

**A STRATEGIC GUIDE TO**

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# Marketing Automation

# Introduction

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Digitalization and the wealth of available information has empowered today's customers. It has also pushed rapid shifts in the marketplace as less known brands and organizations are able to reach customers faster. More and more digital solutions have created new possibilities to connect with large numbers of customers in real-time. As the volume of information has increased, so has the importance of personalized communications.

However, it's not possible to simultaneously handle a huge amount of data, collect real-time customer insights, and create the relevant connections — at least, not without intelligent use of technologies like marketing automation.

Maybe you are new to marketing automation, or perhaps you are already experienced in using this technology. No matter your experience level, this guide will give you strategic insight into how you can get value from marketing automation — not only now, but also in the future.

In this guide, we will concentrate on:

- 1. Strategy and business objectives**
- 2. A new way of operating**
- 3. Data strategy and compliance**
- 4. Content optimization**
- 5. Emerging technologies**

The content of this guide comes from Fluido's extensive experience in working with leading enterprises in b2b and b2c marketing automation spaces.



Espoo, Finland

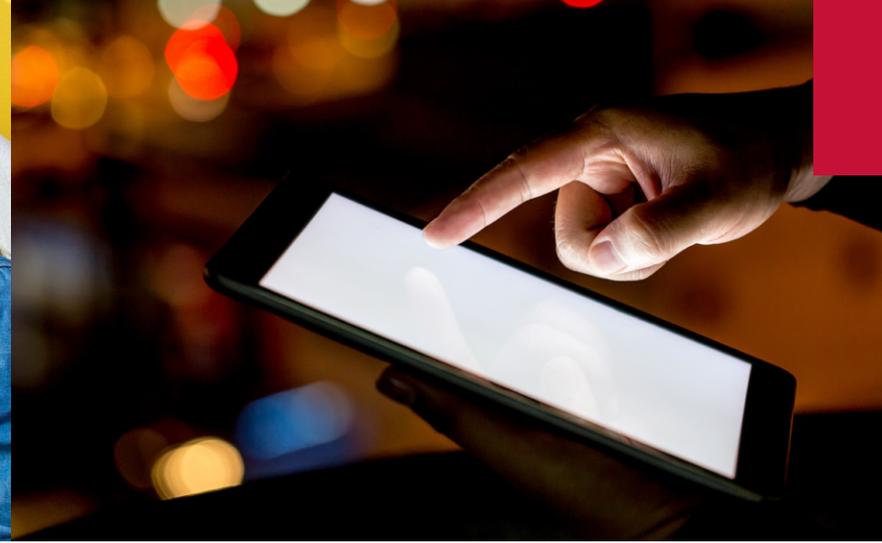
**Milla Hallanoro**

Marketing Automation Practice Lead  
Fluido, an Infosys company

# 1. Strategy and business objectives

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Contrary to an unfortunately all-too-common belief, most marketing automation solutions do not help you reach your business objectives out of the box. Instead, they provide a platform that can be configured to support these goals. This means that deploying the technology is only the first step of the journey. This step is — or should be — followed by a continuous program of incremental improvements.



For most companies, reaching their objectives requires a roadmap with relevant prioritization based on:

## **Feasibility**

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By feasibility we mean that it is actually possible with the current resources and technology to support the objective. For example, if an objective requires that you need more data from your customers or that you need to skill-up or extend your team, it might not be feasible in the desired timespan.

