



The Guide to Building Your Marketing Technology Stack



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Let's just jump right in, shall we? Since marketers love a good stat, try this one on for size: 2567%. No, that's not a typo and in fact the percentage should technically be even higher.

This astronomical percentage represents the unprecedented, unbelievable, unimaginable increase in the number of technology vendors from 2011 until now. Let that sink in for a second. In only five years the amount of vendors offering a marketing technology solution of any kind has increased two thousand, five hundred, and sixty-seven percent.

The number comes courtesy of the man who has become something of a folk hero in the MarTech space, Scott Brinker. Back in 2011, Scott decided to create a chart to illustrate the number of technology vendors and their offerings or solutions. Back then there were only 150 of these kinds of vendors, so the chart was fairly easy to put together.

Today there are more than 4,000—hence the colossal percentage increase. As to why we don't know what the exact number is, quite honestly, the man himself who tracks them is not even sure.

And if you think marketing was the last area to benefit from a tech boom, you would be right according to Brian Hansford, Director of Client Services for Heinz Marketing.

"Marketing departments were the last to get any sort of strategic technology platforms," says Hansford. "Finance, sales, manufacturing, distribution, and HR functions all benefited from technologies that helped streamline how they operated and provided analytic insights. Thanks to the innovations throughout the MarTech landscape, marketers now have tools that help them better engage with customers and measure the results."

In this guide—in addition to an exclusive Q&A with Scott Brinker—we delve into specific areas of marketing that are most impacted by technology solutions and marketing platforms. And we provide a list of questions that you need to ask of any potential marketing technology solution provider.

At the end of the day successful Modern Marketing requires the use of innovative technology. The problem is there are so many new options—and more arriving daily—that identifying the right ones and getting them to work together is not easy. Modern Marketers need to spend more time innovating and less time integrating. That's why an open platform that offers pre-integrated apps is essential to success.

The number of MarTech tools increased
2567% since 2011.

— Scott Brinker

The Marketing Technology Landscape: Interview with Scott Brinker

Scott Brinker is co-founder and CTO of the interactive content marketing firm ion interactive and author of the chiefmartec.com blog. He is the mastermind behind what has become the symbol of the ever-growing technology landscape via the now infamous image below.

We sat down with Scott to pick his brain on many topics, including the explosion of the marketing technology landscape, the trends he has identified over the years, and where he thinks this is all headed in the future.

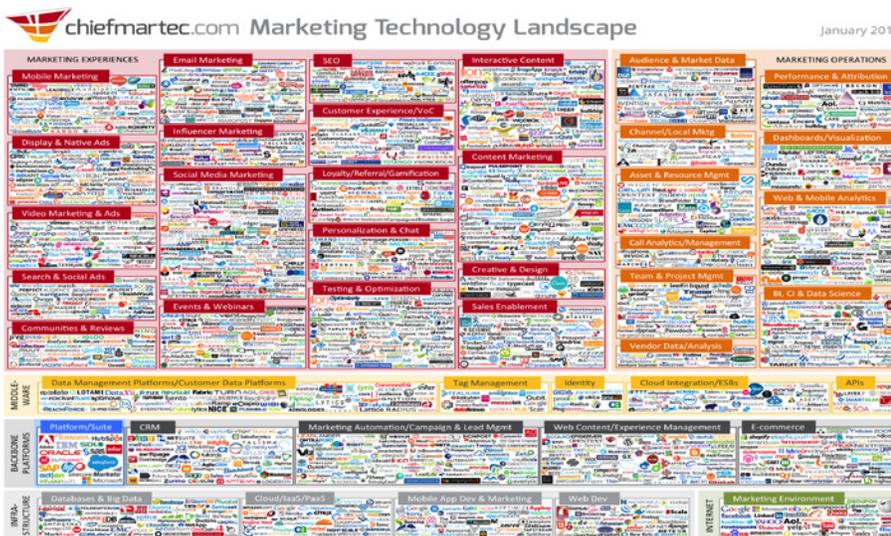


Image by Scott Brinker chiefmartec.com

- Q How long have you been tracking the marketing technology ecosystem?**
- B** I've been tracking the ecosystem since 2011. I've been writing for a number of years about technology professionals having a greater and greater role in the marketing department, and one of the reasons I started assembling that chart of marketing software companies was really just as an exhibit to demonstrate, "Hey, look at how much technology and how much marketing is becoming dependent on these tools and these technologies to do its job." And I thought that was a lot when it was like 150 of them.
- Q How many technology and marketing platforms are there today, as of last count?**
- B** There's "how many companies there are" and there's "how many I can fit on a single page." My best guess is that there are about 4,000 companies worldwide that could be legitimately labeled as marketing tech or marketing technology companies. Usually on my graphs, I probably limit them to a ceiling of about 2,000, and that's trying to show as representative of a sample as possible.

