

Why Marketing Transformation Initiatives Fail

and the Seven Hallmarks of Transformation Success

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In July of 1881, President James Garfield was shot as he walked through a Washington D.C. train station. The Civil War veteran was well liked by the citizens of the country he had led for just four months prior to this inevitably fatal incident. His devote constituents followed his health obsessively after the assassination attempt, hoping for salvation. Newspapers shared details about the innovative young inventor named Alexander Graham Bell who deployed a newly-constructed metal detector to aid in the search for the bullet. They marveled at the ingenuity of Naval Engineers who attempted to comfort the president in the blistering heat of summer with another first: a rudimentary air conditioning system. They revered the dedication of the president's doctor and found hope in his reports of the president's improving condition. Nonetheless, Garfield died in mid-September, and the country mourned bitterly.

Why the history lesson in a paper about modern marketing business transformations? Garfield's death was less the result of the bullet that punctured his abdomen, and more a failure of the conditions under which he was treated. It's a good analogy for what many marketers face today, as they watch their own seemingly robust initiatives wither away. Marketing executives invest in a new kind of technology, often considered to be a silver bullet. However, similar to Garfield's myopic doctors, Marketing teams miss the big picture. They focus only on the bullet (marketing automation in this case) producing minimal, if any results that impact the business... let alone revenue. Before we consider the failures that parallel the death of a president– and the death of the digital marketing shift– let's consider why this shift is happening today.

The Forces Driving the Epidemic: The Customer

So why have we arrived at this fascinating and flummoxing apex of technology, promise, evolution, and elevation? Here's a look at the forces converging to bring us to this point.

In 2009, in the midst of the worst economy in decades, Corporate Executive Board (CEB) set out to understand why some sales reps were successfully selling while others were losing ground and not reaching quotes by miles. In conducting their research, the team found that B2B consumer buying behavior has changed dramatically, and that successful sales people were adapting to this new dynamic of the complex sale. This meticulous research was published in 2011 in The Challenger Sale, disrupting sales and marketing organizations everywhere as they found that consumers are nearly 60 percent of the way through the buying cycle before ever contacting a vendor or supplier. Since 2011, nearly all of the big analysts firms have conducted their own research to confirm this finding. As it turns out, in today's market buyers are at least 60 percent, with some analysts finding the position closer to 90 percent. This is a fundamental and formative shift in buying behavior.

It is not unreasonable to expect that buyers today have nearly made up their minds before they even talk to us. Very often in the B2B space, it's buying groups making a purchasing decision instead of a singular decision maker. These groups are often cross-functional, all infusing their own perspective into the purchasing decision. It's no longer a conversation, it's an investigation. Customers research exhaustively. With the internet they can pry into every detail, eavesdrop on conversations with your existing customers, and stack you up to your competitors. These buyers are more informed by the time they approach you. This allows them to control the conversation and decide when and how to engage you. What your brand 'says' to your buyers before you even know who they are is of paramount importance.

Surrendering control (or even participation) in the early buying process is terrorizing. In response to this changing dynamic, thousands of marketing organizations have changed their customer engagement strategy, looking for ways to re-tip the scales in their favor. Today, the adoption and optimization of marketing automation platforms (MAPs) and any number of plug-in technologies give us digital binoculars. We can watch a consumer's online behavior, and shape the way they perceive us, evaluate our competitors, and make purchasing decisions. We collect that digital behavior, and make inferences about their likelihood to buy from us, when they might do so and how to present our brand at the right time with the right message.

Insights from our inspection through a metaphorical microscope create a voracious appetite for more. More data. More insights. More tech. More of anything that will put us in front of the investigative consumer earlier, or steer the conversation in our favor. For this, today's marketer must become more digitally literate. Investments in our people become critical or crippling if we fail to focus on development and mastery of new skills and knowledge.

At the same time, CEOs are demanding that marketing leaders demonstrate how their craft contributes to revenue in a meaningful way. This pressure from the top is forcing CMOs to take a closer look at their strategy, people, processes and operations, engagement strategies, investment in technologies and tactical, operational, and revenue performance metrics.

The Breakdowns that Lead to Failure

There are many factors that contributed to the death of President Garfield, the finger of blame can't point in a single direction. Similarly, there is rarely a singular reason that a digital marketing transformation initiative fails. Below we explore some of the more common reasons that these initiatives fail.

