

# MARKETING TECH 101:



An Executive Guide to Understanding  
and Applying Emerging Technologies



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# Introduction

For modern B2B marketers, the ability to understand and use technology is a basic survival skill. Marketers now work in an always-on, highly connected world where buyers call the shots – deciding where, when and how they will interact with vendors.

**With the right technology, it's possible to identify these buyers, and to build meaningful – and profitable ~ relationships with them.** That sounds simple enough in theory. In practice, however, it's a very different story.

Consider a graphic published every year by Scott Brinker, co-founder and CTO of Ion Interactive. The 2015 edition of Brinker's "Marketing Technology Landscape Supergraphic" includes **1,876 marketing technology vendors across 43 categories** (see next page). That's more than double the number of vendors featured in the 2014 version of this infographic – a strong indication of just how quickly the marketing technology landscape continues to grow.



# Today's Marketing Technology Landscape: A Portrait of Complexity

The 1,800-plus solutions listed in the 2015 edition of Scott Brinker's "Marketing Technology Landscape Supergraphic" fall into five broad categories:

## 1. **Marketing experiences:**

Solutions ranging from mobile marketing and display ads to personalization and SEO, all of which contribute to building, managing, optimizing, and monitoring the end user experience.

## 2. **Marketing operations:**

Solutions, such as audience and market data, team and project management, and dashboards and visualization, most of which focus on generating and delivering data-driven marketing insights.

## 3. **Middleware:**

Integration and management platforms, including APIs, designed to automate and integrate other parts of the technology stack.

## 4. **Backbone platforms:**

This group includes CRM, marketing automation, web content and e-commerce platforms. Marketing automation, as a core backbone component, is generally the place to start planning and implementing a modern B2B marketing tech stack.

## 5. **Infrastructure:**

Databases, cloud platforms, development environments and other solutions that allow developers to build, extend, and customize a technology stack.

The goal of this eBook is to help B2B marketing executives cut through the clutter and complexity of this landscape, and to make better decisions about where and how to plan their technology investments. We'll show you why marketing automation is almost always the foundation for a modern B2B marketing technology stack, and we'll also explain which supporting technologies are most likely to deliver immediate ROI.

Along the way, we'll explain why some of the most important success factors for marketing technology investments are more about process and organizational issues than about technology.

# Future-Proof Your Marketing Technology Stack

Marketing technology will continue to evolve, and the tool you can't live without next year may not have been invented yet. If you choose a marketing automation platform that supports an open marketing ecosystem, you'll have the flexibility to customize that platform to suit your own evolving needs as things change.

An open marketing ecosystem allows you to integrate with the best-of-breed tools you already use, such as your CRM system and your content management system. Some marketing automation platforms (MAPs) come with these tools already bolted on, presenting a closed system and a challenge to integration. Other MAPs are one piece of a larger branded system, and have preferred sister technologies.

In either case, it may be harder for you to integrate the tools you prefer to use now, or the tools you'll want to try next year. You can retain flexibility and choice by selecting an open system that's built with easy integration as a key design principle. An open MAP should make it possible for you to extend the range of the tools you already use across your organization and across channels.



# Marketing Automation: The Foundation for Technology Investments

Every B2B marketer has heard of marketing automation, and the vast majority knows something about how it works. What you really need to know first, however, is why a MAP is now so vital for B2B organizations. Two key trends offer the answer to this question:

- Most buyers don't contact a sales rep until they are more than 60% of the way to making a decision.
- Conversely, only about 20% of leads are sales-ready when an organization receives them.

**A MAP provides a powerful, practical and cost-effective way to identify these leads, build relationships with them and move them towards a buying decision.** MAP technology also gives you a way to track and measure progress towards these goals – a powerful capability at a time when marketers face growing pressure to show quantifiable ROI.

A MAP typically works hand-in-hand with two other applications: a customer relationship management (CRM) solution and a system for managing and publishing web content. "If you don't have those three capabilities well set, it's hard even to build other things on top of that," said Scott Brinker. "That usually becomes the core – the triangle upon which modern B2B marketing techniques are based."

In most cases, a modern B2B firm already has CRM and web content solutions in place – whether managed by the marketing, sales or customer service organizations, or some cooperative combination of the three. As a result, the MAP is the final missing link that enables data and insights to flow smoothly between these systems, and to engage prospects at the right time and place to advance them through the buyer's journey.

