



A large, stylized logo where the letters "LMA" and the numbers "22" are formed by swirling, colorful liquid or paint. The colors transition from blue and purple at the bottom to white and black at the top. The "L" is blue, "M" is purple, "A" is white, "2" is purple, and "2" is blue.

STRETCH BEYOND. TOGETHER.

## Annual Conference

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ARIA Resort • Las Vegas

# What Are We Solving For?

How to Stop Random Acts of Marketing Technology

**Gordon Braun-Woodbury**

Calibrate Strategies



**CALIBRATE  
STRATEGIES**

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Fisher Phillips LLP

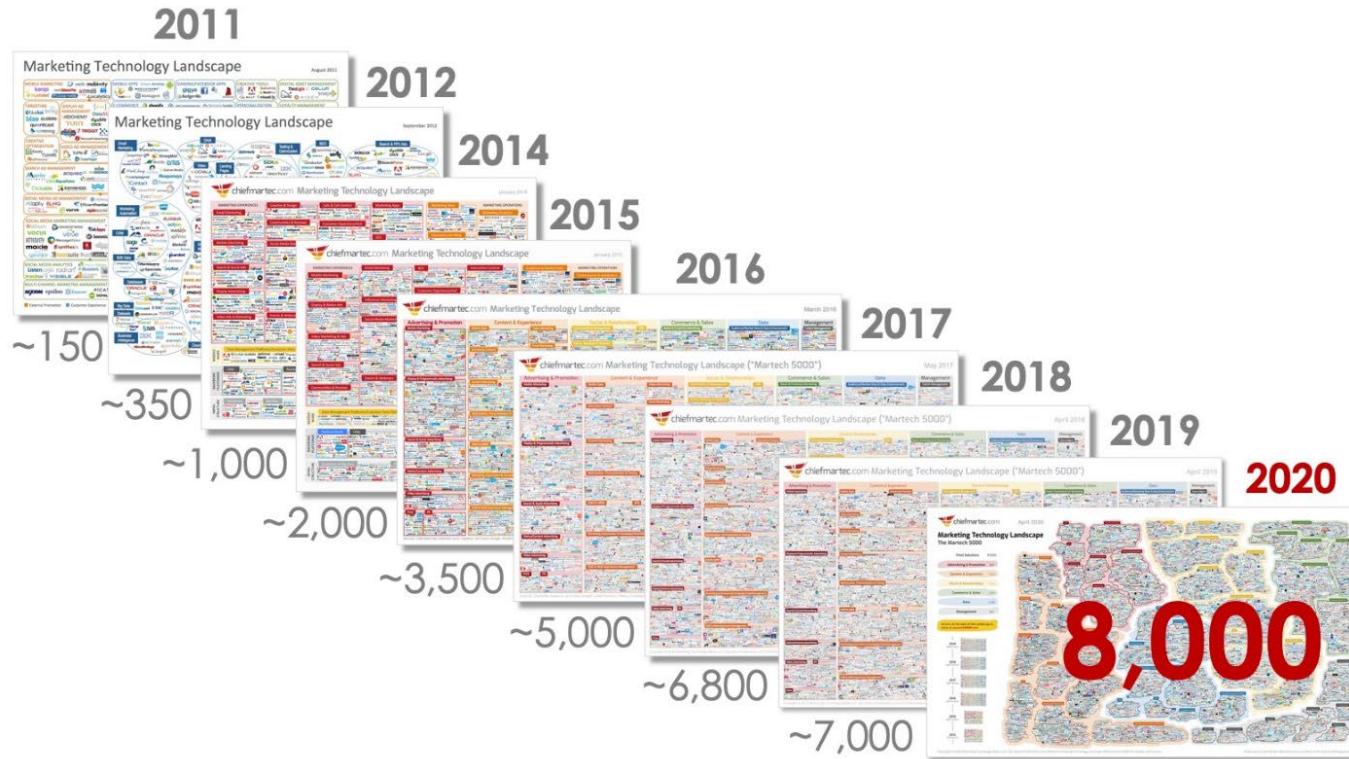


# Learning Objectives

- Discuss and articulate the business problem that technology is supposed to address
- Evaluate your current martech stack (what do you have, what are your goals, what are the gaps, and how do you measure it?)
- Create a business case for new technology investments to fill your gaps



