for an entire business. It means investing in the technologies, people and processes that recognize the impact of creating customer-centric journeys.

SCOPE: Minor

COST: \$-\$\$

WHEN TO EVALUATE: When implementing new site designs or creating/ updating lead and e-commerce user flows

IMPLEMENTATION TIME: Short to medium

TIME TO VALUE: This quarter

ROI POTENTIAL: Important

VENDOR EXAMPLES: Optimizely⁶⁶, Google Optimize⁶⁷, Oracle Maxymiser⁶⁸

ANALYSIS: An Epsilon study found that 80% of consumers⁶⁹ are more likely to do business with a brand that knows how to personalize the customer experience. This means marketers must be able to track and collect customer data from various applications — web, marketing automation, customer service, CRM and digital ad platforms — and then flight that data in real time to the right system in order to serve up applicable content to prospective buyers.

Implementing dynamic communications, populated with specific content based on the prospect's needs can demonstrate a significant uplift in returns.

This is why a testing and personalization strategy should be at the forefront of marketing initiatives. Not only does this require a company to think through its data governance and system integrations (which have huge value in themselves), it also has the potential to increase revenue through better designs, content and user experiences.

A comprehensive plan also has the potential to reduce costs. Rather than investing huge resources in a new campaign or site redesign, why not test to prove the value before committing to make changes that might have a negligible (or negative) impact?

A good testing and personalization strategy requires software and also the right team, which should include marketers, technologists, designers, analysts and project managers. In some cases this could also include third-party consultants. Centralizing this team structure to cascade across the various business units works best, because it improves organizational communication and helps implement the results of successful testing and personalization company-wide.

TAG MANAGEMENT

DESCRIPTION: As defined by Tealium, “a tag management system makes it simple for users to implement, manage, and maintain tags on their digital properties with an easy to use web interface. Using a TMS is integral to providing a foundation for your organization’s data collection and governance needs while helping to drive better customer experiences.”⁷⁰

Tags allow users to insert code on a website to track data from client-side properties. Examples of these include conversion pixels from ad platforms, analytics tracking or code from marketing automation systems designed to capture user-level activities.

SCOPE: Minor

COST: \$-\$\$

WHEN TO EVALUATE: When you are looking to improve your site performance, standardize your data structure or gain efficiencies from the marketing team being able to manage tags

IMPLEMENTATION TIME: Short

TIME TO VALUE: This quarter

ROI POTENTIAL: Important

VENDOR EXAMPLES: Tealium IQ⁷¹, Google Tag Manager⁷²

ANALYSIS: The first key benefit of a tag manager is increased site performance —not every tag needs its own line of code on your site. These also generally reduce the time to [implement a new technology](#) on your website as they can be updated using configuration. In many cases, this means you won’t need a developer.

In addition, some of these tools have consent management, which allows you to manage users preferences to comply with regulations like GDPR and CCPA. You can use these tools to help you manage your data layer by standardizing how data is collected and passed downstream. Integrations with CDPs also allow for customizing messages to users in real time.

While there are several viable solutions for tag management, some are free and some are paid. Like most things in life you get what you pay for, and each use case is different. The most important consideration is how many different technologies are in play on your site — the more you have the greater the likelihood is that you will need a more robust solution.

Tag management tools manage integrations with different vendors so selecting one that supports most — if not all — of your technologies is important. The ability to manage and inject data definitions without code while maintaining security and oversight is a huge value.

The ability to collect your data from various client-side sources lets you have additional flexibility and avoid being locked into any one tool or platform.



OPERATIONS DEPOT

When building a marketing technology stack you can understand how operational tools might be overlooked. With so many systems, processes and responsibilities accounted for within the marketing stack, operational tools may sometimes appear superfluous.

However, just like middleware (the glue that holds software together) and ETL tools (that move, clean and load data across databases for a unified view), operational tools keep everything working in harmony.

When it comes to project management, many people see this as an expensive administrative cost that can be handled by the existing team or with current software. But without these tools, how do projects stay within scope, on time and in budget?

The hallmark of a successful operations program is that these tools aren't seen or heard — rather, they are felt when everyone is on the same page, campaigns are integrated and your vision for success is realized.

Companies that overlook the importance of this section of the toolkit do so at their own peril. While these tools do create value on their own, it's the synergy they bring to your team that can help take you from good to great.

PROJECT MANAGEMENT

DESCRIPTION: The Project Management Institute defines a project as “a temporary endeavor undertaken to create a unique product, service or result. It has a defined beginning and end in time, and therefore defined scope and resources.”⁷³ Project management tools help teams manage tasks and resources effectively to provide for smooth transitions, tracking progress toward goals.

SCOPE: Major

COST: \$

WHEN TO EVALUATE: At least annually and potentially when making major staffing, process or technology changes

IMPLEMENTATION TIME: Short

TIME TO VALUE: This month

ROI POTENTIAL: Important

VENDOR EXAMPLES: Wrike⁷⁴, Workfront⁷⁵

ANALYSIS: Project management and PM systems feel like the third rail of business. From both a client and an internal perspective project management sometimes feels like a cost that should be reduced or even eliminated. This stems from a feeling that the overall project team should be able to manage work without extra overhead.

However, project management can be what holds initiatives together and can be a defining attribute on projects that succeed. As more teams move to a remote environment (by choice or due to extenuating circumstances) PM tools have become more critical to conducting operations.

The case for these tools in demand generation is even more pronounced. In many situations work is produced by cross-functional teams. Successful teams use PM tools as a starting point and then put the people and processes together to maximize the effectiveness of the team. It is important that your process is managed correctly; because no matter how good your tool is, it can't fix poor planning or subpar execution.

In addition, a project manager who not only understands the process but also the work necessary to be successful is worth his or her weight in gold.

COLLABORATION

DESCRIPTION: Collaboration or productivity tools help enable disparate teams get more done. Whether your team is separated by expertise, distance or reporting structure, these tools help maintain connections between teams.

SCOPE: Minor

COST: \$

WHEN TO EVALUATE: As part of your overall technology stack (most of these tools are part of enterprise software agreements)

IMPLEMENTATION TIME: Short (for functional units like marketing, as the heavy lifting will likely be done by your technology infrastructure team)

TIME TO VALUE: Immediate

ROI POTENTIAL: Solid

VENDOR EXAMPLES: Microsoft Team⁷⁶, Google Chat⁷⁷

ANALYSIS: Collaboration tools have increased in relevance in recent years with no signs of abating anytime soon. While tools have different strengths and weaknesses they all help teams be more effective. A key differentiator is how the team leverages these tools to positively impact workflows and processes.

TALENT MANAGEMENT

DESCRIPTION: Nearly every organization will have an applicant-facing talent management system. These systems are responsible for marketing your company, its culture and open positions available. These systems allow users to search and apply for jobs and track their application process.

SCOPE: Minor

COST: \$\$-\$\$\$

WHEN TO EVALUATE: Every few years

IMPLEMENTATION TIME: Medium

TIME TO VALUE: This quarter

ROI POTENTIAL: Solid

VENDOR EXAMPLES: Taleo⁷⁸

ANALYSIS: Your people are critical to your success as an organization. Your employment brand is your key to attracting solid candidates. Your talent management system's ability to attract and secure applications and manage the recruiting process is similarly paramount to your success.

Find a system that is flexible enough to integrate with both your talent management process and your website while being able to track interest to determine where best to spend recruiting dollars in the future.



ENGAGEMENT LAND

Marketers are blessed with many tools to attract, retain and grow customer relationships. As we have discussed, there are 8,000 martech tools — and growing — on the market today. The growing [market of engagement tools](#) — marketing automation, webinar/event management, search marketing, social marketing and more — shows that software designed to engage your customers is more important than ever.

