INSPIRED MARKETING

ISSUE 3 | SPRING 2018

WHAT IS COE AND WHY IS IT IMPORTANT?

PAGE 39

HOW TO ENSURE SALES AND MARKETING ARE BFFs

PAGE 37

3M'S AGILE APPROACH

PAUL ACITO

CMO for 3M on innovation in a post-digital era

PAGE 5

YOUR GUIDE TO GDPR

PAGE 41

relationship | one

CONTACT US

RELATIONSHIP ONE

8009 34th Avenue South, Suite 300
Minneapolis, MN 55425

P: +1 (763) 355 1025
E: getinspired@relationshipone.com
W: relationshipone.com

—

At Relationship One, we empower organizations to modernize their marketing through strategy, technology and data. With a core staff of experienced marketing consultants, integration specialists, data analysts and development gurus, we have a well-respected track record for delivering solutions that meet our customers' unique business needs.

Our mission is simple – inspire success.

PRINT & PRODUCTION

ERIC CRATON
Graphic Designer

JOHN ROBERTS
Print Production

PHOTOGRAPHY BY ALI HORMANN
Cover Story

05

COVER STORY: PAUL ACITO ON 3M'S AGILE APPROACH

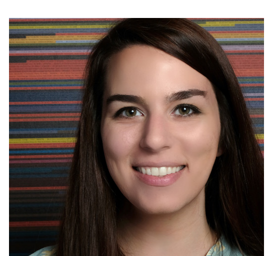
DELL

ORACLE

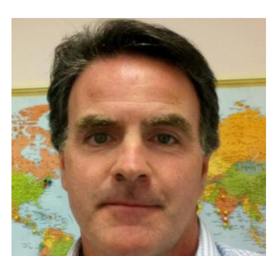
DEMANDBASE

11

STORIES OF MARKETING INSPIRATION



DEMANDBASE



PERKINELMER

33

A/B TESTING IN ORACLE ELOQUA

37

HOW TO ENSURE MARKETING AND SALES ARE BFFs

39

WHAT IS COE AND WHY IS IT IMPORTANT?

41

YOUR GUIDE TO GDPR

TABLE OF CONTENTS

LETTER FROM THE EDITOR

Ron Corbisier
FOUNDER AND CEO | RELATIONSHIP ONE

Relationship One has spent the last year hiring a lot of Marketing Geeks. I was recently talking with one of those new hires, discussing how he was first introduced to the Oracle Marketing Cloud community.

He shared how his first introduction to marketing automation came years ago at Eloqua. A friend was interviewing for a job there and referred him for another job. He said he was immediately impressed by the technology, the company leadership, the culture and all of the passionate people behind the young company.

But, he quickly came to see that behind the employees there was a much larger and even more impressive community of marketing scientists, busy with all kinds of marketing experiments. He talked about how he saw these marketers as pioneers, literally running toward the historic intersection of big data and marketing. An intersection that was already transforming every other business function—a truly historic transformation of business that we are all living through.

Our new employee went one step further sharing that after joining the company, and beginning to work directly with customer teams, he found these marketers possessed many impressive qualities. They were brave, smart, passionate marketers, brought to life and energized by the changes dawning on the industry. While others around them clung to traditional practices, these marketers leaned forward and took risks. They wondered. They challenged. They tested. They measured and they wondered some more.

And most impressive of all, he said, whether they succeeded or failed, they shared. They actively collaborated. They iterated together and across company lines. They got better and smarter together. And they celebrated their successes together.

So why do I tell you all of that? I believe the foundation for good marketing inspiration comes from people's success stories. We love sharing people's stories, and that's why we created the third edition of the Inspired Marketing Magazine.

I BELIEVE THE FOUNDATION FOR GOOD MARKETING INSPIRATION COMES FROM PEOPLE'S SUCCESS STORIES.

At Relationship One, we are privileged to work daily with some of the most skilled and visionary marketers in the world. Our goal in sharing this magazine with you is to inspire you, point you toward success, promote collaboration and help you get better at everything you do. When we see groundbreaking work in the field, we just have to share it. We selected these inspiring stories specifically for this publication because they represent dynamic work, innovative presence in the market and because these are some great people doing great marketing.

I invite you to enjoy learning more from Paul Acito at 3M on his approach to agile marketing and customer-first mentality. Find out about how Demandbase is getting sales and marketing to work together, and learn from Oracle's very own Jeb Dasteel on how to find customer success. Finally, learn from PerkinElmer and how they do marketing automation.

Our hope is that these stories will inspire you too. And I look forward to sharing your successes in a future issue.

- COVER STORY -

3M'S AGILE APPROACH

WE ARE PROUD AND EXCITED TO PROVIDE AN EXCLUSIVE INTERVIEW WITH 3M'S CMO, PAUL ACITO. IN THIS INTERVIEW PAUL SHARES HOW 3M'S CENTURY-OLD, CUSTOMER-CENTRIC MENTALITY, COUPLED WITH ITS NEW METHOD OF AGILE MARKETING, IS EVOLVING THIS COMPANY'S MARKETING. COMBINING THESE CONCEPTS HAS PUSHED 3M TO CONTINUE TO BE INNOVATIVE ALL WHILE LEARNING AND CHANGING TO MEET THE DEMAND OF THE MARKET.

RELATIONSHIP ONE: Tell us about yourself and your role as CMO at 3M.

PAUL ACITO: I started with 3M as a marketing intern, and I've worked in three of the company's five business groups over three decades of incredible leading and learning experiences. I've led businesses in the U.S. as well as Thailand, Belgium and Japan.

I'm a strong believer that technology can take our connections with customers to a whole new level. I am very fortunate to have a role that involves building diverse, high-performing teams, and making sure our current and future customers everywhere feel a personal connection to 3M. We use 3M science and its ability to solve our customers' toughest challenges to make the world a better place.

R1: Where did this evolution start? What were you trying to solve for?

PAUL: Marketing at 3M is centered on our customers, our drive to elevate their needs and our desire to delight them at every touch point. Knowing our customers empowers us to stay relevant with them as their business needs change. Putting them first has been vital to how we've conducted ourselves for more than a century. It's the foundation of our company's success at applying science to life.

Throughout our 116 years in business, understanding customers and working to gain their trust has been core to our culture. We earn our customers' trust using our science and technology know-how to tackle their problems. It's what we do—it's in our DNA.

Our portfolio puts us in a stronger position than many other B2B companies. Customers know we'll be there when they need us, with the right solutions at the right time. Our agile approach enables us to provide personalized, high-quality solutions at the exact time they need them. It also gives us the ability to redefine our relationship with end-users.

We literally have billions of end-user customers and consumers globally, and online technologies bring a new dimension of intimacy to every stage of their journeys. It's helping us build upon the already strong loyalty and trust customers have in the 3M brand.

R1: How did you start? Tell us about the approach you've taken.

PAUL: As the pace of business continues to accelerate, customer expectations of responsiveness and value have also increased. That creates a need for all companies to adjust their cadence to match that of information technology. 3M has adopted Agile Marketing to accelerate the diffusion of our growing marketing technology stack to quickly turn data into insights and insights into enhanced customer experiences.

We use Agile Marketing to continuously learn and apply insights about our customers' experience in a test-and-learn environment for our content and campaigns. This unleashes real-time optimization and focuses our efforts on solving problems with dedicated, small, cohesive, cross-functional teams that are co-located.

We have been a Lean Six Sigma company for more than 15 years, so it's natural for us to innovate our own toolsets and combine agile, lean and six sigma methods to deliver for our customers.

Bottom line: Innovation at 3M isn't just about the product solutions we create to improve lives. It's also about executing our Playbook to build sustainable, profitable growth for our customers, our stakeholders and 3M.

Agile Marketing is making a difference, but the real secret to our success is our Playbook.

R1: **Follow-up question: Tell us more about the Playbook?**

PAUL: The 3M Playbook is behind everything we do. It is made up of five important components: our vision; our six strategies; our code of conduct; our leadership behaviors and the three levers. The first is our vision—to have 3M technology advancing every company, 3M products enhancing every home and 3M innovation improving every life.

Our six strategies are to:

- Expand relevance to our customers and expand our presence in the marketplace
- Gain profitable market share and accelerate market penetration everywhere
- Invest in innovation by invigorating existing market opportunities and focusing on emerging megatrends
- Intensify capabilities to achieve regional self-sufficiency
- Build high-performing and diverse global talent
- Drive consistent, superior levels of operational excellence

Our code of conduct governs how we do business, and our leadership behaviors guide how we work together. Finally, the themes that drive our competitiveness are the three levers: portfolio management, investing in innovation and business transformation.

R1: **What were some of the most important steps along the way?**

- 3M'S AGILE APPROACH - PAUL ACITO -

PAUL: In all 3M businesses everywhere, 3M marketers are now using our enterprise-wide marketing technology stack to unlock customer insights and drive growth. Doing this in an iterative, agile way frequently delivers rapid and effective results. And because we put customers first at every step, our enhanced martech stack delivers value back to them.

Here's how: Our Agile Marketing teams focus on developing content and campaigns using real-time data for test-and-learn optimization. These teams gather insight and learning from our marketing automation platform to adjust the content or, if appropriate, to create new content for customers.

Next, we deliver the user experience on 3M.com. Digital product teams use data mined from multiple platforms to enhance the user experience. What we learn can drive changes both large and small across the user experience – from SEO updates to the addition of other martech components to our existing stack.

We are also experimenting with upstream agile approaches for marketing planning and budgeting—again putting the customer front and center in our strategic marketing efforts.

In all cases, we are biased toward action and stay focused on creating and delivering real value for the customer, while keeping the 3M Playbook in sharp focus. Another important factor is having an enterprise-wide marketing automation platform. This delivers improved insights as well as greater standardization and control at a reduced overall cost-to-serve, which ultimately drives growth for the company. Beyond delivering improved insights, customers from different geographies and industries experience a consistent end-to-end 3M journey.

R1: **What other recommendations would you have for a marketing leader embarking on a similar journey today?**

PAUL: My advice is to spend time understanding your culture and choosing the right approach for your particular situation. While organizational structure remains important, your teams and the way they interact are crucial. This is at once a bottom up and a top down endeavor. The right teams with the right leaders and the right tools are essential.

A clear, but flexible governance model will help to maintain focus on customers, while at the same time help to sort through the thick and changing forest of marketing technology.

"INNOVATION AT 3M ISN'T JUST ABOUT THE PRODUCT SOLUTIONS WE CREATE TO IMPROVE LIVES. IT'S ALSO ABOUT EXECUTING OUR PLAYBOOK TO BUILD SUSTAINABLE, PROFITABLE GROWTH FOR OUR CUSTOMERS, OUR STAKEHOLDERS AND 3M."

R1: What's next? Where do you go from here?

PAUL: In many ways, we've been in the "build" phase of our new marketing engine for some time. We're now winning some races, and to continue with the metaphor: We're embarking on methods to both maintain and rebuild the engine in a responsive way.

There is an overwhelming influx of marketing technologies that require both careful consideration and also restraint as the organization's capacity to adopt these technologies must be considered. For us, realizing the value from our current stack is paramount. It's an exciting time for marketing, but we're closer to the beginning than the end of marketing's evolution.

The journey is not just important, it is the end state. Being agile means never being complacent. 3M teams (like 3M customers) are in a never-ending search for new and better ways to address customers' challenges. An agile mindset means providing customers with more seamless experiences that become adaptive and then predictive while bringing the 3M brand to life.

