



The Business Side of Marketing Automation:

HOW TO PLAN & PREPARE
FOR A SUCCESSFUL JOURNEY



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Learn how to tackle the business side of marketing automation strategy and implementation, from plotting your approach and putting together your teams to creating a framework and analyzing ROI.

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OVERVIEW

In our **blog series on marketing automation**, we provide a high-level overview of the steps involved in the design and implementation of a successful digital marketing automation strategy. Derived from our own experiences and insights as an industry-leading digital services 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) in order to implement any kind of useful automation strategy.**

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 and the technology side.

In this eBook, we'll cover the business components of the process. You'll learn how to outline the aspirations of automation within your organization while also identifying the steps that must be taken to get there. You'll also learn how to assemble key internal teams to spearhead the movement and ensure the consistent use of best practices throughout the organization. Finally, we'll outline key business process discovery metrics and criteria for analyzing ROI.

These exercises are critical components of the automation journey that must be worked through thoroughly before any technical aspects are put into place. By prioritizing and following these guidelines, you'll create a solid framework for automation implementation and evaluation within your organization. This will set you up for success once you begin applying actual automation technologies to the marketing processes in your workflow.





MAPPING THE AUTOMATION APPROACH

A successful marketing automation journey begins with a holistic, wide-angle view of the organization from all areas. This is best achieved by breaking your initial approach down into four main categories: selection parameters, preparedness, prioritization and decision making, and planning and execution.

1. SELECTION PARAMETERS

The parameters by which automation candidates are selected should be both market-driven and investment-driven. From a market perspective, you'll need to consider the voice of the customer (VOC), your company's specific business objectives, short- and long-term automation needs, and the end needs of the customer. In terms of ROI, effort and cost must be considered, along with reusability.

2. PREPAREDNESS

You can't embark on a successful automation journey if your organization does not have the organizational and structural capabilities to carry it out. Ask yourself:

- ✓ Is the technology available?
- ✓ Is your organization's current level of digital maturity adequate?
- ✓ Does opposition to automation exist within your organization and can it be resolved?
- ✓ What solutions will you have to put into place to mitigate workforce insecurity and other barriers?

From a business structure and environmental perspective, you'll need to be able to construct a dedicated Center of Excellence (CoE) to guide and govern the automation process. We'll define roles and discuss **specific criteria for assembling a CoE in the next section**, but assuming you have a basic idea of what your CoE will be responsible for accomplishing, ask yourself:

- ✓ Are there enough qualified executives within your organization to serve on a CoE?
- ✓ Do you have appropriately qualified experts within your organization to serve as Task Force members and Change Agents?

3. IDENTIFICATION & PRIORITIZATION

It can be very helpful to prioritize the candidates you've identified for automation in terms of which are most automation-ready. Making this determination will require deriving and capturing key information on each automation processes so they can be properly evaluated for value. Based on these evaluations, you can create a shortlist of processes most ready for automation and submit them to executives for approval.

4. PLANNING & EXECUTION

Once approved, you can start involving tech and operational groups in the planning and development of selected automation tasks, always keeping the what/why/how/who in mind:

- **WHAT** are the benefits you expect to reap as a result of your automation strategy?
- **WHY** is automation the right choice for reaching these expected benefits?
- **HOW** do these expected benefits align with your overall business strategy?
- **WHO** will be responsible for overseeing the organization, education, and implementation of your automation strategy?



BREAKING DOWN YOUR INTERNAL TEAM STRUCTURES

A sound marketing automation strategy is not created in a vacuum. It requires the involvement and collaboration of multiple teams across a number of key departments, including C-suite leadership, IT, media operations, finance, and others. Based on our own research and experience, we recommend forming three internal teams to govern and guide your automation journey: **a Center of Excellence (CoE), a Task Force, and Change Agents.**





COE

Responsible for providing leadership, sharing best practices, and improving the overall efficiency of the automation journey, a CoE can be broken down into two groups: CoE Leadership and the CoE Team.

CoE Leadership is in charge of the big picture. They are the executives who define the business aspirations and future state of the organization, as well as set automation goals and facilitate and approve projects.