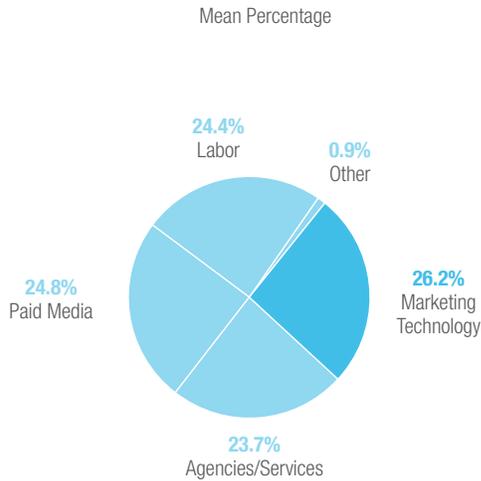
Due to [growing investment in marketing technology](#), the average company outlays nearly 30% of its marketing budget on technology today. And that doesn't include the resourcing needed to operate this technology.

Just ask any marketer or salesperson who spends a significant portion of each day in marketing automation, CMS or CRM systems how important these tools are to productivity. You'll quickly understand the value of these systems in your organization.

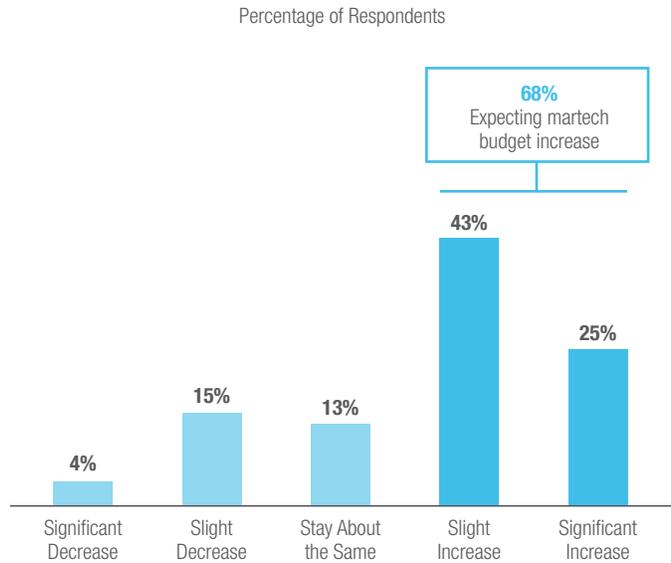
While these systems are looked at as costs in most companies, they are more likely to be revenue drivers (through increased sales) or cost savers (allowing fewer people to do more), which means a good martech strategy can be one of the most important priorities for any company.

THE AVERAGE
COMPANY
OUTLAYS **NEARLY**
30% OF ITS
MARKETING
BUDGET ON
TECHNOLOGY
TODAY.

MARKETING BUDGET ALLOCATION ACROSS MAJOR RESOURCES



EXPECTED CHANGE IN MARTECH BUDGET ALLOCATION IN NEXT FISCAL YEAR



n = 420 marketing leaders (excludes "don't know")

Q: How is your total marketing expense budget for the current fiscal year being allocated to or spent on each of the following major resource categories?

Q: Compared to the current fiscal year, how do you expect your total marketing expense budget allocated across the following major resource categories to change in the next fiscal year?

Source: 2020 Gartner CMO Spend Survey⁹

Best-in-class marketers establish the [processes, technology and culture](#) that revolve around their customers. In an increasingly digital world, this means generating interest using multiple tools to create a seamless journey, regardless of how customers choose to interact with your brand. Companies must develop the ability to:

- Create higher quality customer journeys.
- Personalize content to users in all marketing channels.
- Enhance the value of products to customers.
- Scale communications across multiple platforms on the customer’s schedule.

Putting together a comprehensive, synergistic marketing engagement stack is a key first step.

PRINT

DESCRIPTION: Print tools enable your design and content teams to produce top-flight sales collateral to put your products in their best light. These can supplement other technology and advertising investments.

SCOPE: Minor

COST: \$-\$\$

WHEN TO EVALUATE: Annually

IMPLEMENTATION TIME: Short

TIME TO VALUE: This month or this quarter

ROI POTENTIAL: Solid

VENDOR EXAMPLES: Adobe[®]

ANALYSIS: Mark Twain once said, “The reports of my death have been greatly exaggerated” when his obituary was published prematurely. The same can be said of print advertising. Digital media is definitely growing, but there is still a place for print, specifically in B2B direct or account-based sales or for in-store sales.

The real power comes within a stack where nurture streams combine digital ads with print and broadcast advertising. Think of the impact of a printed sales collateral piece arriving on a prospect’s desk to supplement a sales presentation and a marketing email showing your product’s ROI.

INTERACTIVE CONTENT

DESCRIPTION: Content marketing is a key component of any marketing strategy. Interactive pieces allow clients and prospects to learn about your company or highlight relevant data that boosts brand recognition or perceived value. Utilizing these tools can be an effective way to disseminate information to relevant audiences in a noteworthy manner.

SCOPE: Minor

COST: \$-\$\$

WHEN TO EVALUATE: When a visualization could provide compelling content for educational or competitive analysis purposes

IMPLEMENTATION TIME: Medium

TIME TO VALUE: This quarter

ROI POTENTIAL: Speculative

VENDOR EXAMPLES: Tableau⁸¹

ANALYSIS: Just like the old adage that a picture is worth a thousand words, the value of interactive content visualizations can be a key differentiator for your business. The ability to create charts, graphs and other visualizations that your clients and prospects can interact with has the potential to impact all levels of the customer's journey. However, depending on the complexity of the data or tools utilized this type technology can be labor intensive. Make sure there is clear ROI prior to pursuing this type of technology strategy that goes beyond the "wow" factor, as it won't be right for all use cases.

VIDEO

DESCRIPTION: Video has increasingly become a very important channel for marketers. Few mediums produce a level of engagement comparable to video. Examples of video include:

- Marketing messages embedded within your website.
 - Advertising on platforms like YouTube.
 - Messages on social platforms.
 - Collateral for your sales team.
- Product demos or descriptions for e-commerce products.

SCOPE: Major

COST: \$

WHEN TO EVALUATE: Anytime

IMPLEMENTATION TIME: Short

TIME TO VALUE: Immediately

ROI POTENTIAL: Solid

VENDOR EXAMPLES: YouTube⁸², Vimeo⁸³

ANALYSIS: Everyone knows that Google is the highest trafficked website, but did you know that YouTube ranks second for both traffic and searches? Users watch over 1 billion⁸⁴ hours of video on YouTube each day, which exceeds the volume of Facebook and Netflix combined.

As we move to more remote-based selling (both for sales and e-commerce) video has an increasing role to play as it replaces some of the gaps where salespeople have historically driven sales.

Video makes your brand more relatable to clients and prospects. It also is more cost-effective to leverage than ever before with nearly nonexistent storage costs, better and more cost-effective video recording platforms, the ability to brand your content and the opportunity to humanize your messages.

MOBILE

DESCRIPTION: Few things have revolutionized customer communications more than mobile devices. That sentiment likely wouldn't surprise anyone, but the degree to which mobile has asserted itself in our daily lives may.

Mobile e-commerce purchases make up nearly half⁸⁵ of online transactions. Mobile is quickly becoming the preferred device for email, accounting for nearly 46%⁸⁶ of email opens last year. Mobile apps were expected to generate nearly \$200 billion⁸⁷ in revenue in 2020.