R1: What inspires you?

PAUL: What inspires me more than anything are our customers and employees. Together, we're on a journey to advance, enhance and improve companies, homes and lives. As our chairman, president and chief executive officer, Inge G. Thulin says, "Make change your best friend. Do things differently, not just better."

3M'S AGILE APPROACH - PAUL ACITO

"WHAT INSPIRES ME MORE THAN ANYTHING ARE OUR CUSTOMERS AND EMPLOYEES. TOGETHER, WE'RE ON A JOURNEY TO ADVANCE, ENHANCE AND IMPROVE COMPANIES, HOMES AND LIVES."

STORIES OF MARKETING INSPIRATION:

REALIZING SUCCESS WITH THE ORACLE MARKETING CLOUD.

Sharing stories of inspiration is what we do. This magazine is full of ideas, best practices and innovative marketing techniques that will inspire you to do your work.

Throughout our Inspired Marketing podcast, we've spoken with modern marketing leaders across all industries to learn more about their modern marketing journeys. We share these stories to help fuel your inspiration, drive you to excellence and teach you more about the marketing automation platforms you love.

There's a lot of knowledge coming your way, so you might want to sit down for this. In this edition of the Inspired Marketing magazine we will learn from **Dell**, **Oracle**, **Demandbase** and **PerkinElmer**.

DELL

CUSTOMER NURTURE

If the aphorism is true and timing really is everything, then automation is one of the most dynamic tools that modern marketers can deploy. The numbers are clear: Marketing automation drives a 14.5% increase in sales productivity and a 12.2% reduction in marketing overhead. "The power of timing," as Oracle calls it, shows in your organization's ability to plan, execute and scale campaigns that predictively—not reactively—deliver rich digital experiences that engage and convert.

Jennifer Gruninger
PROGRAM DESIGNER AND MARKETING AUTOMATION STRATEGIST
DELL

JENNIFER GRUNINGER IS THE PROGRAM DESIGNER AND MARKETING AUTOMATION STRATEGIST AT DELL, ONE OF THE LARGEST TECHNOLOGICAL CORPORATIONS IN THE WORLD.

BACKGROUND

RELATIONSHIP ONE: Thanks for sitting down to speak with us, Jennifer. Before we dive into the marketing projects and automation journey at Dell, can you tell us more about yourself and your role?

JENNIFER: I'm a program designer and automation strategist. I've been at Dell for about eight years now. For the past several years, I've been one of the main team members who manages our global nurture program and audience through Eloqua. I help guide how we design the program, how we evolve the program and how we manage it on a day-to-day basis.

R1: What is Dell's nurture program? What was the initial vision you had as marketers when you set out to build it?

JENNIFER: At its core, our nurture program is all about educating and sustaining conversation with contacts—specifically, with people who aren't ready to talk to sales yet but who do want to learn more about Dell solutions. When we started looking to build a nurture program, we knew we wanted something that would always be on, something that would really be an email experience that could shift the conversation toward whatever topics the contact wanted to learn more about—driving them to engage with the program as we adapt in real time, based on that engagement.

R1: An immediate feedback loop.

JENNIFER: Right. We knew we wanted to look at their individual engagement with the content, or lack of engagement, which we could use to help them along their journey. We wanted an experience that would allow contacts to binge: to go deeper into the content if they wanted, to back out a little if they wanted, to switch topics and learn about a completely different solution area.

For our audience, we knew one of the big things here would be our ability to look at indicators of interest and make sure we were getting contacts into the program at the right time, at the right journey stage—and, of course on the right topic.

R1: How long has Dell been executing on this nurture program? Has the structure or management or direction of the program ever changed over time?

JENNIFER: Nurture at Dell has been around for at least five years. When we first looked at creating this specific program several years back, many of our team members were brand new to marketing automation.

As a result, when we really sat down to do Phase 1 of the nurture and launch the program—a phase we called "the first build"—we didn't map out what kind of customer journey we wanted contacts to go through. We should've done that on paper and then figured out how to convert that vision to a marketing automation application, before we built out the architecture.

CHALLENGE

R1: What were the ramifications of not ideating formally first, in the way you describe?

JENNIFER: The initial program was too difficult to manage. But for Phase 2, we were motivated to create a program that was more simplified. We went back to the drawing board—went back into design and rebuilt structure from the ground up—so our nurture would be easier to manage. In the second build, we could update and make changes faster. We focused on making the nurture work efficiently with all the other technology [in our stack], even as that technology evolved.

R1: Is Phase 2 the stage that the nurture program is in currently?

JENNIFER: No. After Phase 2 came Phase 3, which for us is all about Program Canvas [an Eloqua feature] following our merger with EMC. Dell recently went through one of the largest tech mergers of all time, and Dell and EMC are coming together as one company in a unified approach [to marketing].

As part of that, we had to reexamine the experiences around our content. We had to partner with our different business units and regions to make sure we were still creating the experiences that are ideal for our customers, based on our solutions and our combined vision. And we realized we could do even better on the technology side with Program Canvas, so the third build was centered on implementing Program Canvas as part of overall design.

R1: That's quite an evolution. And it sounds like it exemplifies the old saying: "Necessity is the mother of invention." Dell was forced to adapt for better builds, so you and the team kept hammering away. What was the hardest part of that development?

JENNIFER: The work was improving our Eloqua instance on a regular basis, so it would be useful to everyday marketers at Dell. That still is the work. We're really in the tool all the time, so leveraging it to its fullest potential is important.

We're trying to adopt processes that enable Eloqua to function optimally for us. We want a nurture program that's clean and simple and fast, so our goal at this point is to use Eloqua to streamline and improve. And we're always looking for new apps and integrations that can work with Eloqua to customize our instance and make the nurture program the best we can.

> "GOING THROUGH THE LARGEST TECH MERGER ALMOST OF ALL-TIME - **IT FORCES YOU TO STEP BACK, GET A NEW LAY OF THE LAND, AND REEDUCATE PEOPLE ABOUT THE PROGRAM AND ITS PURPOSE."**

R1: Customization is even more challenging when you're at an organization that is going through major changes. How did the merger with EMC factor into the evolution of the technical builds?

JENNIFER: That's right. During the past several years, we've gone through many organizational changes. Our immediate team has changed; our senior leadership has changed; and the biggest change of all, of course, is the merger. Going through the largest tech merger almost of all-time—it forces you to step back, get a new lay of the land and reeducate people about the program and its purpose. You have to be certain the program is still working for your business needs.

R1: Is it?

JENNIFER: That's one of the great things about stepping back and looking at things in a new way after big changes. Today we realize that our initial vision, which we started with five years ago, has stayed essentially intact. We're noticing that people still seem to agree with it. And not only that, but the vision has actually become much clearer over time.

With that in mind, we can focus on being proactive and positive about supporting it. That means keeping everyone informed about what we're trying to achieve and enabling the organization to use the technology to the fullest.

R1: Using technology to the fullest is a challenge in and of itself. As most marketers can attest, SaaS technology is rarely static. It's meant to mature and evolve—to grow as your vision grows. How has this particular challenge manifested at Dell?

JENNIFER: We have a pretty good foundation and strategy, but yes—there is always the challenge of keeping up with changes, both internal at Dell and external with the people we engage, because that affects how we use the technology. We address this by asking ourselves a couple of key questions. "How does this technology work for our business process? Does that architecture still work for our needs?" When we build a program flow, we ask, is there something we need to adapt this flow to?"

Since there are always new apps and integrations available, we're always looking to see if there are new capabilities we can add to enhance our process. We also examine the results of how we're currently using the technology, which can tell us if we're missing something.

> "FOR NURTURING WE USE A STANDARD WIREFRAME THAT'S FLEXIBLE ENOUGH TO **ADAPT TO ALL THE DIFFERENT TOPICS WE HAVE, SO WE CAN USE IT TO INSERT MODULAR CONTENT PIECES."**

SOLUTION

R1: It's funny you bring up results—that is something I always look forward to unpacking with marketers! But before we dive in to outcomes, can you reveal how you overcame the specific challenges we've just explored? What were key steps in the solution process?

JENNIFER: One part of the solution we've already discussed: the structure of how we evolved the program. But another critical step was making partnerships. We had to establish strong partnerships with many teams, both internal and external to Dell. For our nurture campaign to work on a global scale, we have to work with our regional go-to-market teams, as well as our global product teams and business units. That's how we ensure we're producing content that aligns with our overall Dell goals, vision and solutions areas.

Another big step was looking at our audience and making sure we were seeing indicators of interest in the right way, so we could look at an individual contact and say, "this is the best communication to take next with them." If they're browsing this content, what does that tell us about their interests? What part of the journey does that mean we should enter them into? What solution area makes the most sense [to talk to them about]? We had to analyze all of that information and make a strategy for how to consistently flow people into the nurture.

R1: And I imagine that wasn't easy, given the vast number of solutions that Dell offers.

JENNIFER: Right. We have tons of products and tons of solution areas that we can cover in the buyer journey, so it was critical we balanced all of those choices to create the right flow for different people. You don't want to overload your contacts. So, we had to figure out the key messages that aligned with certain indicators.

R1: How did you create the content that fulfills that messaging and, in turn, fuels the program?

JENNIFER: For content, the marketing team again relies on the very strong partnerships that we have with our business unit teams. We have an intake process, where we all work together to make sure we have content that fulfills all of the different stages in the buyer journey. Do we have discovery-level content? Do we have deeper, education-level content? Then, as people get closer to purchase, are we bringing in the right type of content to keep them interested and prime them for sales? We're constantly managing this and refreshing this on a regular basis.

There is also a regional component because this is a global program. We want content to be right for the region [it's being delivered to], so we have translations for different countries.

R1: That's great. And here is where I have to cheat a little bit—because I do have some background on Dell's approach. Please correct me if I'm wrong, but you aren't using a massive number of different emails, right? You're managing different wireframes, so you can plug and play different elements into the program based on recipient?

JENNIFER: Yes. For nurturing we use a standard wireframe that's flexible enough to adapt to all the different topics we have, so we can use it to insert modular content pieces.

As a result, when we're working with our partner teams to create content for the program, we get that content, break it apart into individual components and label them. Then, we can pull those different parts and plug them into the wireframe as needed—based on the journey, the buyer stage and the topic of interest as indicated by the customer.

RESULTS

R1: Are there any outcomes you can share with us since you've adopted Eloqua and started using it to build out the nurture?

JENNIFER: For the nurture as a whole, one of the things we're seeing is extremely strong engagement metrics. We're seeing people opening, downloading, coming back and binging on content. The numbers are better than what we saw using our traditional batch-and-blast email approach, so that's a big motivation for us to continue.

A lot of these improvements are due specifically to Program Canvas. One of the things we're doing this year is using Canvas to enter audiences into the nurture program in real time, as they come in from many different sources. This feature is always on, so there are new people entering on a daily basis. Contrast this to our old processes, where it would take days or sometimes weeks to get audiences loaded in.

R1: A stark contrast indeed. Sounds like you've also upgraded the speed of the program.

JENNIFER: Exactly. More people are getting more communication faster and on time. The other thing we really want to focus on is making sure we're contributing and helping people move along their journey. We conducted some multivariate tests with nurture and without nurture, and we found that with nurture we are delivering 35% more incremental opportunity creation to the business.

R1: That's huge! And to achieve metrics like that, you have to dedicate yourself to ongoing, evergreen communication—like you said, always on with real-time updates. That takes a mindset shift in marketing. Is that shift here to stay, and has it impacted the wider organization?

