# ULTIMATE GUIDE TO ASSESSING YOUR DIGITAL MARKETING PROGRAM



**SILVERPOP**
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# ULTIMATE GUIDE TO ASSESSING YOUR DIGITAL MARKETING PROGRAM

Every day, marketers take steps to enhance their digital marketing programs. A new email here, a Twitter campaign there, a list growth initiative going live soon. With buyer sophistication growing daily, you're constantly having to re-up your marketing game with increasingly smart campaigns. Given limited resources, it's challenging to find the time to pause long enough to consider your next move, let alone evaluate how your efforts are working.

But before you dive headlong into the next task, consider this: How will you know if you're improving (or regressing) unless you step back to take stock of your digital marketing program?

Assessments can be the starting point for establishing – and achieving – goals in the upcoming months and years, but that's just the first benefit. They're also valuable for sharing with coworkers to help explain where you are and where you want to go. And last but certainly not least, they raise awareness for digital marketing among the executive staff and help get budget buy-in for new campaigns.

Done properly, periodic assessments enable you to attack upcoming initiatives with renewed vigor and make substantial progress compared to what you'd be able to achieve without taking the time to regroup.

## Getting the Timing Right

Performing thorough, periodic assessments is highly recommended – but you have to make sure you pick the right time to carry through with them, otherwise you'll spread yourself too thin. During budget season, for example, you're busy figuring out how much key programs will cost, tallying technology expenses, and making a case for additional headcount and resources. For most marketers, this exercise is pretty all-consuming with specific deadlines attached to it. So naturally, assessment exercises will fall by the wayside.

With that in mind, look to do your evaluations at a different time of year than your budget planning, heaviest sales period, etc. Pick a month that's a little less hectic to begin to take stock of your digital programs. For each area of your program, evaluate what you're doing, compare to benchmarks where possible and develop action plans to improve your execution and overall sophistication.

While the key areas of assessment will vary a bit based on your industry and product or service sold, most digital marketers should systematically review at least the following seven areas:

- Target Market
- Pipeline
- Content
- Engagement
- Technology and Skills
- Mobile Marketing
- Social Media



*Ellen Valentine*
Strategic Marketing Evangelist

**Tips for Performing a Marketing Self-Assessment**

In this white paper, we'll take a closer look at each of these seven areas, advise you on key questions to ask as you're assessing yourself, and provide worksheets and related tools to help you get the most out of your evaluation.

Remember: Done thoroughly and thoughtfully across the department, your digital marketing assessment can be both a report card for how well you're doing and a springboard for substantial improvement moving forward. Let's get started.

# Section 1: Target Market

## Target Market Assessment Overview

What is the total addressable market for your products and services? The identification of your target market is a key starting point for your assessment and should include a good definition of the personas most likely to purchase your products.

**Example Personas:**

- **B2C Example:** Fifty percent of our products are most likely purchased by millennial young men age 20 to 25 years old who like winter snow sports. Seventy percent of those live in Colorado, Utah, Washington, and Oregon.

- **B2B Example:** Engineering Managers/ Directors/VPs employed by companies in NAICS codes 31xxxx where the company revenue is more than $200 million.

Do your best to estimate how many individuals fit your definitions. Use outside data sources such as USA Data or Hoovers to get summary counts of how many individuals are in each of your persona categories. (If you're new to buyer persona marketing, see the "Additional Resources" sidebar on p. 6 for further reading.)

Next, look at your database and see how many prospects (people who have opted in to your database but never purchased from you) match these personas. How many customer contacts (people who have purchased from you) do you have that match?

From there you can calculate your market capture (prospects in your database divided by total addressable market) and market penetration rates (customers divided by total addressable market).

If you have a lot of names in your database that you don't know much about, and you're unable to assign them to a persona, consider adding a couple of questions to better discern who your prospects are. Many of us have huge addressable markets, so our percentages of market capture and market penetration will be quite small. The important thing is that you analyze this and track it over time.

If you need more prospects in your database there are many tactics you can try employing, such as enhancing your email magnet (see p. 6), expanding ad retargeting, including an opt-in tab on your Facebook page, writing more SEO-friendly content and increasing Pay per Click advertising.