# Marketing is... a Technology-Powered Discipline



# Marketing is... Tech Rich, But Insights Poor



**Systems for everything, but**

- Minimal integration
- Siloed data stores
- Inaccessible data points
- Haphazard design
- No ability to get a full view of the client

## Data Trumps Technology Every Time!



# Let's Talk About RATs

# RAT = Random Act of (Marketing) Technology

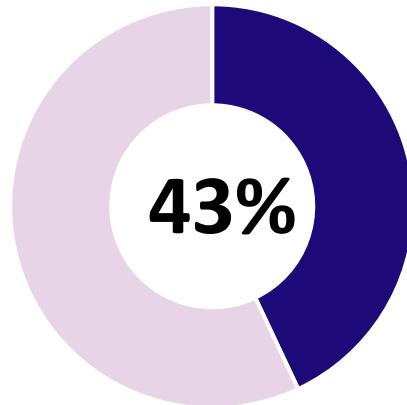
- Selecting individual marketing technologies to meet immediate needs
- Haphazard implementation approach
- Lack of attention to user's needs
- A “Stack Without a Strategy”

# Why do RATs happen?

**Because Martech Solutions tend to be...**

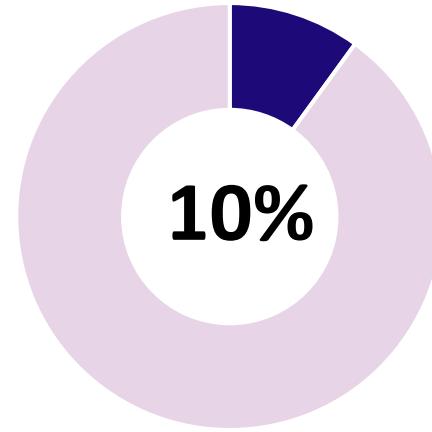
- Cloud-based (no physical infrastructure requirements)
- Easy to buy (often with just a credit card)
- Low investment (as compared to enterprise software)
- Point solutions (non integrated with other data sources)
- Low barrier to entry

# The IT/Marketing Disconnect



of Marketing Execs plan to  
hire marketing or customer  
analytics talent

**BUT ONLY**



of Marketing Execs plan to  
work more closely with the  
CIO and IT Department

# The Result: a RAT's Nest of Issues

- Selection based on vendor claims (buyer beware)
- Poor or non-existent integration
- Inconsistent data
- Inability to track across channels
- Confusing interfaces
- Cumbersome reporting
- Poor user adoption
- Unclear or negative ROI
- Service failures
- Unhappy users

# And In Some Cases...



# Stopping RATs Before they Start



Document  
Current State



Define the (Real)  
Problems



Involve People



Create a  
Roadmap



Build the  
Business Case



Focus on the  
Last Mile

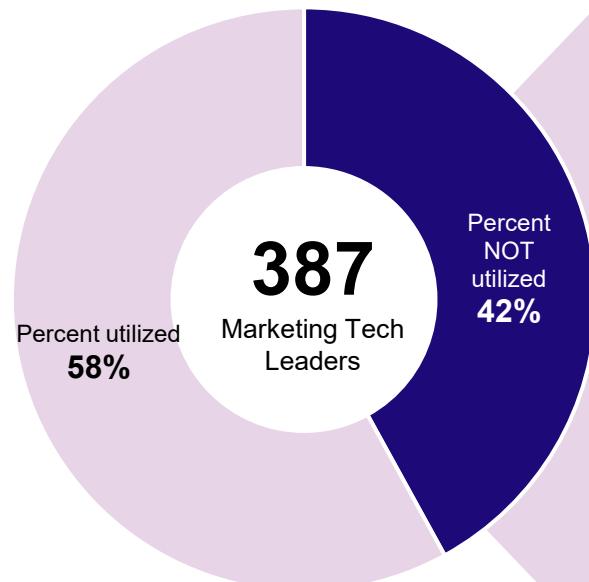
# Document Current State



*"The job isn't to catch up to the status quo; the job is to invent the status quo."*