JENNIFER: Yes. You're absolutely right. We need this program to always be on, so we designed it that way. One of our goals is to focus on the customer journey across all of our solution areas, whereas before we may have used one campaign to highlight one solution area. Our approach is more holistic. We're always looking across our content and at the different solutions we offer—just to see how we can fulfill the best experience for customers as they go back and forth through the program across topics.

Do people need to be going deeper into certain content areas? Do they need to back out of one area [to explore another]? We need to enable those options while keeping the experience intact. People need to be able to self-navigate and have their own individualized, personalized experience with the nurture.

R1: Is there anything else you can share from a win and success perspective? Creating 35% more opportunities is amazing—but are there any qualitative wins that have emerged, for example?

JENNIFER: We're seeing that the nurture has become a model for how behaviorally driven automation can work in our business—beyond the nurture itself. There are lots of opportunities to use a similar framework at Dell to create other types of experiences. Teams are thinking of taking nurture beyond email with omni-channel campaigns. Teams are also forming stronger partnerships thanks to the work they've done with each other for the nurture, which is a huge win for our business.

With all that, I think another key win would be the adoption of marketing automation technology across the business, for many purposes. It's now really getting the recognition it deserves, and as we evolve we're going to see automation [become] embedded into the work we do every day as marketers. This will help us think about experiences and journeys rather than only communications and messaging.

R1: Right. That's a lot of factors to balance at one time. But now, with a lot of the foundational challenges behind you—as you appreciate results like this—can you look back and say you'd do anything differently? Is there any step in your approach that you would change?

JENNIFER: That's a tough one. I think the team did a very good job when they first launched the program. Anytime you're building a new program, it's really challenging to figure out, "do we go fast, or do we focus on perfection?"

If I had to pick one thing, looking back, I think it would be to keep things as simple as possible, so that the program would've been easier to manage and better about adapting to changing technology. The complexity that we built in initially made the program hard to manage internally, on our team; and outside of our team, it made it really hard to sell the program to other teams, to get organizational alignment.

I also think I would be more transparent with partner teams about the work we were doing. We were using great, cutting-edge technology [with Eloqua], but because we're such a large organization we could have communicated that more. Ultimately, the goal is to bring everyone at Dell along with us on the journey.

FUTURE

R1: What's next? Where does the nurture program go from here?

JENNIFER: As we educate everyone and continue to get input and more collaboration, we think team members will start to find more use cases on their own in the business. We're also going to work to keep up with enhancements and changes to the technology.

There are a lot of different directions we want to go in, building off this momentum. We want to stay educated on the latest apps. We want to leverage dynamic content. We want to consider the use cases that might improve the overall experience. As part of all this, we also want to maintain our partnerships with Oracle and Relationship One, so we can make sure we're using all the features and technologies to their fullest extent.

R1: Excellent. Around here, we like to geek out on different technologies and apps—so, speaking of, what is a tool you don't think you could live without as a marketer?

JENNIFER: For the nurture, I'd say the Relationship One Campaign Date Checker is my favorite app right now. We can use it to ensure we're scheduling communications for each country while avoiding important holidays there [which would diminish ROI]; to make sure we're communicating with the right people at the right time.

It's a really cool app, with a simple drag-and-drop functionality onto the canvas for each email step—so, I really can't live without that one, knowing what it can do for us and how it's improved the way we send emails, especially for the global program.

R1: On behalf of Relationship One, thank you for the generous shout-out! Great to hear the Campaign Date Checker is working wonders for the Dell marketing team. And just to conclude our talk today, could you tell us what inspires you as a marketer?

JENNIFER: It inspires me to see customers engaging with our content—bingeing on it and getting what they want out of the program. Seeing all of those engagement rates go up is super inspiring. And as we continue to automate, our ability to free up resources to focus on other projects will also continue to improve.

> "ANYTIME YOU'RE BUILDING A NEW PROGRAM, IT'S REALLY CHALLENGING TO FIGURE OUT, **DO WE GO FAST, OR DO WE FOCUS ON PERFECTION?**"

ORACLE

CUSTOMER EXPERIENCE

Jeb Dasteel leads a customer-focused team that engages daily with some of the world's largest enterprises, ensuring they get the most from their Oracle investment. Dasteel has recently published a book entitled "Competing for Customers: Why Delivering Business Outcomes is Critical in the Customer First Revolution."

Jeb Dasteel
SENIOR VP AND CHIEF CUSTOMER OFFICER
ORACLE

JEB DASTEEL IS ORACLE'S SENIOR VICE PRESIDENT AND CHIEF CUSTOMER OFFICER, HAVING BEEN WITH THE ORGANIZATION FOR 17 YEARS IN VARIOUS CORPORATE AND FIELD-BASED ROLES.

BACKGROUND

RELATIONSHIP ONE: Let's start with a burning question I had while reading your new book. Chapter Two is called "Making the Case for Customer Success." I was just wondering—with so many threads for organizations to pull in order to be successful, from engaging prospects to getting conversions to keeping clients happy, why is customer success so important nowadays?

JEB: I think the single biggest reason is that basic buyer expectations in the B2B world have evolved significantly [in the last few years]—pretty much to the point that now, they're the same as the expectations buyers have in B2C. Your basic B2B buyer is now a consumer at lunchtime, at night, on the weekends.

R1: Has this B2C influence on the B2B landscape impacted Oracle at all?

JEB: For us at Oracle, this shift has meant realizing our buyers wanted simplicity, they wanted value, they waned that value immediately and they wanted a much, much better way to engage with Oracle technology. As a result, I think we have cultivated a laser focus on customer success at Oracle.

We aim to simplify and speed up the buying process, and then return value to the customer by helping them achieve their desired business outcomes. Creating that kind of simplicity and focus can be challenging in a large-scale B2B organization, if only because of the sheer volume of touch-points between buyer and seller. Orchestration of this is essential.

CHALLENGE 1

ORGANIZATIONAL SHIFT IN MINDSET

R1: How do you "simplify and speed up" the buying process? It sounds like a sea change. How do you move the needle at an organization as well established as Oracle is—changing processes that, until the emergence of the subscription economy, were successful?

JEB: Our mindset is very different today from what it was three years ago. Three years ago, for example, I would've told you, "our [internal] shift is going slowly. We're making progress, but it's measured progress." But today I can say this: In the last three years, the rate of change at Oracle—and I've been at Oracle for almost two decades now—is like nothing I've seen before. The rate of change is amazing.

The company is going through nothing short of a transformation, and the kind of technology we build, the way we deliver it, the way we interact with customers, how we measure our success - all of that is moving along at a remarkable pace. But that said, are we done? Absolutely not. We're on a clear path, and the company is behind it.

R1: Exciting! You say there's been a mindset shift. Is this due to the fact that Oracle is good at the Three Pillars of Customer Success you mention in your book: listening, engaging and ensuring?

JEB: Yes. We are really good at listening. And we have been working at actualizing all three of those pillars for much more than a decade.

But there are challenges in building those pillars, which we meet head-on with our technology. We use our technology to do the listening: to collect data, to apply analytics, to do reporting in a way that has maximum positive impact on the organization.

R1: What about the other two pillars: engaging and ensuring? Does technology enable you to achieve these, as well?

JEB: Yes. Technology has an important role to play in engagement. When we look across our customer base and figure out the strategies we should use to reach different customers in totally different markets with different sizes, we engage with them via an omni-channel approach.

An omni-channel approach is not exclusively technology-based, obviously. If you look at the objectives we have for engagement, they revolve around continuity and supporting our customers' business objectives at very specific steps along their journey. Technology can effectively help us level the playing field across customer segments, and allow us to balance our investments appropriately.

CHALLENGE 2

MARKETING AND SELLING IN THE SUBSCRIPTION ECONOMY

R1: When you say omni-channel is mostly technology-based, what are the parts of the customer success formula that do not involve technology?

JEB: Technology plays a big role, but it isn't the whole answer. It may not even be half the answer. A lot of customer success is simply showing up: doing some research, asking smart questions, learning your customer's business, understanding how they measure themselves, and obsessively following through.

> "THE COMPANY IS GOING THROUGH NOTHING SHORT OF A TRANSFORMATION, **AND THE KIND OF TECHNOLOGY WE BUILD, THE WAY WE DELIVER IT, THE WAY WE INTERACT WITH CUSTOMERS, HOW WE MEASURE OUR SUCCESS - ALL OF THAT IS MOVING ALONG AT A REMARKABLE PACE."**

R1: That sounds like it enters marketing's domain—or at least brushes up against it.

JEB: It does. I would love to see marketing in the driver seat at more organizations, the way I see it working here at Oracle: establishing and facilitating engagement strategies. Marketing occupies a huge role at Oracle.

Part of that role is to set basic customer segmentation strategy: to design and deliver programs for engagement and for key accounts. Marketing collaborates with other teams during the account planning process. It impacts how we approach customer advocacy. It provides us with the engagement managers whom we map to every top account, by name. So, its role cannot be understated in the continual journey of engaging customers and making them feel—and be—successful.

R1: Sales, of course, is the flip side of marketing. What are your thoughts on selling in the subscription economy?

JEB: Sales is a tough business. But one aspect is really straightforward, I think. In our business—and I think this applies to many, many businesses, actually—you can no longer sell the technology and move on to the next opportunity. You have to stick around. You've got to help your customer be successful, and that means driving adoption of what you sold and then being in a position to help them track, target and measure the business results they sought in the first place.

R1: Why is that? Why is it suddenly so easy to leave one solution for another?

JEB: The whole investment model for cloud technology is fundamentally different than what we used to deal with. Customers previously made enormous investments upfront and spent years working on their return. Now, much smaller, incremental investments are made, and the expectation is that the return happens in a straight line, starting almost immediately.

R1: How do you go about ensuring renewal, then?

JEB: Perfect word choice: "ensuring." That's the third pillar. The job of professional services today is about ensuring success and understanding each customer's business, which enables you to actively engage with them and help them achieve their goals. There is a consultative or advisory process here that is the heart and soul of professional services.

"A LOT OF CUSTOMER SUCCESS IS SIMPLY SHOWING UP: **LEARNING YOUR CUSTOMER'S BUSINESS, UNDERSTANDING HOW THEY MEASURE THEMSELVES, AND OBSESSIVELY FOLLOWING THROUGH."**

SOLUTION

R1: How does Oracle manage to "stick around" in that post-sell part of the funnel? In the part that used to be, "job well done, now on to the next deal"—how does Oracle keep itself in the customer's mind to reinforce its value-add?

JEB: Marketing and sales never conclude. You have to sell, you have to resell, and then you have to sell again. You need to ensure that your customer is getting everything needed from your solution—and maybe more—and will therefore renew their subscription. It's just too easy in the subscription economy to switch to a different solution from a different provider.

But this means you have to develop and execute the right strategies to move customers to modern technologies. And that in turn means you have to help customers implement those technologies quickly. It means you have to drive adoption and ongoing consumption of product updates, which comes frequently in a subscription kind of environment. And then, to return to my earlier point, you have to target, track and measure business results continually so customers know your solution is working for them.

All of these are challenges inherent to the subscription economy. But again, these are challenges we're excited to face and to overcome, and we're going to do that with a focus on customer success, superior technology and thoughtful marketing, because the economy shapes customer expectation, and that expectation fuels what we deliver.

FUTURE

R1: Big picture, what are the next steps as Oracle navigates this customer-first revolution?