- O** **With that proliferation—from 150 to over 4,000—have you noticed any specific trends in terms of the types of technology?**
- B** There’s definitely a whole category of major companies, who even if a company doesn’t buy only that software—most companies now do have multi-product strategies—they will often look to one of those companies, or possibly a couple of them, as their foundation around which a lot of the rest of their ecosystem or marketing stack is built. Outside of those big companies—and there’s a finite number of those—there are these more innovative niches of all the incredible things people are doing around things like more advanced customer analytics, content marketing management, really cool things with social media. The nature of social media itself continues to change at such a rapid rate so you can imagine all the companies that chase those new opportunities with software to support it. That innovation is spread very widely across many different categories.

“ There are so many new channels, so many new ways of engaging customers and prospects, but part of it is also just the changing nature of software. ”

— Scott Brinker, CTO, ion interactive

- O** **It sounds like there’s this core group of big players and then there’s a lot of smaller niche companies that only offer a social media technology option, or that only does content marketing. So there are smaller players and then there are the big boys at the table kind of thing.**
- B** Yeah. And even within a category, you can often have not just a company that specializes in content marketing, but a company that specializes in curating visual content marketing, and that’s all they do, and another company that specializes in social media analytics associated with content marketing, and they do this really, really well due to their focus. A company like that can be very valuable, but it’s probably not going to be a multi-billion dollar company unto itself.
- O** **If we think about this from a marketer’s perspective, all these options create a double-edged sword. On one hand, there are a lot of options. On the other hand, there are a lot of options. I can’t imagine wading through that sea, that really now seemingly endless sea of technology vendor options.**
- B** The strategies that people take to solving this are really important. Starting with my landscape is usually the wrong first move. The landscape I do is meant almost entirely as a conversation piece, just to be aware of just how massive the scale and scope of marketing tech is.

When it comes to how a marketing organization actually needs to think about what technology it should adopt, in what order, how it’s going to be able to operationalize that, I always recommend that they put the landscape aside. Don’t look at that, but rather sit down from a customer-centric perspective of what is the audience we’re trying to reach, who are we competing with for their intention, their engagement, their revenue, and really be able to look at

what sort of marketing capabilities do we need to be able to competitively execute in our space.

Then, from that approach—what are the actual business strategy, marketing strategy requirements—you start to back into what capabilities are we going to need to do that, and then start looking very focused on which technologies will help you achieve that.

“ I think we’re getting near what I would call Peak MarTech—where there’s a finite number of companies that you can have in this space that have limited budgets, limited time, and so on. ”

—Scott Brinker, CTO, ion interactive

Q Where are we headed with all of this in the future?

B There are several possible futures that I think are all viable.

I do think it is a viable future to consider this landscape consolidating significantly. I don’t believe it will consolidate down to simply a dozen companies. If you look at almost any software-powered market in the enterprise now, they don’t have the same market dynamics that they did in the ’80s and the ’90s. But still you could see really significant consolidation and maybe get it down to a marketplace that has several hundred vendors. That’s one possible world.

The most likely outcome is a two-tier market where you have a small set of primary marketing technology platforms. Oracle is a terrific example of what that strategy can be. You have a number of these finite platforms that provide stability. They provide some standardization. They provide the rock around which companies can then build their marketing technology strategy.

“ I think the collaboration between marketing and IT is the centerpiece to having a coherent marketing technology strategy and how you deal with the landscape. ”

—Scott Brinker, CTO, ion interactive

But there is a second tier that these platforms really help cultivate. They help enable ecosystems through the APIs and their ISVs (independent software vendors) that allow hundreds or possibly even thousands of companies to come up with more focused, innovative, marketing software that plug into that environment and really give marketers the best of both worlds. It gives them that solid foundation, a standardization for their data, but at the same time, the ability to always be able to pick and choose the innovative capabilities on the edge of how marketing is changing that is the best fit for their particular marketing strategy.

“ Many core platforms offer a solid foundation of capabilities, for example marketing automation and CRM. By themselves these solutions have some white space where a partner ecosystem can add value like personalization, content marketing, and predictive intelligence. ”

—Brian Hansford, Director of Client Services, Heinz Marketing

Marketing Automation

Successful email marketing, demand generation, and lead management processes hinge on a strategy closely aligned to buyer needs and expectations across all phases of the buying process. Marketers are increasingly enhancing their understanding of how data can fuel the delivery of meaningful interactions. This access to vast sources of information that marketers are applying to execute and achieve more refined marketing simply can't be captured manually.

Marketers are leveraging the power of marketing automation to refine, target, and optimize program initiatives, including customizing content and automating communications. Marketing automation technology empowers marketers to improve their knowledge of buyer behavior and understand how it plays out in campaigns.

85% of B2B marketers using marketing automation platforms feel that they're not using them to their full potential.

—SiriusDecisions

Campaign Management

Marketers look to marketing automation programs to run their campaigns. Welcome campaigns, nurture campaigns, event reminders. Everything you do is organized around these campaigns. Sometimes they are simple and follow a very linear course of action. But marketers are creative, and have been known to over-think things from time to time. When that happens, we need to design campaigns that have the ability to respond to real customer activities, not some limited and prescribed series of steps.