Another item to consider is how many fields you have for each record in your database. If you just have email address and a name, you're most likely relegated to doing batch-and-blast email that may lead to recipients unsubscribing or just ignoring you.

On the other hand, if you have lots of fields that can be used to create rule-driven, highly relevant communications, you stand a much better chance of continuing with strong engagement. So, assess the health of your database and consider whether using improved Web forms, progressive profiling and/or surveys would help you increase the number of fields you can use to develop highly relevant, personalized messages.
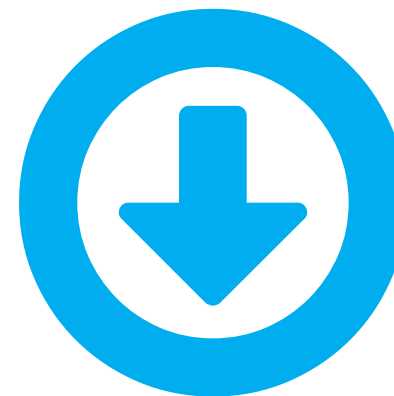
# Target Market Worksheet

| Persona Name | # of Prospects in Your Database | # of Customers in Your Database | Total Addressable Market | Market Capture | Market Penetration |
|---|---|---|---|---|---|
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| | | | | | |
| | | | | | |
| Unknown Persona | | | | | |

## Target Market Tip: Develop a Great Email Magnet

Many companies are still offering the same incentive for providing an email address that they did two, five, even 10 years ago. But the way potential customers interact with businesses has changed a lot since 2004, and so have their expectations about what they want – and deserve – in exchange for providing their email address.

The term "email magnet" refers to the offer you make to encourage anonymous website visitors to sign up for your email list. As you're assessing your target market, it's a good time to go back to basics and think about your email magnet.

The email magnet should contain some of your best content and educate prospects while providing information about your culture and brand. Plus, it should make their day!

That's right, the best email magnets are about building a relationship, not pushing products. Here are a few examples to prime your creative content pump:

- **For parents of problem children**, offer a personal parenting plan.

- **For women shopping for suits,** offer a guide to looking slimmer and traveling to the next meeting wrinkle-free.

- **For fire safety professionals,** offer a resource list of top industry trends they can share with their executives, while also providing your take on the Top 10 things they need to do to minimize a catastrophe.

- **For heads of procurement**, offer a guide to improving their negotiating skills.

In general, don't ask for too much information in exchange for your email magnet offer, but certainly ask for one or two important pieces of info you can store in your digital database and use to tailor future offers and marketing communications.

Also, don't forget about the best practice of placing your offer above the fold in a prominent part of your website. You may even want to consider a modal or pop-up window on the first visit.

If any of these suggestions rings true, take the time as part of your assessment process to make a massive upgrade by launching a great email magnet.

### Additional Resources

1) Blog: "Marketing Lists: Are You Growing or Just Treading Water?"

2) Website: "Buyer Persona Institute"

**3) Ebook: "31 Tactics for Building Your Database"**



4) Blog: "Email Opt-Ins: Be Where Your Customers Are"

5) Blog: "Progressive Profiling: The Key to Collecting Data Without Weirding People Out"

# Section 2: Pipeline

## Pipeline Assessment Overview

While pipeline analysis has long been the domain of the B2B marketer with a sales force, pipeline analysis can also be done in a B2C environment – and not just for companies with longer, big-budget buying cycles. In a landscape in which there are more paths to purchase than ever – and in which driving repeat business and building brand loyalty has become increasingly critical to success – improving your understanding of pipeline has taken on greater importance regardless of industry.

It's easy to let a marketing pipeline fall into disrepair as incoming leads or list growth take precedence over slow-burning opportunities or repeat business, which can slip and stagnate for a variety of reasons. But increasing attention to this area can save a lot of wasted time and energy.

B2B marketers will want to look at how many companies and people you have at each stage in your buying cycle. Spot check a few dozen individual cases (successful and not-so-successful situations) to see when they became an identified record in your digital database, what content they consumed in their buyer's journey, and the time it took to progress to a sales handoff.