The CoE Team is tasked with translating Leadership's vision into an executable roadmap. Made up of experts well-versed in the organization's business functions, they are ones who are deployed into the organization to achieve objectives and facilitate automation implementation.

TASK FORCE

The Task Force is a small 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 and know how to execute essential manual tasks, as well as identify automation candidates through analyzing current processes against market needs.

CHANGE AGENTS

Change agents are responsible for promoting change and encouraging the automation movement throughout the organization. They are the influencers and evangelists of the automation journey, encouraging others to embrace automation by taking the lead in demonstration. They engage in relevant dialogue about automation across teams and share holistic feedback with CoE Leadership and other relevant groups.

ASSEMBLING YOUR TEAMS

COE MEMBERSHIP

Constructing a solid CoE isn't about starting from the ground up and creating something new. Instead, it's about centralizing the expertise already in your organization to drive the consistent use of best practices across the company. This means recruiting CoE Leadership who are early adopters of change and technology, can arbitrate between immediate and long-term automation needs, and have the ability to remove bureaucratic "red tape" to enable speed, agility, and innovation.

It also means recruiting CoE Team members who have the skills and expertise required to understand the goals set, carry out end-to-end analysis in real time, and outline optimal solutions using key ROI metrics. Candidates must

be influential, well-respected, and fully integrated into the inner workings of the organization, with diverse business and technical skill sets to help inform the Task Force selection process.



TASK FORCE SELECTION GUIDELINES

Your Task Force does not need to be a large group. Ideally, it should have between six to eight members with mixed tenure at the company (from zero to six months, one to two years, and two or more years, for example). In addition to having domain knowledge and hands-on experience with key operational processes, members should demonstrate high standards in the implementation of tasks and timely deliverables.

Task Force candidates should also have exposure to market trends, excellent client communication skills, and the ability to identify challenges and implement swift solutions. It can also be helpful to include members who have been part of process improvement plans in the past.

CHOOSING YOUR CHANGE AGENTS

As influencers for change across your entire organization, Change Agents must have positive, open-minded attitudes. They must be excited to work in challenging environments, eager to engage in dialogue at various levels, and willing to share holistic feedback with the CoE and other groups.