A Failure of Sophistication

Garfield was shot just as modern medicine as we know it today took shape. His doctors weren't the self-taught barbers and apothecaries of decades prior. But buoyed with a false sense of their own capabilities, their miscalculations were lethal. Convinced the bullet needed to be extracted, they explored its path... and introduced a myriad of germs in the process. Old-school doctors implemented an approach to sanitation they deemed "good enough," and when it failed (because a tool or finger that "looks" clean really isn't), they wrote off the method. In the end, Garfield would've lived with the bullet in his abdomen; he died because of rampant infection introduced in the search for it.

Likewise for Marketers: So many companies come to us with a "good enough" marketing strategy, but it rarely accounts for the unseen microorganisms that infect a modern marketing initiative. The most obvious and 'lethal' example is a failure to include digital as the primary engagement means of your customers and prospects in the marketing strategy. Historically marketing planning centers around budgeting: which events run again, how much money for advertising, how much for slicks and other thought leadership materials, can we open staff positions (and why), and so on. We gnash about over these details, then divvy up our budget accordingly. But in today's digital marketing environment, we need to scrutinize our every marketing investment for return. First and foremost, what is our business strategy? How will our company grow in the year ahead? What is the sales strategy for next year? And then we cascade that down into our marketing strategy.

A Failure to Focus on the Customer

Another potentially lethal germ, metaphorically, is the failure to account for how your customers buy in a different way today than they did even five years ago. They are online, researching your products before you know it. They are reading reviews wherever they can. They are connecting with your customers to determine satisfaction with your services or products. And yes, this is happening every day in the B2B space. It is not unique to the B2C space. Our marketing strategy must be completely rebuilt to account for today's consumer-driven, collaborative decision-making process. It's fed by shockingly accessible information about what you do, and what you sell, and to whom. This shift has put Marketing in the driver's seat for the first time ever– owning the early stages of the sales cycle. Marketing must strategize with Sales to determine how best to connect and engage with customers and prospects in the digital space. This means more strategic partnerships at all levels of the sales organization to ensure that both groups are putting the customer first and connecting with one another regularly to share customer insights that they are learning.

A Failure Not 'of Technology,' but of Applying It

Alexander Graham Bell promised that his induction-based metal detector would find the bullet. It would have. Later tests proved unequivocally the technology worked. But reasons for the failure became clear in hindsight. The presiding doctor insisted on scanning the wrong side, while the newly invented metal-coil mattress upon which Garfield lay impeded the physics by which the detector worked.

Likewise for Marketers: We frequently work with clients who purchase promising technology, like a marketing automation platform, or any number of content and customer experience platforms, as well as programmatic advertising, social and relationship, data append, BIs, etc. In only two years, the number of marketing technologies available has multiplied three- to four-times over. Nearly 70 percent of CMOs surveyed by IBM say they intend to reassess their strategic direction given the technological advances now disrupting the marketplace. That's a rather substantial number when you consider the sheer volume of technologies in the space- and wonder how those technologies could literally change the way CMOs do business.

However, we often see companies buying these technologies without really knowing what they are buying them for, how they can support their new digital marketing strategy, or even how to use them to get the most out of them. Further, in many cases implementing the technologies will need to involve IT– a new relationship for many marketing teams– and therefore, new stakeholders to influence. So the issues here are abundant: What are we going to do with the new technology? How are we going to use it? Who needs to be a part of the decision to buy? How are we going to integrate it with our existing technologies? What skills will we need to run the new technologies? What processes need to be created to support them? The list goes on and on. Once you start conducting due diligence around buying the shiny new technology, the downstream implications emerge rapidly. In most cases, it's these items orbiting the technology that account for the failure– and yet technology takes the fall.

In an HBR article published as far back as July 2014, Scott Brinker and Laura McClellan quoted a recent Gartner study that found that 67 percent of marketing departments plan to increase their spending on technology-related activities over the next two years. In addition, 61 percent are increasing capital expenditures on technology, and 65 percent are increasing budgets for service providers that have technology-related offerings. At the time, there were roughly 1,000 marketing technologies in our space. Today, that number is closer to 4,000 marketing technologies. In short, the space is exploding. It is simply too big to ignore.