JEB: Like I said earlier, in the last several years Oracle has massively transformed how we deliver technology to our customers. That's helped us become more of a services organization than a product organization. So, our major, ongoing goal is to keep developing and delivering next-generation business application with built-in artificial intelligence, machine learning and business analytics.

If you look across all the different business application categories—ERP, supply-chain, HCM, CRM and so on—it's clear we're focused on building out a whole suite of next-generation applications. And beyond that, we're focused on having them be well integrated for our customers so those applications can sit on top of a truly state-of-the-art foundation that's comprised of cloud-based platform and infrastructure.

R1: Is that what inspires you as a marketer? Or is it something else?

JEB: Every time I'm put in front of a customer and I can see that we've done the right thing in terms of making a real difference for their business and their customers, that is inspiring. That's why Oracle's transformation is about so much more than appreciating ourselves for our incremental moves. Improvement is good, and so is noticing what you've done right as an organization.

And we've done right here: to appreciate the subscription economy and enhance our approach. But I get even more inspiration from looking at an individual situation and seeing, "Wow—we have genuinely helped this customer to be truly successful."

DEMANDBASE

ACCOUNT-BASED MARKETING

Beth Tiltges and Stephanie Thomas hail from sales backgrounds—experience they use to infuse their marketing with a focus on accelerating opportunities, building excellent client experiences and expanding partner engagement. Together, they launched an ABM campaign that used direct mail and their own proprietary tool to spark 400% ROI growth.

BETH TILTGES AND STEPHANIE THOMAS ARE SENIOR MANAGERS, FIELD MARKETING AT DEMANDBASE, A TARGETING AND PERSONALIZATION PLATFORM FOR B2B COMPANIES.

Beth Tiltges
SR. MANAGER OF FIELD MARKETING
DEMANDBASE

Stephanie Thomas
SR. MANAGER OF FIELD MARKETING
DEMANDBASE

BACKGROUND

RELATIONSHIP ONE: **This is a rare and great opportunity: for us to sit down and speak with two marketers from the same organization, at the same time. Beth, would it be all right if we started with you? What brought you to Demandbase and how would you describe your role?**

BETH: Previous to Demandbase, I spent nine years in IT sales, selling large data center gear and services to oil and gas enterprises. We were the classic example of complete disconnect between sales and marketing. I would hear about new campaigns from customers and partners, but I had no idea what was coming up next [from my own colleagues].

When I joined Demandbase, it was a complete shift in offering, sales cycle and target audience. It's been a whole different conversation, and the alignment has been quite refreshing. I joined Demandbase about three years ago. We're a B2B marketing company. We offer a complete end-to-end ABM platform. And for two of the past three years, I've been in field marketing, supporting the central region [of the U.S.], which includes working with awesome partners like Relationship One.

One of my favorite parts of the role is I still get to keep my sales hat on. Our customers are not only the paying kind but also the internal sales teams [at other organizations], whom we support. We're marketers who are marketing to other marketers—and that has tons of perks.

R1: **Excellent. Stephanie, what is your role at Demandbase, and what brought you to the organization?**

STEPHANIE: I've been in field marketing for about four years now. Like Beth, I actually also came from sales. Funny enough, I didn't know this until just now, but I was also selling to oil and gas! So, Beth and I have a lot in common. And I really do have to echo her sentiments about sales experience being essential for field marketing.

I started my field marketing career at Oracle, specifically within their marketing cloud division. I was focused on the big-name products: Eloqua, Responsys, BlueKai. But after a couple years, I hopped over to Demandbase, which is an Oracle partner.

I've only been here about six months, but coming from a larger company I was really chomping at the bit to unleash some new ideas. When I arrived, I came up with this integrative campaign idea: the summer account-based marketing idea. In hindsight, it was perhaps a little ambitious for someone a couple months into a new role, but together we made it a big hit in a very short amount of time.

R1: **Perfect. Thanks for sharing, Beth and Stephanie. Now, I propose we spare our readers and avoid the oil and gas jargon—no "upstream," no "downstream." But we can talk about field marketing! Stephanie, could you tell us more about the summer ABM program? How did it start, and what were you initially trying to solve for?**

STEPHANIE: Of course. Summer is inherently a difficult time in the fiscal year. It's prime vacation time, but even when people are in the office they're working differently. They're trying to coordinate around kids who aren't in school, for example. So, from a field marketing perspective, summer is usually pretty dead. Not only are your prospects out of office but also your sales reps are on vacation. Imagine how challenging it is to plan events when your audience and your reps are both MIA.

When it came to Q3 planning, I was really looking at a pretty light event schedule. For a field marketer, that's the kiss of death when it comes to pipeline generation. So, I started looking at other channels like social ads and email in order to generate my pipeline—my quarter, essentially.

R1: **Of those channels like social and email, which one helped you generate the leads you needed but weren't finding in the usual field marketing pipeline?**

STEPHANIE: Well, I think a lot of marketers fall into the trap of having tunnel vision when it comes to those types of channels. They say, "I'm going to work on my ad campaign," and they check that one off. They say, "now I'm going to work on my social campaign," and they check that one off. I really wanted to tie it all together.

R1: **No single channel was the cure-all?**

STEPHANIE: Right. The only problem was I only had a couple of months [before summer ended], and I didn't have enough juice to make everything happen.

> "THE NUMBER-ONE GOAL OF THIS PROGRAM WAS TO CREATE PIPELINE. **THAT'S ULTIMATELY GOING TO TURN INTO CLOSED-WON BUSINESS."** - BETH

Thankfully, though, on the other side of the country, Beth was looking at a number of different complex programs. She had this great new food truck competition idea [that involved] direct mail and a summer swag bag. She had a whole bunch of different things going on. She had almost the opposite problem I did! When we came together, we realized that both of our programs had a summer theme, so we joined forces to create 'The Summer of ABM.'

In the coming weeks, when we implemented the program, we saw several other summer-themed campaigns pop up in the market. It's not like we're the first ones to ever do this, but it was still pretty cool the way we tied it all together.

R1: **Awesome. Almost serendipitous how it worked out. If we can skip ahead to end—I know I'm not supposed to, but I'm really curious about this—can you reveal the results of your joining forces? This melding of the minds?**

BETH: With that question I feel like I'm talking to our CMO! As Stephanie explained, the number-one goal of this program was to create pipeline. That's ultimately going to turn into closed-won business. All in all, we saw 43 marketing qualified leads come out of 'The Summer of ABM.' That equaled 30 new pipeline opportunities, and additional pipeline is still trickling in even now.

We also wanted to drive awareness around our ABM certification program, which is a full-day, deep-dive course around ABM. The messaging there was to get the teams educated on account-based marketing and how they're going to implement that in 2018. In the summer months alone, we certified over 140 individuals; these came from both sales and marketing and included both online and in-person trainings.

And because we practice what we preach when it comes to ABM, we only marketed to the accounts on our target account list. These were the 4,000 accounts that we focused on as a company, and [that focus] was a unifying force that brought sales and marketing together.

R1: Can you expound on that? How does leveraging an ABM approach get different teams at Demandbase to believe in and work toward the same vision?

BETH: This is really important to understand when we're looking at the metrics of programs like 'The Summer of ABM,' because when we're looking at the MQL-to-pipeline conversion rate, we see numbers like 70% conversion. That's much higher than the industry average, which is 50% to 55%.

> "WHEN WE'RE LOOKING AT THE MQL-TO-PIPELINE CONVERSION RATE, WE SEE NUMBERS LIKE 70% CONVERSION. **THAT'S MUCH HIGHER THAN THE INDUSTRY AVERAGE, WHICH IS 50% TO 55%."** - BETH

While it's our job to keep the sales team fed with pipeline from our target account list, we also need to make sure the executive team is bought in so we can run future integrated programs and pull resources from multiple groups throughout the organization. And the expected ROI on this program itself is over 400%. Given that number, we think we're going to get future executive buy-in for programs of this nature.

R1: Great to hear you've combined drinking your own champagne, so to speak, with creating positive results. Stephanie, could you walk us non-Demandbase marketers through the details of the summer program? Beth just spoke to the importance of cross-team buy-in.

STEPHANIE: Definitely. With regard to the groups we needed to actualize all this, we had two sides: marketing and sales. Speaking for marketing, we had our email, social and web teams—nothing out of the ordinary there. But the challenge, as we've said, was that everyone was on vacation or planning a vacation. That included people on our own team.

That shortened our timeline. So, from inception to execution, we actually pulled this entire campaign together in about 2 or 3 weeks, which is unheard of.

We first had the idea in May and launched in early June, with different touchpoints being executed throughout the summer.

R1: That's a condensed timeline if I ever heard one! So, you named the different teams that you guys have there working on campaigns: web, social, email. Were all of those elements present in 'The Summer of ABM,' even while you were on that incredibly fast schedule?

STEPHANIE: We had a lot of balls in the air, and it was pretty record time, to be honest.

On the digital side, we had an always-on retargeting ad campaign for our target accounts. We had social promotion through the whole summer. We had blog posts about the benefits of training during a slow time of year, so our reps wouldn't have to justify [promoting] the certification; they'd just be able to share the blog posts. Then overall, we had an umbrella landing page that all of our traffic was directed to. And for most of the summer, that page was actually within our top five most visited webpages.

On the campaign side, we had direct mail and a food truck competition deployed strategically to our top five accounts, the big guys. As we mentioned, we had a couple ABM certification courses. And in order to drive people to these types of campaigns, we leveraged a tool that we actually created very recently, which we call Account-Based Marketing Assessment.

R1: That's exciting—a solution you made yourself at Demandbase. What is its purpose? How does it work?

STEPHANIE: It's a survey that measures your ABM readiness against other organizations'. I think, whether we admit it or not, everyone who's a marketer is competitive. We want to know what everyone else is doing. This assessment can measure you against other organizations so you know where you rank in the grand scheme of things. We use that tool to drive traffic to our campaigns.

But I would say the most successful element of the entire program was essentially guerilla marketing: where we physically showed up to a prospect's office with snacks or cookies or something equally delicious, and chatted with them. Sometimes we had to drop the snacks off with the receptionist because the contact [in question] was busy or in a meeting; obviously, we never told prospects we were coming. But we still saw a lot of success because it was summer, it was slow and people had the extra 30 minutes to talk with us on a Friday.

R1: Amazing. Boots on the ground, militarizing cookies—all for the good of the pipeline! Outside of the guerilla tactics, what's another reason you think the campaign worked so well?

STEPHANIE: You know, we had a lot of information to provide the sales team but we didn't want to overwhelm them. So, Beth and I created enablement kits that were specific to each sales role. For example, our CSMs [Customer Success Managers] received different kits than our SDRs, who always got the biggest kits because they [needed] the most information.

Each kit came with suggestion email templates, social posts, action items, calendar invitations. You name it, they got it. I actually printed out these kits, and you could've used them for weight lifting. I felt a little bit bad about that—perhaps it was a little too much information—but we made them because we knew our SDRs are essential to the success of campaigns. And I think any marketer worth their salt would agree with that.

R1: Hey, when you're trying to align sales and marketing, is too much communication even possible? I'm sure those teams found it so valuable that you armed them with great content. Beth, I'd like to get your take on this, too. As you and Stephanie rolled up your sleeves and made this happen, what were key steps you took?

BETH: I would say that any good marketer or program manager would agree: first things first. Lay out the plan so you can act fast and coordinate the moving parts.