These trends are driven by all demographic groups. But none more so than younger generations, who barely remember a time when smartphones didn't exist. No matter your customer base or industry, the ability to communicate with users on mobile devices is paramount to your success.

SCOPE: Major

COST: \$

WHEN TO EVALUATE: Anytime

IMPLEMENTATION TIME: Short to medium

TIME TO VALUE: This quarter

ROI POTENTIAL: Critical

VENDOR EXAMPLES: iOS (Apple)⁸⁸, Android (Google)⁸⁹, HTML 5⁹⁰

ANALYSIS: We've come a long way since the implementation of mobile-first design, which became a hallmark of website design over a decade ago. The share of mobile traffic has increased by over 200%⁹¹ since 2013, with more than 50% of web traffic now coming from mobile devices. As more channels are consistently used, the importance of meeting users where they are has never been more important.

Mobile is more often becoming a conversion channel, but it also has a similarly important place in the sales cycle as an assisting channel. Whether by clicking on a search ad, reading a blog post, signing up for a webinar or emailing with a salesperson, very few customers will get through a purchase or buying cycle without interacting on a mobile device with your company. Here are a few tips on how to maximize your effectiveness in the mobile channel.

- Optimize your conversion funnel for mobile — the user flows for registration or purchasing should be as seamless on a phone as they are on desktop.
- Leverage key features that are mobile-specific, like touch dialing or video conferencing.
- Maximize website performance by reducing page load times.
- Use content strategies to tighten messages and designs for mobile devices.

MARKETING AUTOMATION

DESCRIPTION: In an increasingly digital world your firm's ability to lead your customer through the buying process is paramount to your success. Customers rarely fall in love with your products at first sight. Usually, they go through several stages — awareness, consideration and decision — when making a purchase. It's the marketer's job to move the customer down the path as efficiently as possible to close the sale.

Your [marketing automation system](#) is the tool used to scale this journey for each customer across your entire customer portfolio. While email is the primary channel used for these nurture programs, marketing automation isn't just a system that "batches and blasts" emails. It should harness customer data based on customer interactions to create relevant messages to users.

Marketing automation systems have the ability to capture leads, score those leads and then pass these leads onto your sales team (via a direct integration with the CRM system).

SCOPE: Headliner

COST: \$\$-\$\$\$\$ (Generally based on the size of your active customer base)

WHEN TO EVALUATE: Annually or at least 6 months before your existing contract expires

IMPLEMENTATION TIME: Medium to long

TIME TO VALUE: This quarter

ROI POTENTIAL: Critical

VENDOR EXAMPLES: Marketo⁹², Eloqua⁹³, Pardot⁹⁴

MARKETING AUTOMATION (CONT.)

ANALYSIS: A recent study found that you can expect an average return of \$42 for every dollar spent on email⁹⁵. That shouldn't be surprising given that email is likely one of your most cost-effective marketing tools and scales better than almost every other channel. What isn't always understood is the [importance of email in the nurturing process](#) as the glue that holds all of the other channels together.

A customer rarely buys on their first interaction with your brand. Email has the chance to play a supporting, if not lead, role in most opportunities by helping nurture prospects with valuable content and promotions that lead to purchases. Due to the value of email it is estimated that over 100 trillion emails are sent every year — that number is expected to exceed 125 trillion by 2022. With the average subscriber receiving countless emails per day, our most successful clients leverage the following five principles to maximize the impact of email.

Segmentation: Microtargeting is important, but the goal of marketers often is to maximize the quantity, not the quality of each send. Instead think of where the customer is within their journey and target communications that make sense. Rarely do sellers only sell one product, so chances are each customer might be a relevant target for multiple sends.

Companies that are able to understand what email to send and, even more importantly, which email not to send to a particular buyer generally will see the most engaged customers, which will correlate to revenue.

Personalization: Email is a great way to customize an individual's product journey. For example, your goal with a new user might be to deliver product information and capture information to continue the conversation. For someone actively working with a salesperson, the goal might be to give information on how your product is the best solution to their problem. For an existing customer the goal might be to up-sell or cross-sell or maintain business by increasing loyalty.

Testing: It is important to test and edit any creative going live, but with email you can't fix an issue once the send button is hit — you can only send a correction or apology. Be sure to institute a testing plan to verify the content is accurate and that best practices are in place for deliverability.

Automation: The ability to reach a global user base at any time to present dynamic, impactful messages allows marketing teams to work smarter, not harder. Few things will positively impact your bottom line as well as building an automation ecosystem that learns what customers need and responds in kind, when they are ready to buy — on their schedule, not the seller's schedule.

Integration: The average firm uses over 120 different applications to manage different aspects of its business. While not every application contains customer data, a sizable percentage of them do. It's critical to be able to integrate transactional records and stitch customer records together based on a standard variable like email address or user ID.



SOCIAL

DESCRIPTION: With billions of users globally, social media has changed the way we connect with one another. According to Facebook founder Mark Zuckerberg, his organization’s mission is to “connect the world. We often think about this as connecting you with your friends and family — those who matter to you most. But this also means helping people connect with businesses, governments and other organizations in their lives as well.”⁹⁶

Each platform has a slightly different focus. But each of them helps connect users to each other — and businesses to consumers, via paid and organic channels, to sell, service and promote the offerings of a company.

SCOPE: Major

COST: \$

WHEN TO EVALUATE: Quarterly

IMPLEMENTATION TIME: Short

TIME TO VALUE: Immediate

ROI POTENTIAL: Solid

VENDOR EXAMPLES: LinkedIn⁹⁷, Facebook⁹⁸, Twitter⁹⁹

ANALYSIS: There has been a debate about the effectiveness of social media marketing. The sheer size of these platforms and their growth means that nearly every organization has a social media presence. In many cases the primary goal is to build brand awareness and to assist other sales channels.

However, when optimized organic social media can drive revenue for your company. By following these best practices you will outperform your peers.

Know Your Customers Better Than You Know Yourself: The best way to make a meaningful connection is with an effective message. This is why it’s so important to spend time analyzing first-, second- and third-party data to fully understand your customers, their interests and what motivates them to take action. These insights help uncover when and where they are most receptive to your message and how to best attract them to your brand and lead them to convert. Then you must test and retest audiences, placements and creative with the goal of increasing conversion rates and decreasing your cost per conversion over time.

Performance Based and Results Driven: When setting up a [customer journey strategy](#), appropriate tagging must be applied to campaign assets to show how customers interact with the brand. This will also reveal what is working and where customers are disengaging. Mandating an ROI calculation on every campaign and visualizing results of a campaign, persona group or channel in near-real time will enable your team to quantify results with data. And your results will be better, as the team will be able to adjust spend, creative and message quickly to take advantage of opportunities presented by customers.

Personalized Communications at Scale: For organizations to move ahead, [humanizing the digital revolution is essential](#). Customers expect all companies to deliver best-in-class experiences, such as the ones they receive from industry leaders like Amazon and Zappos. Customers demand relevant communications based on what they need, not just what a company wants to sell.

SEARCH & SOCIAL ADVERTISING

DESCRIPTION: Advertising on search engines and social platforms continues to grow, with search quadrupling over the past 10 years and social more than doubling in the past five years. These paid channels give advertisers the opportunity to use data and microtarget messages to clients and prospects.