## **Business priority**

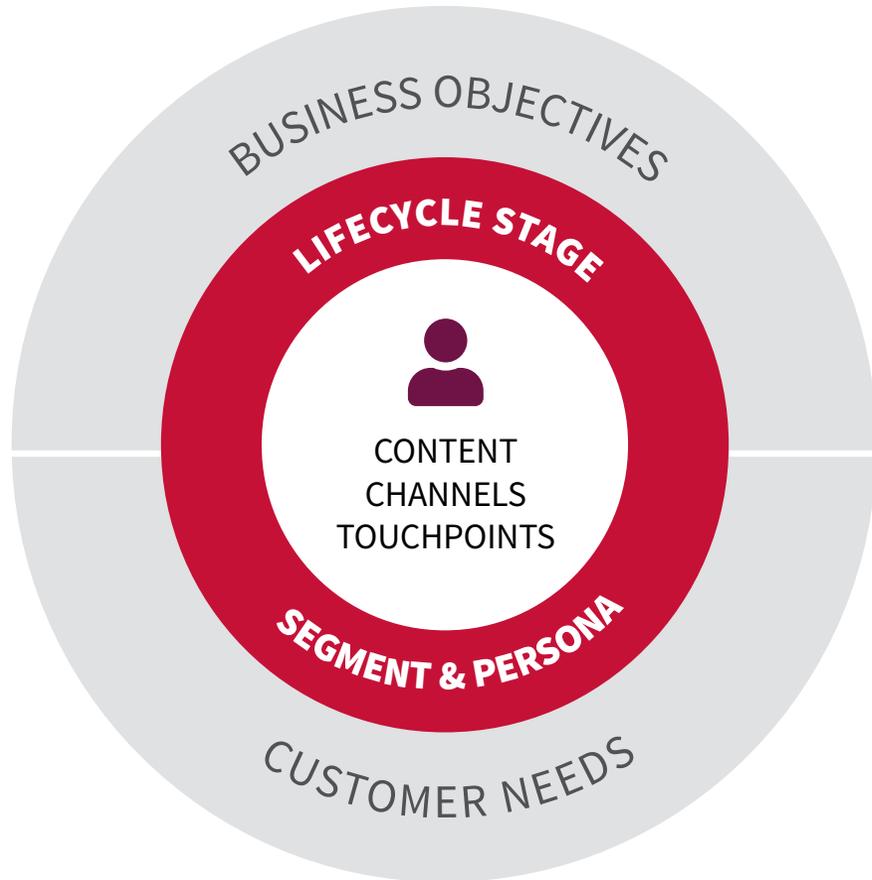
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By business priority we mean that you are supporting an objective that is sufficiently important for the organization. Supporting a less important objective delays the ROI realization of your marketing automation program.

## **A logical sequence**

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By a logical sequence we mean that objectives are prioritized from both technology and business perspectives. For example, introducing marketing programs to reduce churn might be a more logical and efficient objective for growth than aiming to increase marketing qualified leads. From a technology perspective, some objectives might require that you address something else first.



# Align marketing automation strategy with your business goals and customer needs

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Carefully study each of your business objectives and rank these based on the priorities mentioned on the previous page. For each objective, define the necessary KPIs to benchmark and measure your success.

Once you are clear with your objectives, match them with actual customer (human) needs and experience. Together these define how marketing automation should be used and developed: what channels and content are relevant, what touchpoints customers interact through, and which of those enable us to collect additional insights.

All this requires time, planning, resources, and continuous learning to go from single-channel personalized marketing to omnichannel 1-to-1 engagement. The digitalized world is in constant change, and marketing automation capabilities need to rapidly adapt to new customer behavior, data sources, channels and touchpoints.

Before embarking on your automation journey, ensure that you have both of the most fundamental elements of marketing automation in place:

## 1 **An efficient and compliant data strategy**

Data is the fuel for marketing automation. Data strategy will be addressed in more detail in section 3.

## 2 **The necessary organizational capabilities**

This includes knowledge, people, processes and your content strategy. Your organizational capabilities and content strategy are addressed in sections 2 and 4 respectively.

Fluido's experience with numerous marketing automation projects shows that many organizations are often too optimistic about their data and organizational capabilities. We advise caution here: not giving these enough priority early on causes delays and inconsistency in the marketing automation program.

## 2. A new way of operating

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According to a recent McKinsey study, 83% of global CEOs said they look to marketing to be a major driver for most or all of a company's growth agenda. Delivering on this promise requires a whole new way of operating. Beyond the technology framework, marketing automation is also a distinctive way of thinking, planning and executing. It requires changes in an organization's resources, marketing processes, and ways of operating.