Look at the time it took to progress through each step. To ensure maximum success, get sales on board with your definitions and processes. How could this be improved? Is there new content that would help? If you find a large number of customers or prospects "stuck" in a stage, then perhaps you need to design some new content, an incentive or other tactic to keep folks moving down the sales pipeline. Would it be good to introduce a new communication channel into the mix? Would you be able to increase relevance by using more data that's found across your enterprise?

If you're a B2C marketer, you'll want to evaluate core metrics such as lifetime customer revenue for every customer, purchase frequency, and average time from opt-in to first purchase. You may also want to examine average time from first to second purchase, along with related metrics. As part of your assessment, review your abandoned shopping cart program to make sure it's performing to maximum efficiency.

Don't think of content marketing as solely the domain of the B2B marketer. Consider shifting your mindset and campaign strategies from promoting the deal of the day or product push messaging to offering helpful how-to-buy nurture content. (For more on all things content, see "Section 3: Content" on p. 10.)

Is it time to implement a scoring model, or perhaps enhance an existing one? An effective scoring system allows you to improve the quality of leads you're providing to sales (if applicable), better gauge the engagement level of existing contacts, and increase the relevancy of information you're providing to these contacts. As part of the process, look at how you might leverage a scoring model to target specific content offers or place individuals in nurture or reactivation programs based on their buying stage or engagement level.

# Pipeline Worksheet

**B2B instructions:** Note all your pipeline stages in the grid below. If you don't have pipeline stages, consider adopting a basic version by assigning each prospect to one of the following stages: Inquiry, Marketing Nurture, Marketing Qualified, Sales Accepted and Sales Qualified. (As an alternative, you might use Awareness, Researching, Evaluating and Decision.)

Record how many opportunities you have at each stage. Then, evaluate how long clients are spending at each stage in their customer journey before moving to a new stage or becoming disqualified.

| Pipeline Stage | Quantity | Average Length of Time at This Stage | Action Items to Promote Movement |
|---|---|---|---|
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**B2C instructions:** Record the date that someone opts in to your messages and compare that to the date of the first sale. Measure this as an average across all customers in your database. Also, calculate the age of each database record.

| Sale # | Avg. Age of Database Record | Avg. Time from Opt-in to Sale | Avg. Transaction Amount | Action Items to Promote Movement |
|---|---|---|---|---|
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |

**Pipeline Tip:** Incorporate Nurtures into Your Digital Marketing Efforts

Nurture programs can help you build brand preference and loyalty before a sale and in between multiple purchase transactions. Unfortunately, too many marketers are content executing super-basic nurture programs, sending a "one size fits all" newsletter or product announcement every few weeks.

To help improve pipeline efficiency, check out these five ways to incorporate nurtures into your digital marketing efforts:

### 1) Drip Nurtures

This is where most marketers start dabbling with nurture programs. Every recipient receives the same message every week or two, usually containing product announcements, company highlights or upcoming events. It's fine to start here, but you should immediately put together a plan to leverage more of your marketing automation platform's capabilities to provide your contacts with tailored, individualized messages.

### 2) Multichannel Drip Nurtures

These nurtures incorporate marketing channels beyond email, such as traditional "snail mail," phone calls by an inside sales organization or SMS messages, and provide additional touch points that can distinguish you from the competition. Similar to the simple drip nurture, however, all your recipients still receive the same content, so you need to up the ante to deploy more advanced nurtures.

### 3) Data-Driven Nurtures

Begin collecting important information from your contacts such as industry, company size, and/or biggest challenges. Store these values in your database and use them to customize your nurture. Incorporate dynamic content to personalize each message.

Remember: You're not limited to personalizing just one data element. Collect different key data points and use them liberally as rule sets in your communications.

### 4) Persona-Driven Nurtures

Analyze your top customer segments and determine the contacts involved in the buying decision. Then, dig deeper and understand their challenges and interests. Examine your existing content and align it with each persona.

When visitors come to your website, ask about their areas of responsibility or job category (explicit profiling) or infer this based on where they're clicking (implicit profiling). Use these data points as the basis for a persona-driven nurture.

### 5) Specialty Nurtures

Once you get the hang of setting up automated nurtures, the sky is the limit for how you might use these capabilities. Consider new customer onboarding, lead recycling or even sales rep-initiated nurtures.