*- Seth Godin*

# Most firms use only a fraction of their martech capabilities



Source: Gartner 2020 Marketing Technology Survey

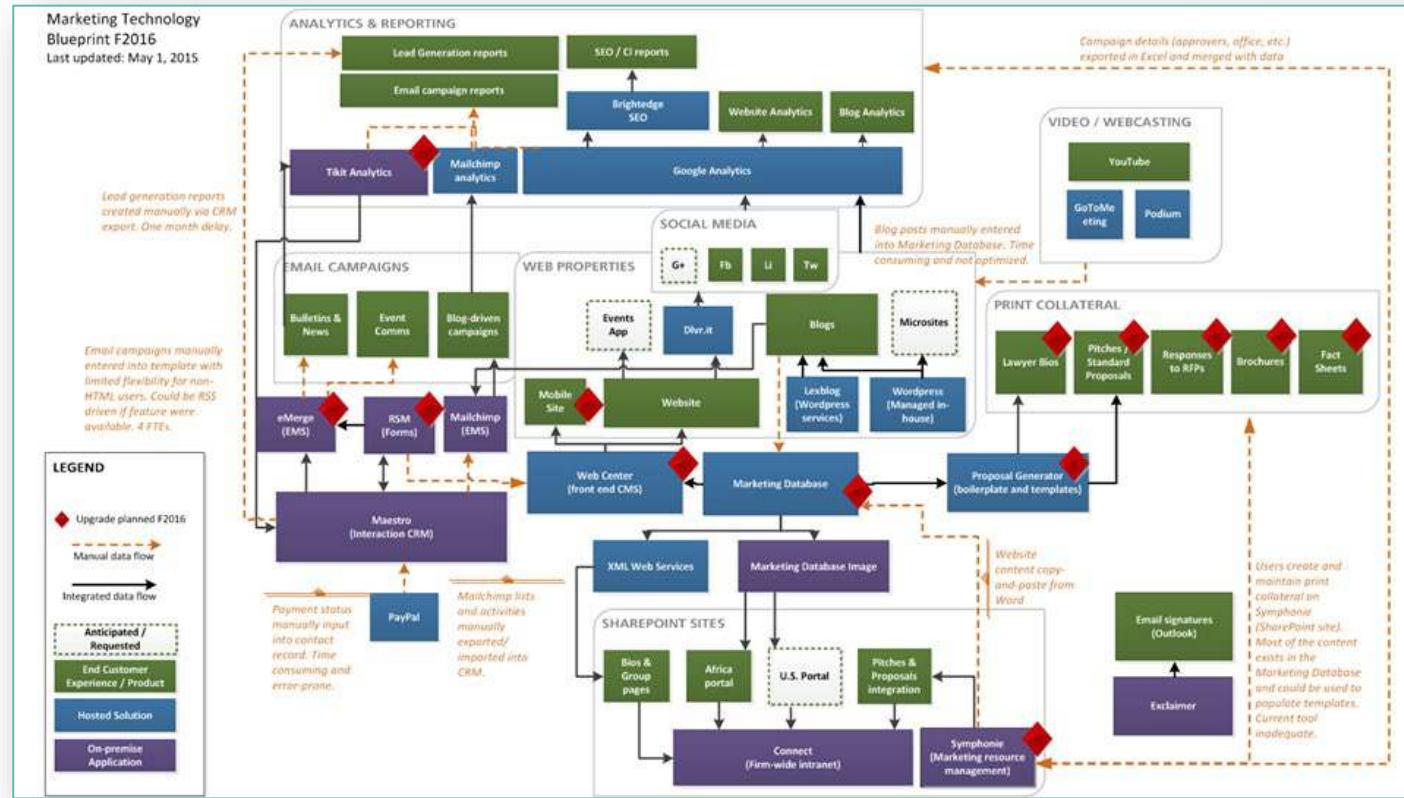
# Symptoms That Your Stack Needs Work

- Questioning the value
- Poor platform knowledge
- Platforms used by few people
- Multiple platforms doing similar things
- Simple tasks are hard
- Can't get data out
- Relying on workarounds
- No process documentation
- Different field names across platforms
- Patches and homegrown solutions

# Suggested Action Steps

- Take an inventory of all your martech solutions
- Identify the data integration points between them
- Understand the cost structure
- Talk – and listen – to your vendors
- Talk – and listen – to IT
- Research the market
- Diagram your current stack

# You don't need to get too detailed...



# Start With the Core Martech Components



# How are Your Core Components?

Component	Systems/ Processes Exist?	State of Data	Integrations	
	Contacts and Companies	<input checked="" type="checkbox"/>	Poor	<input checked="" type="checkbox"/>
	Channels	<input checked="" type="checkbox"/>	OK	<input checked="" type="checkbox"/>
	Content	<input checked="" type="checkbox"/>	Poor	N/A
	Experience	N/A	N/A	N/A
	Opportunities	N/A	N/A	N/A
	Analytics and Reporting	N/A	N/A	N/A

