

INSPIRED MARKETING

BUYER PERSONAS DEMYSTIFIED

8 SIMPLE IDEAS TO
CREATE AUDIENCE
PROFILES

TOP 10

THINGS MARKETING
AUTOMATION
CUSTOMERS NEED TO
KNOW ABOUT EMAIL
DELIVERABILITY

QUICK TIPS

FOR LEAD NURTURING
DO'S & DON'TS

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CISCO'S DIVE INTO PARTNER MARKETING JEANNE QUINN & KELSI DORAN

SENIOR MANAGER & STRATEGY LEAD OF GLOBAL PARTNER
MARKETING ON OMNICHANNEL EXPERIENCE

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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.**

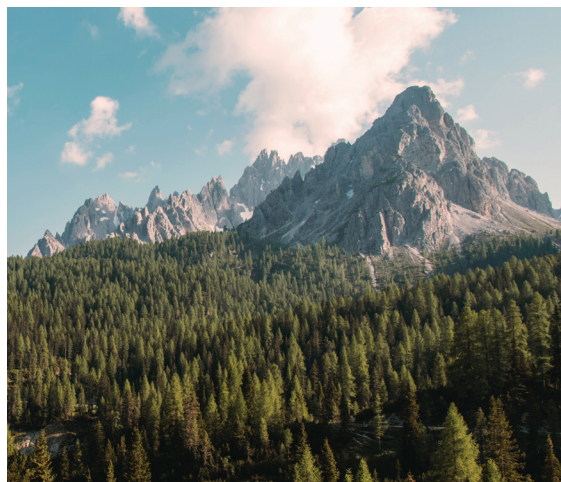


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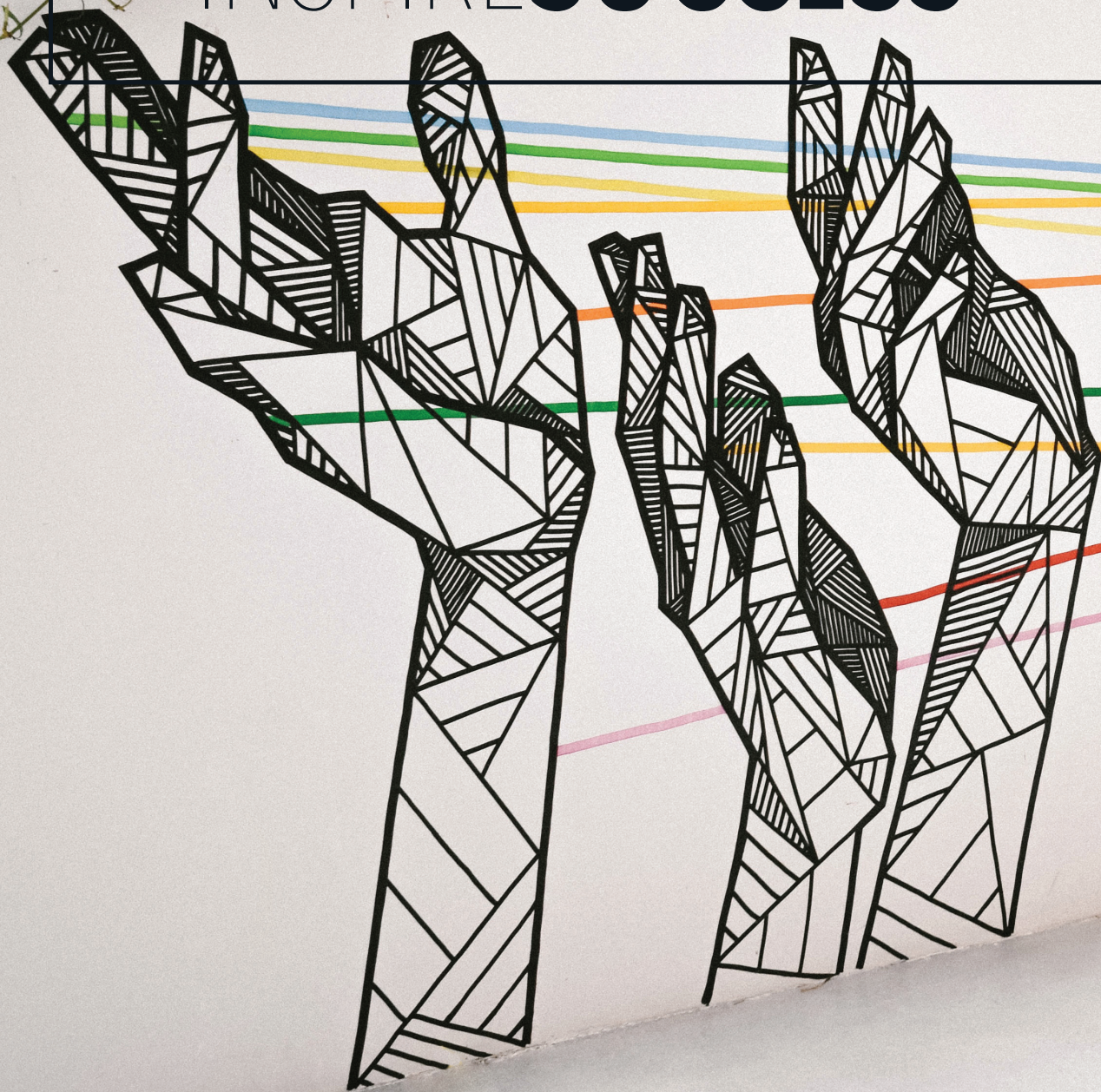
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INSPIRE **SUCCESS**



LETTER FROM THE EDITOR

Ron Corbisier

FOUNDER AND CEO | RELATIONSHIP ONE



Stories of inspired marketing, as told by the marketers who lived and breathed them, have filled the air of our Inspired Marketing Podcast since spring of 2016 and the pages of this magazine since spring of 2017. Our goal from the outset was to give voice to the world-class clients revolutionizing marketing in our time.

Revolution? It certainly felt like a revolution 10 years ago when Relationship One was created. And for years, we've seen remarkable progress against traditional marketing objectives, made possible by ever richer data and ever more sophisticated tools. We've seen transformational marketing processes and technology stacks deployed first on a local scale and then on a global scale. But, is it still a revolution today? Or, 10 years later, is it more of an evolution we see?

The pace of change at any given time is hard to measure, let alone predict. No doubt, the pace increases as new capabilities or approaches emerge, then consolidation occurs and the pace slows, until the next wave of innovation is unleashed. A year ago, I offered my opinion that the next wave of transformation would "fundamentally change how we 'do marketing' ... impact[ing] not only the tools we use, but also how we plan, orchestrate and optimize our marketing efforts."

Today, I'm more confident than ever that we're approaching another revolutionary wave as the disparate pieces of the universal customer profile are assembled and the decisioning engines to consume and leverage them are connected. Predicting the timing is sometimes like predicting an earthquake. Sometimes, there's a lot under the surface we can't see. But, it's coming. All the signals are here. And it's going to be epic.

I'M MORE CONFIDENT THAN EVER THAT WE'RE APPROACHING ANOTHER REVOLUTIONARY WAVE AS THE DISPARATE PIECES OF THE UNIVERSAL CUSTOMER PROFILE ARE ASSEMBLED AND THE DECISIONING ENGINES TO CONSUME AND LEVERAGE THEM ARE CONNECTED.

But you don't have to wait for the next transformational wave to do epic things in your business today. Take a look at the exemplary work of some of our friends featured in this, our sixth issue.

We invite you to learn how Cisco's dynamic duo of Jeanne Quinn and Kelsi Doran are activating digital marketing in Cisco's extensive partner marketing organization. It is worth noting that Cisco's partner marketing team was also recently named "Channel Marketing Program of the Year" by SiriusDecisions. Meet Jeff Kohl of Merrill Corporation and learn about their highly successful project to accelerate lead response and revolutionize their speed-to-lead equation. Learn from Cognex's Kris Gormley as she shares their journey to improve lead scoring and organizational adoption of the scoring system and processes.

Spend a few minutes with John Pavlick of BlackRock, and you'll come away with a model for better adoption, training and professional development in your organization. Jen Renaud recently returned to the podcast. The last time we talked to her, she was leading marketing for the Oracle Marketing Cloud. Now heading marketing for the data center technology leader Vertiv, Jen shares how she's leveraging her modern marketing know-how to lead transformational change in a truly high-tech environment.

We're confident these stories and contributions from our Relationship One consultants and other thought leaders will inspire you to revolutionize critical elements of your modern marketing machine. And when you do, we hope you'll let us share your story of inspired marketing.



**JEANNE
QUINN**

**KELSI
DORAN**

CISCO'S DIVE INTO PARTNER MARKETING

Real-Time & Omnichannel Customer Experience

JEANNE QUINN AND KELSI DORAN WORK TOGETHER TO ACTIVATE DIGITAL MARKETING FOR CISCO'S GLOBAL PARTNER MARKETING TEAM, WHICH REACHES THE BRAND'S MORE THAN 60,000 PARTNERS. A SELF-DESCRIBED "DATA-DRIVEN BUT PEOPLE-FOCUSED" DIGITAL MARKETER, QUINN HAS 20 YEARS OF EXPERIENCE IN THE COMPUTER NETWORKING INDUSTRY. DORAN, WITH EXPERTISE IN BUSINESS ANALYSIS AND AGILE DELIVERY, IS PASSIONATE ABOUT REALIZING EXCEPTIONAL CUSTOMER EXPERIENCES THROUGH TECHNOLOGY AND TEAMS.

THE WORK OF CISCO'S GLOBAL PARTNER MARKETING TEAM WAS RECENTLY NAMED "CHANNEL MARKETING PROGRAM OF THE YEAR" BY SIRIUSDECISIONS.

RELATIONSHIP ONE: Today I am joined by two guests, both from Cisco's Global Partner Marketing organization: Jeanne Quinn and Kelsi Doran. Today on the docket for us is learning more about how you both have digitized the partner experience at Cisco. But first, let's start with learning more about the two of you! What are some of your accountabilities at Cisco, and what should the average person know about Cisco?

JEANNE QUINN: I'm a senior manager, working on the Partner Digital and Omnichannel Experience team. Cisco is the worldwide leader in networking technology. We've been making the internet run since 1984. Global Partner Marketing is responsible for marketing to, with, through and about our 60,000 partners around the world. We've got a very broad ecosystem of partners who are responsible for 85% of Cisco's revenue. So, they're important to us, and the partner experience team spends most of its time focusing on marketing to those partners using our digital channels, the power of marketing automation and our tech stack.

KELSI DORAN: And I'm the strategy and operations lead on the Partner Omnichannel team. Essentially, I look after the campaign strategy for our high-visibility global initiatives, and also I oversee our agency operations across our marketing automation tool.

R1: Great. Welcome to you both. So, I'm wondering if you can talk through how you began to digitize that all-important partner experience. What was the impetus for starting this project, and what problem were you trying to solve?

JQ: Really, this started with a need to overhaul the partner experience and to upgrade the way we market to our partners. We wanted to get to real-time, personalized and trigger-based [experiences]. Our partners are important to us. We want to treat them like they're an extension of Cisco – because they are. They're the reason we're here, the reason we're profitable. So, we had a vision to deliver a consistent and compelling experience to them across all of our channels. We also wanted to move to outcome-driven approaches and to have the communications to our partners be connected for them — to have messaging feel consistent regardless of which channel the partner was touching on.

About three to four years ago, we started with platform improvements and clean-up. We migrated and consolidated our web platforms. We standardized our content management system. And during that transition, we did a really big clean-up and simplification and reorganization of our partner hub on Cisco.com. We got rid of about 80% of our old, outdated content. I mean, we know that people come to our site for a reason; they're not coming just to hang out. So, let's make sure our content really speaks to what they're trying to do at any given time.

And since then we've seen a 60% improvement in our digital usability scores, which is pretty great. But right after we embarked on that project, we turned to making the same improvements with our partner contact database and our marketing automation platforms. For example, we had a really old email client, a really messy marketing database. We had to do a big overhaul there, so we moved

CISCO'S DIVE INTO PARTNER MARKETING - JEANNE QUINN & KELSI DORAN

to Oracle Eloqua, and now we have a big data lake on Hadoop that contains profile preference data and digital behavior data for all of our partner contacts.

KD: And what I'm really excited about is that all of this foundational platform work that we've done has enabled us to start creating those always-on personalized experiences. That's very, very new – not only in B2B marketing but also specifically in channel marketing. We've built this engine, this Ferrari, that has allowed us to do trigger-based journeys. Now we can think about things like a welcome journey for a new contact in our database. We can think through what to say to them as a marketer, in terms of the tool sets they might need to leverage their partnership with Cisco the best they can. I'm excited about that because we're moving from batch-and-blast email campaigns to an omnichannel approach.

Hadoop is an open-source software framework for storing data and running applications on clusters of commodity hardware. It provides massive storage for any kind of data, enormous processing power and the ability to handle virtually limitless concurrent tasks or jobs.

SAS Institute

R1: That's great to hear. Often when I speak with marketers, I don't get a ton of insight into the partner marketing side of the house, because there is such an emphasis on more traditional pipelines. But as you've said, with Cisco's partners proving so valuable for this bulk of your revenue, there has to be an emphasis on talking to them just right – in just the right way for them.

So, you described this shift toward omnichannel, toward consistency, toward data-driven and personalized. What are some of the outcomes you've seen as a result of that shift?

KD: I think we've all rallied around this vision of a consistent and compelling experience. And the good news is we have seen results. Before we started this journey, we had pretty low engagement rates digitally. We do a quarterly survey, for example, and one of the questions on the survey is about how we're communicating with our partners. Last time we did that, the feedback was dismal. But since we've implemented some of these new technologies and strategies, we've seen massive improvements.

Jeanne talked about the 60% improvement in our digital usability score. Well, on top of that, we drove a 150% increase in trackable web traffic from our partners when we



implemented our partner marketing instance of Oracle Eloqua at Cisco. That means in general we are getting more partners to our sites. We've also more than doubled our communication engagement, because we went from 8% unique opens to 23% unique opens this year, which is phenomenal. And we're up to 3% unique clicks. We're far exceeding benchmarks, and we're going to keep pushing forward on that.

Measuring the usability of a system can be an important continuous improvement task. Kelsi and Jeanne do this several times a year and have used solutions from Customer Carewords: customerarewords.com.

The U.S. Department of Health and Human Services has also developed a "quick and dirty" tool to apply a System Usability Scale (SUS), available at usability.gov.

We've also seen some results that are more tangible, in terms of business outcomes. One of our trigger-based campaigns is around driving adoption for some of our toolsets, and we saw we were able to get 2,000 companies last year into a tool and almost 14,000 active contacts. That is really exciting. This year, we've also consolidated enrollment into our channel partner program. We

decided instead of just sending an email, we would use a truly omnichannel approach to driving our partners to sign up for this enrollment program. And within the first month, we had 8,000 companies sign up, which was 175% of our quarterly goals. It's pretty remarkable the results you can achieve when you take that audience-first approach.

R1: That sounds so thrilling, so encouraging. And you both have used the word "approach" a few times, so I sense there was a change not only in execution but also in philosophy. Am I correct in that sense? Could you speak more to that?

KD: Well, we just did that. Part of our approach has been we don't try to design for perfection. We don't think about all of the capabilities we might want. Instead, we start with what's in front of us. So, we took an Agile approach.

First, we started by thinking about the campaign as the product; instead of creating a backlog of all the capabilities we think are cool or might want to enable, we looked at: "OK, what is our campaign roadmap? What are the high-priority campaigns we want to run in the next quarter? And then, what functionality do we need to enable ourselves to run those campaigns?" What that let

"WITHIN THE FIRST MONTH, WE HAD 8,000 COMPANIES SIGN UP, WHICH WAS 175% OF OUR QUARTERLY GOALS. **IT'S PRETTY PHENOMENAL THE RESULTS YOU CAN ACHIEVE WHEN YOU TAKE THAT AUDIENCE-FIRST APPROACH.**"

- KELSI

us do is achieve success early, which was paramount in getting us some additional funding for scalability.

Agile is a process by which a team can manage a project by breaking it up into several stages. It involves constant collaboration with stakeholders and continuous improvement and iteration at every stage. Developed in 2001, its four main values are expressed as:

- Individuals and interactions over processes and tools
- Working software over comprehensive documentation
- Customer collaboration over contract negotiation
- Responding to change over following a plan

Wrike

R1: I'll be honest, I love the Agile approach. It puts you in position to not try to boil the ocean, so to speak, but to focus on the problem areas you want to focus on, and start there – and then, as you said, scale up as the opportunity presents itself.

I'm curious now from a more concrete angle: What were the steps you had to take to make this vision happen? To actually enact all the changes you envisioned for partner engagement?

KD: I just touched on it a little bit, but the key was to show success early. Knowing that, we built everything early on around high-visibility projects, so we'd be able to tell that success story to our leadership. That was key. And then from an ongoing perspective, we looked at how we share successes with our team so that we can continue doing the things that are working and start thinking about how we can optimize the things that aren't working.