"Marketing automation is the cornerstone of a modern B2B strategy," said Andrew Gaffney, Publisher of Demand Gen Report. "As interactions with buyers become more complex – across both multiple messages and multiple channels – this is the technology that allows marketers to streamline and simplify the process of managing these relationships."



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**— ANDREW GAFFNEY**  
Publisher, Demand Gen Report



# Marketing Automation: The Foundation for Technology Investments (continued)

Just a few of the typical capabilities a MAP enables for you include:

- **Email marketing:** Easily create email, manage when and to whom you send email, and track responses.
- **Form management:** Create and manage the registration forms that capture information (and sometimes, augment it) from your buyers.
- **Marketing database:** Manage leads and contacts, including a complete record of when and how you have interacted with leads.
- **Online behavior:** Monitor a buyer's "digital body language" – the online behavior that can tell you about a buyer's interests, preferences, and readiness to make a purchasing decision.
- **Campaign management:** Automate campaigns that send multiple messages – often via multiple communication channels – and that can adapt based on when and how buyers respond.
- **Lead scoring:** Build quantitative models that assign "points" based on certain buyer behaviors – identifying and routing leads that meet "sales ready" criteria.

When you look at these capabilities and others, keep two important things in mind: First, **today's MAP solutions are increasingly robust and powerful**; many vendors have invested heavily to acquire and integrate new capabilities ranging from social media management to advanced analytics and reporting.

The other thing to keep in mind, however, is that **as MAP capabilities expand, so does the risk that marketers will adapt (and pay for) technology they aren't ready to use**. The urge to buy the most powerful technology on the market can be overwhelming, but B2B marketers that try to run before they can walk may undermine their ability to justify these investments.

As experts like Scott Brinker point out, this is a potential problem with many types of marketing technology, but it is especially true when selecting a foundational MAP solution.

# Asking the Right Questions to Begin Your Marketing Technology Journey

According to Scott Brinker, one of the most important things a marketer can do when planning a technology stack is to resist beginning by looking in detail at all of today's cutting-edge options.

"If you're just getting started with this, I think the worst thing you can do is look at all these different capabilities and wonder: Could I use this? Could I use that?" Brinker stated. "Instead, set aside that landscape and look at your needs in terms of how and why to communicate with your customers, understand your pipeline, and perform other critical tasks."

Brinker added: "I think that when you force [marketers] to come up with that list of tasks and capabilities without looking at a technology 'cheat sheet,' one of the nice things that happens is you get a smaller list. You understand what's important to your organization here and now, and where you want to go in the future, and then you map those needs to the technology."



# 5 Keys to Assessing Your MAP Requirements

Fortunately, there's a clear path any marketer can walk to select the right MAP solution and to ensure they get value for their investment. Gauge your readiness for a MAP by asking the following questions:

## 1. Have you outgrown your existing email marketing solution?

This is the traditional precursor to adopting a MAP; if you have specific needs or challenges that your email marketing solution can't satisfy, then it's a safe bet you're ready to make the jump.

## 2. Is your sales process complex and lengthy?

MAPs deliver particular value when when your buyers require multiple touches (often over an extended period of time) to prepare them for a sales conversation.

## 3. Do your buyers require nurturing?

Lead nurturing – the process of engaging and building relationships with prospects that aren't yet ready to buy – can be an incredibly complex and time-consuming process for a B2B marketing team. A MAP solution can turn this task from nearly impossible to relatively simple.

## 4. Does your marketing team make data-driven decisions?

A MAP solution works best when marketers feed it clean and actionable buyer data, and when they are prepared to apply the data-driven insights a MAP can provide.

## 5. Have you considered the processes that support marketing automation?

A MAP solution depends on your ability to perform process-focused tasks, such as creating content-development workflows and aligning with sales, to identify and pass along qualified leads.

You may find that the first three of these questions are pretty straightforward, but the last two – dealing with data and process issues – deserve a closer look. In fact, both of them are actually separate categories in our discussion of where, how and why to plan an initial marketing technology strategy.

# 4 New Capabilities to Extend the Power of B2B Marketing

In recent years, entire categories of new marketing technology have emerged. For modern B2B marketers – and especially those with more advanced needs – a few stand out due to their ability to enhance and extend a MAP's capabilities:

1. **Advanced analytics:** Every MAP has built-in reporting and analytics tools, but advanced analytics add deeper insights into buyer behavior, key engagement triggers, and even predictors of buying behavior or deal size.
2. **Attribution reporting:** B2B marketers are increasingly asked to document and quantify their contributions to a firm's sales pipeline – allowing them to demonstrate the value of their technology investments and campaign activities.
3. **Social media marketing:** Measuring social media sentiment and leveraging these insights can be an incredibly complex activity – one that has spawned a whole ecosystem of tools designed to integrate with marketing automation.
4. **Mobile marketing:** As mobile platforms become increasingly important to reach and relate to prospects, more vendors have introduced tools designed to create and optimize mobile-ready content, measure and report user engagement, and perform other useful tasks.

