Martech Foundations: Explore Advanced Processes to Increase Efficiency

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Initiatives:Drive Tech Marketing Performance

> Implementing marketing automation technology for B2B go-to-market motions is more than just advancing leads. B2B sales are more complex. Product marketers must look to more advanced marketing automation processes to improve marketing team effectiveness.

More on This Topic

This is part of an in-depth collection of research. See the collection:

- Grow Revenue Through a Resilient B2B Martech Ecosystem

Overview

Key Findings

- Orchestrating all the martech tools to provide a consistent approach to buyer audiences requires considerable planning and effort. The ideal customer profile for each value proposition must be defined, and the customer and prospect segments must be aligned with each proposition and then tier each segment by lifetime value.

- Lead nurturing campaigns can be complex and difficult to maintain due to the long complex technology buying process that also includes many buyers.

- As testing and experimentation are essential, tracking all the activity, content and channels to determine what is working effectively remains a challenge with marketing technology (martech).

Recommendations

To improve marketing planning and performance through the utilization of technology and tools, product marketers should:

- Define customer treatment strategies by audiences (segments) organized by potential lifetime value, and then build key processes for each segment. Campaigns based on segments or audiences will always provide similar treatments to (large) groups of buyers, until one-to-one real-time personalization can be applied throughout the lead journey to all messaging and offers.

- Optimize treatment plans for each buyer audience using a combination of nurture journeys and with real-time "always on" or "trigger" campaigns. Use account-based marketing (ABM) go-to-market approaches, and align sales and marketing around them.

- Continuously test and strive for better performance. Clean data, good processes, multivariate testing, multitouch attribution and advanced analytics must be in place to utilize these techniques appropriately.

Introduction

Implementing marketing automation for B2B use cases can be complicated. Having the right marketing (and sales) processes in place is critical and will lead to greater impact and better return on marketing investment. The marketing tech stack is often particularly complex and can require many different tools.

Successfully navigating this market requires a focus on the foundations of a solid martech ecosystem, particularly the backbone of the tech stack — a marketing automation platform (MAP). This document is part of a series that looks at all the practical aspects of martech implementation and covers some of the more advanced topics.

Martech Foundations: Start With Marketing Automation and Key Processes describes the lead workflow and how to structure campaigns.

This document continues to explore more sophisticated processes required in the martech stack.

Analysis

Segmentation and Personas

Audience Management and the "Customer 360"

The audience is often the starting point for a campaign, and MAP tools usually provide sophisticated audience creation tools. They allow you, as the product marketer, to combine multiple criteria and/or Boolean logic to select the accounts/contacts you want to target in an audience. An example might be:

- Contacts of Tier 1 target accounts of a specified job title, who have consumed specified content and visited the website in the last seven days, but who are not in an opt-out list and are not an existing customer.

So, it's useful to think logically about the different audiences you might regularly need. These could include, for instance, "customers," "high-value customers," "customers in Europe" or "prospects in industry x." Specific campaigns will be targeted at them at some stage. Thus, you select an audience, and then target a campaign for it. It is the starting point. Conversely, at other times, you may have specific content, such as a webinar on a specific date with an external speaker that you want to promote. The topic is only relevant to a few of your customers or prospects, so you will define a specific audience for that webinar, and it may only be used on that occasion. In this case, the content is the starting point.

Typically, MAP tools will have sophisticated audience management tools, and the criteria can be based on marketing data and interactions, sales data imported from the sales force automation (SFA) system and potentially other data, such as third-party intent data.

More sophisticated organizations may use a dedicated customer data platform (CDP) that ingests the data from multiple sources and builds the profile of each contact. The discussion around data strategy and where to hold the customer data or "customer 360" is a complex one. For more information, see Apply Customer Data Management Technologies to Create Better Customer Experiences.