SCOPE: Major

COST: \$-\$\$

WHEN TO EVALUATE: Annually for spending budget and daily for campaigns

IMPLEMENTATION TIME: Short

TIME TO VALUE: Immediate

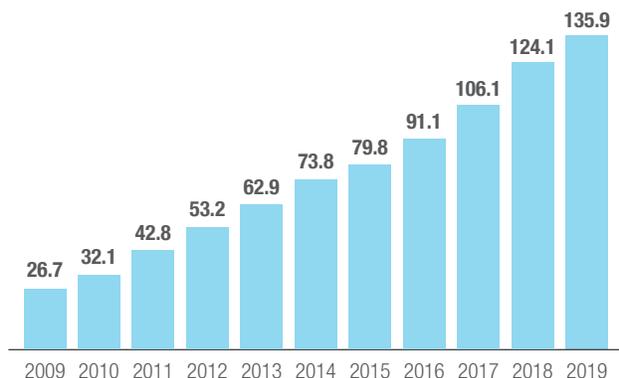
ROI POTENTIAL: Solid

VENDOR EXAMPLES: Google¹⁰⁰, LinkedIn¹⁰¹, Facebook¹⁰², Bing¹⁰³

ANALYSIS: There is a strong upside — specifically for e-commerce products — when it comes to paid search and paid social media. Attribution can be difficult as in many cases these channels assist purchases. Each of the platforms determines attribution differently and in most cases you will need to merge several sources of data to gain insights. Partnering online ad campaigns with a tag management and CDP system can be very effective in understanding results. This also can help reduce your spend as you can quickly reallocate budget across platforms and campaigns to maximize results.

SEARCH ADVERTISING SPENDING WORLDWIDE FROM 2009 TO 2019

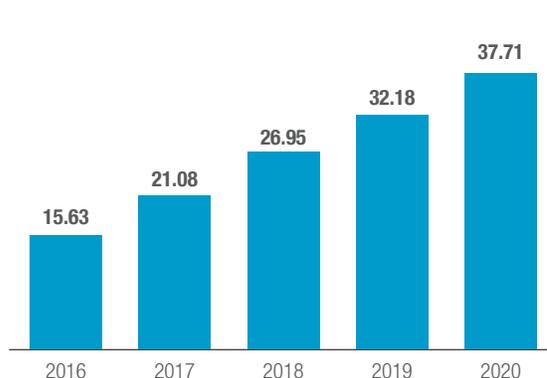
(in billion U.S. dollars)



(Source)

SOCIAL NETWORK ADVERTISING SPENDING IN THE UNITED STATES

(in billion U.S. dollars)



(Source)

DISPLAY

DESCRIPTION: Display ads push your messages onto digital platforms that match the personas of your target audience. Retargeting ads use visits to properties like your social media or website pages and re-engage users with your products. You can also target net-new prospects using advertising and segmentation via the platform.

All platforms do things a little differently from an ad perspective but most have the ability to select a target segment and bid on your ad placement to that audience. You are charged by clicks on the ad, which go to anything from a lead page to e-commerce product page to a lead capture platform.

SCOPE: Minor

COST: \$-\$\$

WHEN TO EVALUATE: Annually for spending budget and daily for campaigns

IMPLEMENTATION TIME: Short

TIME TO VALUE: Immediate

ROI POTENTIAL: Solid

VENDOR EXAMPLES: Tradedesk¹⁰⁴, Google Display Network¹⁰⁵

ANALYSIS: Display ads on search and social platforms will likely be a piece of your marketing budget. Generally the conversion rates are low and cost per click can be high so these are better utilized when the average order value of the product being sold is higher.

WEBINAR

DESCRIPTION: Unless you've been living under a rock, my guess is that you've attended more than a few webinars, virtual events and web meetings within the past year. While always part of the nurture life cycle, webinars have rapidly replaced in-person meetings and conferences to become another high value touch point with customers, which likely will continue into the post-COVID-19 future.

SCOPE: Major

COST: \$\$-\$\$\$

WHEN TO EVALUATE: Annually or in times of tremendous societal change like Covid-19

IMPLEMENTATION TIME: Short to medium

TIME TO VALUE: This quarter

ROI POTENTIAL: Important

VENDOR EXAMPLES: On24¹⁰⁶, Zoom¹⁰⁷

ANALYSIS: In a remote environment webinars and web conferencing arguably have become the best lead generation tool in your arsenal. Being able to attribute revenue from all activities, including webinars, is critical to showing their value (most webinar leads will be top- to mid-funnel). Webinars also need the assistance of other marketing platforms, such as email, social and paid, to be successful.

On-demand webinars can be equally as powerful as live webinars, generating and nurturing leads long after the recording was created. The ability to integrate these leads back into a CRM system seamlessly gives your organization the best opportunity to capitalize on interest to convert. The length of time it takes to get these leads to sales (and the amount of time to reach out to prospects) can be the difference between someone buying your product and someone refusing your salesperson's call.

EVENT

DESCRIPTION: In-person events had been staples of marketing programs for years until the coronavirus pandemic in 2020. And while it's unknown when they will return at pre-pandemic levels, their potential value remains strong.

SCOPE: Major

COST: \$\$-\$\$\$

WHEN TO EVALUATE: Annually

IMPLEMENTATION TIME: Short to medium

TIME TO VALUE: This quarter

ROI POTENTIAL: Important

VENDOR EXAMPLES: Cvent¹⁰⁸

ANALYSIS: There is currently significant uncertainty surrounding in-person events, but what can be spoken to is the overall value they bring to the buying process. Not only do they offer a home-court advantage with clients and prospects coming to you, they also give your company the ability to build relationships with customers while cross-selling and upselling them on new features.

Generally speaking, registration costs pay for an event and pre- and post-conference sales are where events net out as positive investments. Here are three strategies to maximize your purchase of an event platform.

Integration: The true value is for customers to rub elbows with your experts and sales teams. Ensure you have the ability to have conference interactions coming over to different systems like marketing, CRM, financial/ERP systems and even customer data platforms.

Local Currencies and Buying Experiences: If you are a global organization then you need the ability to support language, currency, payment customs, in-person check-ins and locally relevant designs.

Marketing Operations Fit: In most companies there will be several teams needing to understand how to use an event management product — such as your centralized marketing team (content, technology and operations), your sales team and your local event/marketing team. A tool that works operationally at a global level, creating efficiency while giving flexibility to the team on the ground, is ideal.



SERVICE LOOKOUT

Few things rank lower for how you want to spend a day than getting into an auto accident. Even a minor accident where you weren't even at fault can cause a level of frustration that most people wouldn't wish on their worst enemy. So while insurance claim benefits are the product when purchasing insurance, it's a product that the customer hopes to never have to use.

Now imagine the claims representative who has been charged with picking up the pieces of a driver's bad day. With the customer likely already in a sour mood, the representative knows that a small mistake could lead to frustration boiling over.

So how do insurance companies attract and retain customers? By putting together solid customer service programs. These customer service technologies allow reps to quickly understand customer history and what happened in the most recent case. They then guide the representative through the next steps to get the customer back on the road in the same condition they were prior to the accident.

Too often customer service is the forgotten triad of the customer experience (along with sales and marketing). Being able to solve customer problems is key when it comes to building long-term relationships and loyalty. The technologies discussed in this section help firms understand when service recovery is needed and guide front-line customer support members to positively impact the customer experience.

CUSTOMER SERVICE PLATFORM / TICKETING SYSTEM

DESCRIPTION: These systems track customer support tickets and service issues for users in attempts to solve any problems and to handle service recovery. In addition, similar systems help with the onboarding process. Many of these systems can be bundled with CRM systems on the same or similar integrated platforms.