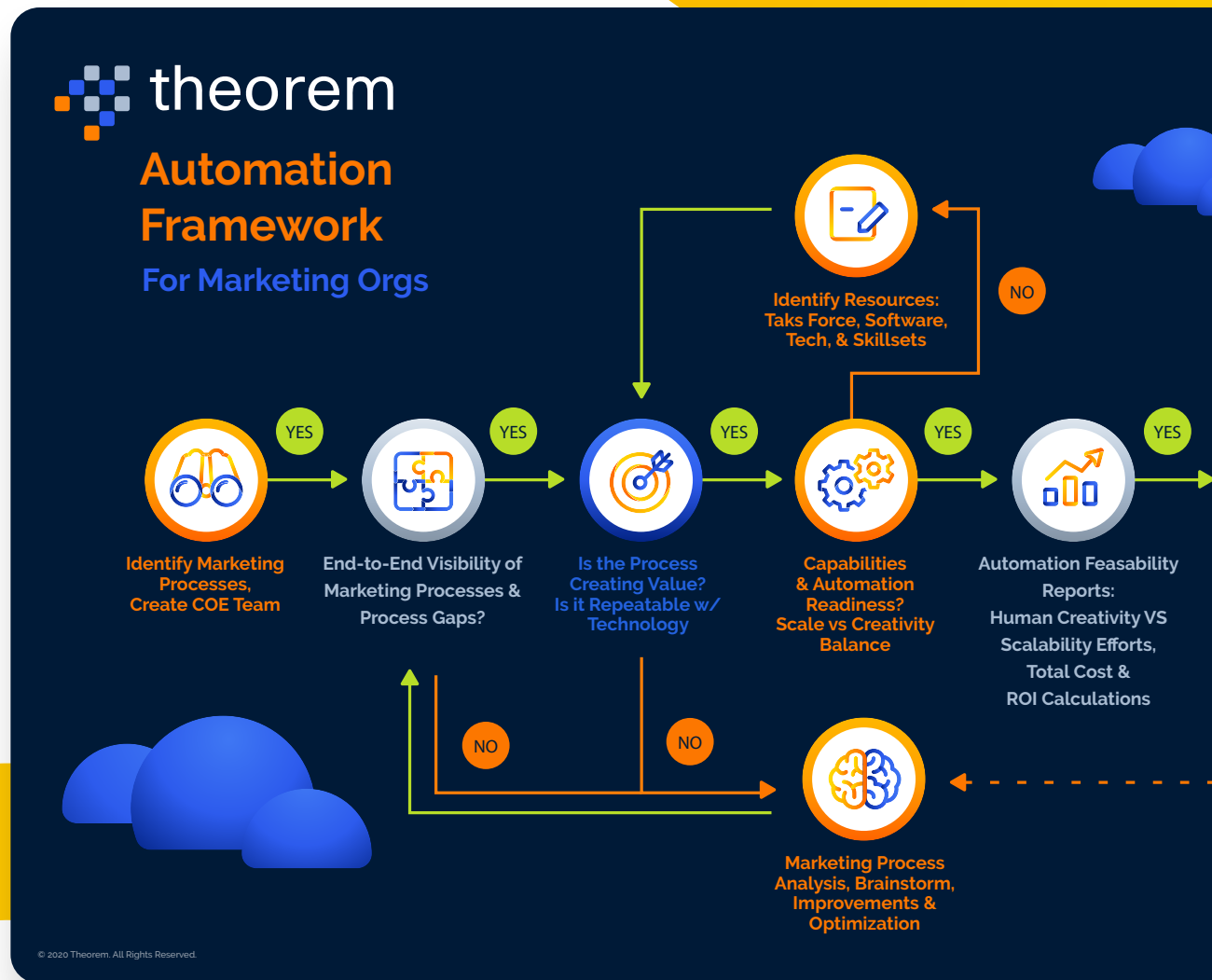
It's also important that your Change Agents have deep expertise in either a business or technical capacity. This is essential, because without a tangible relationship to the actual automation work being planned and developed, their ability to effectively influence change will be dramatically reduced.



CREATING THE AUTOMATION FRAMEWORK

Once you've mapped your marketing automation approach and understand how to build solid internal teams, you're in an ideal position to design the framework for your automation journey. As illustrated in our Automation Framework infographic, this starts with identifying your marketing processes and creating your CoE teams.

[Download Automation Framework](#)