# Benchmark Your Firm's Maturity Level

PEOPLE



PROCESS



TECHNOLOGY

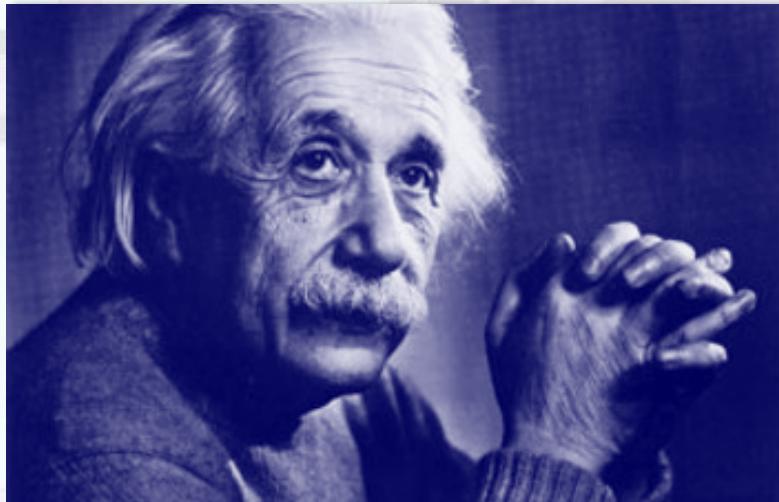


DATA



<https://calibrate-legal.com/lfmta>

# Define The (Real) Problems



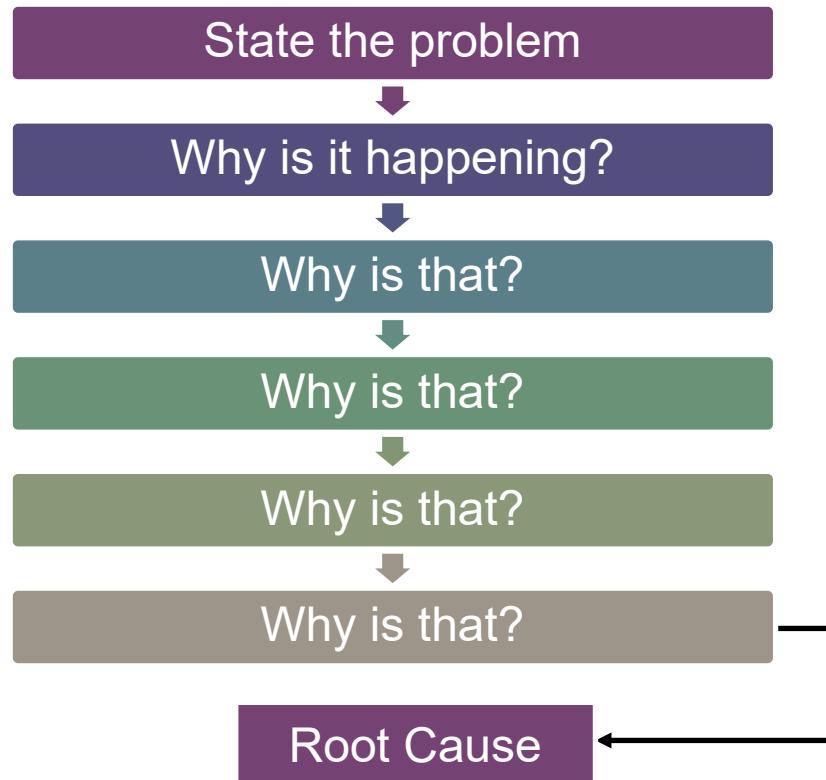
*"If I were given one hour to save the planet, I would spend 55 minutes defining the problem and five minutes resolving it."*