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*Organizations that meet automation goals are far less likely to view automation as a means of reducing costs and more likely to see it as a strategic lever.”<sup>1</sup>*

## Automation experience design

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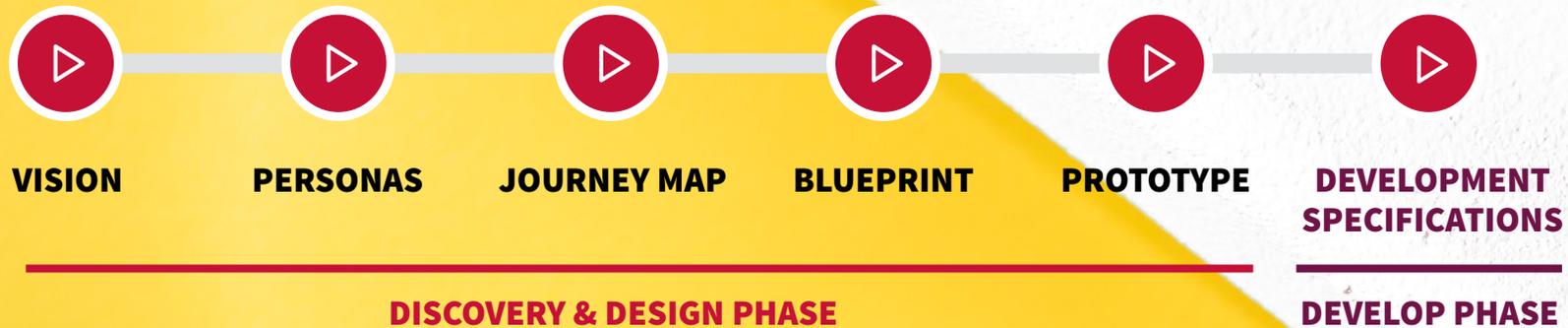
Organizations frequently ignore or lack the processes needed to implement, onboard and develop automated marketing.

To deliver an end-to-end customer experience that is both effortless and consistent, your marketing automation initiative should include representatives across all functions within your scope. Working together across functions is an excellent opportunity to critically evaluate your processes and seek improvement opportunities both from organization and customer perspectives.

This broader view allows companies to see where automation should be employed, what technologies make the most sense for different activities, and what processes need to be redesigned. To get the full benefit from your technology investment, marketing, sales, customer service, and IT must be unified around your organization’s marketing automation program.

<sup>1</sup> McKinsey: the automation imperative

## Customer experience design & development process



### For each process or journey:

- Identify all stakeholders and their needs
- Perform a walkthrough including all stakeholders
- Identify possible pains and improvement opportunities for each stakeholder
- After you've mapped out your current processes, you can focus on your vision for future processes.

Useful tools and concepts to support your vision

## Voice of the customer

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Voice of the customer (VoC) is a research method used to describe customers' needs and requirements. This process captures everything that customers are saying about a business, product or service, and packages those ideas into an overall perspective of the brand. Companies use VoC to visualize the gap between customer expectations and their actual experiences.

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*“The efficient and transparent use of customer data is one of the core elements of marketing automation and also one of our focus areas. That enables us to create more customer value and to send personalized communications and offers through different channels.”*

**Staffan Hemström**, CRM Manager at St1

## Customer personas

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A customer persona (also known as a buyer persona) is a semi-fictional archetype that represents the key traits of a large segment of your audience, based on the data you've collected from user research and web analytics. It gives insight into what your prospective customers are thinking and doing as they weigh potential options that address the problem they want to solve.

## Customer journey map

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A customer journey map is a diagram that illustrates the steps your customers go through in engaging with your company to access a product, an online experience, retail experience, a service, or any combination.

Building on these tools and concepts, you can use the experience of your stakeholders to create your process charts, data flows, and even a prototype, well before selecting the technology and starting the solution design and build. At Fluidio, we use service design methods to help our customers at this first critical stage.



## Life beyond campaigns

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Your marketing may need to change from a campaign-focused approach to designing logical and automated processes that combine personalized content, channels and goals, and are linked to the customer's lifecycle. Time and education are needed to master the skills and mindset required to adapt to this new way of marketing. When too little time is invested in training, it can result in blocked progress, unorganized practices, and inefficient use of marketing automation tools.

## Mar and tech — closing the gap

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Marketing has drastically shifted in a direction where — besides the ability to think creatively and in business terms — a certain level of technical understanding is needed. While businesses continue investing in more advanced technologies, there is a growing need for people who can use the technology to create value.