Our other step was to plan for scalability. We took a classic framework approach that is one of my favorites: thinking about people, process and technology, and having an action plan for each of those things. For "people," it wasn't just about change management; it was also about inspiring them to do modern marketing, and [executing on modern marketing] is harder than you think. We train marketers in school to write copy and content, to think about brand. But no one's teaching them how to be digital marketers.

R1: Interesting distinction.

KD: Yeah. So, we spun up a whole program around enabling their knowledge and scaling the knowledge of our small team so that it could reach new heights in the organization.

Then for "process," we implemented governance for our communications so that as a marketer you wouldn't be able to email all of our partners, all at once, with what Jeanne likes to call "your birthday invitation." Meaning,

just because you want to invite partners to something doesn't mean they'll want to come. That's why we built a governance process, along with defining a scalable operating model. There have to be structure and rules for communication.

And then for "technology" – obviously, that's the key to our strategy here. We invested in the foundational capabilities, of course, but we also looked at how we could connect data sets across the company, because that has been critical in our campaign strategy. And going back to that governance question, we don't want to boil the ocean with our partners, right? We want to target people and meet them in the channels they're interacting with, with the content they actually want. So, that was the other key for us: building up that data lake.

R1: That's great stuff, Kelsi. And I mean, hearing how you guys understood almost immediately the importance of not just identifying those early wins but also really putting yourself in position to score the wins in the first place, you knew this process had the potential to be very difficult, to really challenge the status quo at Cisco and present people with new ideas they might not take to right away.

Would you say that was the main challenge in all of this? Sorry, not to lead you to that question – but I'm wondering what you think has been the hardest part of the journey to this point.

JQ: I think the hardest part was, as Kelsi mentioned, we're a really small team. When we started, there were only about four or five of us in the group who were working on this. Two or three years later, now there are eight or 10 people in the group, including some contractor resources – so, we're still really small! But we still have to deliver the same sort of experience as the digital marketing teams and CX teams, which are maybe 20 times our size. That's why it was so important to do all the things Kelsi mentioned: figure out what success looked like, try to become targeted and make investments based on [learnings from] those successes.

Another hard part was doing all the education we had to do, because we didn't have digital marketing experts as stakeholders. We had people creating campaigns who were doing that as their second job or their third job. Understanding the tech stack and using segmentation and thinking about omnichannel were not necessarily what they were doing all day long, so education was big.

R1: Would you do anything differently now if you had the chance, based on what you've learned?

JQ: Honestly, I think we would do many things the same. But what we might have done differently was ... well, our data has been a challenge for us because we're so big and have so many different datasets and

have so many people we need to work with. But at the same time, we have to understand our audience. That's paramount. And we have to be able to share insights so we can make better decisions around how we communicate. But we have to do it all piecemeal, which can be a heavy lift and lead to things like data analysis done at two o'clock in the morning.

So, what I may do differently would be to make sure we have a data analyst on the team from the get-go – someone who can help us get those insights, who has power and information right out of the gate and can do that at scale and with speed. That's one of the things we're investing in right now.

R1: I hear you. Without data our campaigns are just ideas, right – out there in the wind, performing who-knows-how-well toward who-knows-what-end! I've definitely heard marketers say before that it's so important to resist the urge to jump in and start your idea before you have the data structure in place to support yourself and prove or illuminate the path as you're walking it.

What other sorts of wins have you seen with this program you've re-imagined for the partners?

JQ: We've gotten some good external exposure – with some podcasts, for example – and some stage time at conferences, which has been great. But I'll be honest with you: The internal recognition has been fantastic. The fact that we are really starting to be seen at Cisco as a team that knows best practice, that can be leaders and experts in certain capabilities in digital marketing ... that has been huge. Every day, I'd say, someone will come to us and ask for our advice on how to market to partners.

And as Kelsi said, we're starting to really try to champion [partner marketing] more externally, as well. In the macro sense of digital marketing, we want to show people how crucial it is to do partner marketing well – how you need to do it even better than you do your customer and prospect marketing.



R1: You've mentioned already a number of tools that were a part of this. What other technologies have played into this journey?

KD: Technology has really been at the center of our strategy. I firmly believe that strategy should lead technology, and technology should enable strategy. But at the same time, in our case the changing MarTech landscape was actually the catalyst for some of these conversations. So, it's been such a huge win to see our stakeholders evolve into digital marketers, and we've been able to use technology to show them what's possible. You can't ask someone to change if they don't know what they can change into. Technology is key to those conversations.

It also enables the experiences we're designing; so, we definitely have a lot of skin in the game. And with Oracle

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Eloqua as our marketing automation tool, now we're maturing into some new experience technologies like PathFactory, trying out web personalization. Technology has been at the heart of everything we're doing.

And lastly, there's also quite a bit of technology on the back end. We focus so much on the front-end tech stack that enables the experiences, but you also need a lot of technology to support the operations, the development. For that we're using tools like Workfront and Rally to bring it all together and make it happen.

R1: Got it. Awesome insights there. So, what do you think is next? Where do you go from here?

JQ: As I mentioned, data is a big deal for us. We really see our team as being the crucial linchpin in the

organization that helps people understand our partners at scale. So, I'm bringing in a strong data analysis team to deliver insights both to our team as well as to our stakeholders, so we can keep improving how we target our partners and create messaging for them.

We're also going to bring more channels into our omnichannel experience: events, social media and a lot more personalization on Cisco.com. And another thing, which Kelsi mentioned at the beginning, is we need more audience-led [programs] that are always on and trigger-based. Really, we're just going to turn the volume up on everything that we've done so far.

R1: Love that. And I'm always interested in our personal tech stacks, so to speak – not as companies, but just as people. I'm wondering if each of you could dive into the tools and apps that you use in your life that are invaluable – tools that might bring some efficiency to your day-to-day.

KD: I've got two. The first is Strava. If you've heard of it, it's a social fitness app. I love it. It allows you to track your training and your accomplishments. It's aimed mostly around cycling, running and swimming, and it was really how I got more competitive in terms of my activity level. I love that you can record your PRs [personal records] and almost compete against yourself. I love the social encouragement aspect of it. It's helping me train for my next half-marathon, so I'm pretty excited about that.

The second app I can't live without... it's a little bit generic, so don't judge me. But I love the Notes app on Apple. I know that's a little lame, but it saves me all the time! I've got a couple different lists that I live by. I've got my ongoing grocery list, so I never forget anything. I've got a recommendations list; so, if you meet me and you say I should read this book, I add it to the list. And then the one that I really love and encourage everyone to do, is I have an ongoing gift list. When I'm out and about and something pops into my head as something I



could give someone, I add it to their list; that way, when birthdays or holidays come around, I always have this inventory of good gift ideas to use.

JQ: And for me, I'm going to geek out on cloud a little bit. Anything that connects to cloud, anything I can be sharing with my family is fantastic. My husband runs a paddleboard company, and my son does track and baseball and band. Our calendars are a hot mess; so, having a Google calendar set up where we can all see everything that everyone else has going on, on any given day is huge.

I'll also do a cloud plug here: Cisco Webex Teams is our group chat, group sharing, group collaboration solution – and boy, that thing has made my life a lot easier. With everybody on the team and everybody that we're working with, it makes collaboration so much easier. And then lastly, I just love a good Smartsheet. It's for the same reason – because I can use it on the cloud. Is that ... a little sad? I think I need to broaden my technology horizons! But I do love my Smartsheets.

Cisco Webex Teams is an app for continuous teamwork. Bringing everyone and their files together in one secure, simple-to-use space, it enables colleagues to seamlessly share, edit and download information.

R1: Great stuff. And now, as you know we call this segment "Inspired Marketing" – so, I can't wrap up without asking what it is that inspires you.

KD: I think there's a professional answer to that question and a personal one. On a personal level, I'm honestly inspired by just taking a moment to realize the beauty that surrounds me. That is very, very grounding, and it makes it easier to face other challenges, be those personal or work-related. That's one reason I love working for Cisco. There's so much work-life integration. If you want to take an hour to go for a hike or get on a bike – anytime, even in the middle of the day – that's OK as long as you get done what you need to get done.

And from a professional perspective – I think this will be a common theme with Jeanne too – I love accomplishing things through teams. I like looking at a team and

figuring out how I can play to people's strengths; how I can work on mentoring them or coaching them or teaching them. That moment when you feel it all come


together and you can think, "Wow, we were able to get that done, and I wasn't too hands-on because I was able to provide a little direction. And now we've done it as a team." That energizes me.

JQ: Kelsi stole both of mine! What inspires me? Well, I'm a beach girl, so I love to go for walks on the beach in the morning. Unfortunately, I can only do that about six months out of the year, because I live in New Hampshire; the

other six months I sob quietly in my office and walk on my treadmill. But being outside on the beach is huge for me.

R1: You both love nature.

JQ: Yeah! And same as Kelsi, I'm inspired by the team. Kelsi actually heard it the other day; we were at the tail end of a team call, and I sort of burst out because I couldn't contain myself anymore, because the team is just humming along. They're running. They're doing stuff. They don't even need me! I feel superficial at this point in a way, because I can say, "Hey, let's try to go left," and off they'll go.

When things can run that well, when everybody knows the direction we're going in and why we're going in it, that makes me so happy and so proud. We have a team that works together and, I'll be honest, laughs together. We can be snarky with each other. We can goof around together. But boy, we get a lot done. Having a team that works together so well makes it all worthwhile. 

"WE CAN GOOF AROUND TOGETHER. BUT BOY, WE GET A LOT DONE. HAVING A TEAM THAT WORKS TOGETHER SO WELL MAKES IT ALL WORTHWHILE."

- JEANNE



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.

This is always our favorite part of the magazine. Prepare yourself for fresh ideas and knowledge from industry experts. In this edition of the *Inspired Marketing* magazine, we will learn from Merrill, Cognex, BlackRock and Vertiv.



MERRILL DATA-DRIVEN MARKETING

A CERTIFIED ORACLE ELOQUA MASTER, JEFF KOHL HAS EXCELLED IN MARKETING AUTOMATION AND EMAIL MARKETING IN HIS FIVE YEARS AT MERRILL, WHICH PRODUCES A BEST-IN-CLASS APP THAT ACCELERATES DUE DILIGENCE AND SECURE CONTENT SHARING DURING THE M&A LIFE-CYCLE. JEFF DRIVES OPTIMIZATION FOR THE MARTECH STACK TO MAKE IT FASTER AND EASIER FOR SALES TO FOLLOW UP WITH LEADS FROM MARKETING, ENSURING A MORE PROFITABLE FUNNEL.



RELATIONSHIP ONE: Today I have the pleasure of sitting down with Jeff Kohl, who is the Marketing Operations Manager at Merrill. Welcome, Jeff. Thanks for agreeing to share some of your insights with us.

JK: Thank you for having me.

R1: Now, I know the major thing we need to dive into today is the experience you've had using the Salesforce Integration App, especially as it relates to Oracle Eloqua, which is your marketing automation platform. But before we get started, could you speak a little bit to your background, to what your team does at Merrill – and just in general, what is it people should know about Merrill?

JK: Absolutely. My journey with Oracle Eloqua and all things marketing automation

started almost five years ago. I joined Merrill with no Oracle Eloqua experience, per se, but I do think I had the skills necessary to do well using the tool. I had a great team, a great manager, and some awesome colleagues, so I just became a sponge and told myself I would use all those resources to learn the tool really well. That's helped me progress my career through Merrill, to the point where now I'm the owner of our Oracle Eloqua instance.

And as for Merrill, mainly what we are involved with is financial services and transactions. We're one of the leaders in the industry for virtual data rooms.

R1: What are virtual data rooms?

JK: Well, when companies are looking to be acquired or when they're looking to buy another company, there are a lot of financial documents that need to be shared back and forth. Merrill offers a virtual data room for that situation, which is where companies can securely log in, look at financial information, and review documents – you know, do their due diligence to see if they want to go through with the deal or not.

Traditional data rooms are physical locations where different parties exchange sensitive documents in person. For greater cost and efficiency, virtual data rooms (VDRs) have widely replaced the classic physical data room.

R1: Got it. I know you're probably asked that constantly, but I think that's some good context for a lot of marketers out there. Well, if we can switch gears for a little bit, let's talk about your Salesforce integration project! What is it you guys were trying to solve for?

JK: I think the biggest issue we were seeing was how much time it took for a lead to move over with all of their information to our CRM – which, at Merrill, is Salesforce. It was taking longer than ideal. We could identify that people were coming to our site. We could see when they filled out a form, telling us they wanted to see pricing or wanted to get a demo. And then within Oracle Eloqua we could send a notification email to a specific group of people: inside sales, sales leaders. That part of it was pretty instantaneous.

But the problem was those BDRs would go check Salesforce to view that person, but, unfortunately, due to some historic programs that were [integrated] between Oracle Eloqua and Salesforce, the data wasn't being passed over instantly. It was 15 or 20 minutes before the data would come over. And in our industry, there are metrics out there that show if someone is looking [to talk to] a BDR and they indicate that but they don't hear back from you within five minutes, they're going to go to one of your competitors instead. They're going to go get the demo from them, or get the pricing from them.

R1: Razor-thin margin for error.

JK: Yeah, you have basically moments to act on it. Those potential deals need to get up and running very quickly. So, that was our biggest problem. We were having an issue transporting the data we captured with Oracle Eloqua over to Salesforce, which is where our sales organization lives because it's our CRM.

I mean, our solution today looks really great. We've had a lot of help along the way, but now we're at the point where if someone submits the form on our website and they're a net new lead, they'll be created within our CRM system in under a minute.

R1: That's an amazing turnaround. How did that happen? Fifteen or 20 minutes to less than a minute suggests something pretty major took place at Merrill. What was that change, and how did it come about?

JK: Well, the project [to fix response time] actually started at the Modern Customer Experience all the way back in 2017. I attended the conference that year in Vegas and I sat in on one of the sessions about product roadmaps. That presentation was led by someone who at the time was working for Oracle, who mentioned, "Hey, we're working on a solution that will basically be a firehose between Oracle Eloqua and Salesforce. We're working on an integration will enable you to pass all this data back and forth much, much faster."

That really piqued my interest because that was the exact thing we'd been trying to solve for! I mean, to be clear: Historically, data was passing between Oracle Eloqua and Salesforce. The issue was that [the transfer] wasn't designed to be scalable, or to pass quickly.

So, after the conference ended, I went up to the speaker for that session and I told him what we were dealing with. I said we couldn't send records to our CRM fast enough for sales to act on them. He thought [our marketing program] would be a really good candidate to try out their new Salesforce Integration App, but unfortunately, they weren't accepting beta customers. It wasn't until the following year, at Modern Customer Experience 2018, that I was able to put my name in the hat and we could become a beta customer. That was back in April 2018, I believe. And in August, we were able to be one of the first two customers to use a beta of this new integration.

Modern Customer Experience is an annual conference hosted by Oracle that provides inspiration, innovation and networking opportunities for marketers, salespeople and customer service professionals. Attendees can visit a wide range of in-person workshops to learn the latest strategies and best practices in customer experience from experts in all business functions. Modern Customer Experience 2020 will be held in Chicago.

R1: That's ... a long and winding road; it sounds like you needed not just patience but also some persistence to make that happen. But it was worth it, because here we are full circle. This year, I understand you'll be presenting at Modern Customer Experience!* And you'll be talking about how you have put that new app and integration to use, right?

JK: Right.

R1: That's really inspiring. Is it OK if I ask for some specifics about your presentation? Or is there an embargo? Is it top secret?

JK: I'll be going over what the integration actually looks like. I'm envisioning doing a live demonstration to give people a sense of its look and feel. The app is just so much better and easier than I could have ever imagined. I don't necessarily have the most technical background, but with this app I know enough to make myself dangerous. Anyone can use this app and quickly understand what data is flowing back and forth, and how often it's flowing. That's a big thing that I want to showcase.

R1: Right. I think there's always room at MCX to show marketers how to fix problems in a way that ... maybe isn't super-technical, but just sort of empowers them to do their jobs more efficiently.

What kind of challenges do you think you encountered as you transitioned from the old, slow data transfer to the new, faster one? Were there any "gotcha" moments as you began implementing?

JK: Yeah, absolutely. Actually, there was one really big hiccup.

So, Chris Campbell [Group Product Manager at Oracle Eloqua] and his team are responsible for the Salesforce Integration App. One day Chris came on-site to our headquarters in Minnesota, and he gave us access to the app. He was walking

R1: Yikes. A nightmare.

JK: Yeah, and we only had a day to solve that so we were scrambling, because Chris was only on-site with us for the one day.

R1: How did you get around that?