Website and Web Content Management System

The company website is usually at the core of any marketing strategy. Therefore, it is essential that it be up to date with the company's latest proposition, clearly articulated, and it adheres to good website design, search engine optimization (SEO) and messaging guidelines. For more information, see Website Redesign: How to Scope and Kickoff and How to Optimize Your Website for Relevance and Engagement Success.

Website content must be optimized so that the content also works well for SEO purposes. A consistent flow of new content also helps in ranking higher in search engine results. Production of content is beyond the scope of this document. However, there is a process involved in creating, approving and leveraging content that may be part of the content management system (CMS) or a dedicated digital asset management system and marketing work management tools.

In terms of building and maintaining a web presence, several MAP vendors provide the ability to build and host a website or series of microsites. Simple websites may start with a builder such as WordPress, but as scope (and complexity) grows, they may transition to a full web content management system (see Market Guide for Web Content Management). However, the benefit of using a CMS built or hosted within the MAP compared with a stand-alone CMS, is to make personalization easier.

As research shows that conversion rates are typically higher when the message (webpage content) is personalized and relevant to the visitor, [1] product marketers should plan to include website personalization. This may be as simple as a hero image and tagline on a page being specific to an industry that the website visitor's organization is from (that is, the visitor is from banking or other industry). These capabilities are relatively straightforward to achieve when using a CMS built within a MAP. If using an external CMS, then a third-party tool or data connector may be additionally needed to link the personalized data in the MAP to the CMS. Tools such as ABM platforms normally include APIs or data connectors to integrate with the CMS.

Lead Nurturing and Account-Based Marketing

Orchestrating Nurturing Campaigns

A challenge with B2B buying journeys is that they include multiple buyers and are long and complex: The median buying cycle from Gartner's 2022 Gartner Technology Buying Behavior Survey takes three to six months. To account for this length and complexity, technology marketers need to think of maintaining a relationship with an account and its constituent buying committee over a long period of time.

Most of the MAP tools have some form of *planning canvas*, such as the example in Figure 1 from Oracle's Eloqua user interface in 2023. These interfaces allow marketers to build out a series of largely prescribed steps in a flow/stream/cadence.