A Failure of Process

For President Garfield, naval engineers created air conditioning and entire new train track was laid for a railcar fitted with a waterbed to reduce the effects of travel– but none of those efforts affected the outcome. The president's head doctor refused to be questioned, while the rest of the team bickered over options. The anarchy of his treatment was so extreme that it factored into the trial of Garfield's assassin, Charles Guiteau, He told the court in his own defense: "The doctors killed him, I just shot him." That was true enough, today someone with a wound like Garfield's would be home and out of danger within a few days. (The facts didn't help Guiteau's defense. He paid for that shot with a guilty verdict, and his life).

Likewise for Marketers: Inadequate processes continue to gum up the works of savvy marketers. Similar to Garfield's doctors, our teams attempt shock treatments to infuse sales pipeline with life. To do that in today's environment, significant effort is invested in potentially fruitful endeavors like designing and deploying omni-channel campaigns, but Marketing cannot show the impact those efforts have on revenue because of a broken lead management process. Or worse yet, time, energy and resources are put into creating those campaigns, and then they are blasted out to a database that is maybe 30 percent complete or have a considerable amount of "dirty data." The result: we don't really know who we are sending to, and there is no process in place to keep the database clean let alone impede its disintegration.

These failures are happening faster and more furiously than ever before. The acceleration is due to a significant change in consumer buying habits, a myriad of new marketing technologies promising previously-unheard of benefits, process engineering or re-engineering that needs to be done, plus CEOs demanding that Marketing demonstrate ROI. The result: confused marketers bicker over their patient just as Garfield's doctors did, unsure of who to believe, or how to proceed. Adoption of a technology uproots existing processes, undermines

69% of CMOs use predictive analytics to explore new trends and make datadriven decisions to shape their marketing strategies according to the IBM C-Suite Study- The CMO Perspective.

customer engagement strategies, annoys key staff and forces a new strategy. But all too often, plans move ahead with major chunks missing, and these holes become viruses that propagate, spread, and ultimately wound or kill the initial vision. In the end, Marketing loses credibility. Again.

As consultants, we're brought in to those situations for second opinions... life support for marketing initiatives struggling to survive. In every case, we start with an evaluation of the situation, and discover failures of sophistication of strategy, process, skills, or proper technology implementation and utilization. This guide is a summation of what we've seen with the benefit of retrospect, as well as what it takes to fix the outcome. And we present it in the hope that your next failure is that of failing to repeat history, and that you can sanitize your proverbial tools, deploy the most modern and progressive processes out there, harness the results you need, and save the life of your next major marketing initiative. But first, let's backtrack for just a moment with a look at how we got here.

A Failure to Invest in Positive Business Outcomes

For every investment that we make, we must ask ourselves, "will this investment yield positive return in terms of actual new clients and/or revenue?" If the answer is no, don't do it. It really is that simple. But that doesn't happen because people fear change and insist on doing what they always did. But if those investments are not impacting the business in a positive way, why bother? This is often the most difficult shift companies make. The shift requires a cessation of legacy tactics usage in favor of new, somewhat unknown investments in digital marketing and related tactics. The new technologies enable you to see in great detail what your customers are doing online and to make more informed investments in channels that will drive revenue, like your website, blog, SEM, social channels, and other omni-channel initiatives.

The Miracle Cure

Marketers who transform their businesses do so with six major areas in mind. They do not merely add a new ingredient to the mix, they overhaul the menu. This means clearly articulating your vision, purpose and direction with total transparency: Why you are taking on this transformation, what you need to do to make it happen, and how you and your team intend to do it all must be defined up front and communicated often. Hallmarks of a successful approach look like this:

Success Characteristic: Strategy Obsessed

Single-minded, unapologetic, and intense. These organizations are preoccupied with strategy, and disciplined enough to drive it at every step of their process. They ingest a steady diet of top-quality thinking and meaningfully-interpreted data to shape strategy that reflects a sophisticated worldview with depth and comprehensiveness. You can spot these strategy-obsessed teams by the elements they bake into their journeys:

- Identify and engage executive stakeholders into a new marketing strategy. Why does
 this matter? The essence of change is often a power struggle- the old versus the new, the
 new versus the 'other new.' No longer does this change conveniently contain itself to a
 single department, it usually encompasses several disparate units. To foster cohesion and
 accountability, one must start at the top. You need partners to make this happen, to grease
 the wheels and ensure for example that Sales shares your funnel, and your campaigns
 integrate with them.
- Assess organizational and operational readiness. When we are hired to help a company transform their marketing function, this is the first thing that we want to know about. Specifically we ask, is the organization capable of handling change? Do they have a demonstrated track record of doing so? Is there a business need that everyone is aware of that is necessitating a change in marketing strategy? In terms of operational readiness, has a budget been formally allocated? Is the technology foundation in place? How mature are the processes today and how receptive are people to changing those processes? Structure follows strategy, so what's the status on, say, support for marketing and sales alignment with the new strategy?