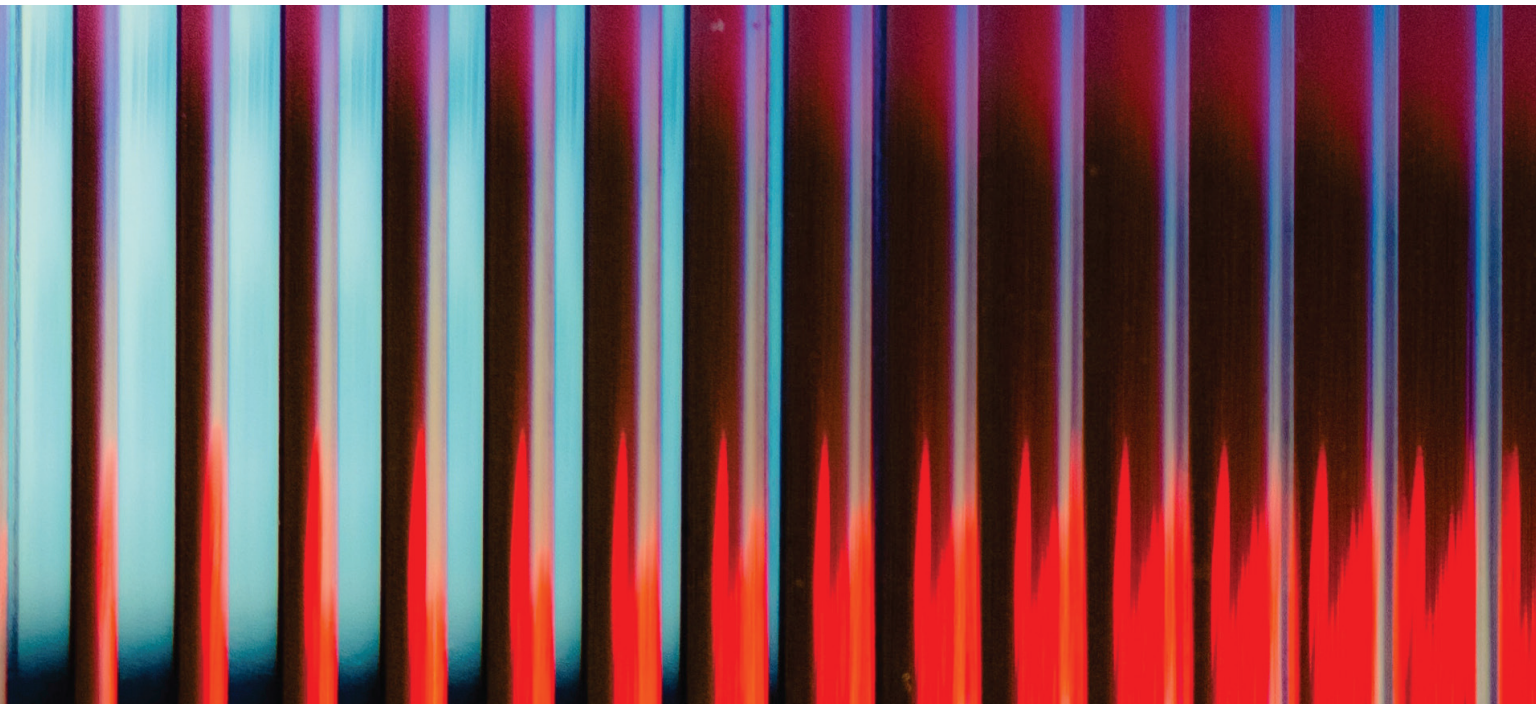
"OUR BIGGEST WIN HAS BEEN VALIDATING TO THE COMPANY THAT **NOW WE CAN EXECUTE AT A HIGH LEVEL AND FULFILL ANY NEED OUR SALES ORGANIZATION HAS.**"

us through it and showing us how it connects to everything – all that good stuff. But it was then that we sort of realized that we couldn't connect our Oracle Eloqua instance to our Salesforce instance. Those two systems had been connected such a long time before – around 2009 or 2010 – and the way you connect them is you create a user within both systems. In Salesforce, that user was called Oracle Eloqua Marketing, but we couldn't log in as that user [anymore], so everything was read-only, and that meant we couldn't log into Salesforce and tell it to let Oracle Eloqua connect with it.

And then on top of that, we had to deal with multi-factor authentication, because of course we're in the financial services industry, so we have even more layers of security.

JK: We had to create ourselves a new Salesforce user. We had to actually have an internal account and then make the same internal account a Salesforce user. Since at first we just weren't able to get in and allow the sync to happen, in the meantime we had to create a dummy account to link the two. Like I said, that was just a really big hiccup – mainly because it was something we didn't foresee happening.

R1: Process change often leads to being blindsided by those little hiccups, for sure. But on the bright side, you overcame that! Like you said: Now, it's a great solution; it's up and running. You've got those efficiencies in place. What are some of the positives that you've observed since you got it all done? Have you seen any wins or successes?



JK: It's been received very well within Merrill. People see the value in it, and they love to see how fast it is. You know, people used to get this email notification saying, "Hey, someone has reached out – they want to get pricing from us." But then sales would have to create the lead themselves, or the data would come over too slow. Just roadblocks. So, I think our biggest win has been validating to the company that now we can execute at a high level and fulfill any need our sales organization has. It's a great win for both marketing and sales, and that's always important.

R1: Very true. And a big win for your customers, as well. What do you see next, coming down the pike? Is there a new challenge you've already got your eye on?

JK: I think the next big thing we're going to do is campaigns. At the moment we can create a new lead or update a current contact with the sort of generic information you capture on a form. But the next level that we're going to take it to is using that "firehose" – making sure that when a lead is created, we can attribute a campaign to it very quickly. Whenever people are created in our system or uploaded to our system, we want that to happen, and so I think that's going to be our next phase.

R1: Good stuff. Well, as you take on these new ideas, what do you think are the tools or the technologies that are essential for you, in your day-to-day as a marketer – as a person who's always thinking about, iterating on these new concepts to improve the programs?


JK: Obviously, the new Salesforce integration and campaign [functionality] have to be at the top of the list for me right now. There was such a big strain on my day-to-day, and that's been relieved because of that integration. Another [tool] I'd have to say is the Contact Washing Machine. I do a lot of data cleansing, especially

when it comes to our UTM parameters, which we put into our CMS, [even though] sometimes they don't look exactly how we want. For example, if we have a lead come in from a certain source, sometimes we have to label it one way first in our URLs and then change it later in Oracle Eloqua — normalize it later with the Contact Washing Machine.

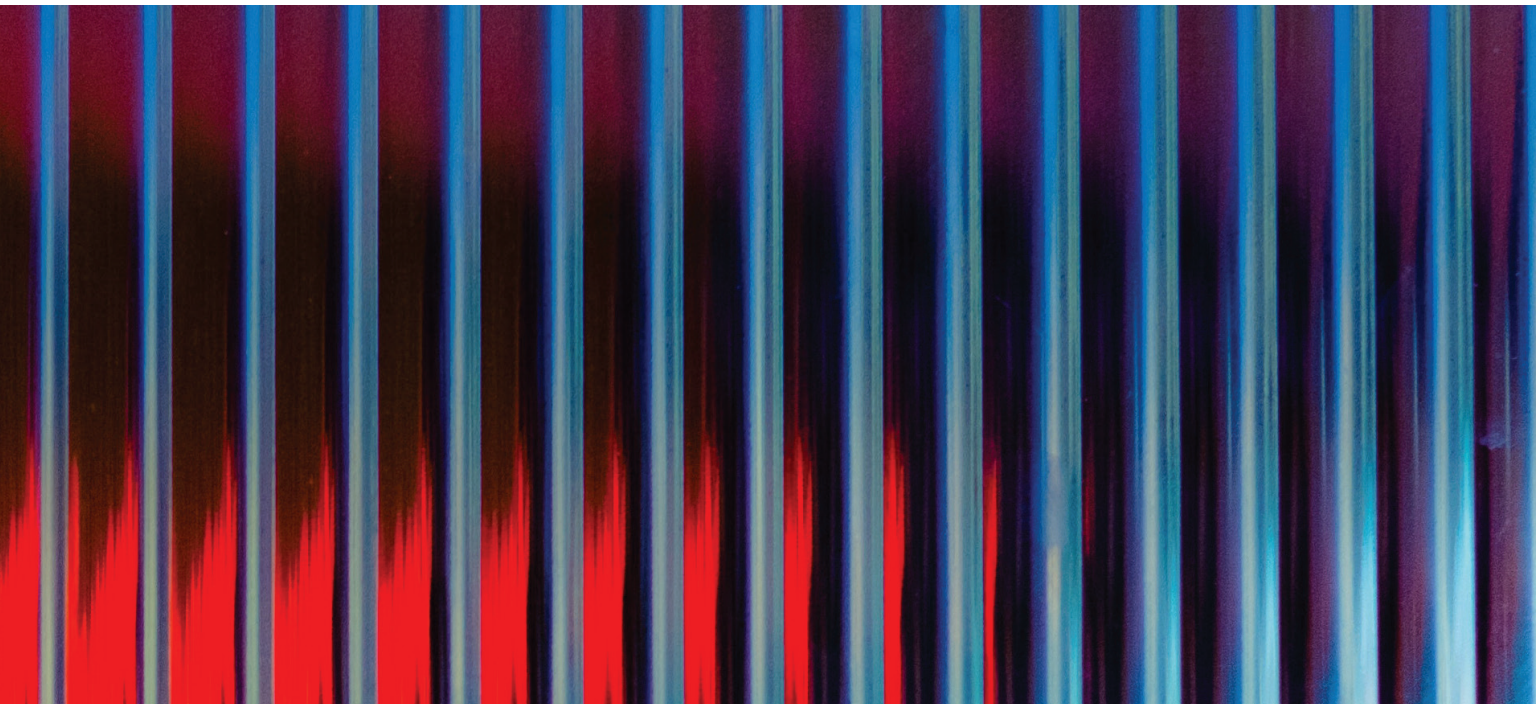
The Contact Washing Machine app enables cleansing of contact fields, which aids in accuracy for scoring, segmentation and personalization. Users are able to define one or more contact fields as inputs, then run actions such as Trim, Concatenate and various Lookups to populate fields. That data can then be mapped back to the original/same field or to a different field.

R1: Excellent. And so, that brings us to the one question I always like to save for last when I'm speaking with marketers about their goals and their ideas. What would you say inspires you?

JK: What inspires me is solving problems, because to me that's what business is. It's problem-solving. Even when I encounter something and I don't have the answer to it right away, I'm inspired to do everything possible I can to fix it – even in scenarios like the one we just talked about, where there can be this old user problem that nobody saw coming, old technologies out of people's control. Even then.

Luckily, with the help of our great partners at Oracle, we're able to get problems like that solved. 

**Modern Customer Experience 2019 has passed, but you can view on-demand recordings of all the keynotes at oracle.com/moderncx.*



COGNEX MARKETING AUTOMATION

KRIS GORMLEY IS A MARKETING OPERATIONS AND COMMUNICATIONS EXPERT WITH VAST EXPERIENCE EXECUTING PROGRAMS ACROSS DIVERSE DIGITAL CHANNELS IN SUPPORT OF SALES AND CORPORATE GOALS. SHE USES MARKETING AUTOMATION TO OPTIMIZE REVENUE, CUSTOMER ACQUISITION AND RETENTION FROM LEAD GENERATION CAMPAIGNS.



RELATIONSHIP ONE: Thanks for speaking with me today, Kris. What I'm hoping we can talk about is your lead scoring program, which I know you're currently in the middle of implementing. But before we go down that road, could you first describe yourself and define your role at Cognex? What is Cognex, for those who aren't familiar?

KRIS GORMLEY: I've been at Cognex over two years. And it was a new role that I joined for, so to speak. Around the world [at the company] we have different regional marketing teams that

utilize Oracle Eloqua, and there was this realization: "Well, if everybody owns it, then really nobody owns it." And that's not good, of course. So, they developed my position and brought me on so I could be the global owner of the application – so I could make sure everyone is trained properly [to use Oracle Eloqua] and make sure it is being used efficiently.

R1: I see. That's a surefire way to feel valued – to be asked to join for a new role, custom-fit for your skill set. What about Cognex? What should the average reader or listener know about what you guys do, what you stand for, the service you provide?

KG: Cognex develops what we call machine vision systems. That's software, like sensors and cameras, that can help automate manufacturing. This sort of equipment can check for defects [in the factory] and identify parts, control robotic arms – things like that. It's something most people don't really think about it, but we're very good at it.

The term "machine vision" (often abbreviated "MV") describes the technology and methods used to provide imaging-based automatic inspection and analysis for applications involving process control, robot guidance, and more, usually in industry. Various hardware, software and integrated systems fall under the MV umbrella.

R1: You're right – that's definitely something I've never thought about before. The fact that machines can help make sure products are functional, up to code – especially the fact it might not be people doing that.

KG: Absolutely.

R1: Let's pivot, if we can, over to the *coup de grace* – or at least one of them – of your tenure at Cognex. Let's talk lead scoring! How do you guys think about that methodology? When Cognex is so firmly B2B and perhaps is operating in a space that many marketers are not super familiar with, what is lead scoring like? What are your concerns?

KG: With lead scoring, we kind of had a recognition that we'd always been focused on the top of the funnel. And we were good at it! But what that meant was there were a lot of leads that had no prioritization whatsoever for the sales team, and it wasn't a very good use of their time to have to weed through so many leads.

So, our new lead scoring implementation was primarily about helping sales be more efficient with their time. I mean, obviously it was also about helping marketing be more productive with how we segment for nurturing programs. But the main goal – that was to help the sales force be more efficient. It was to help prioritize leads for them, so they could use their time even more wisely.

R1: For sure. Sometimes it feels like sales enablement is one of the most overlooked parts of being a marketer, when the funny thing is sales and marketing actually cross over and cross-pollinate so very deeply. With the lead scoring program, how did you start everything?

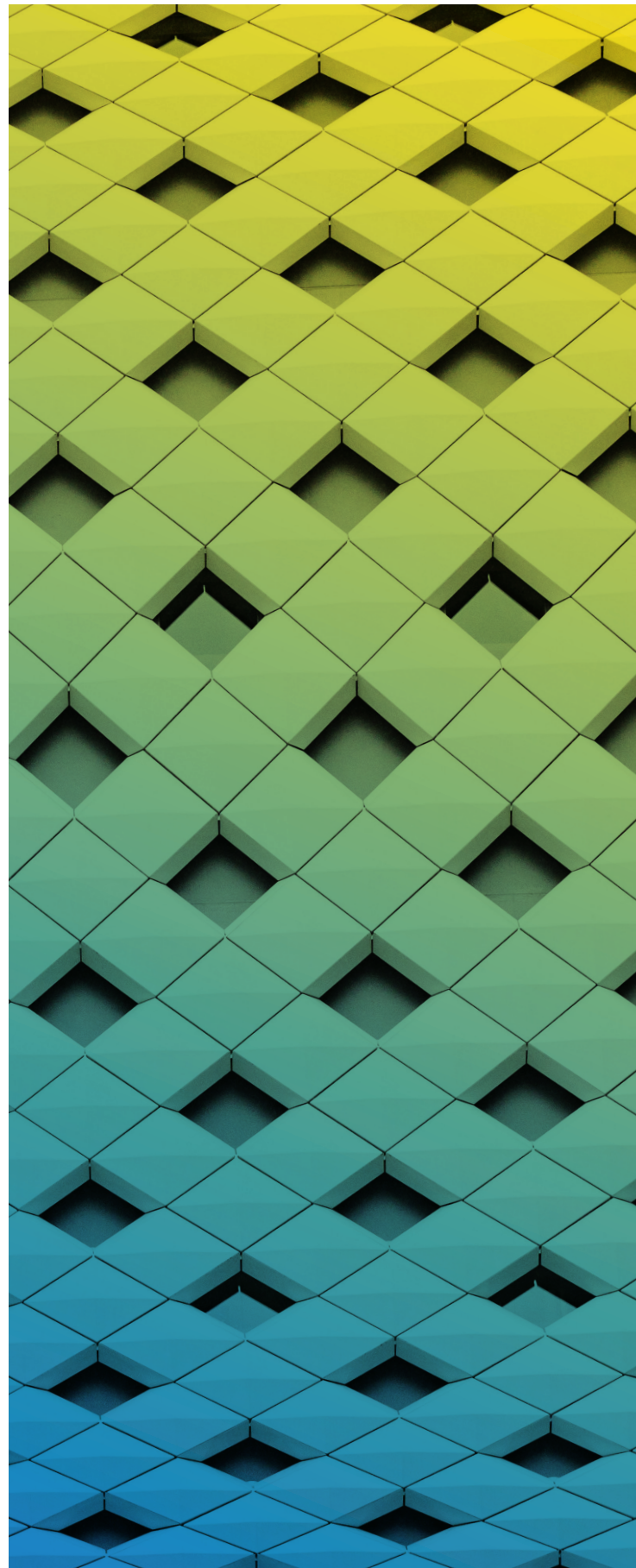
KG: I'll be honest. I have over 20 years of marketing experience, but I started out by looking for help. I researched online, I reached out to consultants – I wanted to learn as much as I could. I knew I was going to need help to officially do this. And no one at Cognex had ever done it before, either, so I was thankful [to be able] to find a couple of people who could help me out – people who could guide me and educate me and help make sure we were bringing in the right people to collaborate on the effort.