Like Stephanie said, we needed buy-in and support from sales. It was imperative they be kept informed and involved through the whole process. We weren't just making the enablement kits and throwing them at SDRs, saying, "time to get to work!" We wanted it to be a two-way street in terms of communication. Luckily our teams aren't shy, so they'll pipe in when something isn't working—or even if something is working, and they have feedback from the trenches.

Another important step was for the calls-to-action, as Stephanie talked about: the ABM Assessment tool, which gives a tailored report on your ABM readiness. There have been campaigns run like this in the past that would drive campaign members to take the assessment, but, looking back, the results of those campaigns were lackluster. In this go-round, during 'The Summer of ABM,' we saw over 40 assessments completed and delivered.

R1: Were you measuring assessments the whole time?

BETH: Yes. We knew we couldn't just measure at the end, deliver the results and move on to the next program. We were continually informing the sales team of new assessment takers and anyone who was getting ABM-certified. Then we updated the pipeline count so we could attribute close-won business that resulted from the entire team's efforts.

> "EACH KIT CAME WITH SUGGESTED EMAIL TEMPLATES, SOCIAL POSTS, ACTION ITEMS, CALENDAR INVITATIONS. YOU NAME IT, THEY GOT IT. **I ACTUALLY PRINTED OUT THESE KITS, AND YOU COULD'VE USED THEM FOR WEIGHT LIFTING."** - STEPHANIE

R1: Nice. If I can pivot back to Stephanie for a moment—you both have made it abundantly clear how much work, strategy and forethought went into executing this campaign. What kind of learnings did you glean from this process? If you could go back in time, is there anything you would do differently?

STEPHANIE: Segmentation. It was the most important part, but it was also the hardest—which is probably why we spent so much time on it. We had to coordinate our emails around other marketing programs that were going on. This is nothing new for modern marketers, with all the webinars, conferences, reengagement campaigns. We all have to slice and dice our database. That's a challenge, but it's something we manage.

We learned early on that segmentation was key thanks to an overambitious email that was sent out. When the assessment was first created back in March [2017], we delivered it to a pretty large segment via email. That segment included non-target accounts, and as a result some of those accounts took our assessment.

On the one hand, that was a good thing; it meant people were interested and wanted to know that information. But on the other hand, it also meant our SDRs had to spend time following up with accounts that were less likely to convert. After that send we really took a more surgical approach to our segmentation.

"WE TURNED SEVERAL NAYSAYERS IN BOTH SALES AND MARKETING INTO FIRM BELIEVERS **THAT THESE WERE EFFECTIVE TACTICS."**

- BETH

R1: What are some other wins and successes you can share from the campaign?

BETH: This is probably my favorite part to talk about when I reflect on the program, because we had a ton of fun. We used pictures of beach balls and barbecues and surfboards and food trucks—all things that trigger thoughts of summer.

This time around we even used the hashtag #ABM all day in our social media promotions, which is a play on words for a certain pink wine that some might enjoy in the summer. From that tactic alone, we got over half the summer's ABM pipeline.

R1: Do you think the unmitigated success of this campaign took anyone by surprise?

BETH: We turned several naysayers in both sales and marketing into firm believers that these were effective tactics. Anecdotally, one account executive comes to mind who was initially so reluctant. He was engaging an account in the sales cycle, but it went dark. We asked him to go to the Northeast [U.S.] and deliver some cookies to this account. I'm serious! He may have been dragging his feet a little at first, but literally three days later a contract was signed.

Not all of the stories are that successful, of course. Sometimes, there were gatekeepers who took all the treats we dropped off at the prospect's office and never shared them with anyone there, which made it really interesting when we followed up with that account later.
But as a whole I'd still say we've seen lots of nuggets of success like that. Stephanie did another summer drop that garnered 12 or 13 responses from 13 accounts that received snacks from us. Numbers don't lie.

There was doubt around the direct mail [aspect], too. Direct mail is challenging in and of itself, but we made it fun. We captured our audience's attention by sending them beach bags, sunglasses, sunscreen—even margarita shakers. Just a whole box of summer goodies. That helped the SDRs get creative when they followed up with those accounts.

R1: Thanks for sharing those stories. Those are great human-to-human examples of what made the program work and what makes it special. Switching focus a little bit—from personal to technical—can you talk about the role technology played?

STEPHANIE: We use Demandbase for our ads and Eloqua for our marketing automation. But I would say one of the most instrumental solutions we used was Sendoso. This was actually the first time we used it, but it's a great company that manages the direct mail process and integrates with Salesforce. It's genius.

Sendoso housed our inventory, and then we submitted the addresses and contact information; then they built our summer swag bags and sent direct mail out on our behalf. As a field marketer, I can vouch for that process entirely.

The fact Sendoso integrates with Salesforce is what really makes it cool. At any stage in the pipeline, Sendoso can automate sending a gift to the contact. You can send clothes or maybe a handwritten note from the SDR—whatever you want.

And then if the opportunity closes, you can have it automatically send a bottle of champagne! It ensures your prospects are getting the love they deserve while also helping you out with logistics.

R1: Awesome. Automating direct mail is something that doesn't come up too often, but you've shed great light on it and it's got very clear benefits. How can you possibly top a campaign like that? What initiatives do you see coming next?

BETH: Stephanie and I joked that once we wrap up 'The Summer of ABM,' we should do a Four Seasons campaign. You know, 'The Autumn of ABM,' 'The Winter of ABM,' 'The Spring.' But we think that might get old! Still though, we're definitely going to leverage the segmentation work that we did over the summer in future programs.

We have a nice primed audience as we execute on our programs this quarter, which are already taking place. We had a product release in early October [of last year], after 'The Summer of ABM' concluded, and the management team ran very targeted direct mail campaigns for it.

Looking forward, we're always going to rely on knowing what our audience is up to—at any particular time of the year. The fact we have that defined target account list throughout the country lets us execute these high-touch, high-return tactics. We're certainly going to be exploring future opportunities to do integrated campaigns similar to this one, assuming the teams involved can support us.

R1: Last but not least, I'd like to wrap up with an introspective question. What is it that fuels you to do what you do? Innovating is hard work, and doing it across many different teams for an audience of thousands of people while under an intense time crunch—well, that's even harder. But you two make it happen. What drives you?

STEPHANIE: I haven't been at Demandbase too long, but I can genuinely say that the team here gives you room to develop and grow. This type of program may not be a "field marketing program," but here we are. Demandbase recognizes potential and creativity. That type of environment inspires me.

BETH: I absolutely agree with Stephanie. Having spent so much time in sales, I think the one thing that keeps me moving forward is the human element.

There has been so much innovation in marketing technology. The emergence of AI makes our roles and our processes that much more efficient. But we're also humans. We have goals, needs and a strong desire to interact with other humans. I don't think we've ever closed a single deal where a handshake did not occur, for example. Maybe it's just the Midwesterner in me, but I think the human element is key. It keeps me inspired.

"MAYBE IT'S JUST THE MIDWESTERNER IN ME, BUT I THINK **THE HUMAN ELEMENT IS KEY. IT KEEPS ME INSPIRED."**

- BETH

PERKINELMER

MARKETING AUTOMATION

Since joining PerkinElmer in 2011, Richard Flaherty has taken on the challenge of building a more efficient marketing technology stack through the introduction of marketing automation. With Marketing Automation, PerkinElmer can get cleaner data to produce more targeted and successful campaigns.

RICHARD FLAHERTY IS THE GLOBAL DIRECTOR OF MARKETING SERVICES AT PERKINELMER, A BIOTECHNOLOGY COMPANY THAT SPECIALIZES IN THE BUSINESS AREAS OF HUMAN AND ENVIRONMENTAL HEALTH.

BACKGROUND

RELATIONSHIPONE: **A lot of marketers aren't too familiar with the biotechnology sector. Could you help us get acquainted with it? What does PerkinElmer do as an organization, and what are the accountabilities of your role?**

RICHARD: Sure. I started my career in manufacturing—probably a big leap from where I am today. Previously I worked with a big corporation, making pens. That was years ago. After that, I moved into various operational roles, then specifically into marketing operations, and then into different marketing roles.

I've been with PerkinElmer for seven years; I came over as part of an acquisition and started in the informatics division. I started my current role three years ago as director of marketing services. We really focus on three primary areas: managing our marketing stack, analytics, and digital campaign execution. That's where our team contributes.

As for PerkinElmer, the organization: We're a global leader, committed to innovating for a healthier world. We've got about $2.1 billion in annual revenue, and about 9,000 employees. Our capabilities are focused on areas like detection, imaging, informatics and research.

R1: **Could you unpack some of the more technical terms you just mentioned?**

RICHARD: Of course. One quick example of something our technology does is newborn screening. We screen over 560 million babies worldwide for a variety of life-threatening diseases so their families can be informed and prepared as fast as possible. We also, for example, use instrumentation to test water to make sure it's safe to drink.

Every year we analyze 289 billion gallons of water to help ensure about one billion people can consume it safely and healthily. Sticking with consumables, we also analyze food. In 2016, we analyzed 220 million tons of wheat to ensure quality, since wheat is a staple in the global supply chain.

R1: **That's extraordinary. I have to thank you—not just for talking shop but also for explaining what it is that PerkinElmer does, because frankly it sounds like you guys are performing a service for humankind.**

RICHARD: Absolutely. It's good to be part of history.

> "WE REVIEWED ELOQUA AND CHOSE TO IMPLEMENT IT AS OUR SOLUTION **BECAUSE IT CLEARLY ALIGNS WITH OUR CORE REQUIREMENTS."**

CHALLENGE

R1: **Aside from the global and historical side of what you do, can you take us more in-house? On a more granular level—I promise that wasn't a pun about wheat—what was the major technical challenge that PerkinElmer faced?**

RICHARD: For the last year and half, the number-one challenge has been our inventory in the stack. Asking ourselves, "what do we have?" As a larger organization, when you grow through acquisition sometimes you find you've taken on new and different business units, which can get complex. So, one of the initial ideas we had was to perform an audit. We had to make sure we fully understood what units we were utilizing and how we were using them in different regions.

We spent a fair amount of time documenting the stack: putting it together, reaching out to stakeholders to create a fuller understanding of what was in place at the time. Then we said, "we have to align all of this." We didn't necessarily have a complete roadmap, but we could at least start to identify certain areas of overlap.

R1: **What do you mean by "overlap?"**

RICHARD: Overlap is when you have multiple systems that do similar tasks for you, or when you have a system that's really used for a very specific reason by one person or a small group of colleagues, but that system is heavily underutilized compared to what it's costing the company to maintain. We learned a lot from this process [of identifying instances of overlap].

Another big project we tackled was eliminating manual processes. That's where Eloqua came in. Between our CRM and Salesforce, a lot of different elements were being manually plugged into our two major portions of the stack. We had to address that with automation.

SOLUTION

R1: **What were the factors that went into your selecting Eloqua as the solution for PerkinElmer?**

RICHARD: Since we didn't have a marketing automation system in place, we were spending too much time manually operating campaigns to try to make them successful. We reviewed Eloqua and chose to implement it as our solution because it clearly aligns with our core requirements.

We had complex needs within Salesforce and our CRM, and we knew whatever marketing automation tool we adopted would have to support those needs. We were a very large-scale organization that needed workflows we could put in place and build on going forward. Eloqua was the right tool for that job.