# Data-Driven Marketing & Technology Planning

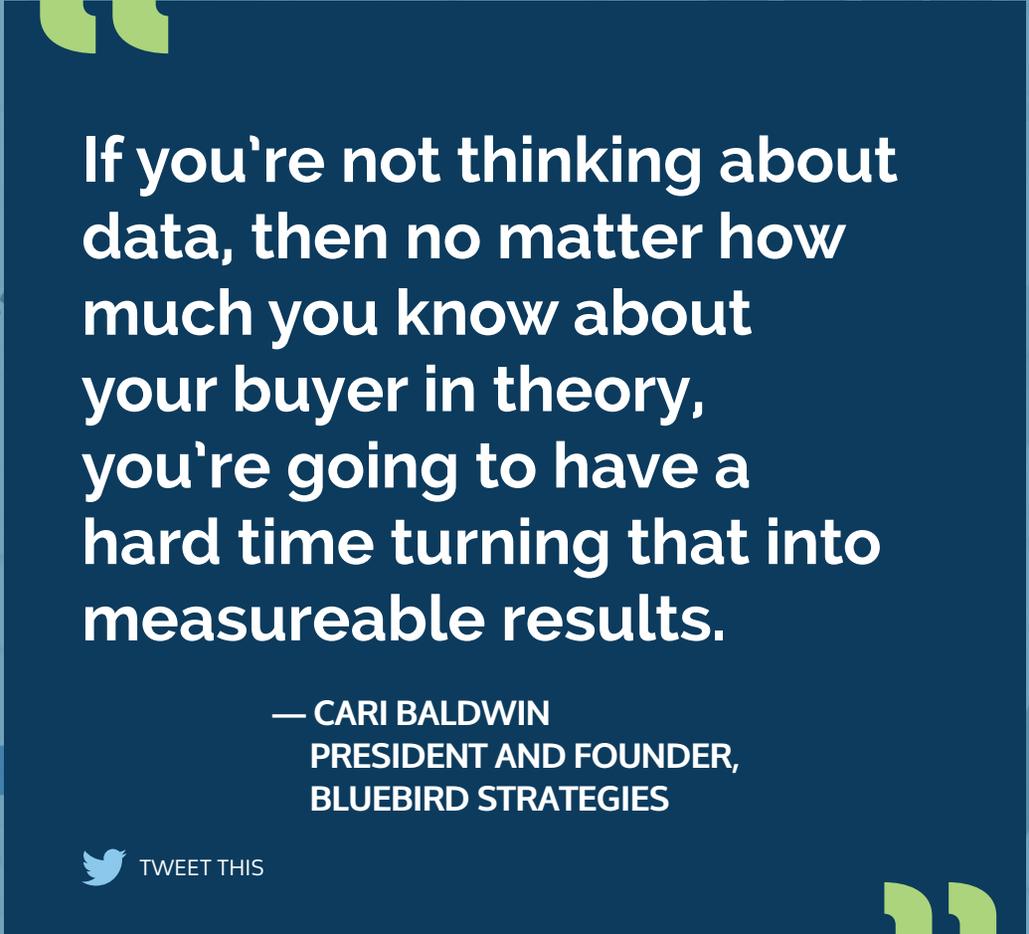
Data-driven marketing is actually a pretty simple concept. The goal is to replace what marketers think they know – often based on gut instinct and emotion – with hard, quantifiable facts about their buyers.

“If you’re not thinking about data, then no matter how much you know about your buyer in theory, you’re going to have a hard time turning that into measureable results,” said Cari Baldwin, President and Founder of Bluebird Strategies. “That means focusing on how to keep your data clean, standardize it, and make sure your records are enriched.”

Where’s the best place to get your arms around data-driven marketing? Baldwin and other experts suggest starting with the following challenges:

1. **Build a clean, robust and reliable contact database.** A number of solutions exist to help marketers strip outdated or irrelevant information from their contact lists, as well as to augment existing data with additional demographic and firmographic data that makes it easier to segment lists and to target campaigns more effectively. Clean lists are also a boon to email deliverability.