R1: Who were the "right" people?

KG: Sales. Product management. People who know our customers.

R1: So, a wide range of teams. Representatives from lots of different areas of the organization.

KG: Yes. It's been great. I'm looking forward to turning it on! We're close. We're so close.



R1: Walk us through your process – me and other marketers out there. What were the steps you took as you worked on this program? In a concrete way, how did you design it from concept stage to present day?

KG: Step number one was getting the stakeholders in a room and engaging with them — talking for a few hours about this, even explaining what lead scoring is. Most of them had no idea what it was actually and didn't understand why it would benefit them and the company. So, early on there was lots of education involved.

Then we started to build out personas: identifying who our customers really are and what makes somebody a potential customer. We hadn't done that before, either. We didn't have personas. And then, once we had all those ideas, we went to the sales team and asked them, "What are your priorities? When you're faced with all these leads, what do you look at that tells you, 'This is who I'm going to call?'"

R1: And you used that to help weigh different parts of the model in different ways?

KG: Right. Then another step was involving inside sales; we call them our sales development engineers. They're huge nurturers for us. We had to get them in a room, as well, and ask them what they were looking for, because the [attributes] they're looking for are what we want to bubble up and score high.

Oracle Eloqua uses two sets of criteria to evaluate a lead: profile criteria and engagement criteria. Profile criteria is explicit data about the lead, such as their job title, industry and company revenue. Engagement criteria is implicit data, such as how many times the lead has visited a certain landing page or how well they have responded to certain promotions.

R1: That sounds so incredibly straightforward. But I'm betting if I were to ask, there were a couple of wrenches thrown in there along the way, right? I'm guessing it wasn't as easy as sitting down the C-suite, explaining, "This is how lead scoring works," and getting instant buy-in.

KG: Oh, no. We really had to do some serious updates to our integration with our CRM before we even had the data we needed to make these scores, to develop [this model]. There was a huge data gap we had to work on for a little while, because our CRM integration is not super straightforward. That did take a little while for us to figure out.

But now that it's done, I'm excited that all that data is there – even just for the segmentation opportunities it opens up for us that we didn't have before, for our outbound campaigns.

R1: What do you think was the hardest part of updating the CRM? I know it's not ready to launch right now – almost! – but surely you've come a long way and you've overhauled many different elements. Knowing what you know now, having gone through the gauntlet – is there anything you would do differently if you could do it all over again?

KG: For me, it's all about setting people's expectations – and then meeting them. Since I was kind of learning as I went along over the course of this project, sometimes I found myself a little bit trapped. I could set an expectation that later I realized wasn't realistic. That's a tricky process.

R1: And are you still learning today?

KG: Yes. Right now we're in the midst of turning the dials on different criteria [to see how that impacts the lead scoring model]. Today we're still learning that, you know, because some of it is science and some of it is art, we have to find the right combination of science and art to make a solution. That is what I find most challenging but also most interesting. It can make you want to pull your hair out at times, but lead scoring in particular is an iterative process. You can't set it and forget it. It's not one-and-done. It's something you have to work on continually.

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R1: Right. Do you have any other projects on the horizon? Soon, your baby – the lead scoring model – will enter the world, take over Cognex! Once you've concluded this experiment – is it fair to call it that? – this sort of brave new model, what ideas do you think you'll work on next?



KG: As a company we like to keep up with the things being discussed at different marketing conferences: topics like account-based marketing, new ideas for the customer experience, for improving people's full journey in digital. Like I said, our marketing team has [historically] mainly focused on top of the funnel activities, but there is so much more than that. So, we're exploring other things we should probably have our hands in; we're starting to explore how we can best use our current resources to improve beyond top of funnel so we can be even more productive. Because you're doing more with less and being even more efficient when you use the tools you already have in place.

R1: And what are some of those tools? As a marketer, when you're going about your day-to-day, what apps or technologies are you using to achieve your goals and keep all the programs running?

KG: Oh, there is one app I access so many times a day I can't even tell you. But ... it's not for marketing!

R1: Hey, Kris, that's great too! What's the saying, about people "containing multitudes?" I'm not sure, but what I mean is of course we're not always marketers, all the time.

KG: Definitely. Well, this app is called the Cozi Family Organizer. It's basically a family calendar. I have a husband and two daughters, 13 and 10. We have a ton of activities, and we're often going in different directions. It has shopping lists. It has recipes. I don't even want to think about a time when I didn't have Cozi to help me

manage where we're all supposed to be and when. I mean, the alternative would be, what? Using a color-coded spreadsheet, I guess? This app is way better than that.

R1: That's great. And I mean, as marketers, one less color-coded spreadsheet might actually be a good thing every once in a while, right? Well, one final question I'd like to leave you with, Kris. This segment for our readers and listeners is called "Inspired Marketing," so of course I can't let you go with asking what it is that inspires you. What drives you to keep learning? To keep iterating?

KG: It's my girls. It's my two kids. As you know, young girls face a ton of pressure. I suppose boys feel it, as well. But I just want my girls to know that their thoughts have value – that they need to speak up and share their gifts with the world. That they have a lot to stand up for. They're my day-to-day inspiration, in general.

From a more marketing perspective, I know that a lot of people are creatively driven. But I'm actually more process-driven. For me, it's all about, "How are we doing that? How are we getting it done?" As I said before, we're turning the dials on the lead scoring criteria. Why? Because that's how you determine the process you have to end up following – by being in the details. That's inspiring to me: tweaking one thing and seeing, "Wow, so this is what happens." That keeps me going. 🏡

BLACKROCK MARKETING ENABLEMENT & OPERATIONS

JOHN PAVLICK HAS OVER 10 YEARS OF EXPERIENCE IMPLEMENTING AND OPTIMIZING GLOBAL EMAIL MARKETING CAMPAIGNS. A CERTIFIED ORACLE ELOQUA LUMINARY, HE SPECIALIZES IN MESSAGING AND DELIVERY FOR RETAIL FINANCIAL ADVISORS, INSTITUTIONAL INVESTORS AND PERSONAL INVESTORS. AS LEAD FOR ORACLE ELOQUA TRAINING SESSIONS WITH HUNDREDS OF REGIONAL MARKETERS, JOHN HAS EXPERTISE IN MARKETING AUTOMATION, DEMAND GENERATION AND LEAD SCORING.



RELATIONSHIP ONE: Today I'm thrilled to be joined by John Pavlick from BlackRock, where he is the VP, Eloqua Platform Manager. Welcome to the show, John. I'm excited to speak with you about a few of the things you do in your role, because it seems you have this really interesting process at BlackRock in terms of how you enable your teams.

To start us off, would you mind telling readers and listeners more about yourself and your role at BlackRock?

For those who aren't familiar with the trillions of dollars you guys take care of, I believe, on behalf of so many people.

JOHN PAVLICK: Sure. So, I started off my email marketing career at a publishing company called SourceMedia, where I primarily worked on marketing for conferences and events. Afterward, I pivoted over to asset management at Neuberger Berman and now at BlackRock, this is also what I do.

Our mission here [at BlackRock] is to help people with their financial wellbeing – to empower them financially. That's our main goal. I've been here for two years now, and it's been great. My main responsibility is to manage Oracle Eloqua, ensuring the platform is set up for success for marketers across the organization.

Secondly, I'm responsible for helping users understand the power of the platform, so they know how it can help them optimize their campaigns. I help people understand the best way they can leverage all the tools in Oracle Eloqua, in a way that is simple and seamless to execute. On a day-to-day basis, that is the goal. And as a large company, it's important we have an easy process for helping people understand these tools.

R1: And that process of facilitating understanding – that's something you try to start immediately, right? Right as soon as a new hire joins BlackRock and begins their onboarding process?

JP: Yes. Every month we identify all of our new hires, and we do that because one of



the first things we do [when someone joins BlackRock] is to bring them all together in what we call a MarTech One-On-One Discussion. In that discussion, we bring together all the various platform owners at BlackRock for one hour, so we can walk all of our new hires through exactly what's available to them across all the platforms — across Oracle Eloqua as well as other tools they'll be using for SEO and events.

But at the same time, we have some marketers who have been at the firm for a while; and what we like to do with them is make sure they really understand what is changing on the platforms — what new features and capabilities have become available that weren't before, and what they can now start doing to leverage those new features for the next campaign, for the next month, for the next year.

R1: Could you talk specifically about how you do that? Because I think what you've solved for is something I hear a lot, which is, "You know, we have these really powerful tools, but they represent a new way of thinking or doing marketing, so it's not a given they'll get buy-in." How do you go about, one, imparting the education, and two, showing people what's new that's possible?

JP: That's one of the things we focus on in the one-on-one trainings: showing people literally what they can do inside the platform. We walk them through all of those core capabilities.

To give you an example: For Oracle Eloqua, we'll sit down and explain the email component, of course, but we also want them to know that it's more than just email. With Oracle Eloqua, they can make forms to help profile our clients. They can make landing pages and microsites that are more engaging experiences. There are so many different use cases that have been executed by marketers at the firm — we walk them through those use cases, so they can see what's been done before, what's possible and what's effective. That's one part of it.

The other part is what I like to call, "Demos, Not Decks" — meaning, don't just tell people what they can do in the platform. Show them. Go into the platform itself and demonstrate as simply as you can how they can use the platform to execute on different ideas, so people can feel like, "Yup, this is something I can wrap my head around and I can implement things fast for myself and my team."

R1: That sounds perfect, and so supportive. And once new marketers — and marketers who were already there, too, as you've said — once they have that education, you also do this division of labor that I've heard about. Your reputation precedes you! I've

heard there is a unique way for the marketers to do what they do, while there's a marketing ops team that engages in a very specific way?

JP: Yeah, so the primary responsibility for marketers at BlackRock is to make sure they can quickly, easily and efficiently build their emails inside Oracle Eloqua. That's the core. But our marketing ops team works with them on a day-to-day basis in order to bring everything else to life: Campaign Canvases, the forms, the landing pages associated with the forms, the reporting we need to ensure our campaigns are meeting KPI goals. So, those two teams work together to meet the proper requirements [for campaigns], and together they make sure we're using Oracle Eloqua to the best of our ability so we reach our goals.

There are about 20 people on the marketing operations team, and the team itself is split into three parts.

One part focuses on orchestration, one part focuses on segmentation and data, and one part focuses on development, which would be landing pages, forms and

"...DON'T JUST TELL PEOPLE
WHAT THEY CAN DO IN THE
PLATFORM. **SHOW THEM.**"

templates. The ops team also helps us enforce a level of governance that we can apply across the platform, so we can make sure that brand guidelines are being followed — that templates are being used properly, that data is being stored in the platform the right way. That way, when marketers actually need to execute, everything is clean and in place for them.

R1: So, you have this ability to be more nimble than before, because the typical back-and-forth that can happen as you try to get the email right and deliver it — that's gone. There is a specialized team within the team to execute on your operational needs.

JP: That's right. But one of the things we do encourage is for marketers to always raise their hand if they would like to become more involved at that operational level. Let us know if you want to use more of Oracle Eloqua's capabilities and get your hands dirty in the platform itself. Because in that case, we do have the One-to-

One program I mentioned before, where we can work with them to develop a combination of different skills. They can also use the B2B Master certification through Oracle Education, because if they get that certification, I can walk them through new areas [in Oracle Eloqua] for them to have control over.

But the way we have it all set up, in general – the goal, like you said, is to be as nimble as possible. We want to reduce the back-and-forth you might otherwise see on a Jira ticket. We want to get our communications out with more speed, and we also want to empower the different groups in marketing to work together to be compliant and optimized.

R1: How did you go about building that ops team? Was it there when you first joined BlackRock?

JP: About two years ago, we were in a place where we had three folks on the ops team, and mainly they were focused on email. But as more teams across the organization [saw] the value they could get from this team, we had to increase the number of people from three to 20. There are 20 people on the team now. And what we've really tried to focus on is ensuring that everyone on the team is able to give people the guidance they need to elevate campaigns and elevate process. We want them to be experts and to feel empowered as leaders in the space.

So, over the past two years, we've tried to make sure they know everything new that comes out on the platform: all the new features in the different releases Oracle pushes out quarterly. We want them to be ahead of the curve, so they can make recommendations to our regional marketing teams across the globe. We want people at the firm to think about ops and feel like, "This person is a really good partner for me because they have an excellent understanding of what can be done [with Oracle Eloqua], and I know they're being updated constantly."

R1: Right. You can't really overstress the importance of faith and confidence between teams or different departments when it comes to collaborating. Aside from that increase in teamwork and trust, what are some other results you've been seeing since you've built up that ops team?

JP: One of the other things to come out of this is now we have an ability to share [with each other] the different kinds of programs we've been executing across the organization. We can share with one team something we've done with another team.

For example, when the ops team is meeting with the marketers they work with on a day-to-day basis, now they have use cases [to refer to]; they can say, "Oh, we just executed on xyz, and that sounds similar to what you're asking us to do now. And on top of that, here are the results we saw. So, today we feel comfortable making a recommendation about what you should be doing, if we can base that on what other folks have done."

And the thing is, this allows you to not only become a better partner for them, but it also really lets you quickly scale certain capabilities that weren't being utilized before: things

like dynamic content and personalization. It's really powerful when you can have the people that are actually executing on these things present these case studies and share it with their colleagues. I think that's helped us get a good amount of speed for the marketing maturity we're looking to achieve.

R1: That's fantastic. So, as you went through the process of scaling with this ops team, what was the hardest part? Or rather, if you could do something in the process all over again, what do you think it would be? Given the knowledge you've gained to this point, that maybe you didn't have back then.

JP: I think the process is the hardest part. Getting it right is the hardest part.

R1: What do you mean?

JP: You have to get the intake process right. You have to get the execution right, and then get the QC process right. All of that took us a lot of time. We had to figure out where we really needed to focus the team, and we had to ensure that the work they were doing was all checked properly and signed off on. We had to make sure proper governance was being followed for everything.

Another thing was how to manage the assets across the [Oracle Eloqua] platform. That's a project that Relationship One actually helped us with. You know, how are the assets being stored? How are they being saved? Are we applying the proper naming conventions? Now this is a team that is able to monitor those things. Whereas before it was kind of like the Wild, Wild West, now we have the proper process in place. So, I'd say cleaning up the process and establishing it and then selling it to partners across the organization, because obviously it impacts their day-to-day as well – that was the biggest hurdle we had to [overcome].

R1: I see. And something you just called out, which I think is so important, is governance. Oracle Eloqua is a deep tool, and you're going to have a hard time wielding it in an effective way if you don't have strong governance – because you're bound to have different users using it for different reasons.

JP: Right. And I do actually think one of the other benefits we got out of it was this ability to identify themes across the organization – needs we could try to address at scale by using Oracle Eloqua in different ways or even new apps on the platform.

Because when you have a team that's hearing all the feedback coming from everyone, you can compile it all in one place and then brainstorm about, you know, what you can do that would be the most helpful to work on, the most effective thing. That makes it much easier to figure out the next thing you should look at, in terms of how you can make everyone's lives easier – how you can make it easier for people to do their jobs.

R1: For sure. That's always the goal. And in terms of technology, while obviously Oracle Eloqua is the main tool in your toolkit, so to speak, what are some other solutions you use to actualize those ideas that you

brainstorm? Pre- or post-feedback. Earlier you mentioned Jira – are there any others you’d like to call out?

JP: Yeah, I’d say our event technology is a huge part of the mix. We do a lot of live events, webinars and virtual events; that’s a big part of the communications that go out on a week-to-week basis. Getting those integrations right is key, because otherwise you’re going to spend a lot of time sleuthing and troubleshooting: “What went wrong?” Trying to figure that out. The [event] integrations are big for us because they help the sales team, which now doesn’t have to do as much work calling or sending out personal invites. That takes some of the onus off them, since now we can help identify the people [who] we need them to touch, as well as the channels that are effective or are not effective.

SEO is another one. You’d think SEO doesn’t have a whole lot to do with email, but we’ve actually found an interesting way to utilize it. We have a tool called BrightEdge, which looks at the different ways that people get to our site organically. One tactic we’ve looked at is, if people are typing certain things to get to our website to solve a problem, that could very easily be a good way to think about a subject line for an email, right? We’ve used that tool to help test different subject lines for our campaigns, which has been a pretty interesting approach.

Also, we have our analytics and customer data platform, which helps us drive better automated journeys.

R1: That brings us to the question I’m most excited to ask you, because I know you’ve got a lot on the horizon. What do you think is next for you guys – the marketers and

marketing ops team at BlackRock? Where do you go from here, with regard to using this really great foundation you’ve built?

JP: I think the next step for us is looking at how we can start talking to people in the right place. Email isn’t everyone’s primary channel. We’re thinking about how we can take advantage of conversational platforms like WeChat, for example, in China, Taiwan and Japan. We want to think about how we can integrate cloud apps to push people that are not email-engaged to the channels they are engaged in.