To get the full value out of marketing automation, both technical expertise and a business mindset are required. This is where cooperation between marketing and tech teams comes into play; the more these teams can think from each other's perspectives, the better. Often, too little effort is spent on training, which leads to blocked progress, unorganized practices, and inefficient use of marketing automation tools.

Research shows that companies that are able to successfully integrate data and creativity grow their revenues at twice the average rate of S&P 500 companies.<sup>2</sup> At Fluido, we provide training sessions, support and workshops to equip and empower your team to manage your marketing automation system independently.

<sup>2</sup> McKinsey: *the most perfect union*

# 3. Data strategy and compliance

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Data-driven marketing cannot work without data. Data defines what we know about the customers, their past interactions and characteristics. Data also helps us decide who should receive the message, when and how, and how it should be personalized. Having large amounts of data is still not enough if the data is not up-to-date, of good quality, or if it is not accessible or structured in a proper way.

Defining how data will be consumed and treated by the marketing automation system is a central part of any system implementation, enhancement or replacement. The data strategy defines:

- Your data architecture covering the parts related to the marketing automation system (data that the marketing automation system consumes or updates).
- Your data governance processes needed to maintain the quality, integrity and compliance of the data.
- A specification of integrations between the marketing automation system and other systems.
- A definition of the possible data model in the marketing automation system.

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## GDPR

Under the European General Data Protection Regulation (GDPR), data collection and governance requirements became stricter and more secure to ensure transparency and to respect individuals' privacy. As a consequence, most companies have changed the way their subscriber data is stored and maintained. Salesforce Marketing Cloud and Pardot are designed to use personal data in compliance with GDPR.

# Consent

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Consent management is an important part of marketing automation system implementation. Typically, there are two ways consent management can be handled:

- 1 | The consent process can be fully managed by another solution like the website: the marketing automation system will redirect to this system when a user wants to sign up or change subscription preferences.
- 2 | The consent process can be fully managed by the marketing automation system. When integrated with your CRM solution, the subscription status gets updated automatically in both ends.

## **Consent management includes two main processes: opt-in and opt-out.**

Opt-in happens when customers subscribe for your company's communication (either general or campaign-related). Best practice is to use a double opt-in subscription process: it is better to have a smaller subscriber list than a list full of inactive subscribers.

Opt-out happens when customers no longer want to receive communication from your company. In case of an opt-out, the easiest way to unsubscribe should be considered.

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*‘Personalization’ used to mean broad offerings across large consumer segments. Today the goal is to leverage data from all consumer interactions to creatively deliver as much relevant one-to-one marketing as possible.”*

– Milla Hallanoro, Fluido

## Data quality

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Data is the fuel of the marketing automation system, and quality issues can significantly impact cost, timelines and success. Missing or biased data obstructs a 360-degree view of your customers. To mitigate data-related risks, consider a data quality assessment together with an improvement plan. Data quality issues can be grouped into three categories:

- 1 Duplicate data**  
A duplicate is a multiple record of the same person or company. To get rid of duplicates, the data needs to be analyzed and cleaned. Many modern CRM systems have a deduplication process.
- 2 Incorrect or incomplete data**  
Incorrect or incomplete data can result from human error and lack of data validation. Some errors can be corrected automatically by machine, others require manual work.
- 3 Outdated data**  
Outdated data is obsolete and cannot be used for marketing automation purposes.

# Data governance and collection

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Data governance processes maintain data quality and integrity, ensuring that you get the most value from your data. If your company can maintain a single source of truth, then data silos and integrity issues are minimized, and data governance becomes substantially easier. Creating this fundamental data layer is often the starting point of implementing a marketing automation system. For example, this data layer can be your CRM or Customer Data Platform (CDP). This layer does not necessarily store all the data used by the marketing automation system, and can be enriched with transactional or behavioral data for specific campaigns.

It is important to ensure GDPR compliance in data collection. This means analyzing what customer data can be used and stored in the marketing automation system. Data collected before the GDPR regulation was enforced should not be used without valid consent. To increase the value of the marketing automation system a process of data collection should be defined in the company data strategy.

GDPR is not only about collecting and using data, it is also about removing data after use. Marketing automation systems give the possibility to remove customer data after it has been used. However, if the data needs to be used later — for example, if an airline sends a check-in message for an upcoming flight during the next year — the removal process should be considered and discussed with the company's legal advisor.