2. **Take the data burden off your buyers.** It’s tempting to use long and intrusive online forms to interrogate prospects that visit your web site and respond to email offers. That’s a mistake: Even a few extra questions on a form can hurt response rates and engagement. Instead, look for technology solutions that can automatically capture and augment data about your visitors without having to ask them specific or possibly intrusive questions.
3. **Extend your data strategy across marketing and sales.** Some of the same technology that marketers use can be extended to help sales reps get a more accurate and complete picture of buyers before they call. When marketing and sales get access to the same data sources – and the same data quality – they’re more likely to find the right formula to turn prospects into purchasers.



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— CARI BALDWIN  
PRESIDENT AND FOUNDER,  
BLUEBIRD STRATEGIES

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# Building the Right Processes to Support Your Marketing Technology Plans

In addition to having the right data, it's essential for a B2B marketing team to have the right processes in place. In fact, Gaffney said, he sees far too many cases where marketers purchased technology first and then turned to process issues – with unfortunate and expensive results.

"Today's B2B marketing activities require close coordination and collaboration across a lot of different functions," Gaffney explained. "You have to think about those activities before you figure out where and how to make technology decisions."

Two common places where B2B marketers should think about underlying processes include:

## 1. Content marketing.

It's a truism that content is the "fuel" that feeds a modern marketing automation solution – allowing marketers to engage with prospects and to deliver the kind of high-value information that builds and sustains relationships.

**Unfortunately, too many marketers select a MAP, plan a campaign and only then think about the content development process.** Instead, they should plan first for the editorial workflows – from initial concept to final review – that make it possible to create consistent, high-quality content on a predictable schedule.

## 2. Sales and marketing coordination.

Before you implement marketing automation capabilities like lead scoring and routing, ask yourself: Do your sales and marketing teams have the same definition of a lead? Do they agree on when the time is right to move a lead into the sales pipeline? Have the two teams even discussed these questions?

**Until you can answer all of these questions, many of the most powerful features found in a MAP can actually be a detriment – surfacing the wrong leads at the wrong time and potentially creating a rift between marketing and sales.**

**Before you implement marketing automation capabilities like lead scoring and routing, ask yourself: Do your sales and marketing teams have the same definition of a lead?**

# Analytics and Reporting: Tools for Turning Information into Insights

Every marketing automation platform – like every email marketing platform – includes basic analytics and reporting capabilities. As marketers become more sophisticated in their campaigns, however, many B2B marketers find themselves looking for third-party analytics and reporting tools – and there are a lot of these tools on the market. There are several common reasons why this is the case:

## 1. **Marketing automation gaps.**

Some MAP solutions are known for their robust analytics and reporting tools, but most leave significant gaps in their ability to tie back campaign reporting – for example, showing exactly when and how a specific campaign drove leads that ultimately turned into opportunities and closed deals. This is an increasingly important capability for B2B marketers, and it is one where third-party tools offer compelling solutions.

## 2. **Data visualization needs.**

It's one thing to report data, but it's another to report that data in ways that makes it accessible, intuitive and useful for business decisions. That's why so many vendors offer data visualization and dashboard solutions.

## 3. **Big Data ambitions.**

So-called Big Data solutions typically promise to take vast quantities of unstructured data, such as social media feeds or call-center records, and use them to uncover actionable business insights.

**While some B2B marketing teams are ready to adopt these kinds of tools, experts like Cari Baldwin warn against trying to do too much, too soon.** "I see a lot of cases where people buy these tools and then ask what they actually want to accomplish with them," she said. "Don't just buy something because it's cool – buy it because you need to get answers to specific questions, and your existing tools can't get the job done."



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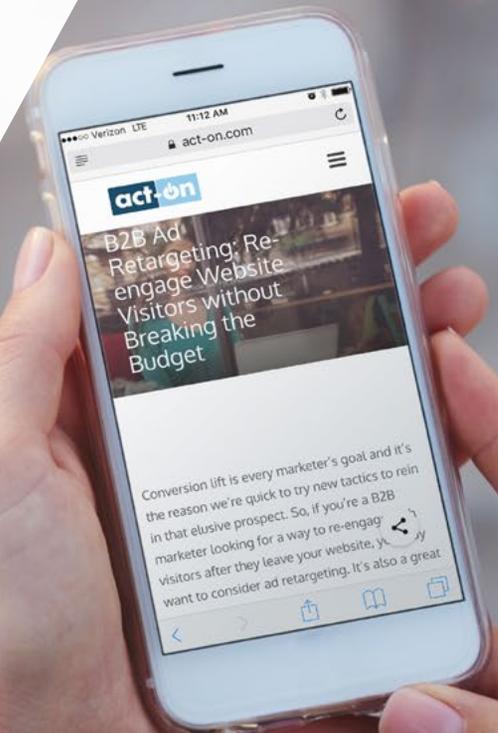
# Content Technology: A New Frontier for Buyer Engagement

As we discussed, content marketing processes are an important part of the technology discussion. But there's another aspect to content-related technology that is increasingly important: the rise of interactive content formats.