First released in 2011, WeChat is a Chinese multipurpose messaging, social media and mobile payment app that is today one of the world’s largest standalone mobile apps with over 1 billion monthly active users. WeChat has been described as China’s “app for everything” and a “super app” because of its wide range of functions, including 580,000 “mini-programs.”

Another big focus for the next six months is onboarding a CDP [Customer Data Platform] to help us create better segments using all of our data sources, which we can then push to Oracle Eloqua to create the proper journeys. Today we’re not able to do that because we’re just using cookies; so, this will solve a lot of the problems we’ve had for the past few years, because right now we can only trigger campaigns based on a site visit but not what someone actually did on the page. I’m very excited about onboarding a CDP, and I think marketers across the organization are, too. They’ve been asking for this for a while.



R1: Great. And when it comes to you personally, what are those core tools and technologies you don't think you could live without in your day-to-day? You've mentioned Oracle Eloqua and BrightEdge and a new look at WeChat potentially; are there other platforms you're thinking about, either as relates to marketing or not?


JP: Aside from Oracle Eloqua, from an email perspective I use a lot of tools to help us with rendering. Litmus is one that's very important, because, honestly, one of the things that keeps me up at night is wondering how something is going to look when it actually gets to people's inboxes. And you know, with the way things change so fast today, you have to make sure you're constantly testing your assets.

Another one would be Return Path. We use that for understanding how people at different companies are looking at different subject lines, and we can then see how that impacts some other metrics. After that, maybe just from an industry standpoint, I like [the news source] MarTech Advisor. I follow them to keep connected with other folks in the industry who are doing similar things to us.

And while I know this isn't a "tool," something I do also value a lot is the monthly call we have with other Oracle Eloqua users at other asset management firms, where we can sit down and talk with them and understand what their challenges are, as well as maybe how they've learned to solve something that we're still trying to figure out. To me, that's extremely valuable.

R1: I totally agree on that one. There is so much value you can get just by having conversations with people, with fellow marketers. I've been doing this for a while, and I always learn something when I sit down folks, when I have my questions, and I pose them and listen to what other people have dreamed up – or even made into reality – as solutions.

Well, John, as you know we call this series "Inspired Marketing" at Relationship One, so I can't wrap up our talk today without asking you the mother of all questions: What inspires you?

JP: Honestly, I think what inspires me is putting together a journey for people that really makes them excited about what we have to say. Just being able to dig into the data we have available to us, so we can understand the personas of our audience and test different scenarios so we can keep learning how to get better results. For me, it's that ability to constantly improve and optimize that has kept me inspired for a long time. 

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JEN RENAUD
VICE PRESIDENT
VERTIV

RELATIONSHIP ONE: Welcome back to our “Inspired Marketing” segment, Jen. It’s been a while since we last connected. I think we’re sitting in the same seats as last time, but since then there has been a big change. These days you’re at Vertiv.

JEN RENAUD: Right. It’s been about two years since we last spoke, and 14 months since I left Oracle and came to Vertiv.

R1: Great. Well, it’s always great to speak with you – no matter the organization you’re leading from the marketing side. So, speaking of the transition: How are things in your new role at Vertiv different from how it may have been with Oracle?

JR: I really miss Oracle Marketing Cloud. It was super fun to be marketing “marketing technology” to marketers. That was probably one of the hardest jobs I’ve ever had. Now at Vertiv, I’m marketing critical infrastructure technology to a number of different buyers: everything from power distribution units to uninterruptible power supplies to thermal solutions, and we’re selling to data centers, enterprises and small businesses. So, this is an amazing change.

But luckily for me, we’re still using Oracle technology. We are a pretty much 100% Oracle shop. We use ERP [Enterprise Resource Planning], HCM [Human Capital Management] and CX [Customer Experience].

These acronyms stand for core enterprise-level software suites offered by Oracle. Brands can use ERP to manage finances, accounting and procurement; HCM to manage talent and workforce on a global scale; and CX to manage various functions around sales, marketing and customer service.

R1: Awesome. Let's dig into two things in particular that I think would be so compelling for readers and listeners to hear about. One, I know there's this overarching transformation you're driving at Vertiv, so we should talk about what that looks like exactly, and how that plan is coming together.

And secondly, I hear you're working very hard to align different teams! Be it sales or product or other teams at Vertiv I don't know about – I know you want everyone to pitch in to drive Vertiv toward a gold standard. How are you getting people to buy in and make the plan real?

JR: Sure, I'd love to talk about all that. It's been an interesting transformation for the business. We're undergoing this huge digital transformation. Vertiv was purchased by a private equity company, Platinum Equity, two years ago, and that's what started it all off. At that time, they made the decision to push into a common ERP system and a common HCM system. Marketing and sales were also both already using Oracle Eloqua, so we decided to start using Oracle Sales Cloud as well.

R1: Just commit to the holistic Oracle suite?

JR: Yes. So, we are now midstream in the process of connecting the systems – of working on that lead-to-cash experience, as I like to say. "What does that look like across our entire business?" We are answering that question not just from a technology perspective but also from the perspective of process changes, which will come whenever there is a big cultural shift in a business. And it's not just about coordinating across the business in its entirety. It also about coordinating within each group and between each group. You know, our marketing team is going through some really big changes globally, because we want to be able to support the greater changes in the business.

R1: I'm so keen to hear more about that: those marketing changes that you see happening for your team within a brand that has Vertiv's level of clout and market share and mindshare. How is the team changing?

JR: Number one, there are complete role changes. We did an employee survey, and the number-one topic that emerged was people felt their roles lacked clarity; so, we ended up rewriting almost everyone's job description – reorganizing teams. And of course, to be honest, some people left the business. But we also hired some folks, and we got ourselves to a position where we can

be world-class digital marketers – where we can really build strength in this space.

With all the role changes, in some ways it's like a brand-new marketing team. It's a complete do-over on where we were a year ago. I thought maybe that change could be done pretty quickly. But it has taken a full year to make that happen. It was harder than I thought it was going to be.

R1: What else has been more challenging than you thought it might be?

JR: Getting our sales and operations teams connected. I was surprised to realize what it would take, but really it was shifting sands for all of us, because, as I said, we've been reorganizing the business.

It's been hard to understand, you know, that if we want to focus on a certain product category, then we have to figure out who the product owner is right now; we have to figure out what we need to do to drive growth in that segment; and we have to know if we're even connected across the business in a way that will let us grow in a certain space.

R1: Right. And something else I know you've been championing is this rethinking of what campaigns are – how to measure them, how to show their business impact, how to think about budgeting when it comes to all the different components that make them up. What can you reveal about that? Because building campaigns, I think, is the lifeblood of marketing.

JR: When I first came in, I was told, "We run thousands of campaigns." And I later realized that what was meant by that was, we were doing batch-and-blast emails, and those would count as "campaigns." Or maybe if we were going to an event, that would be a "campaign." So, to shift thinking so we can identify that a "campaign" is something more complex than that, and it requires you to look at audience segmentation and know how many customers you're trying to convert – that was a completely foreign concept to the team.

People would often ask, "I want to run a campaign, so how much budget do I have?" And I would have to say, "Make sure you understand what kind of lift we need in that product category. Talk to our offering team and our sales team, and find out what growth they're trying to get." Because let's say [we're looking to see] 10% growth in that product category; then you can have 10% of the marketing budget to run your campaign. But at that point, it has to be more than just an email. So, this process has been an interesting challenge for the entire team.

R1: I hear you on the inherently difficult nature of that shift. I don't think that's unusual, right? I mean, it's so easy to send those one-off emails – unsegmented, uncadenced, no omnichannel. That's



easy compared to the alternative – which is, as you’ve said, a multistep process that involves other teams.

How have you moved people through this journey of understanding what a campaign really is? How have you gotten that buy-in? Because at the end of the day, I’m sure you want to use Oracle Eloqua to its full capacity.

JR: First of all, I’m going to give a little plug to my good friends at SiriusDecisions, because we’ve been working with them to help us get through this process. I’ve had to use a couple different approaches. Some folks we had focus on channel marketing or portfolio marketing, but the most important thing was asking the people whom I gave seats to [for SiriusDecisions] if they could train others. That meant they needed to learn [Oracle Eloqua] so they could train others at the company – and not just marketers but [also] everyone else.

R1: And that training helped move people toward thinking about campaigns in a different way?

JR: Yes. For example: We had a confusing challenge in the company when our sellers said to me, “Hey, we’re running a ‘spring campaign.’” I was just like, “OK. What is a ‘spring campaign’? And why are you running it?” And really what it was, was they had come up with some promotions for some products; so, I had to say, “That’s great, but you actually have to run those promotions inside of a larger campaign.” Because it matters, the order in which we communicate to our channel partners, to our product people, to finance, to our marketers, to our sellers – to everyone else [internally] so we can have an orchestrated effort and build an effective campaign. So, there’s been a huge education.

I like to think about how after my first 12 months [at Vertiv] I was asking myself, “What are 12 things I have learned?” And one of the 12 things I’ve learned is education, education, education. It’s so important to teach people what it means to run a campaign, and why the order in which you do things matters, and why that order is the way it is, and how it all comes together.

Another example I love using is for consumer packaged goods. Early in my career I did agency work with Pillsbury, and one of the things I loved about working there was [the fact] there was customer marketing and consumer marketing. Their customers were grocery stores and [convenience] stores. Their consumers were purchasers, like you and me. And when you're leading up to something like, say, Super Bowl Sunday, you are planning that a year in advance, because you want to make sure you know which products you want to sell, and you're probably even going to come out with some new products in advance of [the event].

And with planning, you can go to your customers and say, "Hey, listen – if you buy this and display it in a particular way, then we'll reward you. You know, send us pictures of you doing that and we'll send you something cool." And in the meantime, you're doing other activities to excite the consumer, too. Anything from a coupon in the Sunday circulars or an appearance on the "Today Show," where you talk about recipes you can make for Super Bowl Sunday. But the point is, you want people to walk into the store and as soon as they see that item – your item – they think, "Wow, I have to buy 10 of these." That's how you know you've run an effective campaign.

R1: And that's true beyond the CPG world. The value of using omnichannel to make your product almost like that song people can't get out of their head.

JR: Absolutely. We need to be able to do that exact same thing today [at Vertiv]. Whether you're using a B2B model or a B2C model, you need to know that everyone and everything along the way is orchestrated, so that a buyer buys when they're presented with the opportunity.

R1: And something else I know – I'm cheating a little bit, because I always like to read up on the work and accomplishments of the people I speak with

"THAT WAS THE FIRST THING WE DID TO SHIFT TO A STORYTELLING MODEL. [OCM] HELPS YOU UNDERSTAND HOW YOU CAN COMMUNICATE BETTER WITH YOUR AUDIENCES, WHO ARE JUST EVER-SHIFTING, AND HOW YOU CAN **DO IT BY CREATING ONE STORY AFTER ANOTHER ABOUT WHAT'S HAPPENING IN THEIR INDUSTRIES.**"

– but something else I know is you've angled this through the lens of storytelling. All great marketers know: You're selling a product literally, but a story psychologically. What can you tell us about your thoughts on that?

JR: Last time we spoke, I'm pretty sure I told you – I think you have to start with content marketing. I was at Oracle back then, of course, and we were just starting to use Oracle Content Marketing in a really unique way. At Vertiv, I do the exact same thing. Honestly, my first week here, that's what I brought in with me: Oracle Content Marketing. We didn't have that set up at Vertiv [when I first joined], but now thanks to Relationship One, we do. We're using it.

That was the first thing we did to shift to a storytelling model. [OCM] helps you understand how you can communicate better with your audiences, who are just ever-shifting, and how you can do it by creating one story after another about what's happening in their industries. You know, here's a story about what's happening in data center technology. Here's one about what's happening in 5G. Here's what's trending. Here's what's cooling. That helps us [speak to] every unique buyer, which has been an interesting shift for the business.

R1: Is it that you weren't telling stories before? Or that Oracle Content Marketing helped you reframe them in a more effective way?

JR: We were telling stories, but now we have shifted them to focusing more on the buyer. Now our first focus is on how the buyer searches for this information themselves. We had to go back through every story we'd ever written in order to make sure the SEO was right. That meant we had to revisit every customer story to make sure it was relevant. That meant there had to be a big content audit. So, it has been some tough work for the team, but we got in there and we made it happen.

R1: And your work was made all the tougher, I'm sure, by the fact you're in a space that is just refusing to hold still. Vertiv's space is constantly in flux, constantly evolving.

JR: No, this space is definitely not holding still. In fact, one of the things I loved about working at Oracle and Microsoft way back when was that we had to convince our enterprise customers to shift the workload from their on-premises data center to the cloud. And now that I'm at Vertiv, I'm watching that happen [here], and I'm now the one who is supporting that workload shift.

We sell to hyperscale data centers. But we also sell to edge applications, which could be anything from a small enclosed data center in a store or a small business to what is sitting at the base of a cell tower. So, it's interesting to figure out how we can continue to tell the stories that follow that workload shift. I love that enterprises are doing this. It means I really have to stay up on what companies are doing, just so we can continue to market well, because they're influencing what other companies will do.

A typical data center may support hundreds of physical servers and thousands of virtual machines. A hyperscale facility needs to support thousands of physical servers and millions of virtual machines.

phoenixNAP

R1: Sounds like you've got a ton of moving parts to deal with. You've got stakeholders and influencers – enterprise companies that may be dictating market trends. And you have to see that story, then tell it to the right people, but then also be aware of how the landscape around you is changing. I do not envy this position that you're in!

I'm kidding, I'm kidding. How are you helping your team stay nimble enough to be able to adapt to all these changes?

JR: I wish I could say it's been so easy to do, but it hasn't been! We were going through a persona exercise recently, and I think when we started, we were thinking,

"We're going to write 200 personas." Then we thought, "Of course we can't do that. So, can we narrow it down to fewer?" But the truth is you can't. We've got complex buyers and complex influencers.

Before, I thought we just had to talk to channel partners about our products. That's an important part of it, yes, but that's not all of it. Or think about architects, consultants and engineers [who work at] the companies that construct these large data centers – they're trying to figure out how they can comply with different rules in different states and countries. Or, think about how we can make changes that [speak to the personas that represent] some of the data centers coming out now, which are going to be carbon-neutral or 100% wind-powered. Those data centers need major technology changes, so those personas need messaging that speak to those changes. They'd want to know how to get out ahead of that.

So, staying up on this is really hard. We've got a team of people who gather the information that's coming out all the time – a market intelligence team, that is sharing material with us daily. That information requires us to make shifts in what we're doing all the time.

R1: That's great. I mean, I understand that's a lot of pressure, but that's necessary and it makes your team so much stronger.

I'd like to go back to something you just said, if I may. You were under the impression that if you were going to talk to channel partners, all you would have to say is, "Product, product, product." But now it seems you've learned that's not true.

JR: Right.

R1: So, what is true? Pardon the glibness, but I love when someone even at your level can have their expectations subverted like that. What are the facts about life at Vertiv – the reality of how you go to market at and help sellers at Vertiv – that you have discovered?

JR: I don't know what's true yet! I think that's the hardest part. Our marketing team has to work closely with our sellers and with our product development team and with architects and consultants and engineers, if we really want to understand what trends are happening in our business.

But one truth I can say is everything is changing all the time, and it's really hard to stay ahead of what's changing and continue to be ... well, I don't want to say "relevant," but let's say able to communicate meaningfully. You know, if we have to keep up then our buyers also have to keep up, and we have to be able to communicate with them about what's different, and tell them, "These are the trends." And we have to be able to do that as quickly as possible, because we then have to drill that down to, "How does this product support those changing trends?"

How can we communicate the roadmap in a way that meaningfully points toward whatever is coming next?" Because the goal is to build a high level of trust so we can stand side by side with them – with our partners and our customers – and deliver on whatever is next in data center technology.

R1: Sounds like you did find a truth! Absolutely. And then from sort of ... well, from the alignment perspective, how are you driving that? Because that's another big culture shift, right? That's another big change. Getting everyone on all these different teams to care about each other's strategy and pitch in to actualize the vision. How have you catalyzed that?

JR: First of all, you have to be there. You have to show up. Attend team meetings. We started a process around updating new product development that would enable marketing, sales and services to sit at the same table with product development as we brought everything to market. So, now we can make sure, yes – we're writing the messaging guide early, so that later when we develop content, we can know we've already agreed that this is how we message that product. And now, yes, we can make sure that my team knows who the players are on the other teams. Because you've got to go talk to sales! All the time, you've got to ask them what we can do to deliver the right leads, and then later what we can do deeper in the funnel to help them win the business.

Secondly, you need to have an appreciation for what other people's goals are. That makes it really easy for you to understand what your goals should be. And you have to make sure [your goals and their goals] absolutely align. I always say to my team, "You're going to get paid no matter what. Our sellers are only going to get paid, really, if they meet quota. So, you need to appreciate what their quota is and help them make it happen.

Then if you go back to our product marketers, who perhaps own a P&L, and make sure you understand what growth numbers they need to get to, you better understand what

we [in marketing] have to do in order to get the growth numbers we're looking for in that space. Like I said, one of my team members asked me how much budget they got to have [for a campaign], and my response reflects this: "You have to go find out what the growth numbers are. Build a model based on that, and then you'll know how much budget you need to have."

