



The Technical Side of Marketing Automation:

HOW TO LEVERAGE LEADERSHIP
FOR SUCCESSFUL IMPLEMENTATION

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Overview

[In our blog series on marketing automation](#), we provide a high-level overview of the steps involved in designing and implementing a successful digital marketing automation strategy. Derived from our own experiences and insights as an industry-leading digital solutions provider, our methodology rests on two key principles:

- **Adopting automation has become a competitive imperative for any marketing organization hoping to effectively manage its services at scale.**
- **An organization must have a clear, holistic understanding of its business objectives and goals [\(i.e. a well-defined future state\)](#) to implement useful automation strategies.**

We've found that one of the biggest mistakes a company can make when it comes to embarking on an automation journey is putting its tech needs first. Doing so will result in a disjointed strategy that provides only short-term solutions at best. For this reason, we've separated our marketing automation deep dive into two distinct areas of focus — the business side, which we covered in our [first automation eBook](#), and the technology side, which we'll explore in this follow-up

Ironically, when it comes to tackling the technological nitty-gritty of successful automation implementation, the technology itself plays but a minor part. What's more important is making sure that the right capabilities are collected, and the strongest teams are built to spearhead the movement and ensure the consistent use of best practices throughout the organization.

In this eBook, we'll lay out the basics for assembling critical teams for successful tech deployment — a Center of Excellence (CoE), Task Force, and Change Agents. Tasked with ensuring all elements of automation implementation are functional and aligned within an organization, these groups establish a rhythm and cadence for identifying, solutioning, and deploying automation capabilities into a business (among other things). They're essential for ensuring the adoption of long-term automation solutions that are smart, strategic, and able to optimize all business areas.

Assembly code snippet:

```

SP=0000 SI=0000 DI=0000
SS=1793 CS=1793 IP=0108 NU UP PL NZ NA
ADD EBX,SII,AL

```

C code snippet:

```

asm volatile ( __ex_clear(ASM_VMX_UNMISC
                : "= "(value) : "d"(value)
return value;
#include <stdint.h>
main(int argc, char** xargv) {
    int64_t src = argci
    int64_t dsti
    volatile
}

```

Other visible text includes: ASM_VMX_VMREAD_RDX_RAX, ".byte 0x0f", always inline unsigned long vocs, unsigned long va, and @.

This is one of the reasons why automation implementation can seem like such an overwhelming task. As we discussed in our first eBook, *[The Business Side of Marketing Automation: How to Plan & Prepare for a Successful Journey](#)*, the best way to help mitigate this complexity is to take the time to establish your business vision and future-state strategy. Once you have a solid understanding of the

That said, it's just as important that you resist the urge to dive head-first into tech adoption when moving into this next phase. Many organizations fall prey to believing that a particular technology vendor license will be the "silver bullet" to help them reach their digital transformation target, and that is simply not the case. All too often, organizations lock themselves into a contract for a software license without clearly understanding what their target is and without having

the right business and tech people around them to make that vision a reality.

To avoid this common pitfall, **you need to start with the end goal business objectives in mind, not the technology.**

Technology is just a tool that can enable your organization to meet its objectives, support its people and processes, and deliver value to your customer base. It's similar to building a house — you wouldn't go out and buy a bunch of tools before sitting down with an architect to decide what you want your home to look like. And once you have blueprints, you'd hire trained teams capable of making your dream home into a reality, and they would be the ones selecting the proper tools to ensure your house is built safely and successfully.

In the world of automation, the developer, architect, and building crew of your tech implementation plan are your Center of Excellence (CoE), Task Force, and

Change Agents. Here's what you need to know about assembling these essential teams.



Building Out Your Center of Excellence



The CoE is responsible for providing leadership, sharing best practices, and improving the overall efficiency of automation across an organization. One of the most important parts of putting together this team is choosing a leader, as this individual functions as the link between business strategy and CoE tech initiatives. They act as arbitrators between these two sides of an organization, constantly assessing the state of the union to ensure that all technology-related initiatives align with business strategy and vision.

This is an essential role because business strategy and vision can and often does shift over time, with new targets and new areas of focus to consider. A successful CoE must be able to navigate

the changing landscape efficiently and effectively. To do this, a skilled CoE leader is absolutely necessary.

In simple terms, the main objective of a CoE leader is to manage expectations and relations between stakeholders, rallying them all behind a common core purpose — the successful integration of automation into the organization. To do this effectively, they must be well-versed in all aspects of the organization as a whole, with their feet solidly planted in both the business and technology sides. They must identify and monitor shifts in business strategy and know how to reorient the tech side to align with the organization's evolving business strategies and vision.

Breaking it down into general requirements of the role, there are two key components. CoE leaders will have to:

- ✓ **Monitor the strategic link between the CoE's various technology-related initiatives and the organization's business goals, ensuring continuous alignment.**
- ✓ **Arbitrate resources between multiple initiatives, making sure that a balance between the human and machine elements is always maintained.**

Remember that one of the main challenges in automation implementation is maintaining the human/machine balance. The CoE leader plays a key part in supporting this, along with the help of change management professionals, human resources, organizational learning and development experts, and functional business managers/leaders. Collectively, they must drive digital transformations around the future of the business while also executing the vision established by organizational leadership and driving optimizations in the current way work is performed.