- Partnerships While we think of this as driving change within Marketing, new partnerships must be forged across functions- IT, sales, R&D and nearly every other functional area on your org chart. These functions also have to change with Marketing and work at higher levels of collaboration than ever before. They, too, have to implement new processes, and drive accountability for new behaviors into their organizations. If transformation is designed as something for Marketing only, it will stay and die in Marketing only and fall short of business transformation.
- Alignment Specifically, there's a strong desire by both Marketing and Sales to have greater alignment to achieve business objectives. One of the things that we often see that slows down transformation more than just about anything else is a lack of alignment between these two groups. Lead management is the easiest example, although there are many areas of alignment to consider. Sales must come to the table to discuss the definition of a qualified lead. They must agree to lead stages that will be used in CRM. They must agree to hold sales people accountable for using the CRM and accepting leads or sending them back to Marketing in a given timeframe. In short, they have to agree to be partners, to accept that Marketing really does own that front 60 percent (or more) of the buy cycle, and agree to lead hand-offs to ensure timely follow up and commit to doing their part working a well-qualified lead to close. On the other side, Marketing must agree to find, nurture, and qualify leads that contribute to the sales funnel. Marketing must have shared ownership of revenue goals, and be prepared to reflect the sales strategy in the marketing strategy. If both parties aren't willing to commit to these things, at a minimum progress will be slow and likely painful.

In short, redesign of the marketing strategy that accounts for all facets of your marketing business– your people, processes, your customers and prospects, what technology you use and leverage, and the specific results you expect to achieve across the other five controls as well as revenue contribution to the business.

Success Characteristic: Remarkable people with epic leadership to guide them

Who is the William Wallace to this Braveheart story? Who will charge down the Highlands to fight for this, and inspire a team to take the journey? Like the stuff a blockbuster movie is made from, epic leaders have extreme levels of credibility coupled with compelling influence over direct reports, and others. They can solve the people puzzle, making matches between motivations and skill sets, or challenges and the innate stuff a person has to solve them. Epic leaders see the strategy in terms of people, translating the intent of the transformation into the skills and talents of the people who can make it happen.

Our epic leaders need to be empowered to drive change in the organization, which means that they will need executive support to hold people accountable for new behaviors. In addition, the leaders do need to know what they have to work with. We have found that a lack of clarity around what roles are needed and what responsibilities need to be covered creates total havoc on an organization. Once the strategy is clear and executive leadership has determined the course of action, a careful assessment of what skills you have already and what skills you will need is in order. So often we hear turmoil and even voluntary attrition because people don't know what is coming and what it means for them. You can get ahead of that with careful planning and complete transparency in communication as to why, what and how you will make changes to your business. 7

You will also need to conduct a careful evaluation of which people you will need to execute your vision for the future. Should you find that you do not have the skills in house, a plan to acquire those skills must be accounted for. Staff get very antsy around who is going to to do what in this new environment. It is important to define roles and responsibilities early and communicate that as quickly as possible to team members to diffuse any upheaval. For greater detail around the roles and responsibilities that are required for successful Revenue Marketing, please reference our 4 eBooks around the digital marketing Center of Excellence.

Success Characteristic: Process Orienteers

Implementing any new strategy and technology inevitably means that new processes have to be created or re-engineered, and people will need to learn them. This will have a ripple effect, sometimes vibrating through organizations at significantly disruptive wavelengths. Planning for this means cross-functional collaboration and education planning, as well as executive agreement to hold people accountable for new behaviors. A few key processes that need to be considered are program planning, lead management and data management.