**Additional Resources**

1) Webinar: "Nurture Marketing: How to Own the Gap"

2) White Paper: "Know the Score: The Ultimate Guide to Scoring Customer and Prospects"

3) **Tip Sheet: "7 Tips for Nurture Marketing"**

4) Slideshare: "How SmartPak Uses Lifecycle Emails to Engage Its Customers Every Step of the Way"

5) Blog: "Engagement Scoring: Giving B2C Marketers a Catalyst for Effective Marketing"



TIP SHEET

7 TIPS
FOR NURTURE
MARKETING

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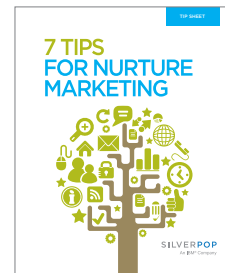
# Section 3: Content

## Content Assessment Overview

Again, content marketing applies to both B2B and B2C markets. The only exception might be an impulse purchase or and immediately consumable product. Take inventory of your content by assessing each piece using the worksheet on p. 11. If you don't have defined buying stage cycles, consider using "Capture," "Nurture" and "Convert" or "Awareness," "Education" and "Conversion":

- **Awareness**: conscious that something different/new might be needed; use content here to help people discover you and your company

- **Education:** why are these particular types of products needed; use content here to explain all the alternatives

- **Selection**: why are *your* products, services or firm the best option; use content here to justify you and the purchase

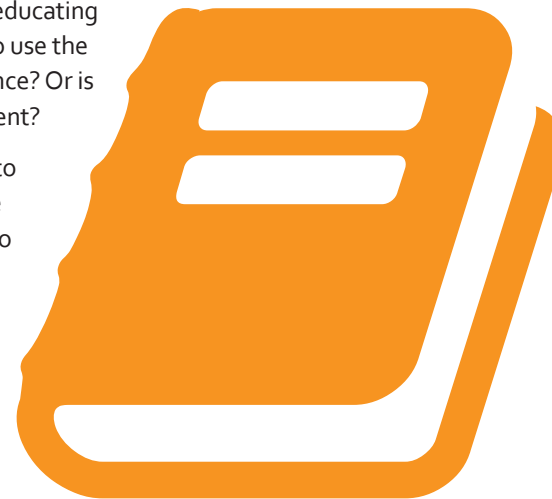Next, determine the three or four key types of buyer categories, or personas, you have. This could be "Engineering Managers," "Operations" and "Procurement" or "Local Snowboarding Millennials" and "Exploring Boomer Cross Country Skiers." (If you need help in this area, review the "Pipeline" section on p. 7.) Then, place each content piece you have in each Persona/Buying Cycle phase. Don't be surprised to discover you have an abundance of content in one or two stages but really lack the content you need in another stage.

You might also be surprised to see that some content you have isn't being used at all. If that's the case you'll have to determine if it it's a fixable issue. Could some combination of re-upping your promotion of the content, changing the title, refreshing the graphics, changing the landing page or sales copy, and educating the sales force on how to use the contents make a difference? Or is it time to retire the content?

This is also a great time to take stock of your image library. Should you add to your library by acquiring additional stock images, scheduling some photo shoots or having additional graphic images designed?

If you're going to need to create one or more substantial content pieces to fill persona or buying cycle gaps, think about breaking that content up into "snackable" smaller pieces that leverage a different format. That way, you can make the most out of the effort and expense you put into creating the doc. After all, the more formats you employ, the more likely it is you'll get engagement and your message will stick. (For more, see the "Go for the Content Triple Play" section on p. 12.)

# Content Worksheet

| Content Piece Name | Stage in Buying Cycle It's Being Used | Who Is Consuming? | How Often Accessed or Downloaded This Year (or time period) | Action Needed (update, promote, educate, retire) |
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## Content Tip: Go for the Content Triple Play

Shifting buying cycles, empowered customers, and emerging channels and platforms have combined to create an environment in which it's imperative that business create content that prospects and customers find engaging, entertaining and enlightening. But it can be a challenge to step up and act as an educator and thought leader: 90 percent of B2C marketers, for example, are using content marketing, but only 34 percent consider themselves effective at it.[1]

One smart tactic for addressing your content needs and gaps is to go for a "content triple play" as you're developing new content.