R1: You said about eight things there that I find so interesting, but let's start with this nugget: Alignment starts with showing up. This idea that half the battle is being present, being accountable. Because something I think we see a lot is marketing that's done on an island, right? But you have to build those relationships. Because how can you help the whole brand if you don't know

the different goals different people are driving for?

JR: Yeah. You've got to be hyper-connected to that [aspect] of the business. And it's really interesting, because recently we've been looking at some of our past acquisitions where we feel the business maybe hasn't gone the way we expected it to, and we've come together and said, "OK. Let's go back with our product managers and with our sellers and parse out what happened in the last 24 months."

And that process has been fantastic. It's really helped us. In one exercise for one of our product segments, we ended up saying, "There are four things we can do that will change the trajectory of this business." And we did those four things, and in one quarter we grew revenue by 50%. Phenomenal.

And those four things were basic marketing ideas. It didn't have to be world-class marketing, with really cool, complex nurture campaigns. In some ways, we did simple things. I said to the team, "This is how much money we can spend," and we spent a fraction of it and still got the growth we were looking for.

R1: What were the high-level steps you took to identify those four things? What was the front end of that process? How did you diagnose what you had to do? What did you intake? What was your discovery like? It'd be great to get a walk-through of how you did that.

"YOU NEED TO HAVE AN APPRECIATION FOR WHAT OTHER PEOPLE'S GOALS ARE. THAT MAKES IT REALLY EASY FOR YOU TO UNDERSTAND WHAT YOUR GOALS SHOULD BE."



JR: First, we had to break down product by product, SKU by SKU, trends on the sales team over a 24-month period. Where we saw shifts, we wondered if we could say that some kind of change [in our business] had happened to cause it. Did a competitive product hit the market, for example? Did we reorganize sales? Did we change product managers? Did we change something in marketing? Did we update our website? All of those things actually did happen at some point. You could map every single item we had done to a change in revenue from sales.

We identified the trends we could affect, and then the ones we could affect quickly. We basically ran tests to see what would happen if we made this shift here or that shift there. So, we ran those tests, we made those shifts and we saw results.

Then, the next step was – well, can we double down on any of these shifts [that have given us results]? Because for some things our focus was on doing them quickly, like I said, so now we had an opportunity to go back again and add just a little bit more. In a specific product category, we went back and asked ourselves when we'd been the most successful in the past – and the answer was actually 20 years ago. Because when that product first came out, we had run this awesome campaign that had been incredibly successful for the business. So, we brought that back! Now we're running a campaign that we first ran 20 years ago. Same messaging. Same way of looking our audiences. We just wanted to see what would happen, and now what we see is it's working, just like before.

R1: And what do you think is the major learning you take from that?

JR: You don't always have to go for something new. Look back. You've got to honor the history of your business and study why things worked along the way and why some other things didn't. Don't be afraid to go back and repeat something just because you think marketing always has to be new.

R1: Right. And as a data nerd, I have to ask: When you were testing those shifts, were you doing them one at a time, so you could more clearly see the individual impacts?

JR: Yes. You can see month by month what happened as we made changes.

R1: That is so fascinating. Actually, I just finished a book called *Smarter, Faster, Better* by Charles Duhigg, and the last section is about absorbing data. And the main point he makes is that when we have tons of data we tend to be overwhelmed by it, so we basically don't do anything with it. So, the key is you can't try to do too much all at once. You have to take a scientific approach, so you can test one by one: When we pull this lever, this happens. When we pull that lever, that happens. It sounds like you

did that, and that's how you get to a place where the data matters to you.

JR: I totally agree. Sometimes the team will say, "We have no data." And I know what they actually mean is we may not have the insights we need.

R1: Right. Big difference.

JR: And if you don't have the insights you need, sometimes you just have to put forth a hypothesis. Sometimes you've just got to say, "Let's test out this idea, because I think the data could be saying this." But that's hard for a lot of people to do. It's hard for us to take risks like that sometimes.

R1: Can I put you on the spot? What's a data situation that you've been in that you felt was risky?

JR: Well, it's the fact that testing things can also sometimes mean stopping things. You know, we've been running Google Adwords for a while. And everybody wants to know if it's doing what we need it to do. I don't know yet. That's something we need to figure out. But what if we stopped running Google Adwords? What if we just turned it off for a week? With our sales cycle being what it is, if Google Adwords is having an effect, then a couple of months from now I would see a blip, a change in activity for this week. Then I would know it had been working. But first I'd have to be willing to take the risk of turning it off.

Businesses make an average of \$2 in revenue for every \$1 they spend on Google Ads.

Google Economic Impact Report

R1: You're right. I was mentioning pulling levers, back when we were talking about the book, and I know a lot of companies would never be willing to pull that one. "Not that lever! Not Google Adwords!" Justifiably so, it's a powerful tool. But your point about risk is spot-on.

JR: Right. To measure value, you either have to try something new or stop doing something. It's easy as marketers for us to spend money. Knowing what works and what doesn't is much harder. It's art and it's science. That means you have to follow your intuition. You have to take risks. And you have to look to the past, and then infer that if your learnings are right then you will also see results in the future.

R1: On the topic of data and measuring value and running those tests – as well as, of course, taking risks – is there a technology in your stack that enables you to do those things in a way you find especially useful? In a unique way? In a way that makes Vertiv, Vertiv?

JR: Our marketing automation is done with Oracle Eloqua. We're using Content Marketing. We're using

Oracle Eloqua Sales Tools, and we've just started deploying the Engage templates with our sales teams. And on top of that we're using a number of other marketing technologies, as I'm sure you can well imagine.


But actually, one of the biggest opportunities when I came to Vertiv was we had all these tools but none of them were connected [to each other]. And as a result, we didn't have good insight into our customers or our prospects. So, that's been the most important thing we've been working on, of late: getting the technology connected so we can have insights. The goal then would be to share those insights with our sellers. That's why we use Sales Tools in the first place; that's why we use Engage – so the sales team can better understand what we [in marketing] understand about the audience.

R1: A good tech stack probably does lead to more knowledge sharing.

JR: I think that's the most important thing. You have these tools so our sellers can start a valuable, warm conversation with people, so putting it all together to make that possible has been a huge opportunity and a great experience for our team. You should use technology to reach the outcome you want on the other end. I've said that before. You have to understand the outcome you're driving for. As a result, I've canceled some tools that I didn't think we should have right now. But I've also purchased or licensed a few more.

And remember what I said earlier about people taking on new roles? I spoke with one person and I said, "We need you to be our martech person, so we need you to gain even more expertise about our customer base. You're the person we're going to rely on to make sure everyone knows what we should be doing for [that base]." That was a really big change for that person, but it was also a really big change for us, for the better. Because now, we have a person to go to for that.

R1: Of course. And here I now have to do a mild – hopefully mild – pivot. Only because we're running out of time, and I can't let you leave without asking you what inspires you. We've talked about the changes you're implementing, the data you're pulling, the teams you're enhancing. What's the spark that gets all that going?

JR: I think the most important thing that inspires me right now is, as I'm working with my team, seeing the "A-ha!" moments they have when something works out and how excited they get about their work – even the little things. Yesterday, the team circulated an email where they celebrated publishing six pages on our website that were all SEO-optimized. I think it's so cool to see the pride they have in their work. That makes me feel like I'm having the time of my life. 

BUYER PERSONAS DEMYSTIFIED: 8 SIMPLE IDEAS TO CREATE AUDIENCE PROFILES

A QUICK INTERNET SEARCH ON THE TOPIC OF BUYER PERSONAS WILL TURN UP NUMEROUS ARTICLES, HOW-TO GUIDES AND TEMPLATES. SOME ARTICLES LEAD YOU TO BELIEVE YOU ONLY NEED TO FILL IN A FEW BOXES ON A PRETTY CHART TO CREATE A PERSONA. OTHERS MAKE YOU BELIEVE BUYER PERSONAS ARE THE MAGIC BULLET YOU'VE BEEN LOOKING FOR. WHILE THERE IS A GRAIN OF TRUTH IN BOTH STATEMENTS, BUYER PERSONAS DO REQUIRE TEAMS TO ROLL UP THEIR SLEEVES AND DIG INTO THEIR DATA TO REALIZE THE BENEFITS.



TRACY MILLIGAN
STRATEGIC MARKETING
CLOUD CONSULTANT

To save you the hassle of scrolling through all those search results, here are some of the key tips to help you create effective buyer personas.

BUYER PERSONA DEVELOPMENT IS A TEAM SPORT.

Persona projects typically start with the marketing team, but developing effective buyer personas also involves sales, customer support and product development. Including stakeholders from each of these areas will allow more insight into your ideal customer. Participation and alignment of these teams will also increase the adoption across the organization.

START WITH WHAT YOU KNOW.

Gather insight on your active customers as a jumping-off point. Web, search and social analytics data can provide a wealth of information on the habits and sentiment of your customer base. Review your marketing automation and CRM data to understand the demographics of your audience. Last, conduct internal interviews with the customer stakeholders to identify the types of customers each area is focused on. Collecting this information will begin to shape the true personas to create.

SIZE THEM UP.

At this point, you might have identified numerous personas to develop. Paring these down to the meaningful few that will be most impactful requires a prioritizing exercise. Think about who holds the budget, who is involved in purchases and how they fit into your target segment.

Another option is to assess your personas from a financial value perspective. First, determine the average deal size to. Second, estimate the number of individuals in the job role for your target market segment. Third, weight the personas on the level of involvement they have in the buying process.

You might also consider the following factors when deciding which personas to develop:

- Is your sales strategy compatible with your persona?
- What level of sales enablement is needed for this persona?
- Can you easily identify the persona within your marketing database?

SURVEY SAYS.

Leverage primary and secondary research to validate the insights you have gathered. This information can fill in knowledge gaps or provide new aspects of the persona that you haven't considered. Industry analyses, job postings, online communities, event attendance and customer surveys are all great sources of information.

GO TO THE SOURCE.

At this point, many organizations will decide they are ready to begin shaping their buyer personas. Sometimes this is perfectly fine. For organizations who are selling to a known audience, they may have enough information.

However, many thought leaders recommend conducting interviews with prospects and customers directly. These discussions will provide additional context that cannot be gleaned from internal sources. For organizations trying to engage unknown personas or enter new markets, this step is an absolute necessity.

GET CREATIVE.

Once you've completed your research, it's time to pull out your template of choice and bring your buyer personas to life. While it's fun to give your personas quirky names and find stock photos, be sure you don't lose sight of the goal. To be an effective tool, ensure your finished persona addresses the following:

- Do you have a clear understanding of their job responsibility? What are their everyday tasks? Where do they fit in the organization? What role does the persona play in the buying process?
- What keeps them up at night? What do they need to be successful at their job? What is their underlying challenge? What is the common jargon of their role/industry?

- What is the primary buying need? Is it solving an organizational problem, or a department or functional need? What is the individual need based on the job role? What is driving the purchase decision?

- What will effectively engage the buyer persona? What types of content do they prefer? Where do they seek information? What type of interactions do they prefer?

DON'T FORGET TO VALIDATE.

Validating the persona is a crucial step in the process. Gather internal and external feedback to ensure the insights gathered truly represent your buyer. If something is off, go back to your research, or conduct a few more interviews. The extra diligence will pay off in the long run.

CONNECT THE DOTS.

The purpose of buyer personas is to become more audience-focused. In addition to developing personas, documenting the buyer's journey is another critical step to tailoring your marketing efforts to your audience. Don't just think about the digital journey; build in the sales touch-points to better understand how the organization is engaging prospects throughout the sales process.

Once you have the buyer journey mapped, inventory your content to align it to your stages and personas. Together, these frameworks will support your efforts to be more audience-centric and engaged with your buyers.

Buyer personas are valuable tools for any organization. And as with all tools, quality matters. Hopefully these steps have provided a better understanding of the development of effective personas. ☐

THE 5 W'S OF PLANNING YOUR CRM AND ORACLE ELOQUA INTEGRATION



HEIDI HUFFMAN
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Whether your CRM and Oracle Eloqua platforms are mature or new, every integration story should include the 5 W's to gather the necessary information for a happy ending:

- **WHY** – Capture the goals for this project and identify how success will be measured.
- **WHO** – Select a core team that includes the five key roles.
- **WHERE** – View the data from the perspective of each CRM and Oracle Eloqua platform.
- **WHAT** – Determine the entities, programs and fields required to support the business goals.
- **WHEN** – Create a project plan with tasks and milestones that will meet the launch date.

THE WHY

In today's marketplace, prospects self-educate before they talk to sales. This puts more responsibility on marketers to not only source leads, but to engage them before passing qualified leads to sales. Prospects expect communications that are targeted and relevant whether they are at the top of the funnel or on the cusp of a purchase.

Integrating your CRM and Oracle Eloqua platforms reflects this shared responsibility for the sales funnel, providing a unified view of leads and customers to sales and marketing.

For your specific organization, many of the WHY questions will be addressed when choosing your CRM and Marketing Automation platforms.

- Why this solution?
- Why now?

In the WHY phase, you need to understand the business goals for the integration and how it will be measured. For example, your goals might include:

- Improving alignment between sales and marketing.



- Increasing marketing efficiencies to deliver highly qualified leads at a lower cost.
- Boosting sales

THE WHO

Your core team should include players that have the knowledge and authority to make decisions and configure the platforms.

Outlined below are five key roles required for your core integration team. For some teams, one person may represent multiple roles; other teams will require multiple people to represent a single role. I have worked on Oracle Eloqua CRM integrations where we were a team of two. In other integration projects, multiple people represented a single role; for example, in complex integrations, the role of the Oracle Eloqua admin may require a solution architect and a technical lead.

Sales Representative

It's imperative for someone on your core team to articulate the sales needs and speak to how sales uses the CRM in their day-to-day work. For example, what data is needed in order for sales to receive and follow up on a new lead?

CRM Administrator

Oracle Eloqua does all the heavy-lifting in initiating the calls for both the push and pull of data between the two systems. All field mapping is done in Oracle Eloqua. For this reason, the bulk of the CRM admin's time will be as an SME advising the team on the CRM data structure — covering everything from the relationship of the entities to the individual field values. Beyond this advisory role, the CRM admin tasks may include:

- Create Oracle Eloqua as a CRM user
- Provide information on number of records that will be imported to Oracle Eloqua
- Add new fields to CRM if needed
- Enable sales tools
- Configure tracking for change of email address
- Assist with troubleshooting
- Confirm accuracy of data pushed to CRM

Marketing Representative

This person is the voice of the marketer and should clearly communicate the requirements for what data is needed for targeting, personalization, scoring, routing and reporting. The representative needs to understand and discuss use cases about the data that supports the Oracle Eloqua campaigns.

In addition to understanding the day-to-day needs of the marketer, this person should understand the marketing KPIs. This role should also have a breadth of knowledge for the Oracle Eloqua instance that includes governance, segmentation and data sources into Oracle Eloqua (e.g., list uploads, forms).

Oracle Eloqua Administrator

The Oracle Eloqua administrator translates the business requirements of sales and marketing into the design solution. This role is responsible for understanding the Oracle Eloqua data model and applying it to building the programs and configuring calls for the integration. The Oracle Eloqua admin will also help identify any limitations or risks for the solution. Many organizations use partners to help with the technical configuration.

Project Manager

The project manager keeps the project on time and budget. They identify scope, milestones and document changes that impact deadlines or budget.

THE WHERE

Perspective is everything. Oracle Eloqua and CRM are two different systems and therefore differ, from their

data structure to their terminology and unique keys. It's imperative that you understand the data source and how it impacts your integration solution.

This is the discovery phase. Level-set around the business goals within the context of each of the two platforms. To get started, include two foundational discussions:

- Lead Life Cycle Discussion
- Oracle Eloqua Data Model Review

Lead Life Cycle Discussion

Whether your sales and marketing teams completely align, or you are just beginning to define your lead life cycle, reviewing your lead process should be one of the first discussions for your core team. Focus on the sales and marketing roles and responsibilities for each stage of the funnel. Use this discussion to flesh out key requirements around what entities are being used and the type of data that must be mapped. For example, you should discuss:

- What is a lead? (Do marketing and sales share a common language for prospect, lead, etc.?)
- How are leads assigned and worked (by telemarketing, inside sales, regional, by product)?
- If a lead is rejected, does it go back to marketing for further nurturing?
- When is a lead converted?
- What is the relationship of contacts to accounts?

Oracle Eloqua Data Model Review

The Oracle Eloqua data model review introduces terminology, entities, field types and data management models from the Oracle Eloqua perspective. As with the Lead Life Cycle Discussion, this is a foundational discussion that sets the stage for future requirements discussions.

For a more detailed look at the Oracle Eloqua data model, read Key Considerations When Planning Your Oracle Eloqua Integration: <https://www.relationshipone.com/blog/key-considerations-oracle-eloqua-integration/>

Additional Data Sources

The integration solution must also take into account other data sources. Capture additional data inputs such as form submissions, list uploads, automated import or third party apps. Minimally, the data may require cleansing before integrating with your CRM; however, multiple inputs may require a larger data architectural workshop to document the data structures and relationships.