Another challenge the CoE must be ready to tackle is sustaining innovation in the core business while enabling and assigning resources toward disruptive innovation efforts. Sustaining innovation is essential because it creates capital, either by freeing up resources (such as people and operational costs) or generating revenue that can be reapplied to

disruptive innovation projects. Focusing on disruptive innovations is pointless if the core business can't support it. In other words, you can't spend what you don't have. Additionally, the CoE leader must convince doubtful board members and stakeholders to stay the course, as it can take years for disruptive efforts to gain traction.





Avoiding Silos

Businesses love to build highly structured organizational units for efficiency's sake. Unfortunately, this practice can be a barrier to innovation. Keeping departments separated across an organization can stifle connectivity and minimize visibility into what other teams are working on. When this happens, resources cannot be shared and leveraged to meet needs elsewhere in the organization.

That's why the CoE needs to be the central trust for overseeing what is happening and filtering opportunities and resources across departments. Having this responsibility housed centrally can reduce a lot of late discoveries of what could have been' due to lack of visibility.

Creating a Task Force

An extension arm of the CoE, the Task Force is a group of experts who bring together a specific set of skills to drive automation initiatives. Primarily tech-focused, they're familiar with the company's operational processes, know how to execute the essential manual tasks, and can identify automation candidates by analyzing current processes against market needs.

The structure of a Task Force can be set up in a number of different ways, and ultimately you'll need to use your own understanding of your organization's culture to determine what works best for your teams and people. Most importantly, the individuals you choose must have a deep understanding of your organization's current tech capabilities, its clients, and its

ways of delivering value. This is critical for successfully driving digital transformation initiatives.

It's also vital that the members of a Task Force understand many different technology capabilities, whether they're owned or not yet owned by their organization. This maximizes the likelihood that they will implement tech solutions that are feasible for business use cases. Rather than simply "buy a new tool" whenever a need is identified, a successful Task Force will make sure the capabilities of already existing technologies are being maximized before investing in new tech.



Assigning Change Agents

Change Agents are responsible for championing the automation movement throughout an organization. They are the influencers and evangelists of the automation journey, encouraging others to embrace automation by taking the lead in the demonstration. They are also a key channel for communication, engaging in relevant dialogue about best practices, new capabilities, and lessons learned across departments and sharing holistic feedback with CoE Leaders

While it is not a requirement that Change Agents be directly involved in delivering and executing on any one particular digital transformation initiative, they must understand the capabilities, see the linkages to the business strategy, and be able to clearly articulate these benefits

across their sphere of influence. They must have expertise in either a business or technical capacity, because without a tangible relationship to the actual automation work being planned and developed, they won't be able to effectively influence change within an organization.

Change Agents can be anyone in the organization close enough to the work to influence the thoughts and culture of the teams delivering value. Often, they are early adopters or individuals passionate about evangelizing, promoting, and encouraging acceptance and dialogue around digital transformation initiatives. Their attitudes are just as important as their skills — Change Agents must be positive, open-minded, and personable. They must be excited to work in challenging environments and eager to engage in dialogue at various levels of business.



Prioritizing Tech Initiatives

There are multiple approaches an organization can take to housing the specific technologies needed to deliver on a digital transformation initiative. While some may be centralized and others federated, both have the same challenge — prioritizing what gets worked on first.

Whether it be a disruptive innovation like developing a new type of ad product for a particular vertical, or a sustaining innovation such as customer experience or internal efficiency initiatives, areas of focus for automation implementation shift and change over time. As such, it's necessary to prioritize initiatives in a logical order to create lasting and substantial change. The CoE should first target use cases directly tied to the organization's current business strategy. This ensures

that the core business is well-positioned for a period of time so other initiatives can be focused on.

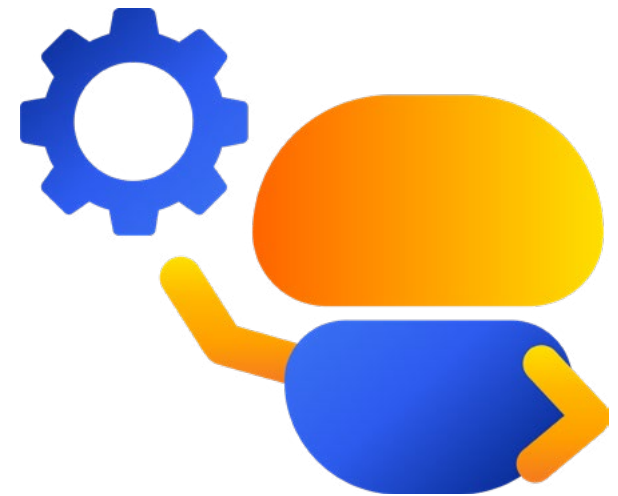
At the same time, the CoE must continuously communicate the necessity of digital transformation to all areas of the organization, clearly outlining the how and the why while making workforce expectations clear. Doing so will help ensure that even if specific organizational capabilities are not directly under the oversight and control of the CoE, the stakeholders that do lead those teams will understand the importance of making those resources available to the initiative at hand.

Managing the Business & Tech Components of Automation

Any organization that chooses to [embark on an automation journey](#) faces resistance and pushback from within the company. From the outset, the biggest challenge for business leaders is to figure out how to effectively balance two opposing forces — the immediate needs of the workforce and the organization's long-term needs.

Establishing a clear business vision and strategy is the first step toward effective automation implementation. After that, it's essential to address the technical side of digital transformation with the same kind of tactical planning. Rather than jumping into immediate technology implementation, business leaders must invest in building dedicated teams — the CoE, Task Force, and Change Agents — to plan and oversee the initiatives. In

addition to spearheading the automation movement as a whole, these groups will help ensure that tech enablement always aligns with the organization's business strategy.





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