Figure 1: Example of Lead Nurturing Workflow in Oracle's Eloqua Nurturing Canvas
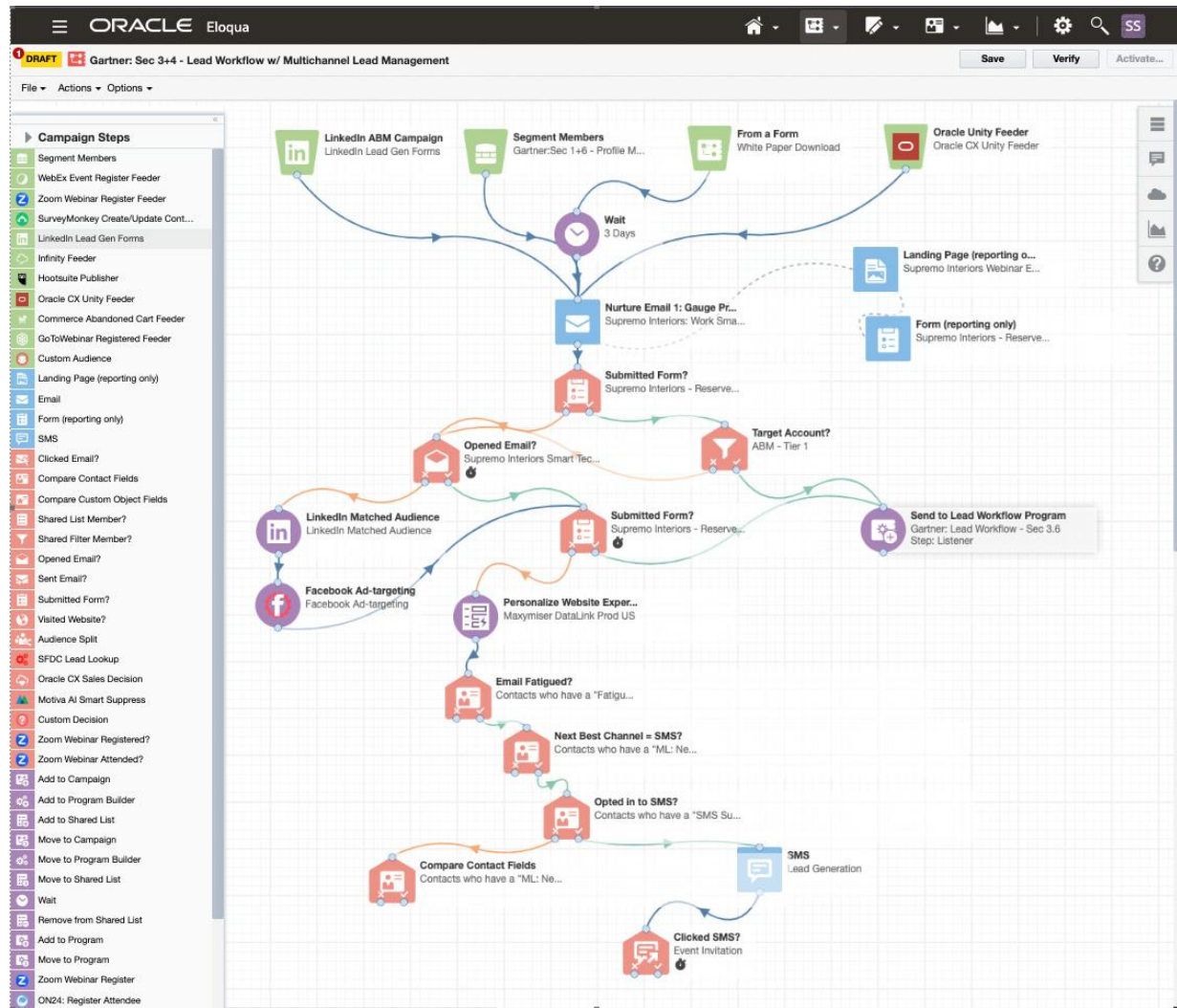
Oracle

As can be seen from Figure 2, there can be multiple start points (a response to an email, a click on an advertisement or a visit to a website, among others), and then there can be decision points and branching. (For example, did a user register for the webinar, or did they actually attend?) The marketer should construct a journey whose objective is to assist the buyer and answer questions at each point in their buying journey.

It's worth thinking about coordination and aligning with sales, as the modern tech marketer, particularly with ABM approaches, usually maintains outreach to prospects all the way through their journey, even when sales is involved. Understanding and agreeing how this journey is coordinated is important. There are three modes — marketing outreach via the MAP, sales outreach using sales or partner enablement content (usually prepared by marketing), and passive marketing via the (personalized) website.

The simplest form of a customer journey may be to think of a linear flow with a single channel, usually an email, where a series of emails are sent out in phases involving various items of content that are offered. If there's no response, each item may be reoffered a few days later until the prospect has progressed to the next step.

To build these journeys, you should consider these tasks:

- **Map the journey.** Work with your customers, prospects and internal stakeholders to map out what a typical buyer journey looks like. (For more information, see Focus on Buying Jobs Rather Than the Chaos of Buying Journeys).

- **Align content with buyer needs and questions throughout the journey.** Then you can align relevant content to each need, stage or question.

- **Plan out the theme based campaigns.** Select the content, calls to actions (CTAs) and channels and steps that are required.

- **Define audiences.** While trigger campaigns act on one contact/account that has been triggered by an event, most other campaigns will start with an audience (segment) that is then treated with a given customer journey via a single or multiple campaign or campaigns.

The sales funnel and its stages are different to the buyer journey and its stages: The former is internal and assists with reporting, while the latter is external or outside-in view from the customers' perspective. But the sales and marketing processes should reflect the buyer journey, and track where the buyers are in their journey and which of the "jobs to be done" may have been completed. Figure 2 shows a representation of the buyer journey, highlighting the complexity and some of the jobs to be done.