Something we often see is program management that is not aligned to the business strategy. Program management is the part of sales and marketing alignment that actually executes against the requirement of a joint planning process. You must have a process in place, or develop a process to have Sales and Marketing get together at the beginning of the fiscal year and discuss the sales strategy. Then work together to plan out which programs will be executed by Marketing throughout the year in support of the sales priorities. The process definition ensures that it happens consistently globally or across P&Ls, etc. In support of those program plans, campaign management process has to be defined and documented. Campaigns can take two weeks to six months to deploy without a clearly defined process for execution. Campaign strategy can be all over the board if a well documented campaign design

and development plan is missing. And more scary: ineffective campaigns will be repeated over and over again if there is not a process for monitoring and either eliminating or optimizing effective or ineffective campaigns.

One potentially toxic internal process is lead management. Most organizations have some process, however elementary it is, for passing leads from Marketing to Sales. When a technology is applied to an existing process, we almost always see that the process is broken, or just really slow– each resulting in the same thing: the loss of the lead. Sales and Marketing have to come together and build out a process that works that includes a common definition of a lead, lead routing and scoring, service level agreement around lead handling and roles and responsibilities, etc.

In a technology driven world, the lead management process can be almost completely automated. When we see manual elements to a lead management process, the first thing we look at is the workflow between CRM and MAP to determine whether or not you optimize the technologies you have. The optimization of lead management process can reduce the cost of sales, increase the number of sales team members hitting quota, increase sales cycle time, and increase revenue overall if you put the right process in place and fully leverage those processes. That includes monitoring them to make sure they are working.

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Lead management isn't the only process that needs to be addressed. Often overlooked is a data management process. Data governance, data quality management, database management– all processes that need to be defined, owned and managed effectively. Failure to have a robust process here will certainly impact several variables including database penetration, segmentation, campaign performance, and of course limit your ability to take advantage of the two ways to grow your business: acquisition and expansion.

Success Characteristic: Customer Casanova

A substantial shift towards obsessing about customer behavior, what it's telling us, and what we can do to engage them more effectively. With our digital binoculars, we can now see so much more of our customer's behaviors, all of which we need to catalogue and leverage for strategic advantage

Successful organizations woo their customers, and engage them at every turn. They are intensely interested in them, because they know relevance is key to successful customer engagement. People in buying groups want to feel like you know what they want and need. If you miss the mark, they'll ignore you. If you miss the mark over and over again, you will be shut out. To be relevant, you need to talk about them, not your products or solutions. You need to talk to them about their problems and their business challenges. And to stand out, you need to teach them about their business. One example: if your copywriters were highly qualified and contented with their role and type of work prior to your transformation, you probably need a new team. The content team must shift what they are writing: less spec sheets, product slicks, brochures, and white papers about products and customers who used it successfully. So we must facilitate change within the writing team- either transforming individuals...or finding new talent that can speak the language of a customer while obliterating the old paradigm and writing a completely new and different product. The web team has the same challenge. Websites are often the single largest source of leads. What would happen if your website addressed the customer based on their needs, not what you sell? Would they be more likely to engage? More likely to dig around and find out how you intend to solve their business challenge?

Depending on your business, Sales can be resistant to actually focusing on the customer. It has never happened, nor will it ever, that I meet a sales leader or salesperson who says that they are not focused on the customer. But in reality, most sales people default to hard core selling. In "The Challenger Sale" research, what CEB found was that the most effective sales person (consistently exceeds quotas among other things) was, in fact, the one who challenged customers' thinking and taught them about an unrecognized problem that they have. This tough love is the kind of customer focus we are talking about. It is cultural within your organization. Every function, every facet of the business is laser focused on providing value to the customer. How each group demonstrates that varies, obviously. But this culture is the most likely to succeed in transforming the business of marketing. Implementation of new technologies that support the strategic direction of the organization as a whole and for Sales. Note that implementation alone isn't enough to get us where we need to be in terms of reporting and analytics, so these systems have to be integrated and not floating out there on their own.

Of course technology is critical to transformation, again, often the catalyst. Once you have your backbone technologies in place, staying aware of what is available in the market is key to staying connected to your customers. If you've seen the ChiefMarTec marketing technology landscape supergraphic, you've probably noticed that it grew significantly last year – from 947 logos in January of 2014 to 1876 logos in January of 2015 to over 3500 in Spring of 2016! In short, the marketing technology market is exploding. Don't just stay informed, stay invested. Like someone starting a business, a technologepreneur experiments, blazes new ground, opens new markets and dreams big.