When you are looking at marketing automation tools, you need to consider both the simple campaigns and the more sophisticated ones. Marketing technology needs to support marketers in their jobs, and not make them feel like they need to go back to school for a computer science degree. Where they rely more on DIY than IT.

One of the biggest misconceptions about marketing automation is that you can set a campaign and forget it. That is not what you want to hear about a tool. Have you ever had a marketing plan change? Sometimes it happens right after you send that email. Now it's time to scramble and reconfigure your campaign with another email and landing page. Make sure your solutions can support these real world scenarios. And remember, the degree of reactive marketing craziness that you have to put up with may vary.

Simply put, you want to get to this euphoric state of campaign operations:

- Easily design and run sophisticated campaigns.
- Measure results.
- Change them on the fly.
- Restart with one click.
- All without IT help.



Targeting and Segmentation

Another key component of any marketing automation program is the ease with which you can target and segment your prospects and customers. You need to be able to capture activities and actions from your owned, earned, and paid channels to target the right people with the right message. Don't waste your time and resources on people who—based on their actions—will never be customers.

Create highly targeted segments and campaigns based on buyer data including social interactions, campaign response, past purchase history, and opportunity status, or any third party data. This will let you quickly identify customers and prospects, so you don't make that awful mistake of sending your customers a message meant for prospects. Nothing shatters a customer's confidence in you more than thinking you don't know who they are.

Just like a marketing team that needs to act a team to get things done, your tools need to connect with other tools, so that you can take advantage of your data to present dynamic content within emails, landing pages, and forms.

Here's what successful targeting and segmentation looks like:

- Quickly identify customers and prospects.
- Precisely target and segment campaigns.
- Personalize and deliver content in context.

Lead Management and Scoring

Every prospect who completes a form on your website or blog is a lead. We all want more leads. Except for those of us who don't. According to a study by Ascend2, 70% of B2B marketers cite improving the quality of leads as the most important objective of a lead generation strategy. And the best way to determine that quality is through lead scoring. That's why you bought—or are considering buying—marketing automation. So you can turn more MQLs into SALs.

Every system has lead scoring, but how flexible are they? Most lead scoring models are based on elements of a prospect's profile and their online activity—or their Digital Body Language—and responses to your campaigns. Some programs tie their lead scoring model to a single campaign. A more flexible and sophisticated system can aggregate activity from multiple campaigns when considering a lead score. Think through your lead scoring model before getting caught in system that doesn't support what's important to qualifying your leads.

Open Platform

There's been a lot of talk about open ecosystems, and there's sure to be some more before we're done. It's one thing to provide a long list of partners that can extend the capabilities of your marketing automation tool, but make sure they work. An open platform means you can find what you need, add it to your stack, and it just works. Out of the box, as they used to say. There's no need to submit a ticket to the IT department, or even bring them a box of cookies. Instant activation and immediate functionality. You get up and running faster at less cost. What more could you want?

Modeled after Apple and their app store, most major marketing platforms provide access to additional tools in their own marketing app store. Be sure you understand how these tools connect to the tools you are considering, including the full stack. If the site has reviews, check those out. And when you're kicking the tires, ask to see how easy it is to plug in these apps. This is where the demo could go off script. Or off the rails. Ask for customer references for your preferred apps too. You could learn a lot.

QUESTIONS TO ASK A POTENTIAL MARKETING AUTOMATION VENDOR:

- How easy is it to change my campaigns once they are set up?
 - How does dynamic content work in my emails, landing pages, and forms?
 - How flexible are the lead scoring models?
 - What are the most common apps that customers use to extend their system?
-

“ Thanks to the innovations throughout the MarTech landscape marketers now have tools that help them better engage with customers and measure the results. Showing the impact to revenue with facts and data raises the status and strategic importance of marketing.

— Brian Hansford, Director of Client Services, Heinz Marketing

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Cross-Channel Marketing

Cross-channel marketing technology is a pillar of the overall B2C ecosystem because it represents the execution engine of your marketing strategy. Even the most well thought-out marketing plans are bound to fail unless they are executed properly using the right technology.

We've already alluded to the fact that marketers love stats. Well, here are some to ponder when it comes to cross-channel marketing:

- 70% of marketers lack a consistent or integrated content strategy. (Altimeter)
- Less than 1 in 4 marketers say they understand customer journeys and adapt the channel mix accordingly. (Econsultancy)
- 89% of marketers admit they have challenges when it comes to creating a single view of the customer. (Experian)
- 32% of consumers indicated that the biggest improvement retailers need to make is to provide an integrated shopping experience across channels. (Accenture)
- 65% of US-based respondents currently shop across at least two channels, while 25% of global respondents and 21% of US respondents are using four or five channels to shop. (PwC)

Rest assured there are more stats just like these to make the case for an integrated, cross-channel marketing experience. The fact is consumers use more than one channel. And very often they will start their path-to-purchase on one channel and complete it via another, perhaps stopping at yet another on the way. This crossing of channels, if you will, is why you need to have access to a full and overall view of your customer via integration across all channels.