*-A. Einstein (attributed)*

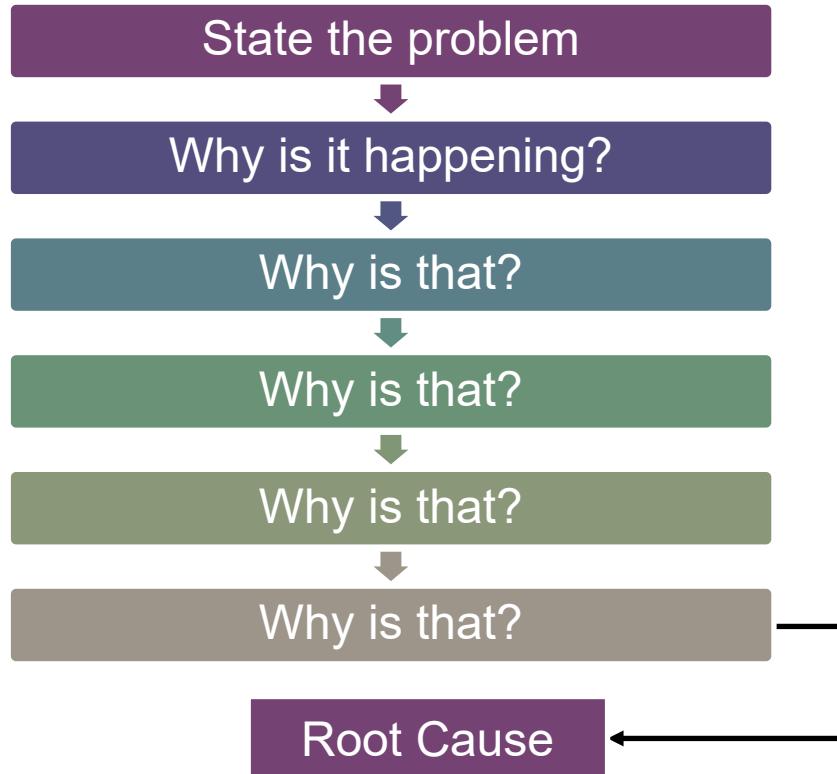
# Before Investing in a Technology, We Need To...

- Invest time and effort to understand the business problem the technology is intended to solve.
- Express the problem in the language of those who will benefit by solving it.
- Express the problem in specific quantifiable terms – preferably with dollars attached.

# The 5 Whys Technique



# We Need to Replace Our CRM!



*Why does it need to be replaced?* No one is using it.

*Why is no-one using it?* Because attorneys don't trust the data.

*Why don't they trust the data?* Because they see outdated contacts whenever we pull a mailing list.

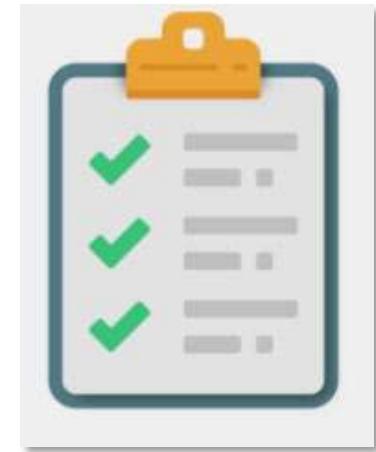
*Why are the contacts out of date?* Because there's a huge backlog of contact changes we can't get to

*Why can't you clear the backlog?* Because our data steward doesn't have time.

*Why doesn't she have time?* Because she has a lot of other responsibilities

# Developing Business Requirements

- Current situation assessment
- Define desired state
- Differentiate between product needs and product wants
- Identify stakeholders
- Identify vendor qualities
- Transition plan
- Implementation plan



# Involve People



*“If you’re going to create change across an entire system, it’s important to bring in as many different voices as possible that are impacted by the system to be part of discussions.”*