In this context, tallying a "content triple play" means thinking about the pieces of content you're creating and spinning off two other iterations, by repurposing and/or repackaging that content. To do this, you'll need to think about your content in terms of these three considerations:

- **Format** (white papers, Webinars, videos)
- **Channel** (email, social media, SMS)
- **Buying cycle phases** (interested, educated, lapsed)

Here are four tips for getting the content triple play right:

**1) Think about the entire buying cycle.** Someone who comes to your website to learn more about your industry needs different information than someone who's comparing product features and functions for the last time before selecting a vendor partner.

**2) Figure out what channels and formats resonate most with your customers and prospects**. Make this your starting point and build outward from there, tailoring the repurposed content to its new channel or format.

**3) Remember that everyone learns a bit differently**. One person may love listening to a podcast or watching a video on a topic, while others may be more comfortable reading a printed PDF. Keep this in mind when you're designing both your strategy and tactics.

**4) Don't skimp on quality in the rush to get content out the door**. Strong content, especially when offered in the right context, enhances the chances that your content will be socially shared, which in turn widens your exposure to future search visitors.

No matter how you go about it, having multiple forms of content allows you to significantly expand the reach of your brand. The end result? Higher consumption, database growth and increased revenue.

**Additional Resources**

1) Blog: "5 Steps to Optimize Your Content in 2014"

2) Blog: "Assessing Content Needs"

3) Tip Sheet: "7 Tips for Generating Content for Automated Emails"



4) Video: "Where Do You Get Your Content for Triggered Emails?"

5) Blog: "3 Tips for Maximizing Content Creation, Consumption and Distribution"

# Section 4: Engagement

## Engagement Assessment Overview

How engaged are your customers and prospects? You can't sell anything to anyone if they aren't engaged and responding to your communications. So, assessing how we'll you're communicating with contacts is essential to continued success.

For this exercise, consider evaluating your customers and prospects separately, as they might have different threshold goals that you need to achieve to meet your revenue and pipeline objectives.

To start, look at your email engagement, since this is often where lead development and conversion happen. Use Silverpop's annual email marketing metrics benchmarking report (see "additional resources" on p. 15) to see how you measure up. What were your highest performing prospect and customer communications? What were your poorest performing marketing messages? You'll also want to compare your unsubscribe rates to your peers.

Are you working enough automated, triggered emails into your messaging mix? Since these emails are driven by the recipient's actions, they often drive greater open, click-through and conversion rates than general broadcast messages. If your engagement levels are low, looking for ways to incorporate these messages – which can include happy birthday emails, cart and browse abandonment messages, demo expiration reminders and many more – can help nudge you toward the top performers.

Do you have a reactivation campaign to wake up dormant people in your database? Do you need to delete the long-term inactives? For those contacts in your database who have been inactive for a year or longer, it's generally advised to put those individuals in a brief reactivation automated campaign. If at the end of that program you still don't have any activity, you should consider deleting these names from your database.

If you have a larger-than-expected number of inactives in your database, you may also want to consider initiating an "early reactivation" program that would "listen" for early signs of disengagement and foster interactions with those contacts after a shorter period of inactivity rather than waiting until a year (or more) had elapsed.

Don't limit your engagement assessment to just email. If you have an SMS program, a mobile app and/or use direct mail, this is also a good time to assess those communications as well. Where applicable, review open, click-through, conversion and usage rates. If a sizeable portion of your app downloaders only use your app once, for example, you might look at an "app welcome" email program that would help educate them on how to get the most out of your app.

What about your website? Are people spending the expected amount of time on your site, or are your bounce rates and viewing times low? If so, adding dynamic, personalized content blocks to your site through a CMS integration with your digital platform might be beneficial. Take a holistic look at engagement and you're sure to spot some excellent opportunities to provide a stronger customer experience.