Such things as gender, location, browsing habits, and demographics are the basics when it comes to knowing your customers. But the best marketers in the world fully understand their customers in greater detail. They track and measure all touch-points along the path to purchase—from display to search to email and more—they understand the influence each channel has by using the right technology.

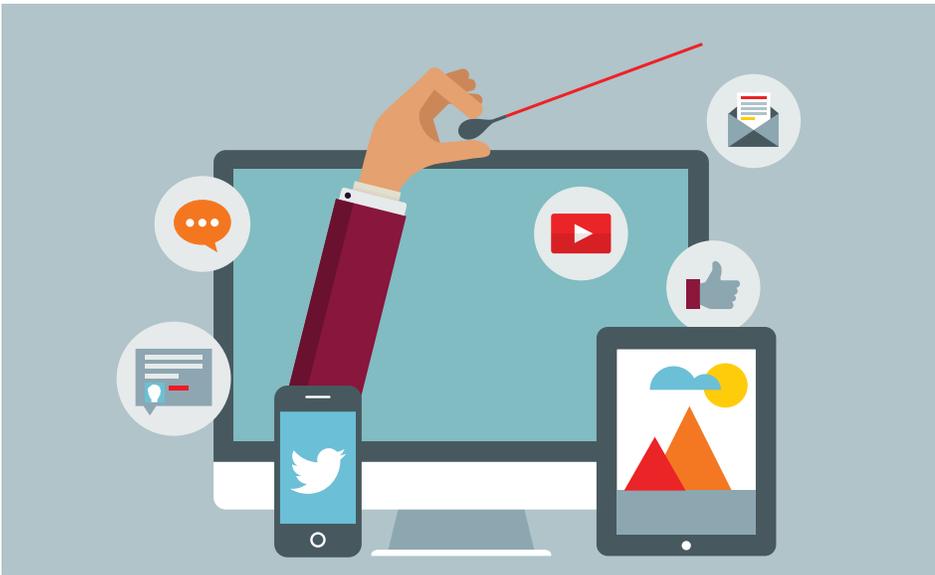
89% of marketers admit they have challenges when it comes to creating a single view of the customer.

—Experian

Orchestration

Marketing technology must be able to orchestrate experiences across multiple channels. Orchestration is a critical concept when talking about digital marketing and really draws the lines of distinction between blindly blasting marketing messages across multiple channels, and contextualized and informed cross-channel experiences.

The technology tool you use needs to be able to provide you with a way to tie channel IDs back to a single identifier so you know who they are, what their preferences are, and how they interact with digital marketing across various channels.



Ecosystem

Maintaining an open platform is required for a variety of reasons, the most obvious being that marketing technology is constantly changing. A partner ecosystem allows customers to leverage a wide variety of additional features in emerging areas of digital marketing through plug and play pre-integrated apps.

The marketing platform is just one piece of the customer experience. Call centers, brick and mortar locations, and interactions with a salesperson are all important encounters that happen outside the tool. However, integrations within the overall ecosystem enable marketers to bring the data from these interactions into the technology tool to gain a more complete view of the customer experience. Armed with this information, marketers can create more intelligent and effective interactions that please their customers as well as their bosses.

Metrics

Choosing the right metrics will largely depend on a particular business's goals. Without the right measuring stick, it will be difficult to diagnose issues and correct them. It is important to note that you should not fall into the trap of judging every message based on direct revenue generated. Some of the most useful ones, such as flight reminders or delivery notices, go a long way in creating loyal and revenue generating customers.

In terms of basic metrics, measuring engagement through unique opens, click through rates, and other similar engagement metrics are important. However looking at these metrics at the general level will offer limited insights. The real power comes from examining engagement at the link level: What got your customers to click? Why was this content more attractive than others?

Consider the robustness of metrics in your technology search. Are canned reports and dashboards the only options, or can you customize them to meet specific executive goals for attribution and transparency. Pretty charts and graphs are just eye candy. Don't think entering the date range and clicking submit completes your reporting. It's your added analysis and insights that actually make the reports valuable.

QUESTIONS TO ASK A POTENTIAL CROSS-CHANNEL MARKETING VENDOR:

- Can I connect cross-channel unique identifiers (email, phone number, device ID) so I can orchestrate across all my digital channels?
 - Can I do day-to-day segmentation, execution, and reporting myself, without IT support?
 - How does your solution help me and my team be more efficient in creation, testing, and automation so I can spend more of my time strategizing and less time doing?
-

“When a marketer has the freedom to choose the best tools for the job, and when those tools natively integrate with one another, they gain the benefits of an integrated suite with the flexibility to swap out solutions as their needs and budget change.”