*– John Berghoff, Appreciative Inquiry*

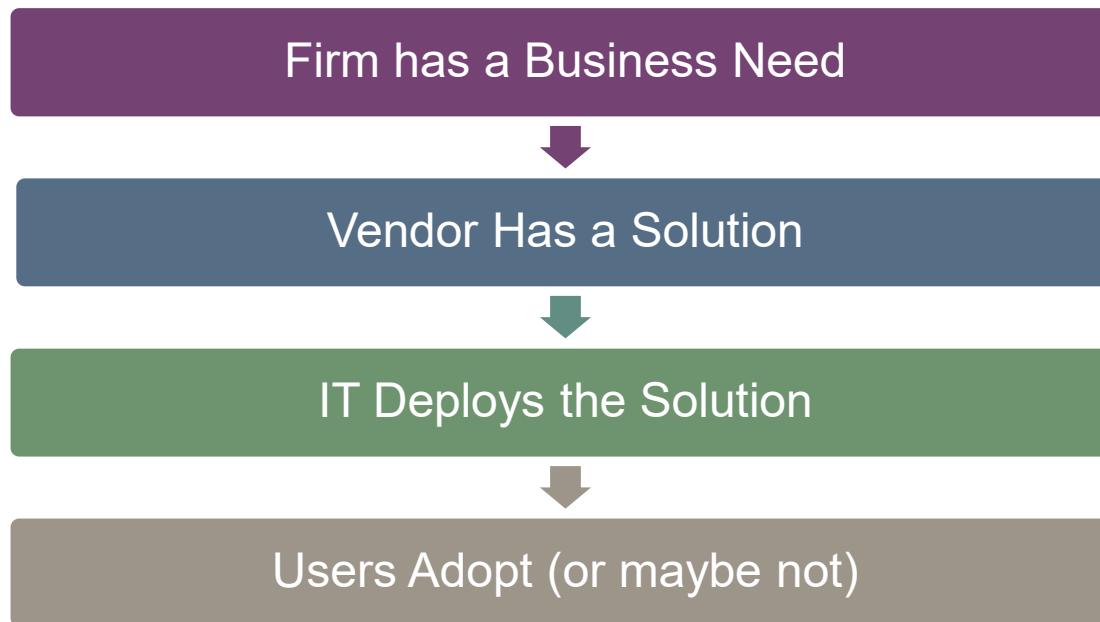
# Why IT Implementations Fail

## Lack of customer involvement.

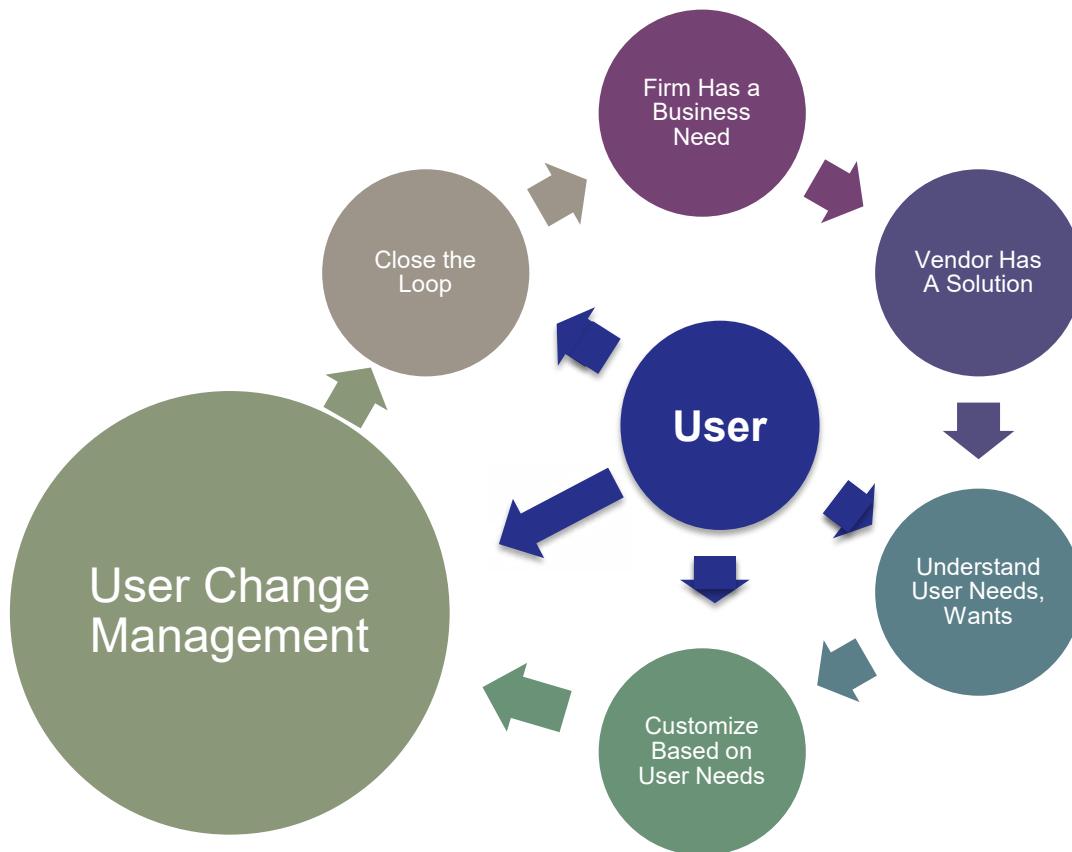
Successful projects occur when customers and the project members **work as teams** in the same.... Projects are less likely to fail if there are **informed customers** giving meaningful input during **every phase** of requirements elicitation, product description and implementation. The customer needs to be asking, "how are the project results used over time and **what do I get out of the results?**"



# Top Down Implementation Approach



# User-Centric Implementation Approach



# Tools for Engaging Users in a Solution

- Share Context and the Big Picture
- Surveys
- Interviews
- Use Cases/User Stories
- Process Mapping
- Early Adopter Groups
- Training

# User Stories

This tool is used in Agile software development to capture a simple description of a software feature from an end-user perspective. In essence, User Stories help the developer and the user to focus on how a feature will benefit the user's life.