Traditional B2B content often comes in the form of PDF documents. These are great for conveying and preserving your brand's look and feel, but they're limited in terms of what they can tell you about who uses your content and how they use it.

Newer options, such as SnapApp, Vidyard, and Uberflip, take a different approach with responsive, web-based content delivery platforms. Content owners know exactly who is viewing their content, and they can even get intelligence on how much time visitors spend on certain pages or with interactive elements. In return, content consumers get a much richer and more engaging experience.

Better yet, many of these platforms integrate with leading MAP solutions, making them another important piece of the bigger marketing technology puzzle.



# Technology Integration: The New Must-Have B2B Marketing Skill?

So far, we've discussed several categories of technology – or supporting processes – where B2B marketers can begin their journey. Yet there's one more important issue to look at: how to tie all of the pieces together.

In fact, this is an even bigger consideration because it embraces other enterprise software, such as customer relationship management (CRM) systems. Marketing automation, data management and enhancement, interactive content, analytics and reporting, CRM, and other components work best when they are fully integrated – capable of exchanging data instantly and automatically.

Fully automated marketing technology stacks are incredibly powerful because they can provide a “single view of the truth” that combines multiple insights and multiple points of view. They also enable B2B marketing teams to do more with less – managing complex campaigns and large numbers of leads more quickly and efficiently.

Yet these integrations can also be challenging; while many vendors insist they offer turnkey integration options, the reality is that even a modest technology stack will present some significant integration challenges.

This is a dilemma for marketing organizations that traditionally have not – and often still do not – employ dedicated technology integration specialists. These teams may have some of the

necessary expertise in a marketing operations team, but they're more likely to rely on their IT colleagues or third-party contractors for these capabilities.

The fact is, as technology moves front-and-center for B2B marketers, these types of job roles will become the new normal for modern marketing organizations. Even if you don't have these capabilities today, planning to acquire them in the future can ensure more consistent returns from your marketing technology investments.

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# Conclusion

At this point, some of the biggest questions you have about marketing technology may not involve the things we've covered here. Instead, they may involve the things we didn't cover, such as the infrastructure and middleware solutions. (See page 4, "Today's Marketing Landscape: A Portrait of Complexity.")

That's understandable. As we mentioned in the introduction, marketing technology is now an incredibly complex and diverse ecosystem of vendors and products. Each of those vendors can explain why their solution is indispensable – and in some cases, they just might be right! Your company's requirements are unique. This means the technology stack that works for you will be unique as well.

We believe, however, that staying focused on the fundamentals is the best way to make smart technology investments that deliver repeatable results. That means...

- **Finding and implementing the right marketing automation tool – not the most complex or expensive one.**
- **Choosing a platform that preserves your flexibility and keeps your options open for the future.**
- **Ensuring that your data is clean and actionable before you put it to work – and that your technology choices are prepared to support your marketing processes.**
- **Thinking clearly about your analytics and reporting needs – being able to articulate your business goals before you go looking for analytics solutions.**

It also means understanding how today's interactive content formats give you insights into buyer behavior and preferences that were impossible to get just a few years ago.

And, of course, it means acquiring the right skills to tie these pieces together and to ensure that the results you get are greater than the sum of the parts you buy.

As you investigate marketing automation platforms, you'll find many larger best-in-class B2B marketing organizations using complex technology stacks with complicated integration issues. You may need to evolve to such a system eventually, but it's not the place to begin. In order to get started realizing the benefits of marketing automation – and to ensure that the journey is as easy and profitable as possible – stay focused on the basics. Begin with the core components and an open system, so you can scale in place, with ease, as your company's needs grow and your marketing processes evolve.



## About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.



Connect with us to learn more

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## About Demand Gen Report

Demand Gen Report is a targeted e-media publication spotlighting the strategies and solutions that help companies better align their sales and marketing organizations, and ultimately, drive growth. A key component of the publication's editorial coverage focuses on the sales and marketing automation tools that enable companies to better measure and manage their multi-channel demand generation efforts.

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