—Yoav Schwartz, CEO, Uberflip

Content Marketing

Content marketing has taken over the world of marketing perhaps like no other type of marketing has before it. According to the Content Marketing Institute, “Content marketing is a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly-defined audience—and, ultimately, to drive profitable customer action.” To state this more simply, it is all about creating the right content for the right audience and delivering it when and where they want it. But it also has to consider what action you want your reader or viewer to take upon discovering your content.

“If your content sucks, good technology will make it suck faster and to more people,” says Tim Riesterer, Chief Strategy Officer of Corporate Visions and Co-Author of *The Three Value Conversations*. “A marketer’s priority should be strong messaging, delivered by cutting-edge technology. Open ecosystems help marketers remove technology innovation obstacles in order to focus on what matters most: engaging customers.”

Creating Content

Start with creating original content. Sounds obvious for sure, but it is far too often taken for granted. Content that answers prospects’ questions or solves their business problems is the way to generate awareness and start a relationship with them. It is also a way to build search authority to improve search engine optimization (SEO).

Audiences don’t want to see the same material over and over again. They want to be exposed to new concepts and ideas to enhance their own education. By leveraging new content across distribution channels, marketers are able to differentiate their brand as a thought leader in their industry, gaining their audience’s trust and loyalty.

85% of B2B marketers cite lead generation as their most important goal of content marketing.

—Content Marketing Institute

This new content should be shared through channels where your prospects are, including blog posts, social media posts, e-books, white papers, video, or the latest drone content delivery system that will appear on Scott Brinker's version of the marketing landscape graphic in 2020. Content technology tools need to both help ease the process of creating new content, as well as harness key content contributors in order to capitalize on existing resources. While some tools promise a network of freelance writers or agencies, it is important to remember that in-house marketing provides an organization with complete control of their brand, messaging, and positioning.

“ More is not better. Better is better. ”
— Joe Pulizzi, Founder, Content Marketing Institute

Integration

A key feature of a content marketing system that is often undervalued is an integrated editorial calendar. You've been told for years that you need to act like a publisher and one of the best ways to do that is to schedule content across channels from one centralized location. What day a particular blog post is running is just part of the picture. Truly successful content marketers have a global view of how and when their content is distributed. This can also serve as a focal point for the marketing organization. As more and more plans revolve around content, giving the whole team access to this one calendar, instead of emailed spreadsheets and a series of presentations saved on the intranet somewhere, can provide a level of efficiency that is often dreamed of, but never achieved.



Integrated Marketing Stack

Content is the fuel for all marketing initiatives. A marketing automation platform can be deployed, but without enough relevant content to support the various audience segments, it is impossible to capitalize on that investment. A social strategy is ineffective without engaging posts to share across social channels. Any campaign that is launched will need content whether it is in the form of text, imagery, or video. When a content marketing system is separated from the rest of the marketing stack, it can result in duplicate workflows and no central view of content. This will make it impossible for marketing teams to work together in a way that supports timely and relevant experiences for their customers and prospects.

Analytics

Content marketing analytics ensure that marketers are able to pinpoint key bottlenecks in the content flow and analyze what types of content drive revenue, loyalty, and advocacy. The right content tool provides comprehensive analytics so marketers can adjust their content strategy to further drive engagement and conversions across all channels. Analytics should cover traffic and conversion statistics, including things like number of visitors, average time spent per page, downloads, and referral sources.

Marketers should also be able to review content production stats, including content contributors, outstanding content assignments, and the amount of content published within a given timeframe. It is also critical for marketers to see how much content was created for a specific persona and each funnel stage.

The marketing technology bottom line here is this: You need to be able to plan, produce, and deliver content in context using an easy-to-use editorial calendar and powerful workflows that are integrated with campaign management.

QUESTIONS TO ASK A POTENTIAL CONTENT MARKETING VENDOR:

- How is all the content organized and stored?
 - How will my teams stay aligned?
 - Is there an editorial calendar that can track activities besides blog posts?
 - Can I create custom workflows to automatically manage approvals?
 - Will this tool integrate with the rest of my marketing stack?
-

“When you rely on metrics and reporting from several tools in your marketing stack, stitching that data together can be a pain. But there are plenty of software vendors actively trying to solve this problem with integrated solutions that will make manual stitching a thing of the past.”

—Yoav Schwartz, CEO, Uberflip

Data Management

Big data. Bigger data. Data this and data that. As you are reading this very section terabytes of data are literally being generated by people all over the world. As to what the marketers of the world will do with all this data is the issue at hand. The trick is, and it's really a trick, is to use the right data. And to do data right you need a data management platform (DMP).

No matter how hard marketers try to embrace organic channels and word of mouth, paid advertising continues to drive results. And the largest part of digital display ads is the data-driven, automated ads called programmatic. According to Ad Age, “Programmatic ad buying is growing not only because it makes ad transactions more efficient but because it can make them more effective, as long as the right data is applied.”

72% of digital display ads will be programmatic in 2017.

—eMarketer

Data Organization and Identity Management

There are all different types of data out there that need to be identified and managed. Of course that's easier said than done. In other words, having the right technology or platform makes all the difference.