SCOPE: Headliner

COST: \$\$-\$\$\$

WHEN TO EVALUATE: Annually or as part of an enterprise agreement that might include your CRM or marketing automation platform

IMPLEMENTATION TIME: Medium

TIME TO VALUE: This quarter to this year

ROI POTENTIAL: Critical

VENDOR EXAMPLES: Microsoft Dynamics¹⁰⁹, Salesforce¹¹⁰, Zendesk¹¹¹

ANALYSIS: Customer service is generally the most overlooked and underfunded pillar of the customer communication triad. When people think of marketing technology they think of marketing or sales/e-commerce — customer service tends to be an afterthought. That is a huge problem; it's hard to find any business or employee able to delight every customer, every time.

The fact of the matter is mistakes happen and products fail. Many times the issues are beyond anyone's control. And sometimes the issues identify process problems, defects or poor customer communication. But a customer service system has the ability to discover an issue, communicate what happened, relate to your customer and initiate the resolution process.

Forward-thinking companies not only invest in the systems, processes and people to get customer service right but also understand the value of data gleaned from those systems. If a customer is having an issue with a product, it makes sense to suppress a marketing email to up-sell or cross-sell on the defective product. You may also want a salesperson to reach out after the problem is resolved to verify everything was handled smoothly and there won't be an impact on the upcoming customer renewal process.

Customer service conversations are also an excellent way to validate customer information and let users know about other products that might need their needs.

SOCIAL MEDIA / PR MONITORING

DESCRIPTION: These tools monitor the reach of your earned, owned and shared media. In many cases these metrics are closely tied to the reach of your brand and show what is being said about your company in the marketplace.

SCOPE: Minor

COST: \$-\$\$

WHEN TO EVALUATE: Annually

IMPLEMENTATION TIME: Short

TIME TO VALUE: Immediate

ROI POTENTIAL: Solid

VENDOR EXAMPLES: Cision¹¹², Brandwatch¹¹³

ANALYSIS: Social media sentiment and PR tools for certain companies can be important tools for monitoring the reach and success of campaigns or initiatives. Larger, more established companies or those that rely on thought leadership to drive consumer and business-to-business marketing generally benefit the most from these types of tools.

CUSTOMER SURVEY / REVIEW TOOL

DESCRIPTION: These are tools that collect feedback from consumers in either a private format (e.g., customer service index [CSI] or net promoter score [NPS]) or a public format (e.g., TrustPilot or Yelp) where users can leave reviews that other customers might see.

SCOPE: Minor

COST: \$

WHEN TO EVALUATE: Annually or when starting to sell/fulfill more products online

IMPLEMENTATION TIME: Short to medium

TIME TO VALUE: This quarter

ROI POTENTIAL: Solid

VENDOR EXAMPLES: Qualtrics¹¹⁴, SurveyMonkey¹¹⁵

ANALYSIS: These tools help enhance your online reputation, improve your organic search rankings, allow prospects to see testimonials and help customers make the best product choices. Transparency with customers is usually a good thing; however, you need to ensure someone from your brand vigilantly watches comments to address customer service issues and intervene when necessary to make sure a bad review doesn't spiral out of control.

RECOMMENDATIONS

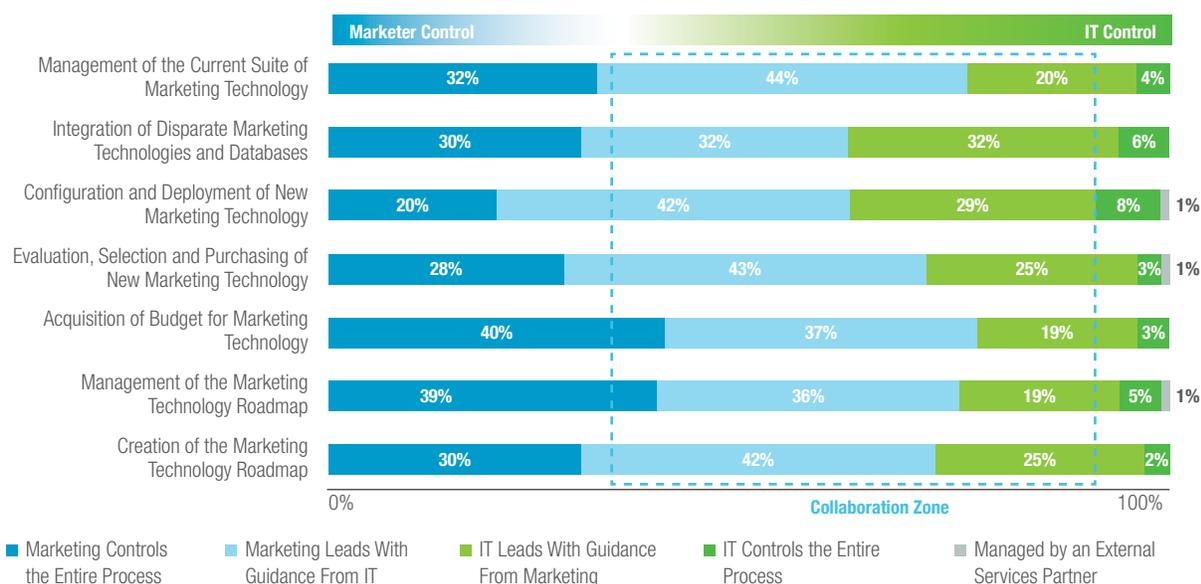
Now that we've discussed the different technologies that make up your marketing stack, we will detail 10 recommendations that will align your processes, people and tools to maximize the marketing effectiveness of your organization.

Define Ownership of Key Business Applications and Processes

The balance between systems owned by each unit and those shared between units is a critical success factor in every organization. [Clearly defining roles and responsibilities](#) is a must.

This includes strategic decisions (e.g., purchasing SaaS applications), connecting tools across systems (e.g., integrating CRM with marketing automation tools and financial reporting systems) and post-launch maintenance and enhancements. The chart below shows how this could work within an organization.

GROUPS THAT CONTROL MARKETING TECHNOLOGY ACTIVITIES



n = 418 Q: Which group controls each of the following marketing technology activities?
Source: 2019 Gartner Marketing Technology Survey¹⁶ Note: Total does not equal 100% due to rounding.

A few general questions can be used to define ownership:

- Does this activity require configuration (marketing) or coding (IT)?
- Can we control permissions and roles using a centralized system like Active Directory? This helps eliminate potential failure points without having to follow a standard sprint cycle to configure a field in a marketing application.
- Do our systems have native marketing automation integrations or solutions that can be installed within a platform? The Salesforce App exchange or Oracle Cloud Marketplace are excellent examples of ways to extend functionality of core systems using low- or no-code methods.

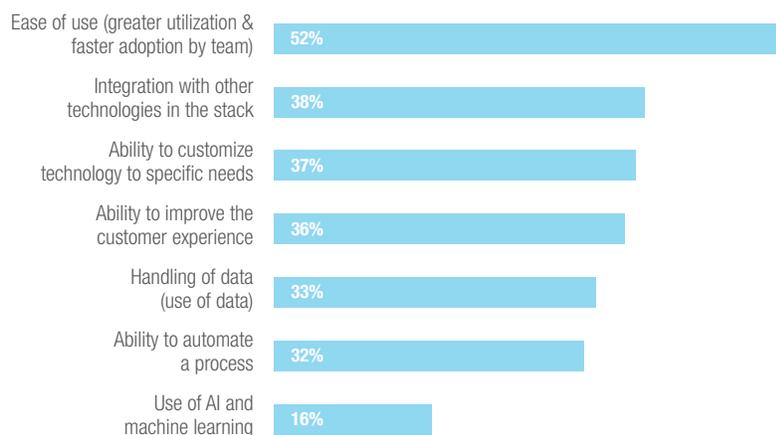
Formalize the Role of Technology in Marketing

With different scopes and infrastructure, it is difficult for marketing and technology teams to fully understand and execute on each others' needs.