R1: **Earlier, you called automation the "number-one" challenge you and the team faced at PerkinElmer in the last year and a half. Were there other challenges, too—a number-two or number-three issue that you helped solve?**

RICHARD: Nice catch! We did have another major issue around data. Again, it goes back to marketing automation. As I said, with a large organization that has multiple business units, we had to manually intervene to make sure that data flowed between Salesforce and our CRM. We needed to eliminate that from the process, and to do it we needed a new system that would integrate or connect those two parts of our stack.

R1: Excellent. And now that you've implemented that solution, what sorts of results are you seeing? What are you doing with all of this new clean data from an analytics and reporting standpoint?

RICHARD: Today, I would say probably 99% of what we do is automated. There may be a few particular business areas that have slightly different needs, so for those we'll do a little bit of manual intervention. But for the most part, we're there. So, we consider our integration with Eloqua to have been a very successful one.

What automation has really allowed us to do is reassign resources to more impactful projects and tasks at PerkinElmer. Any time you're spending effort manually intercepting data or processing it, that's just not adding as much value to the business. Now, people whose hands used to be tied up are free to really step up into supporting our vision—and I don't just mean our vision as a marketing team but also our vision as a company that wants to better the world. Eloqua's features are complex and advanced, so we're very happy because it's enabled this.

"WHAT AUTOMATION HAS REALLY ALLOWED US TO DO IS **REASSIGN RESOURCES TO MORE IMPACTFUL PROJECTS AND TASKS."**

R1: Aside from enabling you to more efficiently allocate resources, what else has automation helped PerkinElmer achieve? I know automation can empower an organization a surprisingly large number of ways.

RICHARD: Right. We've also improved accuracy. Anytime you add manual processes to the mix, data accuracy goes down. With automation, we're seeing much cleaner data flow in. That supports everything else down the road—all the downstream processes that depend on that data. Our ability to target is better now. Our ability to route properly is better. Those are huge wins in my mind.

R1: And with more accurate data, I'm guessing reporting and analytics have also improved?

RICHARD: Absolutely. One of the problems I think many organizations have is there are too many different dashboards and reports. It's kind of a Wild West situation. Everyone can go into Salesforce and create their own dashboard, so you can end up with many, many versions, and none of them match; additionally, some of them aren't utilized beyond that one use case.

So, as we worked through our marketing automation, we put a lot of effort into defining our analytics. We talked about using data dictionaries to agree on how we were going to measure our KPIs going forward, and then we built the standards for those KPIs with stakeholders, and then we implemented specific dashboards for those KPIs.

R1: Sounds intense. How did you accomplish these critical, data-centric tasks?

RICHARD: We moved all of our key data into a data warehouse. So, if our CRM data is flowing in there and our cost management data is flowing in there too, now we have a complete visualization package that can sit on top of this data and give us insights and analytics—and do so in a way that helps us reinforce our reporting standards. We have a long way to go still, but we believe this is the first big step so we're excited about the future.

FUTURE

R1: Speaking of the future—with so much new and advanced functionality in your stack, how do you see PerkinElmer maximizing Eloqua, Salesforce and your CRM moving forward? What projects do you see on the horizon?

RICHARD: Well, it's important to remember where we are. We're still setting that foundation and getting automated at the same time. But you're right. When we first implemented Eloqua, we asked ourselves, "what are some key areas and features that we're interested in?" We knew we might not be ready to fully deploy them, but we also knew we could at least start piloting them. That's how we were introduced to several [of Eloqua's] features—two of the most impactful being nurturing capabilities and lead scoring.

When you think about how a lot of companies still handle email marketing, it's batch-and-blast. We want to be different from that. So, we're excited to move from pilot to fully operational with lead scoring and nurturing. With Eloqua, we can be much more targeted and create better customer journeys. We're looking forward to developing this program more in the coming year specifically.

R1: And as you seek to deepen the targeting and functionality of your campaigns, is there any sort of technology or tool out there you see as pivotal?

RICHARD: Spotfire. It's a visualization package similar to Tableau. I've been using it for quite some time. It's amazing what you can do with it—how you can look at data and slice it, analyze it, get insights.

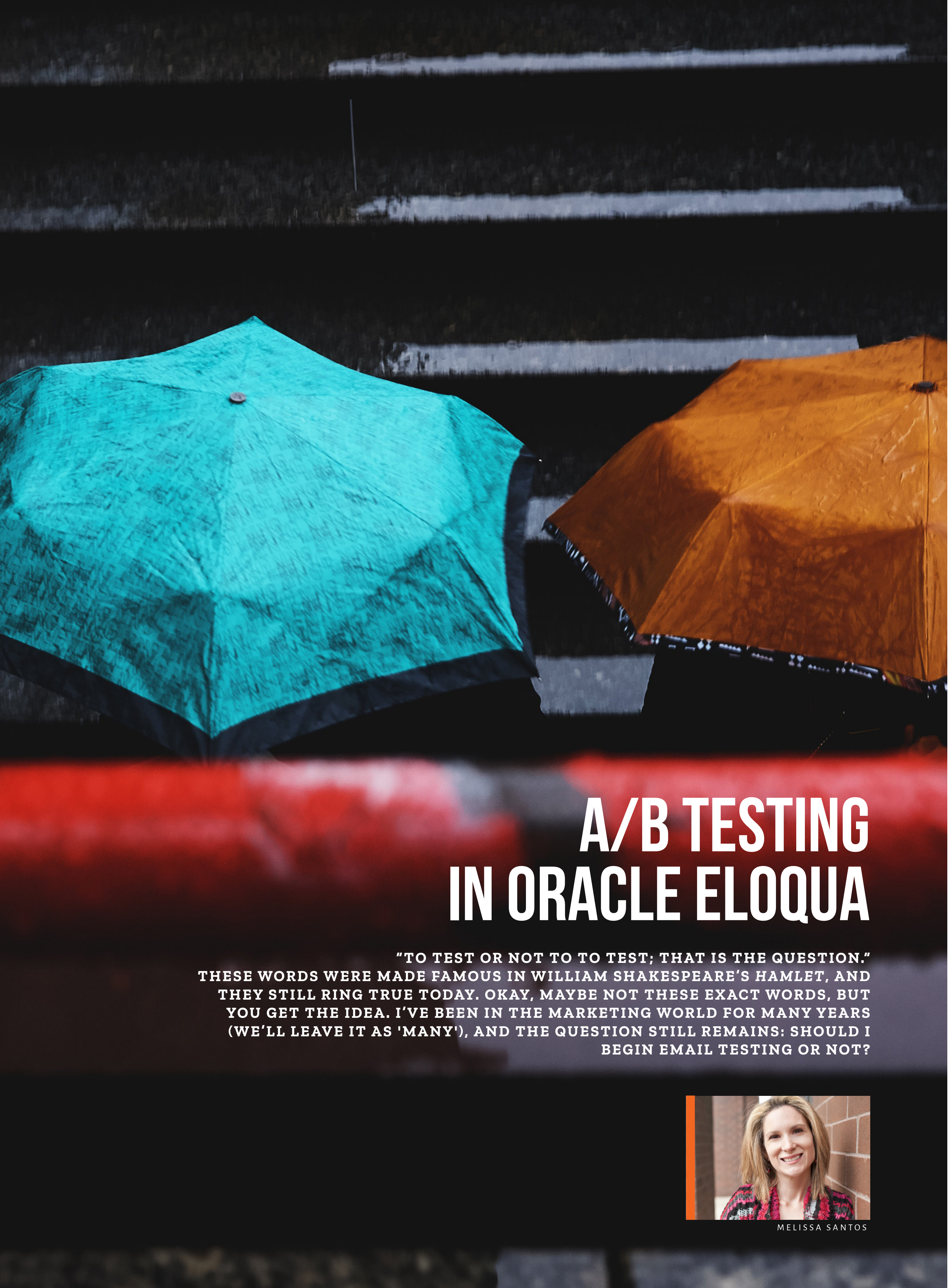
I'm an analytical person by nature, so I guess I can't help myself! I know that a lot of people use Excel to get their insights. The funny thing is, I'm forgetting how to do some things in Excel these days because I go right to Spotfire, which is a much more advanced package.

R1: Great. Well, something we like to understand when we get a chance to speak with accomplished marketers is what gets them motivated—what gets them excited to keep thinking and working and creating and analyzing. What would be your answer to that question? What inspires you as a marketer?

RICHARD: One inspiration is definitely the team here at PerkinElmer, especially my colleagues in digital marketing and marketing services. They've shown their dedication as we've implemented Eloqua. Implementation can be quite challenging, you know?

You're trying to get your day-to-day work done and also trying to execute on a campaign with a new tool. Balancing that takes a certain level of commitment. And to succeed in those conditions—to actually move the needle during that process—is even more amazing.

It can be frustrating to deal with both migration and operational activities, but we get it done. And that is inspiring: to see how everyone steps up and is able to make projects successful.



A/B TESTING IN ORACLE ELOQUA

"TO TEST OR NOT TO TO TEST; THAT IS THE QUESTION." THESE WORDS WERE MADE FAMOUS IN WILLIAM SHAKESPEARE'S *HAMLET*, AND THEY STILL RING TRUE TODAY. OKAY, MAYBE NOT THESE EXACT WORDS, BUT YOU GET THE IDEA. I'VE BEEN IN THE MARKETING WORLD FOR MANY YEARS (WE'LL LEAVE IT AS 'MANY'), AND THE QUESTION STILL REMAINS: SHOULD I BEGIN EMAIL TESTING OR NOT?

MELISSA SANTOS

The reality is that everyone knows they should test, but sometimes it feels too overwhelming. Where do I begin? What should I test? How do I test? Luckily, testing emails is not nearly as daunting as it may sound. Similar to Oracle's approach to marketing automation, you have to crawl before you can walk before you can run. Once you understand the basics, start with a few small tests. From there, the sky is the limit.

WHY SHOULD I BOTHER TESTING?

Before diving into testing 101, let's address the biggest question in the room: Why should I test in the first place? Admittedly, testing emails can be time-consuming and may use up already limited resources. Is it really worth it?

YES! Overwhelmingly, yes! Why? For many reasons, but if I only express one, test to increase conversion. A simple test can significantly impact your final results. Here's the deal: As marketers, we sometimes think we know how customers will react to a layout, piece of content or call to action. But in reality, we may be way off. That's where testing comes in. I've conducted many tests in which the winner was shocking. I never thought a particular version would win, but it drew much higher conversion rates than the preferred version. Goodbye, ego. Hello, higher engagement.

WHAT DO I TEST? WHERE DO I TEST IT?

What to test is not as clearly answered. Technically, you can (and should) test everything, including elements on your website, digital media, and email communications. Naturally, I'm hyper-focused on email marketing communications, but keep an open mind when you're exploring options. Once you get into testing, you'll never want to stop. It's addictive. However, you have to start somewhere.

So, if we start with email marketing, what should you test? The answer, like everything else, depends on what you want to improve. Take a long hard look at your current metrics. Pretend for a moment that you want to test a particular email newsletter. First, run some analyses on your engagement metrics. Are you looking to increase open rates, click rates or both? If your open rates are low, consider testing your subject line or pre-header text. If your click rates are low, perhaps you test your call to action, content or offer. With that said, there are many elements of an email that are worth testing.

Below is a short list that I am sure you can elongate:

- **Call to action – placement, wording, color, size, offer**
- **Subject line**
- **From/reply to email addresses**
- **Email layout – single column or two, placement of messages and images**
- **Personalization**
- **Body text**
- **Headline**
- **Pre-header**
- **Closing text**
- **Images – location, size, type**
- **Content and offers**
- **Timing – cadence, time of day, day of week, different time zones**

The list goes on and on. In short, open your mind to testing anything and everything about your email communications, whether it's related to layout, content or actions. Test major items as well as those you consider minor. You may be surprised to find that the little things really do matter. As they say, the devil is in the details.