The categories of data types are generally qualified in three ways:

First party data. Data contained in systems that a company already manages, like a website, social media, CRM, retail point of sale, call center, and mail. First party data typically has both known (identity) and unknown (anonymous) data contained in the systems and is stored either on premises or via partners. First party data usually has the most exclusivity, but can be limited in reach.

Second party data. Data that is brokered between two organizations, for instance, brands (like say a car manufacturer and a retailer) that might want to share list data for enhanced targeting or co-op opportunities. Second party data is generally not public data.

Third party data. Data that is anonymous with the most amount of reach, least amount of exclusivity, and is purchased through a marketplace (and bid on) based on its reach and cost parameters. Third party data is generally used for programmatic advertising purposes.

Data types are identified via the systems that contain them. Tagging is used to collect data attributes from these systems and ingested into a data management platform for categorization and anonymous audience creation. Data can be collected via cookies, tags, apps, and registration-based (server to server) integrations.

Included in data ingestion is the need to also collect and match user identity. User identity is defined as anything personally identifiable and a DMP will match identities coming through different systems. Look for the ability to match identities from different devices and data sources to limit overlap and redundancy, as well as reduce wasted programmatic ad spend.



Data Intelligence

What kind of intelligence can a marketer glean from data—or more importantly what kind of intelligence should a marketer be able to glean from their data? This should include things such as the size of audience based on key characteristics. For example: Are they car buyers? When did they last purchase a car? Which brands or colors do they prefer?

Another type of data intelligence marketers should be able to access is the cost and reach of aggregated data (third party). Insights and intelligence include reach of audience, attributes of audience (demographics/psychographics), and other brands they may consider patronizing.

Intelligence comes from the learnings you can have once you match data types together. Examples of this are a more complete view of customer preferences and interaction history, overlap with other audiences that you may not have been aware of previously, cost of media associated with reaching more of a certain ideal customer audience type. This refers to look-alike models, which is the data equivalent of discovering prospects similar to your existing customers (or data set).

Data Activation

All that data is great of course, but you still have to do something with it. You need to activate it. Data management platforms are essential for marketing organizations that want to use the data they already have to learn more about their customers. It is vital that technology platforms have the ability to collect data from different sources using different protocols and methods—app, cookie, server integrations, and more—quickly with limited latency.

Data management technology needs to provide different reporting capabilities to show you what the data means, its reach, and how much impact it will make to your business. Then you can take action on the data. Integrations with partners are key as well as integrations with other technology data providers or platforms where you can activate the data for improved email reach, nurturing, and much more.

The right technology platform should provide audience insights when it comes to data. Audience insight reporting is important because it provides a view into how different audiences are performing when it comes things such as reach, frequency, cost, and modeling.

QUESTIONS TO ASK A POTENTIAL DATA MANAGEMENT PLATFORM VENDOR:

- Will I be able to see where all of my data is stored?
 - Will I have easy access to it?
 - Does the solution provide for the issue of matching my customers to audiences?
 - How will it help me manage not only data types and systems, but also identities?
 - Will the solution support my global business?
 - If my business is not global but may become global, will the solution support that?
 - Will the solution integrate with other solutions?
-

“ The current MarTech ecosystem allows companies to create the optimal technology stack for their needs, finding the best-of-breed solutions that complement their overall marketing plan. With an open ecosystem, marketers are able to connect to new technologies that complement their current technology stack and drive great business outcomes. ”

—Gautham Pandiyan, Director of Strategic Alliances, Windsor Circle

Social Media Marketing

Raise your hand if you can remember back in the day when so-called experts were predicting that social media was nothing more than a passing fad. It may have been in the year 2005 when, according to the Pew Research Center, a mere 7% of American adults used social media. As of 2015, according to the same source, that number is now 65%—which represents an increase of 829% in just 10 years. With this kind of growth, it is not only important that social media goals and objectives align with those of the business, but the social media tool set must connect with the overall marketing technology stack.

65% of American adults use social media sites.

—Pew Research Center

Monitor and Interact

Monitoring the social media space is paramount for success as brands today need to be vigilant at all times. There is no down time anymore. Equally vital is the need to engage with and interact with people via social media—in real time. The downside to not monitoring or engaging is huge and a social technology tool has a key role to play.

Now that the consumer has online information to take control of the buying cycle, brands need to engage, nudge, and encourage prospects however and wherever they can to click on their website.

Whether you have a social team of one or five, it's impossible to catch every mention of your brand across the web manually. That's really where having social technology can come in handy. Having a tool to help you listen to specific phrases or conversations is essential for attaining real-time marketing and engagement. Especially for smaller teams, it's important for your social tool to identify mentions, record the sentiment, and respond to conversations happening across the web, all from the tool itself.