**Case Avinor:** Bringing customer centricity into Marketing (2:24)

# 4. Content optimization

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Marketing automation cannot work without good content. And it is easy to underestimate the amount of content needed to fuel a marketing automation engine. It is not enough for content to be high quality — it also needs to be relevant to the recipient. Timing, place, the customer's profile and the moment in the customer lifecycle all play a role here. The customer lifecycle describes a customer's experiences throughout their relationship with a business.



## Data governance and collection

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To start, collect all your previously produced content from across your company. Next, perform an audit (internally or using an external resource) and content analysis to determine what's valuable and current, what's no longer relevant and/or needs to be updated, and what you still need to create.

A customer journey map shows how the existing content connects to the customer's lifecycle and identifies when specific content would be relevant to send. If not mapped properly, the customer might receive the same content too often, miss some content or get outdated content. As part of the mapping process, you'll identify gaps in your content that you could start filling in.

Next, you'll need to figure out the best way to produce regular new content. Taking into account all the variables — including how much and how often your content will be consumed — you'll need to make the production process as efficient as possible. For example, turning a longer piece of content into a few smaller ones or transcribing a webinar into an article so it can be reused. It also helps to know which content is resonating most with readers. An efficient content production process helps unlock resources that can be reinvested in more valuable activities.

# 5. Emerging technologies

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The marketing field is constantly influenced by cutting-edge technologies that change how you work internally or connect with your customers. Understanding the possibilities of emerging technologies helps you prioritize existing and future initiatives in your marketing automation program. Some emerging technologies are described below.

# Machine learning and AI

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Collecting customer data and insights through various digital touchpoints is crucial for understanding your customers. Organizations are getting better at collecting data and insights, but many companies still lack the ability to use those insights efficiently. Machine learning and AI resolve this challenge by using the data to predict customers' future behavior and actions.

One of the core uses for predictive marketing is to help companies predict what a customer is going to buy and when. Platforms like Salesforce Marketing Cloud can add automatic content recommendations based on customer behavior. AI can also be used to notice changes in customers' buying potential and predict the most potential purchase windows and channels for each individual customer. Taking things even further, AI can optimize the best time and frequency to send marketing messages.

# Real-time personalization

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People are looking for seamless and connected experiences that take their needs into account in real-time. Current technologies offer powerful capabilities to track customer behavior in real-time, send personalized and relevant communication and predict the next best actions and most suitable channels to connect with customers.

Customer behavior and actions should be reflected in all the channels, touchpoints and content they are connected with. When customers are searching for information on a website, any follow-up emails should be personalized based on their behavior. For example, if a specific product has already been purchased, or a discount code is not valid anymore, this information should be removed from the content the customer is receiving.

# Customer data platform

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One of the biggest challenges marketers face today is to unify the data from different sources so that it could easily be used in customer segmentation and personalisation. A customer data platform (CDP) is a software which creates a persistent, unified customer database that is accessible to other systems. Data is pulled from multiple sources, cleaned and combined to create a single unified customer profile. The CDP makes it possible for marketers to scale data-driven customer interactions in real-time, making data available across marketing systems. With the increasing number of data sources and amount of data, the benefits of an efficient customer data platform become more and more evident.

# The way forward

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Creating a consistent end-to-end customer experience requires both technical skills and an understanding of all customer-facing touchpoints.

Fluido has comprehensive experience in leveraging technologies like marketing automation to support both your business goals and strategy, but most importantly, the creation of engaging communication that matches your customers' needs.

We help you define a roadmap that starts by building a strong scalable fundament and continues with items that allow you to expand the use of marketing automation in your organization. Together with our senior strategy advisors, your organization can learn how to use marketing automation in the best possible way, creating both efficiencies and measurable results.



Get to know us better at  
**[fluidogroup.com](https://fluidogroup.com)**



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*Fluido is the leading Salesforce partner in Europe employing over 350 experts and serving over 300 customers. With over 1 300 completed projects with the average customer rating of 4,6/5 we are a reliable partner for your digitalization efforts. Backed up by Infosys, one of the top IT consulting companies in the world, we extend our reach globally and capitalize on our shared commitment to innovation and continuous learning.*