Figure 2: The Complex and Challenging Buying Buyer Journey

B2B Buying Journey
Illustrative

Source: Gartner
756623_C

Gartner

The challenge then is to determine, or infer, at what stage each buyer is. This can be done by lead scoring or setting the stage value, based on what content that buyers consume, and other methods. An assumption is that a prospect with no history of interaction is at the earliest stage, which may be incorrect.

With an estimation of where the buyer is in the journey, you may then have a themed campaign that consists of a drip-feed of content based on assuming the buyer's current journey stage.

The challenge with themed campaigns, journey stages and nurture campaigns is it's difficult, if not impossible, to build a journey that reflects the complexity and many months of a typical buyer journey. This situation can lead to complex and intricately mapped out journeys, including many items of content and decision points. Also, contacts within the MAP can be eligible via audience selection to be "in" multiple campaigns and also receive triggered campaigns, which can mean that potentially conflicting treatments are provided to a contact at the same time.

How this challenge is resolved will vary between different MAP technologies and how they are organized, including using suppression filters in your audience segmentation based on recency and frequency of contacts receiving an email. (For example, contacts who have not responded after four outreach emails could be automatically opted out or put on a much reduced outreach cycle.) It also depends on the complexity and maturity of the marketing organization itself and the sophistication of its campaign plans. Hence, these planned journeys can become difficult to maintain, so it's preferable to keep these simple at the beginning or if your organizational resources are limited.

Account-Based Marketing

ABM is the practice of marketing to the entire account or, more accurately, for a given opportunity, to its entire buying committee (see Research Roundup: Account-Based Marketing). MAP tools historically only dealt with leads and contacts. However, the rise of importance and return on investment from ABM programs have meant the majority of MAPs now understand the concept of an account, which may have many different contacts/leads and opportunities associated with it.

ABM has become a popular demand generation/go-to-market approach, and according to the 2023 Gartner Tech Marketing Benchmarks Survey, 74% of the respondents said that their organizations are executing — ABM approaches in one or more countries.

ABM technologies are covered in Gartner's Magic Quadrant for ABM Platforms. These technologies offer additional capabilities that are not usually offered in a typical MAP such as account-level scoring and audience management, native intent data, and native orchestration of display advertising.

With ABM programs, the best practice is for both marketing and sales to be involved with a prospect in their buyer journey up until the point of the negotiation. Sales and marketing should both be aligned to help the buyer get their jobs done so a purchase decision can be made. In traditional demand generation models, leads were qualified and then handed off to sales; now, marketing will remain involved and support sales with content, outreach directly from the MAP and passively from the website. This is represented in Figure 3.

Figure 3. Sales and Marketing Handover and Co-Working in ABM

Sales and Marketing Handover and Co-Working in ABM
Illustrative
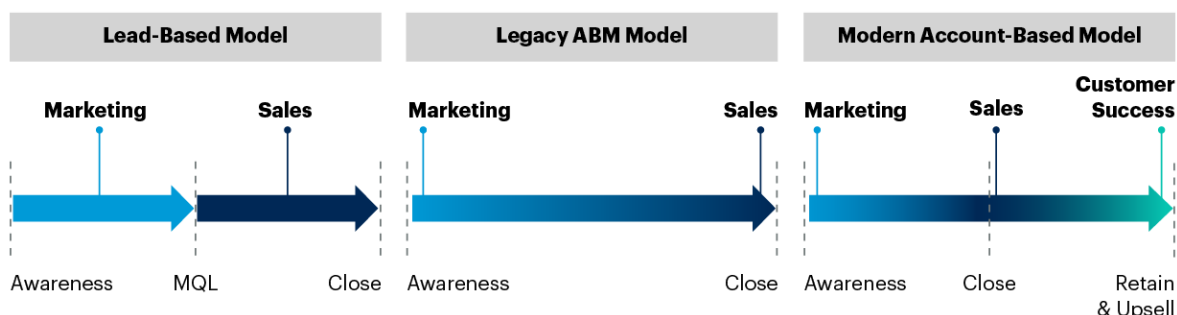
Source: Adapted from Demandbase
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What's important here is to get the senior stakeholders together to agree how this will work and what collaboration and SLAs will be expected in different use cases, such as new business customer acquisition and account growth.