THE WHAT

This is the define phase. It's time to get into the weeds and discuss what data sales and marketing needs. Ultimately you will define and document:

- The overall solution for the entities that will be mapped between the two systems and the relationship of the entities within Oracle Eloqua
- The list of fields to map for each inbound and outbound call
- The requirements of the lead management model for how sales receives and manages leads and contacts from Oracle Eloqua
- The supporting programs needed for lead management and data integrity

Once the documentation has been approved by the core team, you can move to the develop and deliver phases.

THE WHEN

The project plan includes the tasks and milestones leading up to the integration launch date. Managing to the project plan is the responsibility of the project manager team member. In building out the timeline, carefully consider these questions because they can impact scope and timing:

- Are the platforms mature, new or a migration?
- Is this integration part of a larger organizational implementation?
- What is the scope of the Oracle Eloqua integration. For example, does it include Lead Scoring or Closed Loop Reporting?
- Will testing be done in an Oracle Eloqua sandbox?
- How many rounds of testing are required? For example, will testing be done for the DEV, QA and UAT CRM environments?

HANDING YOU THE KEYS

While every integration is unique, the same principles apply, from team member roles and responsibilities to discovery and delivery. The 5Ws of integration will get you started down the right road and help avoid wrong turns. ☰

INSPIRED MARKETING PODCAST



**INTERVIEWS WITH MARKETING LEADERS WHO
ARE TRANSFORMING THEIR ORGANIZATION
USING THE ORACLE MARKETING CLOUD**



THE IMPORTANCE OF CLEAN AND STANDARDIZED DATA

WHEN IT COMES TO CONCEPT DATA CLEANLINESS, MOST BUSINESSES KNOW THAT THE END GOAL IS A CONSTANT CHALLENGE. WE OFTEN HEAR SENTIMENTS FROM CLIENTS LIKE THIS: “WE NEED CLEANER DATA.” “OUR DATA IS DIRTY.” “IT’S A DATA ISSUE.” “CAN WE TRUST THESE METRICS?” “IS THIS DATA ACCURATE ENOUGH TO ALLOW US TO REPORT UP THE CHAIN?”

While most people know data is important, the word “data” is often spoken of in ambiguous statements like the above. It often comes without a practical understanding of why it’s important to have clean and standardized data. Flushing out these ambiguities is necessary in order to advocate within your organization for creation of processes and programs that facilitate smart data practices to ensure clean and standardized data.

One of the biggest challenges for mid-size or large organizations is connecting the expertise of campaign marketers with the expertise of IT or data teams. Far too often marketing has a great idea for a campaign and will rely on the IT/Data team for campaign support, only to find out that they don’t have good enough data to push the initiative forward. And similarly, far too often IT/Data teams don’t have the advocacy or resourcing to standardize their data to make marketing’s ingenuity come to life in the market. Organizations then often fall into patterns of launching campaigns that fall short of expectations. Not good!

Striving for clean and standardized data within your organization will ultimately lead to:

- increased advocacy for smart data practices
- identification of specific data issues (oftentimes low-hanging fruit is identified, and quick improvements can be made)
- improved communication between different functional teams

The more you can articulate these things, the better off you’ll be.

So, with that, why is it important that data is clean and standardized?

There are two main reasons that will be touched on in this article:

- Systems are dependent upon it.
- Analysis is dependent upon it.

SYSTEMS ARE DEPENDENT UPON IT

While systems are becoming more proficient in their capabilities, particularly with AI, these systems rely upon unified data to make decisions and take actions. When systems have cleaner data to work with, it can result in identifying leads to send to your CRM, sending an email to particular contacts, linking contacts to particular accounts, displaying first name or other dynamic information in an email, or scoring a contact based upon profile information. Consistency in spelling, formatting and the values used are also critical. Almost always, clean and standardized data will directly contribute to how successfully the system is able to do its intended action.

(For the purpose of this article, we’ll take a look at this in particular reference to Marketing Automation Platforms, particularly Oracle Eloqua. However, these concepts apply across all Marketing Automation Platforms and other tools in your marketing tech stack as well.)

Here are a few examples in Oracle Eloqua:

- **Targeting / Segmentation**

Example: Try targeting contacts with an “Industry” of “Education” when the “Industry” field contains numerous spellings, abbreviations or formats of “Education.” While there are workarounds at times, like using a “contains” function, it becomes increasingly difficult to correctly target those contacts. In this simple example, that workaround is relatively easy, but now imagine trying to segment using 10+ criteria with numerous fields that have this same issue. A lot of times it becomes impossible. In this case, setting up processes to ensure that the “Industry” field only contains one value for “Education” would allow for much easier segmentation.

- **Personalization**

In today’s world, personalized experiences are expected by consumers. To meet these demands, personalization often only becomes possible for businesses if resource-heavy, manual processes are put into place. With cleaner data, this manual strain of personalized marketing efforts is greatly reduced. The companies that have mastered personalization are the ones who have mastered data to allow automation to do its work.

- **Lead Scoring**

Data cleanliness and standardization is particularly important to accurately evaluate contacts within Lead Scoring. Your Marketing Automation system bases its scoring on specific values on the contact record. If there are not standardized values for the system to look for, but rather hundreds of different values, it can be almost impossible if field values remain unstandardized. For example, one common field that is often used in scoring is “Job Title.” Because this field is usually a free text field on forms, there are all sorts of variations. Create a contact washing machine to standardize this data and write it into a new “Standardized Job Function” field. This is a great way to make this field scorable in your Lead Scoring models.

- **Lead Flow and Routing to Sales**

Lead routing workflows have many decision steps that rely on data being correct. Example: Many U.S.-based companies exclude leads from being passed to their CRM that are not from the United States. To accomplish this, they create a decision rule that removes contacts that do not have a country value equal to “U.S.” If some contacts have a country value of “United States” or “USA,” because technically their value does not equal “U.S.,” those contacts would end up getting excluded, which ultimately results in a loss of valuable leads passing to sales. Use a pick-list and contact washing machine to ensure you keep your country values standardized.

ANALYSIS IS DEPENDENT UPON IT

Systems and reporting engines are also reliant upon your data being standardized. Meta data that is linked to contacts, leads, opportunities, campaigns, emails or any other object is what allows for more meaningful reporting. Meta data are the different variables in your data, allowing you to see results in different ways. If this data is unstandardized, analysis becomes increasingly difficult. Let’s take a look at a couple of examples below:

Example 1: Take a simple pivot table. Imagine you are looking to see these statistics broken down by a particular subsegment in your business. You find a field called “Subsegment” and drag it onto your pivot table. You think you’re about to get what you need, but alas, instead of nine rows to view the data by (one for each sub segment in your business), 60 rows show up. As you scroll through the values you realize that some of the values are old from a few years ago, and many are different variations of one of the nine sub segments that you were expecting.

You need to define and standardize your subsegment values! There may be workarounds, but as previously mentioned, when analyzing across large sets of data this becomes increasingly complex. While a manual rework of the data may be feasible in the short term, doing this over and over again becomes unscalable. This is particularly true when you have many team members looking for this information on a regular basis who may not have the necessary access to your BI tool, Excel skills or context necessary to manipulate the report for their needs.

Example 2: If you are trying to report on how a campaign performed based upon “Company Size,” but have unstandardized values, it can be difficult to make conclusions from the data.

Let’s take three different contacts – one with a company size of “1-50,” another of “1-20,” and a third with “1-100.” In this example, assume that it is critical to evaluate performance by Company Sizes of “1-30,” “31-70” and “71-100.” How do you group these ranges systematically? It’s easy enough manually to go through three contacts and sort in a way you need, but when this data is inconsistent within large data sets, it becomes unfeasible to create reports.

If you expand these issues across large data sets with multiple fields, it very quickly becomes a complex web of disparate data that doesn’t allow you to report in a way you, or your leadership, need to.

CONCLUSION

At the end of the day, lack of standardized data dramatically hinders an organization’s ability to launch smart, effective campaigns, while also making it increasingly difficult to seamlessly operate between divisions. We’ve outlined how data standardization can help create more accurate marketing efforts, drive efficiencies for the business and better articulate campaign success and failures. ☰

TOP 10 THINGS MARKETING AUTOMATION CUSTOMERS NEED TO KNOW ABOUT EMAIL DELIVERABILITY



CHRIS ARRENDALE
CHIEF PRIVACY OFFICER
TRENDLINE INTERACTIVE

1. YOU'RE PROBABLY NOT ALONE ON YOUR IP ADDRESS

Since the volume of email sent by B2B marketers is often much lower than retailers or other B2C sites, marketing automation providers often spread the usage of their email IP addresses across multiple clients. As a matter of fact, most marketing automation subscriptions default to a shared IP. Consider checking with your provider on the costs associated with a dedicated IP address for your company; otherwise your deliverability could be impacted by the bad practices of the other companies on the same IP.

2. MORE VOLUME IS NOT ALWAYS BETTER

Major B2C ISPs and webmail providers publish the volumes that they accept on an hourly basis. Unfortunately, B2B senders don't receive that information. Many B2B networks and mail servers can handle small volumes and don't have dedicated mail server administrators. This makes it difficult to send a large amount of volume to these B2B networks. Instead, send smaller volumes and spread out the volume over the course of your send to achieve better results.



3. NOT EVERYONE LIKES TO TALK TO STRANGERS

Keeping a clean, active email list is key to achieving high deliverability. Meticulously manage your lists by removing unsubscribes, suppressing complaints, come up with a good bounce strategy and use caution with list append and acquisition providers. Strive to continually segment and prune email lists to get the results you want and get into the inbox.

4. SUPPRESS THOSE WHO COMPLAIN

B2B feedback loops exist and should be set up and enabled for your email programs. A feedback loop allows the recipient's network to send you back email digests of those who complain (hit the spam button) about your emails. Not all networks/providers have this, but it is important to sign up for all that are available, as well as suppress those who do complain.

5. STAY SAFE WITH WHITELISTING

Whitelisting, or Safelisting, has long been associated with B2C mailers. The truth is that getting your recipients to whitelist your sending IP address(es) and sending domain(s) to their mail server and/or mail-

filtering solution will help improve deliverability. Oftentimes, marketing emails will get quarantined on the mail server, so having your sending information whitelisted, will bypass this and get your email delivered to your recipient. Always include this information in your emails and on your website, and communicate this to your recipients.

6. PROVIDE YOUR PASSPORT TO THE INBOX

IP and domain authentication are very important when sending B2B emails. Setting up these two types of authentication is typically very easy to do and helps your deliverability. By enabling IP and domain authentication for your email programs, you are showing your passport to your recipient's network and stating, "I am who I say I am." This helps your recipient's network possibly filter out any emails that are not authenticated and could be a phishing email.

7. PUBLISH CONTENT THAT IS RELEVANT FOR YOUR AUDIENCE

Sending the right content, to the right buyer, at the right time is the perfect combination to achieving your conversions. Making sure that your content passes

an array of deliverability checks can also help get your emails to the inbox. Maintain a good text-to-image ratio, include verbiage relevant to your audience, design your emails with images off, design for mobile, and don't include all of your calls-to-action in an image.

8. URLS MAY NOT BE YOUR FRIEND

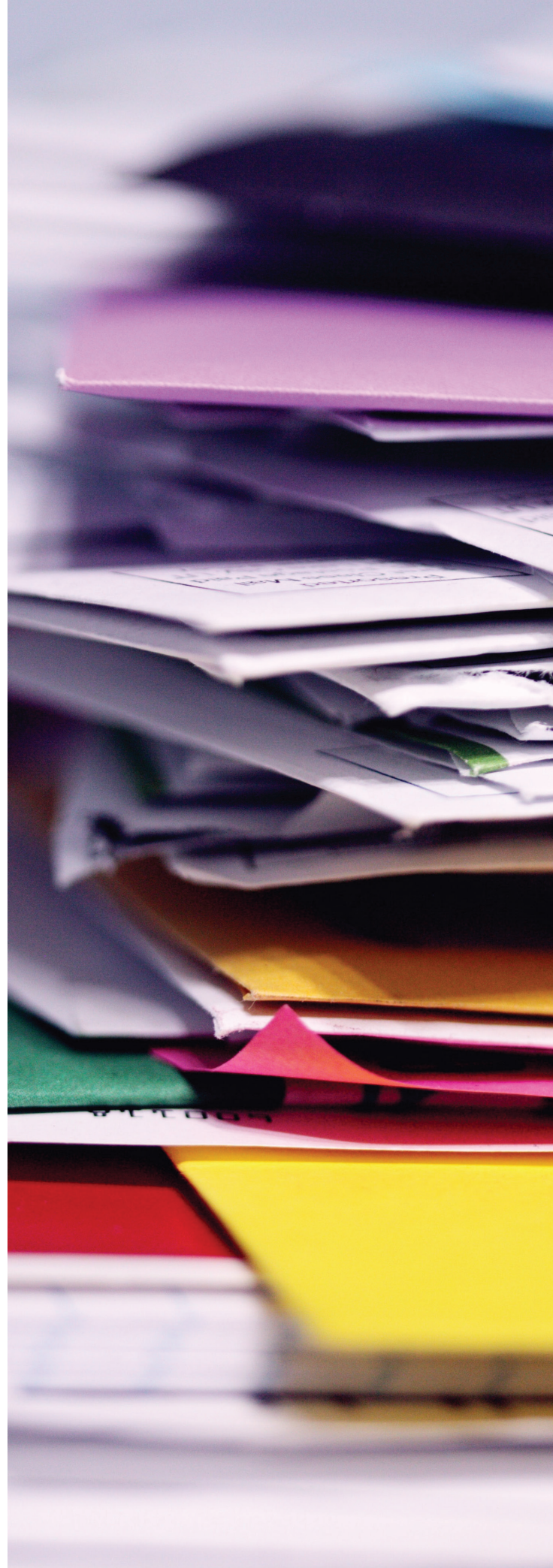
Content URLs can also pose deliverability challenges. As IPs can get blacklisted, so can domains and URLs. Make sure you test all URLs, not only to make sure that they work, but also check to see if they are blacklisted. Too many URLs could also potentially cause deliverability problems, so always plan on testing when doing your content checks. Avoid all URL shorteners, as many of those are blacklisted, and make sure that the domains you are referencing don't keep redirecting to many other URLs.

9. GRAB YOUR RECIPIENT'S ATTENTION

Stand out in your buyer's inbox by choosing the best subject line. Many webmail and email clients now don't display the entire subject line. B2B subject lines are often overlooked and could cause deliverability challenges. There are many B2B studies on this topic, and most reference the fact that promotional words (e.g., "free," "exclusive" or "ROI") do not perform as well as words that speak to the basic, substantive business benefit (e.g., "revenue" or "profit"). Make subject line testing a must to help improve overall email deliverability.

10. PAY ATTENTION TO REPORTING AND ANALYTICS

Deliverability reporting is not glamorous, but paying attention to it will help improve conversions and revenue. Don't just focus on opens, clicks and conversions; also pay close attention to bounces, unsubscribes and complaints. Keeping an eye out for IP and domain reputation is very important as well. Staying off blacklists, monitoring blocks and reviewing deliverability data/reports will help make sure that you maintain high deliverability. Marketers must have a consistent and proactive approach to email deliverability to run programs that drive revenue. ☰





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QUICK TIPS FOR LEAD NURTURING DO'S & DON'TS

WE ALL KNOW HOW IMPORTANT A GOOD LEAD NURTURING PROGRAM CAN BE AS A MARKETING TACTIC. IT'S CRITICAL TO REMEMBER THAT NURTURING IS THE GATHERING OF LEADS NOT YET READY TO BUY. THE "WARM-UP" PERIOD, AS I LIKE TO REFER TO IT, NUDGES CUSTOMERS ALONG THE WAY AND HELPS EDUCATE THEM.





BRENDA BARRELLE
SENIOR ORACLE MARKETING
CLOUD CONSULTANT

First, let's quickly talk about why you should nurture, and then I'll provide some tips based on 20+ years of experience designing these programs.

WHY NURTURE?

Different people have different needs at different times. Some are looking for general information, while others seek a specific solution to solve a known issue. Any credible lead nurture program will anticipate the needs of its targets based on who they are and where they are in the buying process.

The point of nurturing is to keep targets engaged by providing relevant content that best fits their current situation. When done correctly, nurturing can build strong brand loyalty and educate your prospects on your products and services. Nurturing programs are not "one and done;" they should be constantly running in the background to drive customers along the buyer's journey.

LEAD NURTURE DO'S AND DON'TS

I'm sure you're aware of the myriad challenges regarding nurturing. Consumers are bombarded with hundreds of promotional offers weekly through multiple channels. Developing relevant content and targeting the correct audience can be a roadblock as well. These tips should help get your program off the ground quickly!