As mentioned earlier, selecting the right technology for your business and strategy is essential. Proper vetting of the use cases will ensure that you don't buy something that you don't need. Engaging the right partners in the selection process will keep you from buying technology that will not fit within your technology stack- a very costly mistake.

Success Characteristic: Get the credit for revenue influenced

Today's modern marketers are data and results obsessed. We need to collect data on our customers and what they engage in, our funnel and what is staying and what is moving in the funnel, our content and what is resonating in the market, what lead sources yield the highest return, our database and the quality of the data that we have. We could go on and on- the point is, we must obsess over the accuracy and cleanliness of our data to ensure that we can prove that what we are investing dollars in actually works.

Showing revenue impact on the business is the holy grail for most marketing organizations today. Although showing reliable, accurate financial results is a challenge for most of the companies that we work with. In our experience, many organizations underestimate what is required for being able to show financial results. There are two keys here: clearly defined lead management and accountability. While these sound like they are unrelated, these two things together are what allow us to demonstrate financial results. Well-defined lead management process ensures that we can track leads through the funnel, capture best lead sources, push campaigns that are relevant and drive buyers through the funnel, shorten sales cycle, etc. All of these things combined allow us to optimize spend and allocate budget to activities that actually drive revenue. That said, if sales leadership does not hold the sales organization accountable for utilization of the CRM, Marketing will not be able to show attribution back to marketing tactics, and therefore prevent us from seeing the financial impact of marketing investments.

Success Characteristic: Write the transformation story backward

Organizations need to focus on measurable business results as it is essential to continuous improvement. We recommend that you start with the end in mind. What are you trying to accomplish with your business transformation? We often see three major results areas: Tactical, operational and financial. Tactical measures are specific to marketing activities that you do to drive leads into the business. Historically, marketing organizations have not been very good at following these leads through the funnel. We encourage our clients to think of all of these lead sources in the same way you would a personal investment portfolio. Which investments are yielding the greatest return? Which investments do you consider long term investments rather than short term wins?

Operational measures are designed to measure incremental wins to process improvement, marketing efficiencies, and execution of business strategy. Operational measures are the pieces of the transformation that actually drive change. Process reengineering, new knowledge and skills, adoption of new technologies and tools, new organizational structure or a new go to market strategy– all of these things are considered operational changes to Marketing, all of which need to be defined, quantified, and measured. To ensure adoption into the organization, operational measures must be specific, measurable, achievable, results driven and confined to a specific timeline. Failure to identify operational metrics will inhibit organizational transformation without question.

The Path Forward: A Parting thought about Transparency & Communication

Many clients are excited about the ideas presented here. New tech! Strategies! Change! Results. But they tune us out when we share a timelessly unsexy truth: The single most critical factor in making a new business initiative successful is communication.

When you reach the point where you are discussing new roles and responsibilities, it is likely that word is out that change is coming. This is disruptive to a culture, but in a good way, not a bad one. In the bad scenario, whispers over cube walls prompt people to panic. The stable ones worry about where they fit, the dynamic ones grow skeptical quickly if the change appears to stall. A spooked workforce is an ineffective one, and eventually it will calcify into a resistance to change of any sort. Leaders become vocal, efforts are undermined. It's lethal. Irreversible. Impossible to surmount, and when we encounter it— no brilliant strategy or well-laid plan can break through it.

The antidote is transparency. Be clear about the strategy, why you are making a change, what has to happen in order to achieve the goals you set forth, and how you plan to move the needle. Be clear about the roles that you will need to support the new efforts and what new responsibilities are going to be required to meet objectives. While this sounds like an odd place to start, remember that change is about people. People change first individually, and then together they become a department changes, and momentum carries that into organizational change. This will not happen overnight, but it's the good kind of viral sharing that amounts to success.

In addition, share your wins- big and small- that lead you towards that final goal. In this case, it is better to be completely transparent about what is coming and how you intend to get there. This allows people to ask questions and understand changes, resulting in less resistance because they feel less threatened by something new. Once you have moved past resistance to change, you sail happily into acceptanceand this is where the excitement of Revenue Marketing grabs ahold of your team and catapults you into a revenue machine.



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