Advanced Analytics and Profiling

A/B and Multivariate Testing

This is a staple of the data-driven marketer. In the early days of setting up marketing automation, it's important to get all the components and content working together to generate demand and leads. Your campaign and other reporting mechanisms will give you a baseline as to what you are achieving in terms of conversion, pipeline and closed-won business metrics. Once you have a baseline established, you can begin to perform A/B testing. More advanced users may use multivariate testing, where multiple factors are tested at once. A/B testing can be applied in many areas. The most common include:

- Email subject lines to influence the open rate

- Email content — parts of the text and images can be varied to improve views and click-throughs

- Choice of images (for example, hero image) for calls to action or buttons —- improve click-throughs on emails and landing pages

- Landing page — hero images, text, forms or buttons — to improve form fill when accessing CTA content

- Webpages optimization — test for conversions and dwell time

A/B tests normally allow you to select two or more creative elements and then allocate a percentage of your selected audience to be used for the test. Next, set another parameter for how long or how many impressions are needed before a decision is made. The MAP will then decide the best performing element and use that for the remainder and bulk of the campaign.

See Optimize Online Customer and User Experience Using A/B and Multivariate Testing.

Attribution and Analytics

A tech marketer should make decisions based on data, rather than guessing. Data can influence which channel to use by analyzing which is most effective in terms of leads generated, conversion rates and, ultimately, marketing-influenced pipeline and revenue.

This data-driven approach can be taken further to look at more granular data and see the attribution of content and channels on the customer journey. In B2C use cases with a short sales cycle, this can be relatively straightforward, but in a B2B journey lasting several months or more, there can be hundreds of interactions with different content and with sales in multiple channels. Trying to attribute success to a particular channel, campaign or content is challenging and as much an art as a science.

However, leading MAP products may have an attribution capability included in the platform. They typically provide a number of different attribution model types:

- First touch

- Last touch

- Linear

- W shaped

- ▪ U shaped

An explanation of these is beyond this document but see The B2B CMO's Guide to Marketing Attribution, Measurement and Testing for more information.

It's likely that in a B2B context, a simple first- or last-touch model is not realistic. We recommend trying various attribution models to see what insights can be provided.

Progressive Profiling

Several MAPs provide progressive profiling capabilities. These build up the contact data collected over time to create a richer profile, often referred to as an "ID graph," and recognize the trade-off in conversion rates with long and complex forms. With progressive profiling, if an existing known user requests a second item of gated (behind a registration form) content the system:

- ▪ Prefills the form with the already known data, such as the user's email and name

- ▪ May also ask for a new field(s), such as industry or department.

The third time the user visits, the system may ask for new additional fields, and so on.

Evidence

[1] Conversion Rate Optimization Report 2017, Econsultancy and RedEye.

The **2022 Gartner B2B Buyer Survey** was administered in November and December 2022, and it includes data from 771 B2B buyers from the U.S., Canada, the U.K. and Australia. Respondents who qualified for this survey had to be employed full-time at an organization with total revenue of at least $250 million or the equivalent and had participated in a significant B2B purchase decision. A "significant B2B purchase decision" is defined here as a decision that required deliberation with at least one other person and the evaluation of more than one potential supplier or vendor. Respondents were instructed to answer questions based on their experience with this recent purchase and with the supplier that was used to complete the purchase. Respondents evaluated the quality of the purchase decision and provided insights into various stages of their recent purchase decision. Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