Investing in a team of production technologists with a technology leader within marketing (utilizing internal staff or a technology partner like Zirous) lets them liaise between IT and marketing to maintain standards and respond to marketing needs in real time. This team will enable you to align goals, optimize your customer-facing applications and drive results.

The chart below shows what marketers need most from their marketing technology stack. An embedded marketing technology team helps address these challenges while paying dividends for both your customers and your bottom line.

WHAT CAPABILITIES SHOULD THE TECHNOLOGIES IN THE STACK IMPROVE TO OPTIMIZE MARKETING?



Source: Ascend2 MarTech Stack Optimization Survey¹⁷

Addressing these concerns as part of your roadmap or project plan will increase profitability by employing strategies that grow revenue and eliminate costs.

Align Performance Objectives and Results

A recent survey by McKinsey¹⁸ found that only 20% of respondents say their organizations excel at decision-making. And a majority say a significant percentage of the time spent on decision-making is ineffective.

This blind spot extends from the boardroom to the marketing department, according to a CMO survey¹⁹ released in February of 2020. That survey of chief marketing officers found that CMOs use marketing analytics less than 40% of the time to make decisions.

How are these results possible when there is more customer data science available than ever before for leaders to make decisions? For example, most CMOs should have access to some, if not all, of the following data sources: web analytics, CRM, email marketing, social platforms, paid search, paid social, events, webinars, e-commerce and financial systems.

Our hunch is this blind spot [results from the inability of most companies](#) to collect, aggregate, standardize and attribute their customer data pipelines. For example, a typical customer journey might go something like this:

1. A user comes to the company's site via organic search.
2. The user is retargeted on a paid channel.
3. The user signs up for a newsletter.
4. The user clicks on an article in a subsequent newsletter to get back to the company website.
5. The user attends a webinar
6. The user becomes a lead and a salesperson reaches out.
7. The user continues to receive product emails, view social posts and visit the website.
8. The customer signs a contract to purchase services from the company.

As legendary management consultant Peter Drucker once said, "What gets measured, gets improved." The more you can invest in the systems, people and processes to use data to drive decisions the greater your chance of success will be.

Formalize Your Lead Process

According to a study by CSO Insights¹²⁰, only 42% of respondents said that their company had an agreed-upon definition of a lead. Given this confusion about lead qualification, it's not surprising to find frustration around the topic of [lead quality](#).

Sales and marketing leadership must collaboratively identify the criteria that constitute a marketing-qualified lead and when to assign it to sales. Marketing should then continue to nurture prospects who don't meet these criteria with the goal of moving them through the funnel.

First, go through each product or service, considering demographic (title, company revenue, number of employees, etc.) and engagement (attending events or webinars, visiting the website, clicking on emails, etc.) metrics to determine what types of prospects your sales team wants to see. You should also employ data analytics to see how the sales team's perceptions match actual lead and opportunity data.

Second, success metrics need to be aligned between sales and marketing. This means sharing key financial targets — like the number of marketing-qualified leads, the percentage of leads that qualify into an opportunity, the amount of pipeline generated, the closed-won rate and, ultimately, the top-line revenue number.

Last, the two units must agree on a customer hand-off process. Here's an example:

1. Once a lead is created, sales either accepts or rejects it within a specified time frame.
2. If accepted, a sales rep attempts to contact the lead within an agreed upon period and at least a certain number of times using various methods (phone, email, social, etc.).
3. If rejected, marketing evaluates leads to learn why they weren't productive. Should they be put into a re-engagement campaign? Or are they simply not a fit?
4. Marketing tracks sales progress to determine if the marketing messages and nurture streams adequately prepare prospects for a sales engagement and adjusts the campaign as needed.

Break Down Data Silos

If your company is like most, there are [numerous databases](#) where customer information is stored. At even a small- to mid-size business you might have a CRM, email, customer service platform, webinar platform and/or event platform, ad platforms (Google Ads, Facebook, LinkedIn), e-commerce platform or point-of-sale system — just to name a few. And that's before you get into any internal systems or databases where customers fulfill or access your products.

When it comes to data management this siloed approach is detrimental not only to your business but also to your ability to comply with privacy and email law. Just imagine how hard it would be to delete data from someone who requests to be forgotten if that data resides in multiple databases sometimes managed by different teams.

Our recommendation is to invest in a centralized, master customer data management infrastructure like a customer data platform or data lake. Mapping data together to understand where it is generated and resides not only protects companies, but also lets you utilize that same master customer record in campaigns to personalize the customer experience. And that will then reduce your risk while amplifying your sales opportunities.

Here's how a master customer data management system works in practice:

- **Help standardize data across systems.** If a customer's address changes the master customer record gets updated so our mailing campaign gets to the prospect and not returned to the sender.
- **Reduce the time to value.** Most systems are able to connect directly into a wide variety of marketing platforms and use low- or no-code logic to clean, store and aggregate that data for the master record.
- **Less developer resourcing to eliminate opportunity costs.** The more that platforms integrate and are standardized the fewer custom developer resources are needed. Development resources generally cost more than marketing resources and these scarce resources can be used on products that are critical to your competitive advantage.
- **Reduced ongoing management expenses.** Gartner¹²¹ found that bad data costs companies an average of \$15 million per year. That adds up to nearly \$3.1 trillion annually for U.S. firms, according to IBM¹²².
- **Data sharing provides for better customer experiences.** Imagine how valuable it would be if sales knew all customer touch points when reaching out on a lead. Or the importance of your customer service team being able to see the value of each customer. And how much revenue could be gained by the marketing team being able to segment based on all customer activities? On the flip side, how much wasted ad spend could be avoided by better consumer targeting based on data?



Lead With Consent

Most people relate [consent to compliance](#) in light of privacy legislation. While complying with regulations is important, the ability to track consent, preferences and opt-in status not only reduces legal risk but has the opportunity to be a tremendous asset for your organization.

A recent study found that 81% of customers directly correlate trusting a brand with making a purchase from that company. What better way can a brand demonstrate trustworthiness than having a robust process to opt-in users to receive communications? Or putting security practices in place to manage, store and secure that data? And offering users the ability to subscribe or unsubscribe from different pieces of content?

By understanding customer interests you can target content more effectively to customers which builds trust that will increase conversion rates and reduce the risk of losing the customer.

Think of how many times you've been solicited to buy products you aren't interested in — or have already purchased. If you're anything like me, it doesn't instill faith in that brand.

On the other end of the spectrum, think of your best customer experience. In some cases it may have been due to exceptional customer service. However, many times it was due to the foundational elements of the customer experience, where the company used data to “know” you and fill your needs at just the right moment.

Think of the power of a cross-channel experience that, no matter what medium you use, picks up where you left off and enables you to solve your needs rather than placing barriers in front of you. Privacy compliance doesn't get you to this point on its own, but if you can build an infrastructure that keeps you in compliance and also sets the foundation for better customer journeys, you'll be ahead of the competition.

To track consent we suggest using a consent manager that opts users into having their data collected and stored via a web experience. A good example of this can be found on the [Marketo¹²³](#) site. On form completion, registrations or purchase workflows it is important to ask for and even encourage consent as part of the submission process, which is tracked in a centralized consent system.

If someone wishes to opt out or unsubscribe it is important to provide users an effective workflow to not only remove themselves from that list but to hopefully maintain their subscriptions to other relevant products through a preference center.