**Basically, a User Story employs the following format:**

<b>As a:</b>	<business role>
<b>I want:</b>	<description of the feature needed>
<b>So that:</b>	<description of what the feature will help the user accomplish

# Example User Story

As a:	Marketing Communications Manager
I want:	A report on what time of day/day of week our contacts are most engaged with our mailings
So that:	I can schedule mailings to increase the likelihood of engagement and conversion

# Create a Roadmap



*“The road to success is dotted with many tempting parking spaces.”*

– Will Rogers

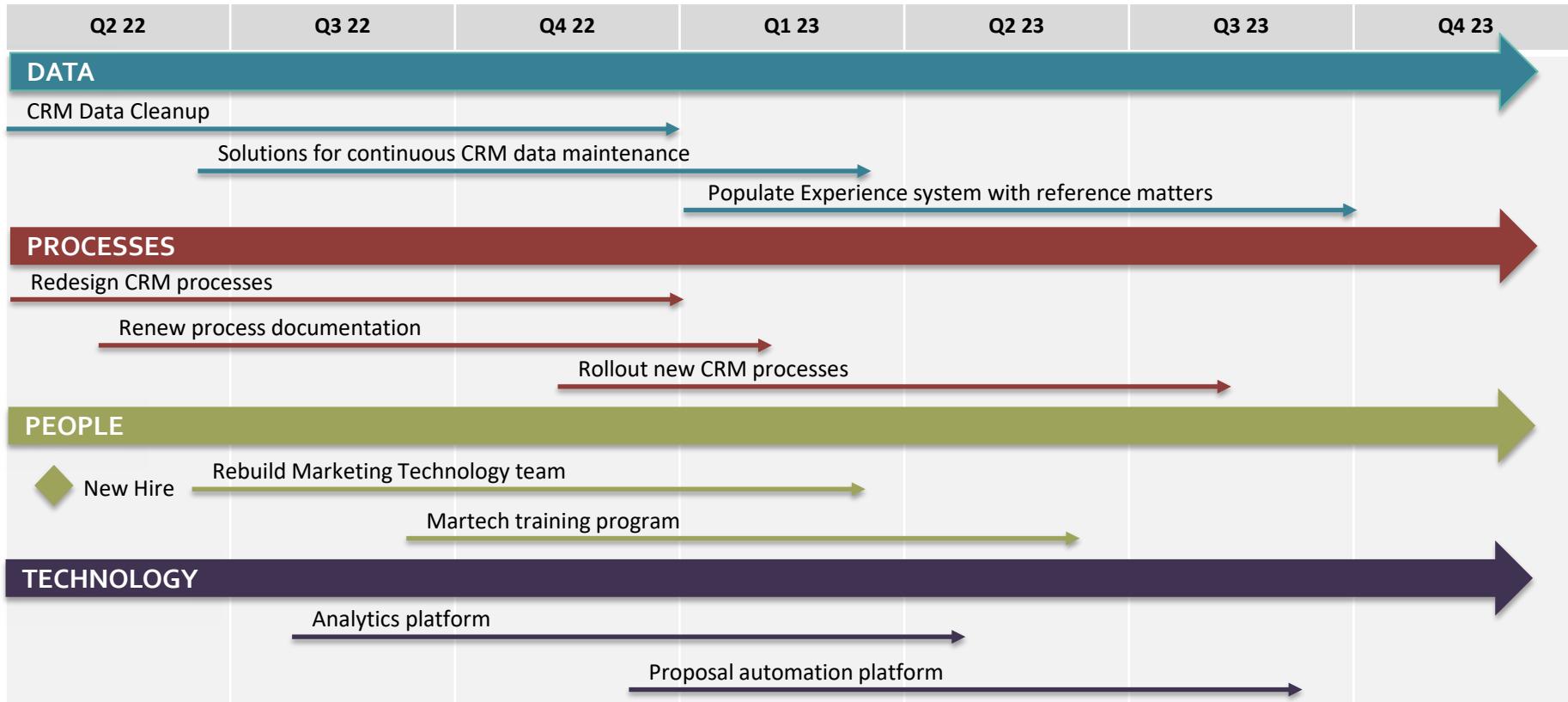
# What is a Marketing Technology Roadmap?