The **2021 Gartner B2B Buyer Survey** was administered in November and December 2021, and it includes data from 725 B2B buyers from the U.S., Canada, the U.K., Australia, India, Singapore, Germany and Sweden. Respondents were required to be employed full-time at an organization with total revenue of at least $250 million and have participated in a significant B2B purchase decision. A significant purchase decision was defined as a decision that required deliberation with at least one other person and the evaluation of more than one potential supplier or vendor. Respondents were instructed to answer questions based on their experience with this recent purchase and a specific supplier they considered. Respondents evaluated the quality of the purchase decision and provided insights into various stages of their recent purchase decision. The survey was developed collaboratively by a team of Gartner analysts and Gartner's Quantitative Analytics and Data Science (QUADS) team. Disclaimer: Results of this survey do not represent global findings or the market as a whole, but do reflect the sentiments of the respondents and companies surveyed.

The **2022 Gartner Technology Buying Behavior Survey** was conducted to understand how organizations approach large-scale buying efforts for enterprise technology. The research was conducted online from November through December 2021 among 1,120 respondents in organizations with at least 20 employees and $1 million in annual revenue, and residing in either North America, Western Europe or Asia/Pacific regions. The North American countries represented in the survey were the U.S. (36%) and Canada (7%). The European countries were France (12%), Germany (13%) and the U.K. (20%), and Asia/Pacific countries were Australia (6%) and Singapore (5%). Industries surveyed included education, financial services, government, insurance, healthcare, manufacturing, natural resources and energy, media, retail, services, telecommunications, transportation, utilities, and wholesale. Respondents representing information technology organizations were excluded from the survey. Respondents were required to be at a manager level or higher, aware of large-scale buying efforts for technology occurring during the past two years, and directly involved in the evaluation or selection of products or services for technology projects. Qualifying technology purchases included new, replacement or expansion purchases of software, services, hardware, managed services or integrated solutions. At least 70% of the purchases reported by respondents had contract values of at least $250,000. Approximately 87% of expansion purchases resulted in at least a doubling of the original contract value. The survey was developed collaboratively by a team of Gartner analysts and Gartner's Research Data, Analytics and Tools team. Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

The **Gartner 2022 Technology Marketing Benchmarks Survey** was conducted online, from 8 March through 9 May 2022. A total of 381 respondents were collected from technology-focused organizations with more than $10 million in revenue located in the U.S., Canada or the U.K. Respondents were required to have one of the following primary job functions/roles:

- CEO/president/founder

- Demand/lead generation

- Marketing leadership

- Sales leadership

- Web/digital social marketing

- Marketing operations/analytics

They were also required to have knowledge of the marketing budget and spend for the company or business unit and knowledge of the marketing campaign/programs tactics. At the country level, quotas were established to guarantee a good distribution in terms of product offering (software, technology services, and hardware) and company size (revenues). The survey was developed collaboratively by a team of Gartner analysts and was reviewed, tested and administered by Gartner's Research Data Analytics team.

The **2023 Gartner Tech Marketing Benchmarks Survey** was conducted online from January through March 2023 among 310 respondents. Respondents came from technology-focused organizations located in the U.S., Canada and the U.K. with more than $10 million in annual revenue. Among the total respondents surveyed, 215 respondents came from organizations with $100 million or more in annual revenue.

Respondents were required to be aligned to one of the following primary job functions or roles:

- Demand generation/ABM marketing/performance marketing

- Marketing executive leadership

- Web/digital/social marketing

- Marketing operations/analytics

- Product marketing

- Customer marketing

They were also required to have knowledge of the marketing budget and spend (for the company or business unit) and the marketing campaign or program tactics. Quotas were established to guarantee a good distribution in terms of countries, product offering (software, technology services and hardware) and company size (annual revenue).

Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

Martech Foundations: Optimize Budgets and Maximize Utilization

Martech Foundations: Start With Marketing Automation and Key Processes

Martech Foundations: Metrics and Marketing Impact

Martech Foundations: Marketing Precision With Use Cases and Data