Lead Generation, Integration, and CRM

Using social media as a lead generation tool is becoming more and more common. As more and more of the buying cycle falls into the laps of the marketing teams, marketers are increasingly being asked to prove the ROI of their efforts. Unfortunately the hard fact is that not everything related to social media is quantifiable. However, when you start to track and benchmark what you're doing on social

media, you're able to get a much clearer picture of your ROI, and social tools can help you do that. Many of these tools are able to provide you with all the engagement metrics you want.

Going a step further, integrating your social tool with your marketing automation or cross-channel orchestration tool is ideal. This way, when you're creating a demand generation campaign, you can automatically schedule posts to align with various email sends and any other digital activities. Even if these tools don't integrate, it's still important to create unique URLs for all your campaigns. This allows you to track attribution to your social channels for downloads and registrations.



As theoretically a direct line to the business, more and more people are taking to Twitter and Facebook to voice their complaints. And 42% of consumers who have complained in social media now expect a response within 60 minutes according to The Social Habit. Because of the incredible visibility of social media, it's now more important than ever for businesses to have a social customer service strategy, and to have a social tool that helps to identify those conversations across the web, respond to each, and keep a record of that workflow.

Oftentimes this information is also very important to relay internally to account managers and sales reps. Integration of your social tool with a CRM system can help here. A record of a conversation with a prospect should get entered on the account profile so your sales rep is aware of it in further conversations with that prospect. Similarly, knowing that a customer is having issues and is tweeting to you about them should be in the CRM system so their account manager can better serve them.

Multichannel Posting

Ultimately the goal for every marketer is to reach their target audience wherever that target audience is. That usually means having a presence on several different channels, including email, search, web, or social media. When it comes to social media, everyone has their own personal favorite that they check every day, or even several times a day. It's important that you identify which social platforms your customers and prospects use and create a presence there to engage and educate them.

Social strategies can vary drastically among companies today. Where Facebook might be huge for a consumer brand, LinkedIn might be the best channel for a brand that focuses on selling to other businesses. Make sure your social tool of choice offers integrations with the social platforms that best fit your needs.

Analytics

First and foremost when it comes to analytics, metrics, and KPIs, your social marketing strategy needs to align with the goals of your business. Are you a new startup trying to build brand awareness or an established brand trying to reach iconic status? Do you need to field a lot of customer service questions and complaints? Are you trying to establish a community? Or do you simply want to capture new leads?

Once you've decided which business goals matter most to your organization, you can then figure out what metrics best showcase how your social activity is helping to achieve them. For brand awareness it could be reach and impressions across the web. For customer service, it could be response time and sentiment.

It's also important to tie these metrics together so that you're telling the overall story of your social efforts. Individually these numbers may not provide you with the best picture, but when told together they have a stronger meaning. This is where social technologies come into play. Make sure that you're choosing the technology that can give you the metrics that you've already defined based off your business goals.

QUESTIONS TO ASK A POTENTIAL SOCIAL MEDIA MARKETING VENDOR:

- What social platforms can be updated and monitored?
 - What metrics and dashboards are available?
 - How easy is it to integrate with other marketing technology?
 - Do the tools support multiple languages?
 - How responsive and supportive is the company itself?
-

“ We’ve seen tremendous growth in the industry, fueled by the fact that the CMO has more technology buying power than the CTO. With buying power comes great technology needs, and with that comes innovation. ”

—Gautham Pandiyan, Director of Strategic Alliances, Windsor Circle

Testing and Optimization

Website optimization helps companies learn more about their audience and then more directly and accurately give each segment the experience it needs to convert. And seeing how the entire world—or so it seems—is on a mobile device or app with increasing frequency, it is equally important to optimize your mobile channels including apps.

To take it a step further, data-driven optimization fuels higher conversion rates across the board: more purchases made, more accounts opened, more forms completed, more links clicked, and more quotes requested. This helps companies stand out from the competition, drive higher revenue, and generate greater customer lifetime value.

Testing

By running A/B or multivariate tests—the two most popular forms of optimization testing—businesses obtain data results that reveal valuable patterns in customer behavior so they can make better decisions about what content to show to which customers, at what time, and in what way.

In order to run an optimization test, companies have to create different versions of a website for each of its segments. Different versions will use different elements in different ways, depending on the intended audience. Elements are the overall defining features of a website: images, copy, calls-to-action, color scheme, and much more. Variants are the changes that companies make to these elements and address size, placement, color, content, and even inclusion at all.

The technology solution you choose must provide this type of functionality in order for effective and accurate testing to take place.

Personalization

Personalization begins with segmentation, which involves learning more about the pain points, preferences, and lives of the people interested in their services. By segmenting well, brands can more accurately give content to the people in their funnel.