- A long term plan for introducing technology-based innovation into a marketing organization
- Focuses attention on how you can achieve strategic priorities through targeted technological investment
- Forces a reality check on the cost, effort and time required for change.

# Why Create a Martech Roadmap?

- Marketing technology is complex and constantly evolving.
- Changing your martech is a heavy lift and carries risks.
- You need to consider:
  - What the firm wants to achieve
  - The tech stack
  - The firm's technology architecture
  - Inter-related business processes
  - Data flows
  - Readiness: people and skills
- You can't expect to solve all problems in one go-round.
- Typically, plan on a three-year horizon for major changes.

# Sample Roadmap



# Build the Business Case



“Price is what you pay. Value is what you get.”

– Warren Buffett

# Prep for your Business Case

- Understand your decision makers and hone in on the organization's strategic plan/needs
- Work across departments to impact your credibility
- Make friends – Influence the influencers on the decision process
- Objections need to be understood, use demos and documentation, do not ignore an objection
- Know your technology inside and out – Document!

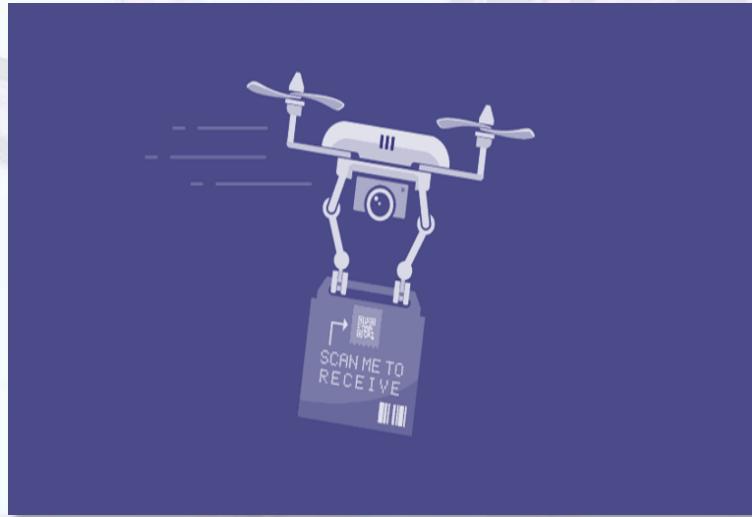


# Writing the Business Case

- Include trend research from our industry, identify what your competition is doing or not doing with this type of technology
- Address why this solution is cost wise
- Frame out your business and project management approach, include additional department's time needs and their buy in to the project
- Include how this technology will contribute to the firm's strategic goals



# Focus on the Last Mile



*"The fight to the finish spirit is one we must possess if we are to face the future as finishers."*

*– Henry David Thoreau*

# The Last Mile: Securing User Adoption

**Too often we don't think through the last mile of implementation.  
The results...**

- Poor user productivity
- Information overload
- User churn
- Training that fails to stick
- Loss of trust in systems and data
- Project failure – not meeting the goals

# User Adoption Playbook

- Adoption goals and success metrics
- Communications plan
- User training plan
- Internal marketing plan
- Support and troubleshooting plan
- Reporting lines and reporting requirements



# The Last Mile: User Adoption Strategies

**User Adoption:** The process by which users embrace and become productive with new software.

Re-focus  
on the the  
business  
need

Envision  
the future

Pilot,  
phased or  
Big Bang?

Consider  
a digital  
adoption  
platform

Visibly  
track  
progress

Reward  
the right  
behaviors

Listen to  
Users

# Stretch Beyond & Put Into Practice!

1

Diagram the core components of your martech stack.

2

Write User Stories to discover what people really need.

3

Conduct a 5 Whys analysis to uncover root causes.

4

Roadmap your martech stack and program over 1-3 years.

5

Write a business case in the language of your CFO.

6

Build a User Adoption playbook for the Last Mile of your project.

# Review of Learning Objectives

- Discuss and articulate the business problem that technology is supposed to address
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- Create a business case for new technology investments to fill your gaps



# We Appreciate Your Feedback

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