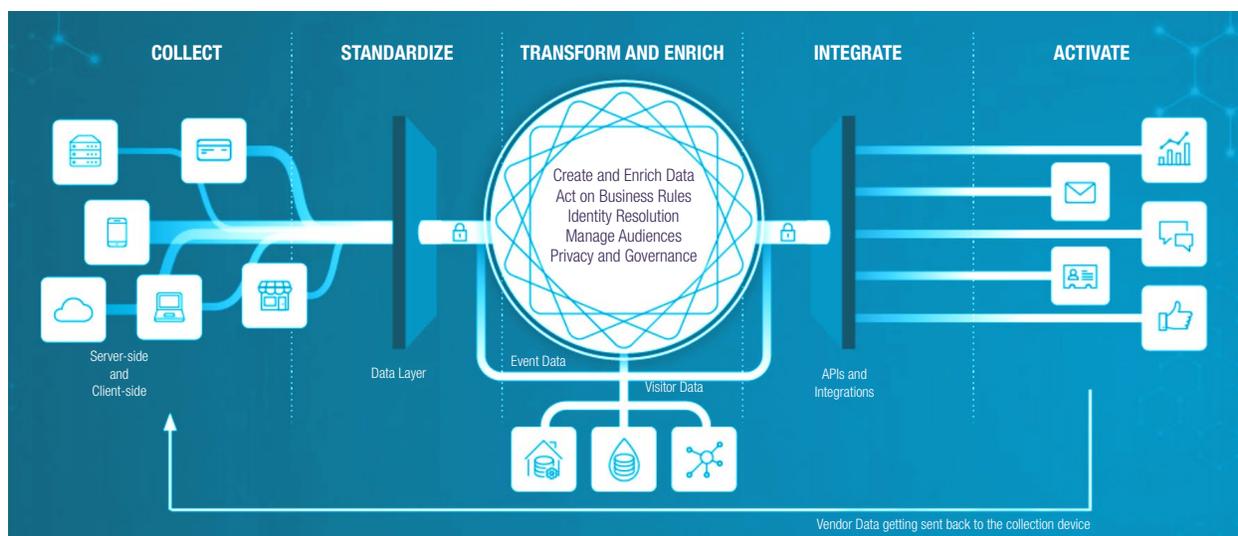
By following these best practices your customer bonds will be even stronger, and your compliance risk will be minimized. How's that for killing two birds with one stone?



Maximize First-Party Data Practices

After its employees, arguably the most valuable asset any company has is its customer data. So why do so many companies [struggle to take advantage of customer data](#)? As we already discussed it most likely stems from siloed marketing data within the organization — sales might own the CRM system, marketing owns the ad systems, IT owns the e-commerce system, the customer service team owns the service tool — and the sheer number of software as a service (SaaS) applications needed to manage customer communications.

The best way to [aggregate this data](#) is by using a customer data platform that uses client-side tagging and server-side integrations to bring your customer interactions into a centralized system where a master customer record is created. From there you can build out segments that can be activated dynamically in campaigns as well as provide a dashboard to view key units that interact with customers — namely marketing, sales and finance.



Source: Tealium¹²⁴ Customer Data Hub pictured above. We are proud to be a certified Tealium partner.

Here are just a few of the business challenges that can be solved with a CDP:

USE CASE #1: RETARGETING

As any fisherman would tell you there is nothing more frustrating than getting a fish to bite on your hook only to lose the catch while reeling it in. The same is true when it comes to prospects. Companies spend so much time, energy and money to attract customers to their products and services, yet many industry reports¹²⁵ peg e-commerce conversion rates in the low single digits, and landing pages conversion rates¹²⁶ are about the same.

One of the benefits of a CDP is that it helps reduce your attrition rate by recognizing who is interested but didn't make a purchase. It allows you to better understand a customer's interest and retarget him or her or in the appropriate channel, which could be an email with a discount coupon or paid social or other messages.

USE CASE #2: AUDIENCE SUPPRESSION

Companies waste significant dollars and marketing resources because data isn't unified and/or can't be shared between systems. This could include purchase data, consent, identity, support interactions or engagement/behavioral data. This lack of a single view of the customer means dollars wasted on customers and prospects who either have already converted or likely won't convert.

This data gap also opens a company up to sending messages that aren't relevant to a customer's stage in the purchasing journey, which at best don't benefit the selling process and at worst push the customer away. A near-universal complaint from customers is disjointed experiences. This could include receiving a coupon after they already made a purchase or being messaged about products that don't interest them or in channels to which they haven't consented.

USE CASE #3: CUSTOMER ACQUISITION AND CROSS-CHANNEL SEGMENTATION

Every company wants to identify and target new prospects to acquire customers. The idea here is to capture customer activity data from multiple channels — web, point of sale, mobile, etc. That data is then standardized into a profile a company can use to discover the best ways to reach customers and see which messages best resonate in order to increase revenue through better targeting and segmentation.

While CDPs are one of the hottest new marketing tools, they are not all built equally. When looking for the right platform make sure that the tool is able to meet all aspects of the customer data lifecycle. These include the ability to:

- Build in connections with many data sources to collect customer activities.
- Standardize data from multiple applications into a consistent format.
- Transform and enrich activities into a master customer record.
- Integrate with customer-facing platforms.
- Activate campaigns dynamically in all marketing channels.

Kick Automation Into High Gear

In today's experience-driven, digital world your customers demand that you know who they are and how they have interacted with your brand, regardless of the device they are on. Your customers are not [comparing their experience](#) with your brand to your competitors but to their last best experience — think Amazon, Netflix or Apple. Every interaction with your brand must be personal and purposeful.

80% of customers say the experience a company provides is as important as its products or services. And 57% of customers have stopped buying from a company because a competitor provided a better customer experience.

When it comes to automation most marketers think of email marketing automation tools like Pardot, Eloqua, Marketo, Mailchimp and more. And all of those platforms help automate the email process with their ability to build lists, create templates and send emails. In our opinion, an email platform is just table stakes when it comes to nurturing demand. In addition, web personalization and testing tools as well as chatbots should be leveraged to build demand when customers are interacting with your brand.

Of greater importance is the ability of those systems to set up dynamic journeys for customers as they work through your sales cycle in addition to their ability to collect customer data from various other platforms in real time to be used in campaigns.

Embrace & Enhance Machine Learning/AI

[Knowledge is power](#). Tech corporations like Amazon and Google have been using machine learning for a long time, and the results have elevated them to a level of success the world has never seen before.

But [machine learning](#) is no longer just for large tech companies. Marketers are understanding that machine learning can be a secret weapon in delivering a personalized customer experience, and that means the gates are wide open for who should be leveraging this type of technology.

When considering how to bring advanced analytics into your business follow these principles:

Fail Fast: Machine learning projects are very iterative and experimental. Not every business question or use case is going to be a great application of machine learning. Being able to recognize that in an appropriate amount of time will give you more time and resources to dedicate to the golden nuggets you are able to uncover.

It's good to set checkpoints in a project so you are constantly evaluating both progress and roadblocks. Don't succumb to the sunk cost fallacy; there will be times where an accurate machine learning model is not viable for a specific question. And that's OK if you have set up the proper checks and balances. In fact, it should be encouraged because it opens you up to exploring many more use cases, giving you the best chance to land on opportunities for massive savings or increased revenue.

Start With a Strong Pilot Project: One of the biggest challenges with adopting machine learning and advanced analytics as part of your strategy is that it usually requires a culture shift as well. This is why it's important to have a strong pilot project. There should be a tangible impact and the pilot should relate to as many departments throughout your company as possible. It should excite people about the possibilities of machine learning.