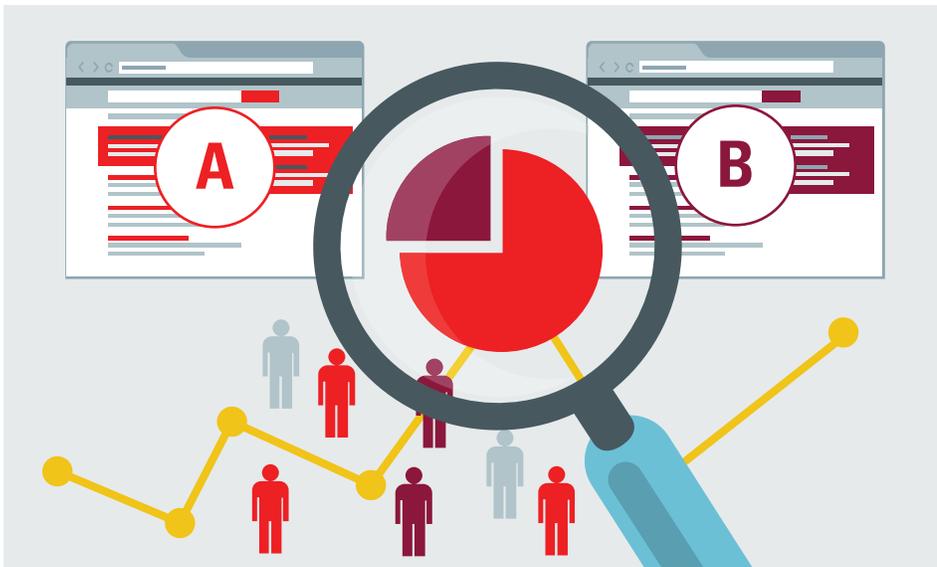
Then there is dynamic personalization, which is a real-time content adjustment based on visitor segments. It directly impacts conversions. Companies can count cookies and use self-identification to increase the accuracy with which they deliver dynamic content to visitors, which makes content stickier.

Poor A/B testing methodologies are costing online retailers up to **\$13 billion** a year in lost revenue.

—Conversioner

Perhaps the most important thing a technology tool should do to maximize personalization is understand intent. By understanding the customer's immediate intent, marketers can deliver a personalized experience to drive conversion. Using CRM and understanding the customer intent enables marketers to take personalization to the next level.

The technology needs to be able to collect and connect customer data from all data sources across all channels and devices in their customer journey into a unified profile that the marketer owns.



Mobile and Apps

Just because the desktop version of a website or application delivers x, y, and z doesn't mean the mobile version has to deliver the same, even in a mobile-friendly form. Desktop customer experiences are by nature more expansive, and there are natural differences between desktop and mobile that companies and developers must simply accept. Not every desktop feature will translate well to mobile. Some won't translate at all. Since phones and tablets have smaller screens than desktops, you'll have to determine the core functionalities of your website or application.

According to a Yahoo Advertising report, consumers spend 9 out of every 10 minutes on their smartphones in apps. Moreover, on average they delete apps one to two times per month. Marketers need to take a serious look at the user experience from the moment a user opens the mobile app. The screen real estate available for marketers to work with on a mobile app—and even on a tablet—is precious. Making the most of real estate is one of the key goals of optimization.

The technology you use should provide one user interface for every device—whether you're launching test campaigns to desktop, smartphone, or tablet. It should also provide equal testing and personalization functionality across the board.

Analytics

There are two key metrics marketers need to think about: pre-test and post-test.

In pre-test the need is to understand who your website's visitors are, and what preferences they have. Most important is understanding the underperforming visitor segments that you can target with more relevant user experiences. Pre-test discovery answers these questions by identifying particular groups of customers who are converting and engaging with your site at an above and below average rate. It works on the basis of the existing user experience that you offer to your customers without the need to run any tests.

Post-test provides an automated process to find visitor micro segments and the content that they prefer, then the opportunity to target them with those relevant experiences. Post-test discovery automatically identifies meaningful segment profiles based on their best performing experiences and uses these segments to determine who to target, and which experience to serve to achieve the highest possible uplift for a campaign. Use post-test discovery to review the predicted results and then apply these segments to a targeted campaign.

The technology tool you use should show what experiences produced the most engagement, conversions, and revenue. It needs to also aggregate customer data to help you bundle your audience into segments/profiles, which helps locate profitable opportunities and make informed hypotheses.

QUESTIONS TO ASK A POTENTIAL OPTIMIZATION VENDOR:

- Can your platform test and optimize in secure areas of the site or app, such as the checkout funnel?
- How elegantly does your platform handle executing many concurrent campaigns across multiple websites and apps?
- How expansive are your personalization capabilities? How many attributes can be considered, from which data sources, and across which customer touch points?

“ All marketers really need to be doing is saying: Okay, will these particular tools that we're evaluating help us accomplish our goals? Can we find something that works for us? Great, let's use them, move on. ”

— Scott Brinker, CTO, ion interactive

About Oracle Marketing Cloud

Modern Marketers choose Oracle Marketing Cloud's digital marketing solutions to create engagement, orchestrate experiences, connect data, and optimize interactions that attract and retain ideal customers. These solutions connect cross-channel, content, and social marketing with data management and activation on a proven system that marketers love and IT trusts.

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