Although there are no limits to the types of elements you can test, here are some simple rules you should keep in mind when building your testing plans.

1. **The golden rule of A/B testing is to set up your test so you can select a winner. Define the result metric(s) that you plan to analyze in order to determine which variable or version worked best.**
2. **Make sure to test only one variable at a time. Otherwise, it will be impossible to know which change ultimately impacted the results. You can certainly utilize multivariate testing when complex experience changes are required, but with A/B testing, simple is best.**
3. **Run your tests simultaneously to ensure your results are not skewed by time-based factors. Take time zone into consideration if sending to a diverse geography.**
4. **Use an objective list. Split your lists randomly across regions, units, and groups. Test as large a sample as possible for more accurate results. Typically, I recommend at least 10% of your target audience.**
5. **Listen to the empirical data collected. You're testing for a reason, right? Remove your gut instinct as a consideration for a decision, and let the data guide you.**

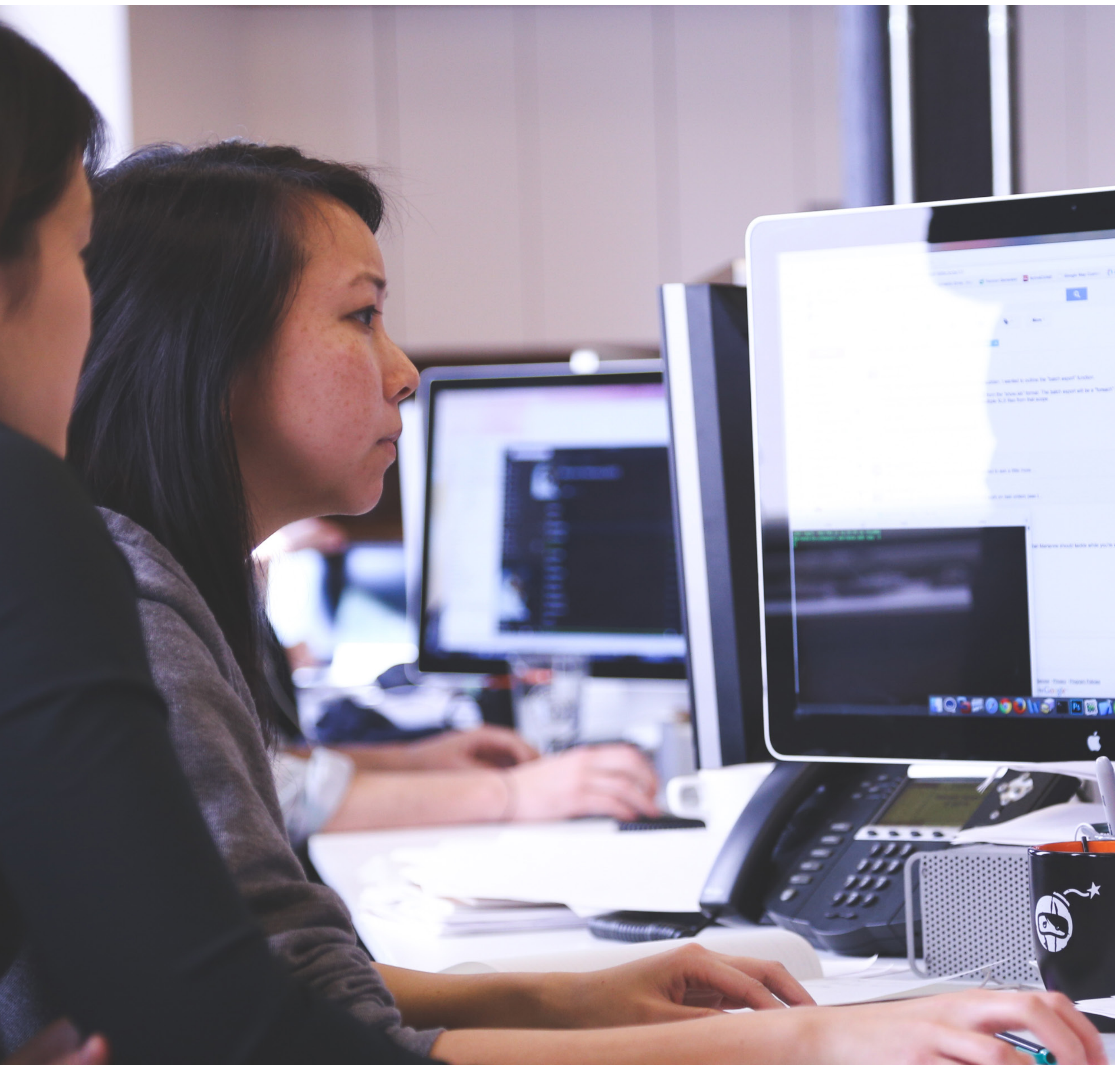
IN CONCLUSION

No matter how you test, what you test or why you test, hopefully it is clear that everyone, including you, should test! Even the most savvy marketers don't always get it right. Sometimes we are surprised by which layout, call to action or subject line drives the greatest engagement.

I encourage you to review your content calendars,and to devise a testing plan. Start small, test a theory or two and grow from there. With each successive test, you gain valuable knowledge that will turn into higher conversions. Don't be afraid to start somewhere, and once you begin, just keep testing.

For further information on the various A/B testing methods in Oracle Eloqua, there are a number of excellent articles on Topliners, examples include:

- E10: How to Run A/B Email Testing on the Campaign Canvas
- Building a Random A/B Split Email Testing Program
- Walkthrough of Randomized A/B Email Test in E10 Campaign Canvas



HOW TO ENSURE MARKETING AND SALES ARE BFFs

LOVE-HATE RELATIONSHIP? NECESSARY EVIL? CONSCIOUSLY UNCOUPLED? HOW DO YOU DESCRIBE THE RELATIONSHIP BETWEEN SALES AND MARKETING IN YOUR ORGANIZATION?

TRACY MILLIGAN

If it's not so hot, you may want to consider bringing them closer together. Here are a few benefits that sales and marketing alignment can provide to your business:

- Ability to close more deals
- Likelihood to lose less customers
- Overall faster growth as an organization

Sounds great, but how do you get there? Every organization requires a different process, but successfully aligned sales and marketing teams have to focus in four key areas.

ORGANIZATIONAL ALIGNMENT

Sales and marketing alignment comes from the top down. Leadership commits to working together, developing shared definitions, processes and goals tied to business priorities. Teams meet regularly and have open lines of communication.

Tips for driving organizational alignment:

- **Find an executive sponsor**
- **Job shadow to better understand roles and responsibilities across the aisle**
- **Create cross-functional teams for strategic initiatives**
- **Develop multiple channels of communications – regular meetings, chat groups, collaborative online spaces**
- **Be social – find opportunities for marketing and sales to mingle**

TECHNOLOGY & DATA ALIGNMENT

This may be obvious and is crucial to long-term success. Each technology in the stack should contribute to demand and revenue creation, and be integrated to eliminate data silos. Organizations that focus on technology alignment can improve their data, which leads to better targeting, scoring and conversion efforts.

Technology alignment can also drive efficiency for both teams. It supports closed-loop reporting and creates a single source of truth for the organization.

Tips for driving technology & data alignment:

- **Audit your marketing, sales and support technologies**
- **Identify technology gaps or redundancies**
- **Document the data flows between systems – both from the high-level integration down to the field-level data that is mapped**
- **Create a data dictionary**
- **Standardize data among systems, reducing open-text or free-form data where possible**

OPERATIONAL ALIGNMENT

This is where the rubber meets the road. Marketing and sales need to define their respective roles and responsibilities for each stage of the funnel. Today, prospects can research solutions online more than ever before, allowing marketing to engage leads further in the buying process. Campaigns need to be targeted and personalized along the stages to effectively engage and convert unknown prospects to known prospects.

Sales and marketing work together to determine when a lead is qualified and should be handed off to keep leads moving through the funnel. However, marketing's job does not end once a lead is delivered. Ensuring sales has the right content to convert those leads into opportunities is crucial as well as having the mechanisms in place to re-nurture leads who aren't quite ready to buy. Mature marketing and sales organizations go beyond the initial sale by developing customer-based campaigns to support renewal, cross sell/up sell and advocacy efforts to retain customers and drive additional revenue.

Tips for driving operational alignment:

- **Create buyer personas**
- **Define buyer journey stages**
- **Perform a content audit, map content to personas and buying stages**
- **Define marketing and lead stages, owners, hand offs and service-level agreements**
- **Develop a lead scoring model**
- **Set up closed-loop reporting process to measure ROI**
- **Create key lifecycle campaigns: welcome programs and reactivation programs are great places to start**
- **Deploy sales tools to provide insight on lead & contact behavior**

METRICS & GOALS ALIGNMENT

Teams that measure together, stay together. Developing a core set of metrics and dashboards provides common ground for sales and marketing to measure success and optimize programs or processes. Teams should meet regularly to review the data, discuss concerns and celebrate success.

Tips for driving metrics & goals alignment:

- **Create goals that are in-line with the larger business goals to start, then ladder down to function-specific goals**
- **Create internal benchmarks for KPIs to track against**
- **Socialize the data—ensure reports and dashboards are accessible to both teams**
- **Agree on reporting cadence—weekly, monthly, quarterly, yearly**
- **Tailor reports for your audience—executive dashboards will be very different from the operational dashboards**

Like any new relationship, it's best to learn about each other before jumping into the deep end. Initiate conversations to understand where priorities align and identify areas of collaboration to help develop an action plan. Also, don't be afraid to seek advice. There are many experienced professionals who can help your organization navigate this relationship and set you up for success!

WHAT IS COE AND WHY IS IT IMPORTANT?

CENTER OF EXCELLENCE...A CLEAR AND OBVIOUS TERM, RIGHT? TAKE A MOMENT TO GOOGLE IT, AND VERY LITTLE MEANINGFUL INFORMATION WILL BE PROVIDED. YET THE PHRASE KEEPS SURFACING, AMIDST OTHER BUZZWORDS SUCH AS ARTIFICIAL INTELLIGENCE AND INTENT MONITORING. SO, WHAT IS IT AND WHY SHOULD YOU CARE? GLAD YOU ASKED.

TESHON DYER

A Center of Excellence or COE (or CoE) is a team, shared facility or entity that provides leadership, best practices, research, support and/or training for a focus area. In our arena, it's frequently a Marketing CoE.

Before we dive into the definition of a CoE, let's discuss what a CoE is not. It is not a steering committee, whose focus should be on the strategic priorities of the business and therefore the overarching direction of its operations. Nor is it a demand center, which is a central and/or regional hub of shared marketing services, infrastructure and processes. Think of the demand center as the operational arm for what the CoE develops and implements.

Typically, there is a gap between the strategic planning and decisions made by executive leadership and the teams that will operationalize those decisions. I'm sure you've all seen that play out in your world. The CoE solves for this gap, especially as the technology stack grows but the structures and processes currently in place can't enable and support it.

Additionally, the CoE addresses one of the issues that is all too common, which is the transition from deployment to implementation and adoption.

The CoE is not only involved in the building of these processes, but also owns the management and ongoing progression of them.