Do:

- Understand the high-level demographics of your target audience and segment them correctly, taking into consideration that each person sees the education and buying process differently. Remember, nurturing programs can have multiple streams.
- Keep your program simple to start: An average of three to four touches (or pieces of content) is great if you are just getting it up and running. Whiteboarding can also be helpful to brainstorm the flow.
- Have a constant stream of conversation pushing the audience toward a next step while educating them about your product or service.
- Test the timing between touches. Generally speaking, in the B2C world, three to eight days between touches

is good. If you've got more content, think about sending communications more frequently at the start of the program and slowing down toward the end.

- Use customizations such as field merges and progressive profiling to nurture known customers already in your database. This creates a sense of trust in your communications.
- Monitor and measure your program results and make dynamic alterations as necessary.
- Leverage existing content whenever you can as developing new content can be a major obstacle.
- Use automation to manage the communication flow, as well as a constant stream of newly qualifying contacts.
- Use multiple channels! For example, a form submission or email click-through could trigger an SMS follow-up.

Don't:

- Choose quantity over quality. These programs are targeted. It's not about how many contacts you can shove through the program; it's about how many you can move to the next step in the buying process.
- This is a reason many programs fail. Too many pieces of content or too long a flow will have more people opting out than getting educated. If I could only give you one piece of advice, this would be it.
- Try to launch too many at once. There are loads of different types of nurturing you can do, from welcome campaigns to new customer onboarding to customer retention/loyalty. Pick one to get up and running. Once you've mastered it, move on to another.
- Let them run forever unattended. As with lead scoring or any other marketing tactic, you've got to monitor them and adjust as your business changes.
- Think of the program as "email communication." Instead, think of it as an automated work-flow where the content builds in a meaningful way to drive recipient to next stage. There should be a theme and cohesiveness between messages.
- Involve too many internal folks in the program process. Have one person champion the program and own it, getting input from a few others.
- Launch without understanding your buyers and ensuring each piece of content maps to them at the right stage.

Hopefully these tips will get you up and running with a stellar nurturing program! ☺

BRAIN CANDY



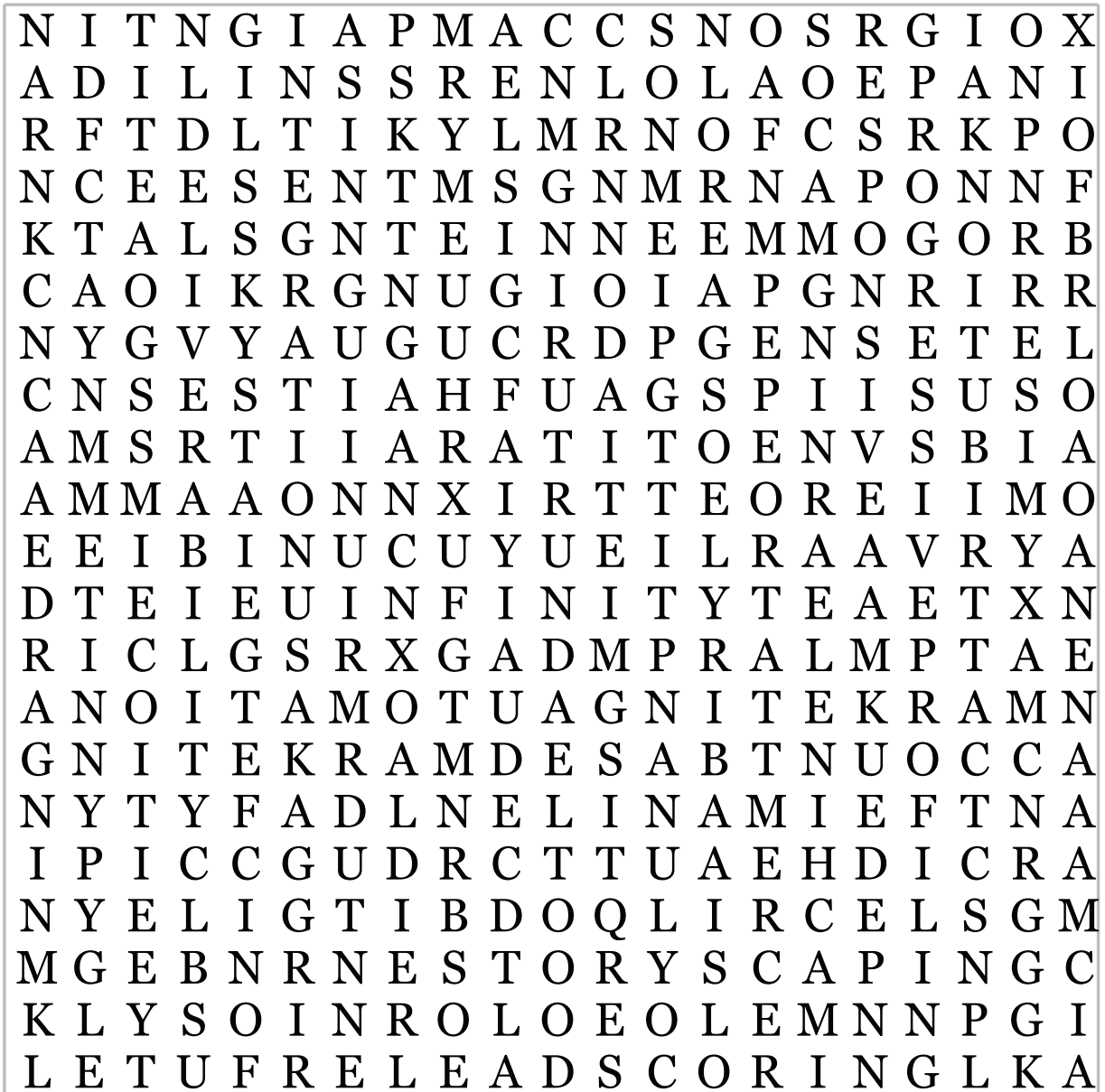
BRAIN TEASERS TO RACK YOUR BRAIN

1. Tom's height is six feet, he's an assistant at a butcher's shop and wears size 9 shoes. What does he weigh?
2. Feed me and I live, yet give me a drink and I die. Who am I?
3. What kind of room has no doors or windows?
4. What gets broken without being held?
5. What word describes a woman who does not have all her fingers on one hand?
6. What kind of tree can you carry in your hand?
7. Which word in the dictionary is spelled incorrectly?
8. A girl who was just learning to drive went down a one-way street in the wrong direction, but didn't break the law. How is that possible?
9. If you have me, you want to share me. If you share me, you haven't got me. What am I?
10. Take off my skin – I won't cry, but you will! What am I?
11. Imagine you are in a dark room. How do you get out?
12. What invention lets you look right through a wall?
13. What is at the end of a rainbow?
14. What is always coming but never arrives?
15. What occurs once in every minute, twice in every moment, yet never in a thousand years?

1. Meat 2. Fire 3. A mushroom 4. A promise 5. Normally people have half of their fingers on one hand. So she can be called a normal woman. 6. A palm 7. Incorrectly 8. She was walking. 9. Secret 10. Onion 11. Just stop imagining! 12. A window 13. No, not clouds or the ground. It is the letter w. 14. It's tomorrow, so better do it today. 15. The letter m

Answers

MARKETING BUZZ WORD SEARCH



LEAD SCORING
LEAD NURTURING
ORACLE
ELOQUA
RESPONSY
CAMPAIGN
PROGRESSIVE PROFILING
RESPONSIVE
DELIVERABILITY
BIG DATA
MAXYMISER
INFINITY
MACHINE LEARNING

ACCOUNT BASED MARKETING
KPI
OMNICHANNEL
RETARGETING
STORYSCAPING
MARKETING AUTOMATION
UNITY
INTEGRATION
DMP
CX AUDIENCE
FUNNEL
ATTRIBUTION





APPLE Salsa

FRESH APPLE SALSA

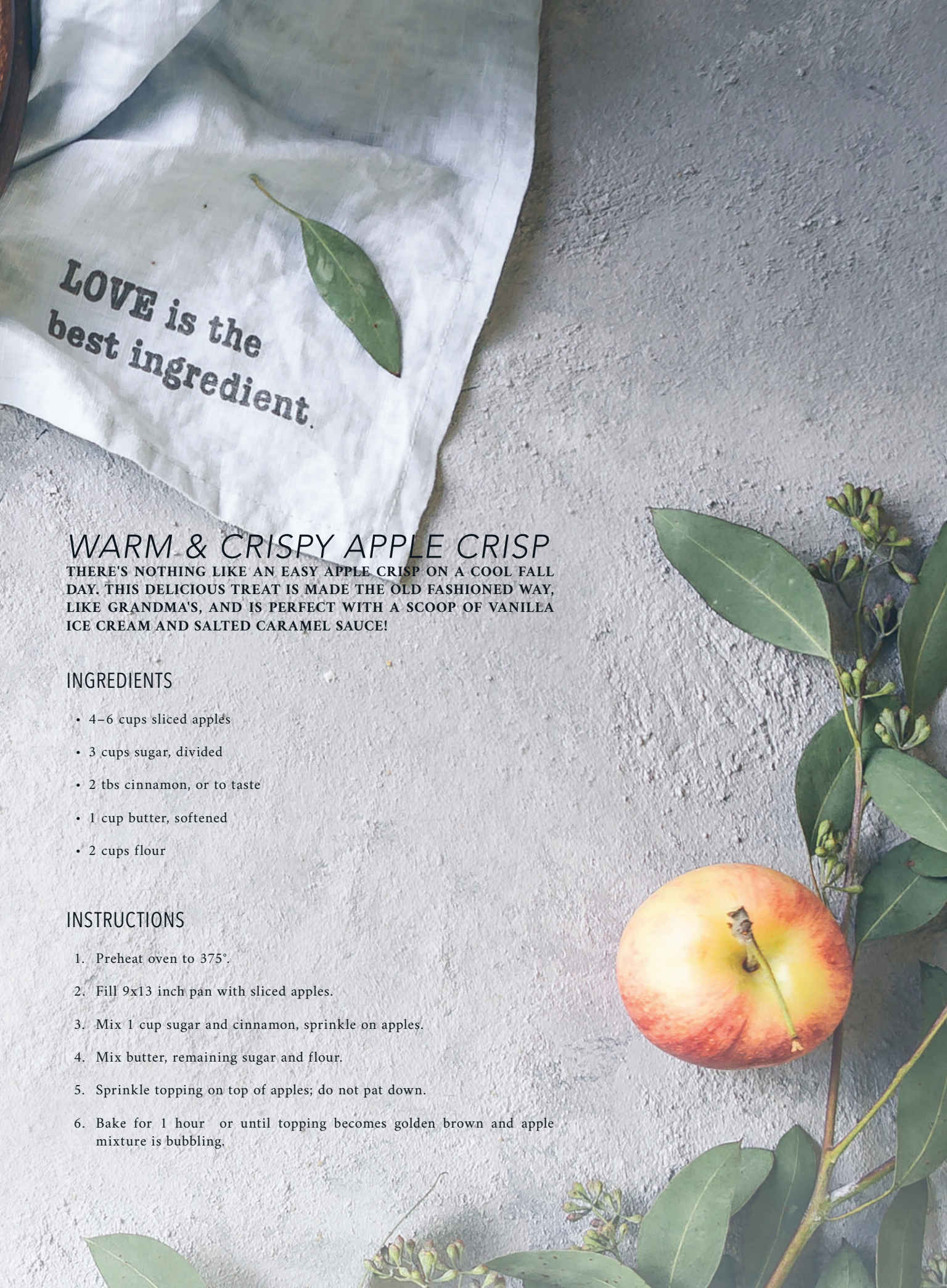
EQUALLY SWEET AS IT IS TART, THIS FRESH SALSA IS BEST WITH A CRISP AND SLIGHTLY ACIDIC APPLE. DELICIOUS IF SERVED WITH PORK OR ROASTED CHICKEN.

INGREDIENTS

- 2 cups diced and peeled apples
- 1/2 cup bell pepper, diced
- 1/3 cup freshly squeezed lime juice
- 1/4 cup red onion, diced
- 1 jalapeño pepper, seeded and diced (or to taste)
- 1/4 cup fresh cilantro, minced
- 1 tbs local honey
- 1/4 tsp salt
- 1/8 tsp freshly ground black pepper

INSTRUCTIONS

1. Combine all ingredients and chill.



LOVE is the
best ingredient.

WARM & CRISPY APPLE CRISP

THERE'S NOTHING LIKE AN EASY APPLE CRISP ON A COOL FALL DAY. THIS DELICIOUS TREAT IS MADE THE OLD FASHIONED WAY, LIKE GRANDMA'S, AND IS PERFECT WITH A SCOOP OF VANILLA ICE CREAM AND SALTED CARAMEL SAUCE!

INGREDIENTS

- 4–6 cups sliced apples
- 3 cups sugar, divided
- 2 tbs cinnamon, or to taste
- 1 cup butter, softened
- 2 cups flour

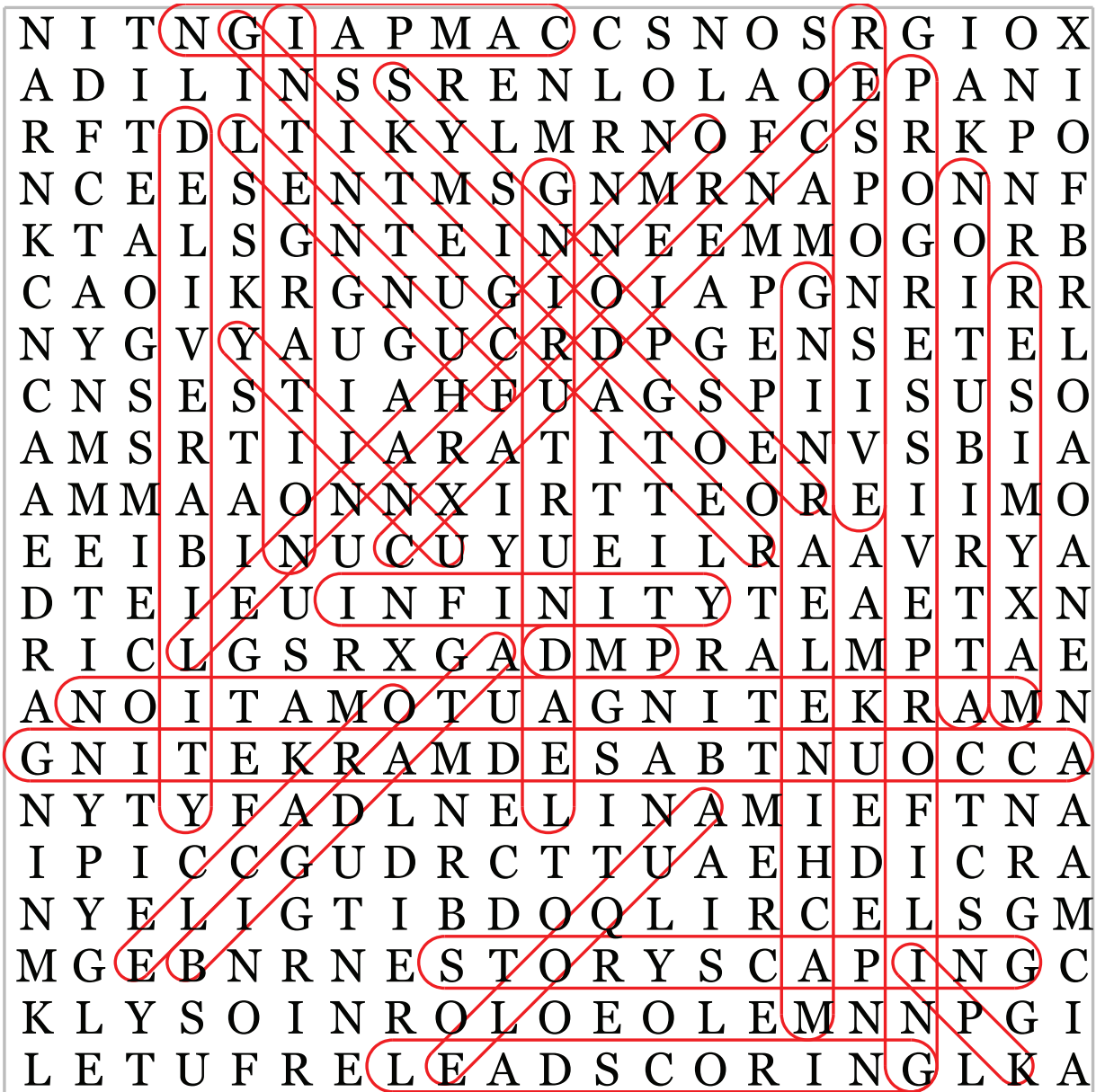
INSTRUCTIONS

1. Preheat oven to 375°.
2. Fill 9x13 inch pan with sliced apples.
3. Mix 1 cup sugar and cinnamon, sprinkle on apples.
4. Mix butter, remaining sugar and flour.
5. Sprinkle topping on top of apples; do not pat down.
6. Bake for 1 hour or until topping becomes golden brown and apple mixture is bubbling.

BRAIN CANDY



WORD FIND ANSWER KEY





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