



PEDOWITZ
GROUP

The Revenue Marketing
Consulting Firm

Case Study

D+H™

Introduction

After investing in Marketo and a CRM platform to enrich and automate its marketing demand generation processes, D+H found it difficult to use the platforms to their fullest capabilities. These difficulties were caused by issues with integrating the systems and being unable to leave legacy processes behind.

Key Challenges:

System Integration Issues

The primary issue with the system integration was that users on either side did not fully understand how the data fields were synced, resulting in inconsistent data across the platforms, duplicates being created and system performance issues.

Legacy Process Issues

Because the marketing automation and CRM users were still using legacy processes to manage tasks such as lead imports and list segmentations, they weren't realizing the potential of the platforms to automate these processes. Some of these legacy processes included manual list pulls from the CRM and importing into Marketo for audience segmentation and importing, matching, and converting marketing lead lists in the CRM. Lacking data governance and system field maintenance created extra frustration with reporting and segmentation.

The Solution

In order to address the issues with the system integration and legacy processes, TPG identified several key technology and process enhancements that needed to be implemented and provided a timeline for implementation.

Technology:

Review and optimize the current integration

- Work with TPG and Marketo's Product Management team and engineering to ensure that the system is configured to best practices.
- Based on the field mapping process, simplify the field structure and reduce the number of fields that marketing has to use.

Implement a data governance software add-on

- TPG Suggested to implant Automerge for the CRM which would allow for automated data enrichment, de-duplication, lead to contact conversion, and contact to account matching.

Process

Define and implement and field management and data governance plan, also known as a "Data Dictionary" for Marketing, which includes:

- Document all existing fields
- Document unnecessary and unused fields for cleanup
- Determine "Key Fields" necessary for:
 - Sync Criteria
 - Lead routing requirements
 - Persona development
 - Segmentations
 - Lead scoring
- Document the standardized values (where applicable) for Key Fields

Results

After implementing the recommended enhancements, D+H's marketing team saw several immediate benefits:

- The ability to segment lists in real-time with auto-updating of lists based on up-to-the-minute additions
- The ability to conduct marketing initiatives that target key personas at various points of the buyers' journey
- The ability to lead score effectively and utilize lead scoring as intended as a basis for lead management and lead readiness for sales
- The ability to have accurate reporting based on lead lifecycle stage, campaign performance and marketing revenue attribution
- Effective lead nurturing that is automatic and moves prospects automatically from one stream to another based on real-time interests in various products and services
- Effective SPAM compliance and Opt-in and Opt-out compliance

By engaging with TPG's Data Operations Services team, D+H was able to quickly address the issues caused by a lack of standard data practices and in turn utilize the capabilities and features of its new marketing automation and CRM platforms to their fullest. Developing these data management standards helped D+H get the most out of their investment and increase the overall effectiveness of their marketing program execution.

The Pedowitz Group – Connecting Marketing to Revenue™

The Pedowitz Group wrote the book, and is the undisputed thought leader on Revenue Marketing™. As your partner, TPG helps you plan, build and optimize your revenue engine by delivering services in Marketing Technology, demand generation and marketing operations. We believe that marketing is the driver of customer engagement that fuels the revenue engine. The Pedowitz Group customers have won over 50 national awards for their Revenue Marketing excellence.