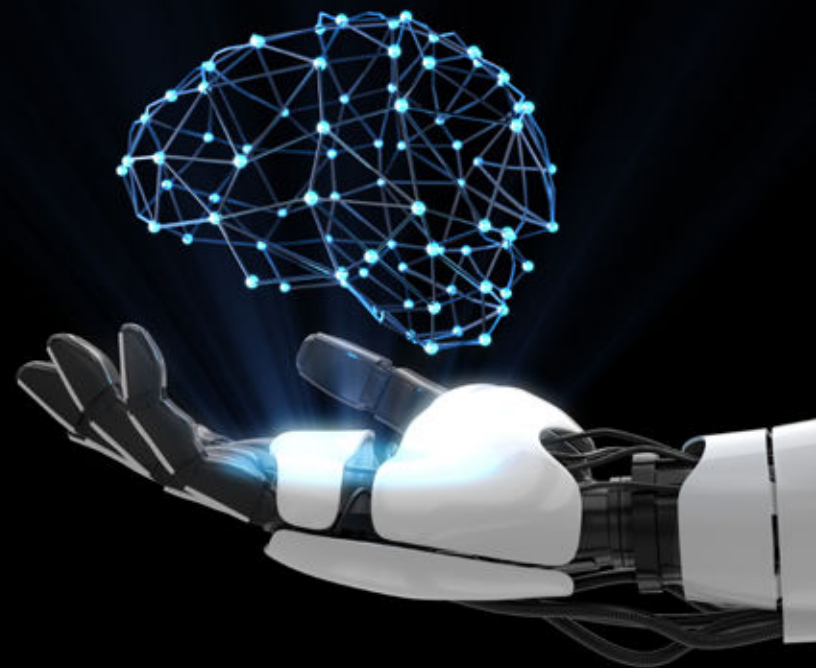


Once these are in place and you have end-to-end visibility of the process, you can review it to ensure that there are no gaps and that everything is clearly defined. You'll also need to make sure that the process is creating value — does it meet both your business objectives and customer needs? Is it repeatable with technology?

If the answer is no, you'll return to the drawing board to analyze, reevaluate, and improve the process. If the answer is yes, the next step is to check that your organization is automation ready via the criteria previously mapped out in the automation approach.

In many cases, this is where the automation journey stalls. Because the reality is, not all marketing organizations have the tech skills and methodologies in place to embark on an automation journey of this scale. If this happens to you, do not be discouraged — **this is the reason why we follow a framework in the first place**. Revisit your approach and reevaluate your resources to determine if and where you can make changes.

If you determine that your organization is good to go, the next step is to generate automation feasibility reports based on human creativity and scalability efforts, total cost, and ROI calculations. Submit your reports to stakeholders and wait for approvals.





PROCESS DISCOVERY

Developing a set of process discovery metrics will help you determine which processes are most effectively streamlined by automation, to what capacity, and at what level (if any) humans may still need to be involved in the processes. It will also allow you to pull out and prioritize the processes that provide the best return on investment.

At Theorem, we did this by creating a master document designed to calculate automation success rate based on values assigned to specific rating criteria. As recreated in this infographic, we divided these rating questions into three relevant sections – People & Processes, Business, and System & Data.

Once all data was entered and analyzed, we used the output to determine which processes were the strongest automation candidates from both tech and business standpoints, including the all-important ROI.

[Download Full Infographic](#)



ROI ANALYSIS

CALCULATING ROI

In order to get a full and comprehensive view of the financial impact automation will have on your organization, **ROI needs to be analyzed from a number of different perspectives**. In addition to using traditional metrics such as profit margin and revenue growth, it's also helpful to consider your company's overall objectives regarding the automation of its marketing processes.

For example, is the end goal of your automation strategy simply to streamline your business's operational processes, or do you also hope to generate new revenue streams by packaging and selling your processes as market-touching tech services? In terms of planning and execution, do you have enough in-house expertise to map a well-outlined automation framework, or will you need cost savings to hire outside consulting services and support?





The answers to these types of questions – which will depend largely on where your organization currently is in its automation journey – will have a direct impact on how you calculate your return.

Additionally, if your automation framework or discovery data reveals that a process should not be automated, you may still be able to increase ROI by finding an alternative method for optimizing the process. This is a helpful side benefit of following a well-constructed automation framework – it can call attention to broken processes that may gain ROI if fixed, even if automation is ultimately not the solution.

DEFINING ORGANIZATIONAL ROI IN A 1 TO 5 YEAR HORIZON

Because automation ROI needs to be looked at through different lenses depending on where your company is in its journey, it can be helpful to plot its focus and trajectory over a one-, three-, and five-year time period.

YEAR 1 - 2

Few companies see the cost benefits of automation right away because it's all about strategy and implementation in the beginning. Savings, if any, are internal and derived solely from the investments made in technology and processes. ROI calculation, therefore, is purely cost-driven, as automation is applied only to internal back-office projects.