At Relationship One, we typically see the following functions fall to the CoE team:

- **Best Practices - provide support and direction on organizational change management, standardized approaches/processes, tools, methodologies and knowledge centers.**
- **Support - deliver shared services, policies, training, templates, communications, etc.**
- **Measurement - define marketing performance measurement (MRM) approach, analyze marketing results and CoE ROI.**
- **Training - provide skills assessments, e-learning curriculum, classroom training, certification programs, etc.**
- **Technology - technology/systems standardization, integration standardization, vendor management.**
- **Governance - provide oversight on marketing technology access, usage, performance management, integration management, data management, utilization, etc.**

Looks great, right? But this requires a shift from how we do things today, one that requires creating roles and functions ensuring better interdepartmental functions in an organizational structure that doesn't currently support it—or more often, isn't aware that there is even a need.

For that, this requires the visibility and sponsorship of your leadership team, and a plan. Creating something from nothing, especially in an enterprise environment, takes both.

But for our clients who have implemented CoE, it pays overwhelming dividends and has provided our team the evidence that the "CoE" as a term and a function will soon become as familiar as any others in our organizations.

YOUR GUIDE TO GDPR

AS THE IMPLEMENTATION DEADLINE OF MAY 25, 2018 APPROACHES, IT'S MORE IMPORTANT THAN EVER TO UNDERSTAND GDPR, OR GENERAL DATA PROTECTION REGULATION. LUCKILY, IT'S NOT HARD TO FIND INFORMATION.

MELISSA SANTOS

Many guides and resources abound describing requirements and protocols under this new law. Relationship One's recent Industry Brief: CAN-SPAM, CASL & GDPR provides an excellent comparison of compliance laws and details a number of GDPR's regulatory measures that apply most to marketers.

Although these resources are incredibly helpful in understanding the details behind the regulations, they don't often speak to the proactive preparations required for marketers to be ready. Although GDPR affects all levels of an organization, it is important for marketers to understand their role in planning for, and adhering to, GDPR law. In this article, we will focus not only on GDPR's regulations, but also on steps you can follow to begin preparing for these upcoming changes.

GDPR RULES AND REGULATIONS OVERVIEW

Relationship One's Industry Brief covers GDPR rules quite well, but a few regulations may impact marketers most directly and are listed below. We advise that you speak with your legal team regarding each requirement as Relationship One cannot provide legal counsel on these matters.

• Data Protection Officer (DPO) – In some cases, your company may be required to have a Data Protection Officer, or equivalent. Although not necessarily the responsibility of marketing, it's important for marketers to understand the reasons behind this regulation and how they will need to collaborate with the DPO.

- **Data Protection** – Data needs to be protected quite specifically, and access to this data needs to be regulated.
- **Consent** – Consent needs to be given explicitly, and pre-checked boxes on forms are not acceptable. There are specific rules around how opt-in needs to be collected depending on source (online, phone, etc.). Consent regulations are also quite strict for minors.
- **Data Collection and Usage** – There must be a reasonable legal basis for processing and collecting personal data. The length of time that data can be held must be defined by a reasonable measure and clearly defined to the public.
- **Consumer Rights** – Each consumer has a right to be forgotten. They may also request their personal data from your systems in a portable format.

EIGHT THINGS YOU CAN DO NOW TO PREPARE FOR GDPR

As marketers, we know GDPR is looming, but in some cases, we aren't sure how or where to begin our preparation. Here are eight actionable steps you can take to ensure you are ready.

1. First things first. Chat with your legal team. Ensure your company has a corporate governance policy for all things compliance-related, including CASL, CAN-SPAM and GDPR. As stated previously, guides and resources like this article are fantastic, but none of us can provide the same advice as your legal counsel. Be sure you work with your legal team to understand the specific requirements in the communications you are utilizing.

2. Conduct a data audit. This is a global audit of grand proportions that may require a DPO and certainly expands well beyond marketing data. However, as marketers, we should conduct our own data audit. Review your data collection practices, including fields collected, storage practices, usage requirements, data accessibility, etc. Audit the security of your data, including who has access to it and why. Create an audit report that explicitly defines your current data collection, storage, and usage practices.

3. **Audit your current compliance and opt-in procedures. Are you only opting in consumers that provide explicit consent, or do new processes need to be created? It is important to secure direction from your legal team when devising your strategy and implementation for an opt-in process. As part of the assessment process, review your current architecture to ensure you have the foundation in place to collect and store consent so you are compliant with all regulations. If you uncover gaps, now is the time to build a plan of action so compliance is complete before May 25, 2018.**
4. **Review your ability to comply with a consumer's right to be forgotten. Anybody at any time can request that their private information be removed from your system. Again, this goes beyond marketing, but marketers need to have a plan to remove this data from their systems. This plan needs to be in compliance with their company's governing policy. Consider your process to find, remove and confirm forgotten status.**
5. **Review your ability to provide consumers with their personal information in a portable format. Consumers have the right, at any time, to request the information you have collected and stored within their profile. How would you do that today? If you don't currently have a process, now is the time to work with you DPO or internal data team to make it happen.**
6. **Update your Privacy Policy. With all of these regulatory changes, it's important to make note of your corporate approach and policies where it is easily accessible to consumers.**
7. **Audit the security settings within your current marketing technologies. How is security access granted today? Does that meet the stricter requirements currently being imposed by GDPR? Work with your legal team to understand how security privileges may need to be changed to ensure data is protected and in compliance with rules and regulations.**
8. **Communicate, communicate, communicate. GDPR is a cross-functional and global regulatory law. It's extremely important to work with your legal and data teams to define a corporate governance policy. Once this policy is in place, develop a communication plan for your team that describes the regulations, their impact to the team and their processes, and the plan of action to follow. A thorough communication plan can be an integral component in ensuring company-wide compliance.**

In some cases, you may want to consider an impact assessment to fully understand and document how GDPR will affect your organization, and, most notably, your marketing processes.

This will likely require a cross-functional team that can properly assess impacts to data regulation, data collection, process control, security, etc. that include marketing, but are not limited to it. This team can address gaps in compliance as it relates to your organization's legal requirements and make plans to address them.

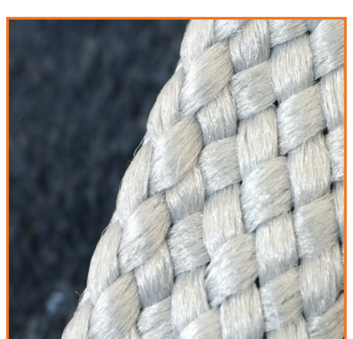
GDPR, and compliance in general, is a very complex topic. Regulatory measures that impact data management and communication should be taken quite seriously and managed at the global level. Marketers can do their part by understanding the laws, assessing their greatest impact on marketing processes, and devising preparations in congruence with their organization's overall requirements.

If you would like additional information on GDPR and how you can best prepare, please email Relationship One at info@relationshipone.com.

BRAIN CANDY

CLOSE-UP

It's important for modern marketers to have an eye for details. How observant are you? Check out these zoomed-in photos and see if you can identify each item.



WORD FIND

Pretty self-explanatory here—find the words from the bank below. In case you missed the theme, they all revolve around this full-stack, gold-level partner.

R	T	E	L	R	E	Z	D	L	Z	X	N	R	C	E	L	C	A	R	O	B	O	X
Q	L	I	A	K	E	U	L	B	B	J	C	J	S	D	D	A	Z	R	J	C	W	R
Z	U	H	S	Y	S	N	O	P	S	E	R	N	H	P	X	Y	I	N	M	O	K	A
C	N	E	E	S	R	N	N	V	Z	S	Z	Q	A	X	B	R	B	S	H	N	A	L
O	G	A	I	R	O	P	E	N	W	O	R	L	D	L	A	B	Q	R	F	S	P	G
U	P	C	E	R	T	I	F	I	E	D	P	A	R	T	N	E	R	M	B	U	P	T
M	A	J	W	Q	C	Q	X	L	H	G	O	I	Z	D	V	G	E	N	X	L	C	D
Q	R	E	S	I	M	Y	X	A	M	Q	H	I	I	J	N	S	K	A	Q	T	L	B
R	S	Q	J	D	U	O	L	C	G	N	I	T	E	K	R	A	M	C	K	I	O	T
G	M	A	R	K	E	T	I	N	G	A	U	T	O	M	A	T	I	O	N	N	U	P
F	N	O	I	T	A	R	G	E	T	N	I	U	A	C	U	C	O	Y	K	G	D	C
H	F	C	L	S	G	N	I	T	E	K	R	A	M	N	R	E	D	O	M	W	Y	E
Z	L	Y	A	B	O	H	Y	A	U	Q	O	L	E	X	U	C	K	R	T	D	X	O
B	V	N	V	B	O	G	F	W	L	P	T	E	U	B	M	U	O	K	K	X	W	Z
E	I	U	Z	B	A	L	G	P	C	A	J	D	U	S	A	U	S	L	Y	U	B	O
M	Y	Q	E	D	N	M	E	N	O	P	I	H	S	N	O	I	T	A	L	E	R	A

APPCLOUD
SRM
OPEN WORLD
MODERN MARKETING
RESPONSYS
CONSULTING
MARKETING AUTOMATION
CERTIFIED PARTNER
MAXYMISER
ELOQUA
INTEGRATION
MARKETING CLOUD
RELATIONSHIP ONE
BLUEKAI
ORACLE

BRAIN CANDY

ANSWER KEY

CLOSE-UP


TAPE DISPENSER


CRAYON


KNIFE EDGE


PRETZEL


WIRE TIE


MEASURING TAPE


SHOE LACE


NAIL CLIPPERS

ERASER

WORD FIND

R	T	E	L	R	E	Z	D	L	Z	X	N	R	C	E	L	C	A	R	O	B	O	X
Q	L	I	A	K	E	U	L	B	B	J	C	J	S	D	D	A	Z	R	J	C	W	R
Z	U	H	S	Y	S	N	O	P	S	E	R	N	H	P	X	Y	I	N	M	O	K	A
C	N	E	E	S	R	N	N	V	Z	S	Z	Q	A	X	B	R	B	S	H	N	A	L
O	G	A	I	R	O	P	E	N	W	O	R	L	D	L	A	B	Q	R	F	S	P	G
U	P	C	E	R	T	I	F	I	E	D	P	A	R	T	N	E	R	M	B	U	P	T
M	A	J	W	Q	C	Q	X	L	H	G	O	I	Z	D	V	G	E	N	X	L	C	D
Q	R	E	S	I	M	Y	X	A	M	Q	H	I	I	J	N	S	K	A	Q	T	L	B
R	S	Q	J	D	U	O	L	C	G	N	I	T	E	K	R	A	M	C	K	I	O	T
G	M	A	R	K	E	T	I	N	G	A	U	T	O	M	A	T	I	O	N	N	U	P
F	N	O	I	T	A	R	G	E	T	N	I	U	A	C	U	C	O	Y	K	G	D	C
H	F	C	L	S	G	N	I	T	E	K	R	A	M	N	R	E	D	O	M	W	Y	E
Z	L	Y	A	B	O	H	Y	A	U	Q	O	L	E	X	U	C	K	R	T	D	X	O
B	V	N	V	B	O	G	F	W	L	P	T	E	U	B	M	U	O	K	K	X	W	Z
E	I	U	Z	B	A	L	G	P	C	A	J	D	U	S	A	U	S	L	Y	U	B	O
M	Y	Q	E	D	N	M	E	N	O	P	I	H	S	N	O	I	T	A	L	E	R	A

relationship | one