Doing a pilot project will also give your company a stronger assessment of where it is on the analytics curve. How hard was it to get data? What did you already know about the data? How did the project surprise you? The answers to these questions will give you a better understanding of your company's placement on the curve and how you can move up.

However, picking the right pilot project can be difficult. You need to have access to the right data, and the project should be promising in terms of your ability to achieve your desired machine learning outcomes. The difficulty is even greater if you don't have an in-house data scientist or machine learning engineer.

Consider Finding a Trusted Consulting Partner: Working with a machine learning and data science consulting company can give you a taste of the benefits of data science and machine learning for your company without having to make the full commitment of hiring a data scientist: the “sexiest job of the 21st century,” according to Harvard Business Review. People with these skills are in demand and can be a costly hire. This is especially true for companies that haven’t fleshed out an advanced analytics strategy.

Leaning on a trusted consulting partner for your initial projects allows you to take a phased approach and learn from vetted experts before making long-term financial and strategic commitments. Fortunately, Zirous has experienced and vetted data scientists, with certifications in data science and machine learning from Microsoft Azure and Amazon Web Services to back them up, so you don’t have to worry about finding your own to get started.

What about trying to decide on a good pilot project? The right consulting company can help you determine which projects you have the right data for and that would have the most impact — and then help you implement those projects. We have led a number of organizations through pilot projects, like one that uncovered an additional \$370,000 in annual revenue for [one urban hospital](#).

Another advantage of working with a machine learning consulting company is that your IT department and data resources can remain dedicated to their own tasks. The right consulting partner doesn’t just bring a data scientist to the table. It brings a complete team, with the skills to tackle infrastructure, security and project management needs to complete the project on time and without sidetracking your day-to-day operations. Your staff offer crucial domain knowledge and understanding of your business, while the consulting staff can transfer knowledge to your team for a smooth hand off and a jumping off point to tackle future initiatives solo.



Maximize Your Existing Toolkit

When it comes to getting the most out of your current technologies the two things that hinder companies from seeing the greatest possible return on their investment are lack of training and the [inability of systems to work together](#).

Many leaders report a skills gap between the talent they need to reach their goals and what their current workforce offers. In fact, two-thirds of companies report¹²⁷ that they don't have the right skills or talent to effectively use marketing technology.

Purchasing and integrating marketing technologies only gets an organization so far. To truly maximize the benefits of these investments your staff must become experts on not only the technology but also how these tools transform processes for your users.

Training leads to tangential benefits like higher employee engagement and succession planning. In fact, Coursera found that 87% of people learning for professional development report career benefits, like a promotion or a raise. And when your employees succeed, so do you and your company.

However, while most vendors offer training or conferences on their platforms, they are expensive — factoring in fees, travel costs and more. They also solely focus on that vendor's product(s), not how those martech tools fit into an organization's larger framework, which is the other reason why marketing technology initiatives don't reach their potential.

One of the greatest assets of marketing technology today is the amount of innovation that both startups and established companies are bringing to the space. This has created an enormous growth of tools and that competition for wallet share has led to some really innovative products. Many of the larger companies — the Oracles, Salesforces, Microsofts and Adobes of the world — have been forced by smaller firms to innovate and consolidate by buying and integrating new technologies into their ecosystems.

While in many ways this has been good for consumers, in other ways it has been confusing. Decision-makers are forced to evaluate not only the best products but also how they fit into their overall technology strategy. They also must forecast how those tools will continue to evolve to meet their ever-changing needs.

We've found that one of the most important decision criteria when buying a new system is how it integrates with the rest of a firm's technology stack. While all systems say they are compatible, look for native integrations whenever possible, which means the vendor will be responsible for maintaining the connection between systems instead of your technology team.

Look for add-ons within your platform ecosystems to use configuration instead of customization whenever possible. The more out-of-the-box features you can use limits your risk when you invariably add other systems in the future and as new software features are released.

Both of these reasons are why bringing in a trusted partner, like Zirous, can benefit an organization's martech strategy by helping select the right tools, connecting systems together and training your team to meet your company's specific needs.



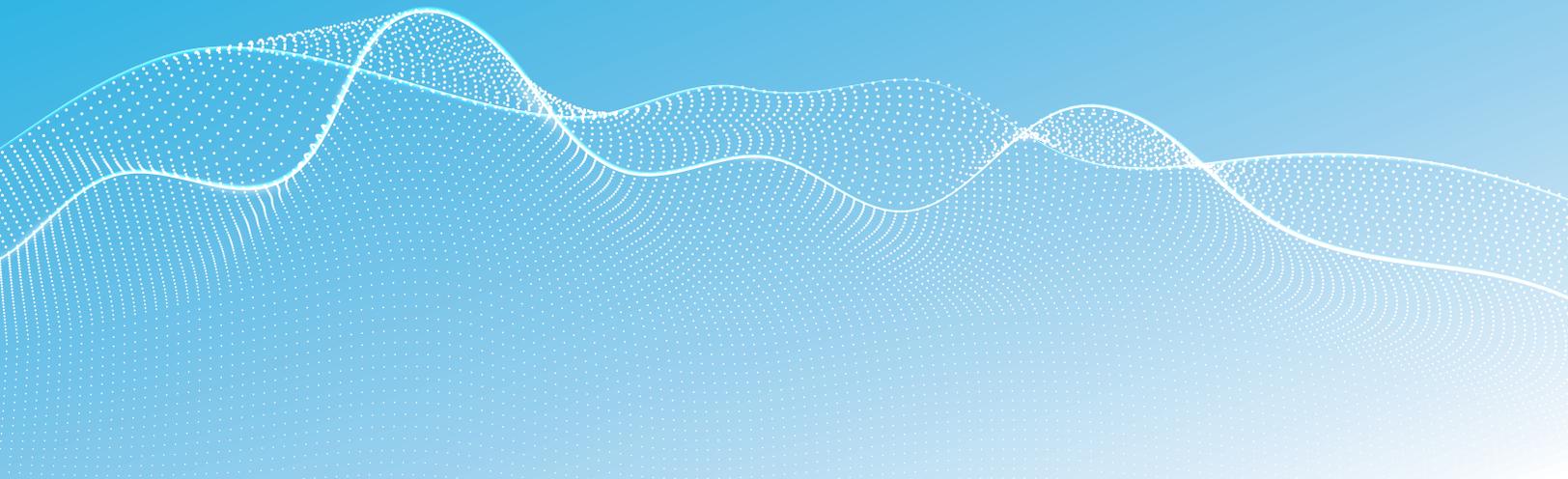
This report may be coming to a close, but your marketing technology journey continues.

Use these insights to help you avoid pitfalls and capitalize on new opportunities. Regardless of whether you are a senior executive, new to marketing or somewhere in between, Zirous is here to help you every step of the way.

With decades of experience we enable clients to overcome the paradigm shift in marketing driven by new technology and customer demands and thrive in the new marketing landscape. Our expertise in technology, data, performance marketing, analytics and marketing automation helps create customer-first organizations — resulting in faster revenue growth, higher return on investment and improved operational efficiency for our clients.

We leverage our expertise to drive value for clients.

- **Uncover Hidden Demand** – Increase revenue by unlocking the potential of your customers.
- **Attribute Revenue to Spend** – Connect activities to dollars to generate the highest rate of return on your investment.
- **Scale Communications Cross Channel** – Follow customer experience strategy best practices to drive brand loyalty.
- **Optimize Marketing Effectiveness** – Remove barriers to unleash the effectiveness of your team and message.



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