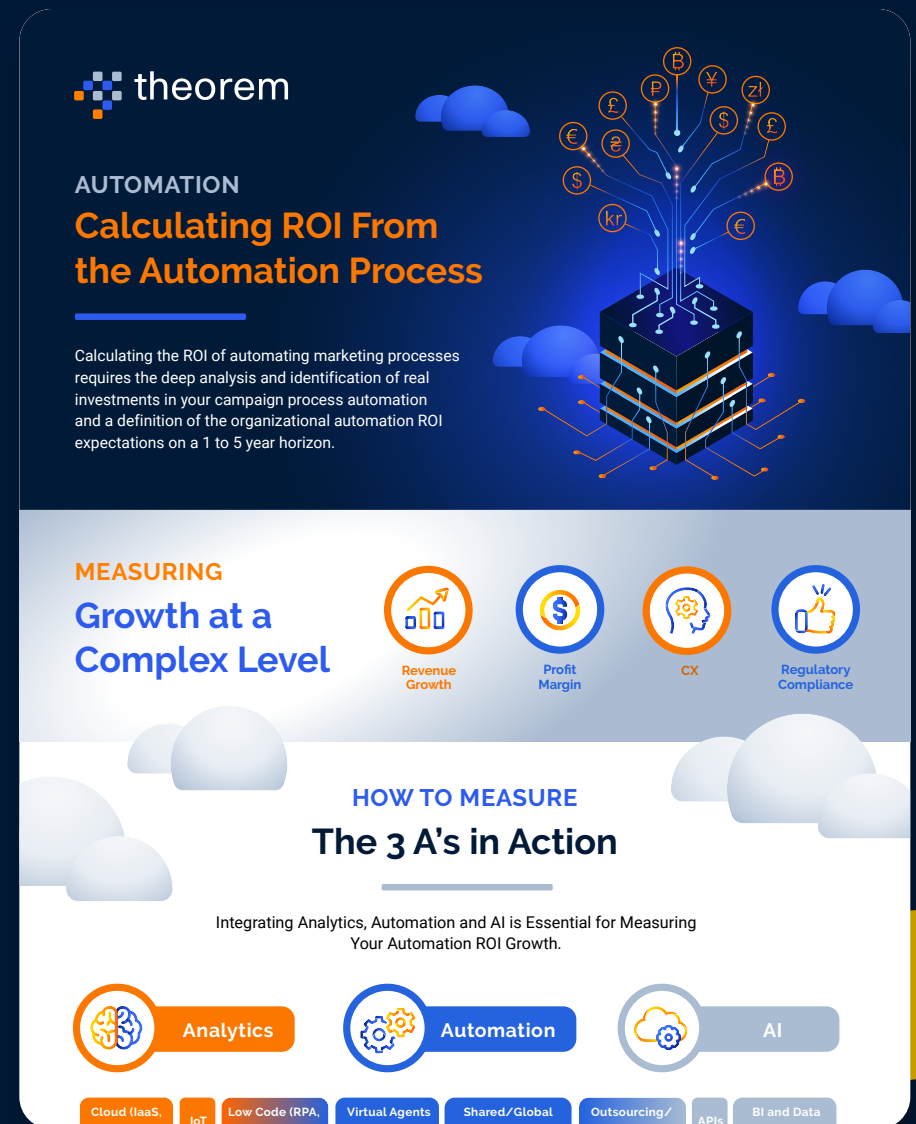
YEAR 2 - 3

Before moving toward front-office projects that are external and market-facing, you can evaluate your internal processes to determine if they can be used to achieve economies of scale. Are they standalone? Or can they be used across multiple customers and clients? If the answer is yes, that's when you'll start to see incremental ROI.

YEAR 3 - 5

Building on your incremental ROI, now you can begin to move automation toward front-office, market-facing projects. Can they be packaged and sold to outside companies as a service to generate revenue?

[Download Full Infographic](#)





MANAGING THE BUSINESS & TECH COMPONENTS OF MARKETING AUTOMATION

When it comes to automating marketing processes, we've learned from experience that planning and preparation is a vital precursor to the actual implementation of technology. Carefully considering the needs and objectives of your business from a holistic standpoint — and creating a detailed roadmap to guide you through the journey — can help ensure the transition is smooth and successful.

Of course, the technological side of marketing automation is just as important once you've built a solid foundation for your journey. In our next eBook, we'll take you through our tested and approved best practices for applying automation technologies to your marketing workflows. When used as a companion piece to this guide, we hope it will provide you with the tools and guidance you'll need to implement a successful marketing automation strategy for your business.



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