## Engagement Worksheet

| Communication Type (email, SMS, direct mail) | Date | Time Sent | Offer | Open Rate | Click-Through Rate | Conversion Rate (if applicable) |
|---|---|---|---|---|---|---|
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**Assess the engagement of the entire database:**

__% active with email and/or on the website in the last 30 days

__% active with email and/or on the website in the last 90 days

__% active in the last 6 months

__% active in the last year

__% inactive in the last year

## Engagement Tip: Tap the Power of Behavioral Marketing to Deliver More Relevant Content

Incorporating behavioral marketing into your emails and website is a surefire way to increase engagement levels. Because the content is based on the contact's unique behaviors, it's inherently relevant and thus much more likely to be interacted with.

Here are four tips to get you started taking advantage of this powerful way of communicating to customers and prospects.

### 1) Get Web tracking turned on.

Meet with IT and explain what Web tracking code is, how it will be used, and how it differs from Google Analytics. If response is slow, enlist management to help you escalate this important requirement.

Once you've got Web tracking turned on, you'll be able to capture the basic behaviors essential to behavioral marketing, such as general website visits, specific Web page visits and file downloads.

### 2) Set up an actionable, centralized marketing database.

It's fine to put all the information you capture on prospects and customers into a data warehouse for segmentation and analysis, but this shouldn't be the sole place your data resides. Instead, make it a priority to configure your systems and integrations so you can capture behavioral marketing information into an actionable central marketing database and deliver real-time, relevant interactions with contacts.

### 3) Build out trigger-based communications.

Eventually, you'll want a whole portfolio of behavior-based communications ready to go, but you'll see benefits from incorporating even a handful of triggered emails. One great place to start is with browse or process abandonment messages. For example, you could set up rules so if a prospect visits a product specification page, this behavior would trigger an automated email letting that person know how to contact a specialist and providing some product FAQ answers.

### 4) Consider capturing more advanced behaviors.

By integrating new data sources into your digital marketing platform, you can increase sophistication. For example, if someone watched a video, did they watch it to its conclusion? If they listened to a Webinar, how long did they listen? Did they cross a geofence surrounding one of your physical stores and, if so, did they make a purchase? These are all behaviors that can be fed into your platform to support near-real-time communication.

**Additional Resources**

1) White Paper: "Creating Real-Time Individualized Campaigns Around Every Imaginable Buyer Behavior"

2) Blog: "5 Approaches to Minimizing Unsubscribes"

3) **White Paper: "2014 Email Marketing Metrics Benchmark Study"**


2014 SILVERPOP EMAIL MARKETING METRICS BENCHMARK STUDY

4) Video: "Re-Engage Inactive Subscribers"

5) White Paper: "21 Tips for Building a Strong Modern-Day Preference Center"

# Section 5: Technology and Skills

### Technology and Skills Assessment Overview

There are some great digital marketing tools in the marketplace, yet many marketers are only using about 20 percent of the capabilities of their platforms. If you want to be successful today, you need a strong digital marketing platform and a blend of creative thinkers and smart systems-thinking specialists on your team who can leverage this technology to drive efficiency within the marketing department.

So, take this time to evaluate your current use of your digital platform as well as your skill levels in each of these areas. Review all the features and functions that are provided, including the ones you haven't given much thought to trying in the past.

Remember: The purpose of this exercise isn't to make you feel bad about all the capabilities you're not using or to become overwhelmed by all the features available. Part of the beauty of marketing automation is that you can choose to phase in functionality gradually or implement just a few features from your marketing automation platform's comprehensive tool set. To that end, this exercise will help serve as a reminder of the capabilities available to you, at which point you can determine which ones make the most sense to incorporate based on business goals, revenue impact and ease of implementation.

As part of the evaluation, you'll want to assess both your skills ("none" to "expert") and your exploitation of the function ("none" to "using extensively in a sophisticated manner"). If you don't have high skill levels, evaluate whether you're dedicating enough time and resources for education. Many companies overlook staff training when they're strategizing about how to improve results, and that's a huge mistake: Continuous education is essential for staying on top of both industry trends and technology enhancements.

Would you also benefit from hiring an agency and/or tapping your platform provider's services team to leverage the technology for you and/or teach you how to become self-sufficient in future efforts? Given all the specialized resources needed today, even the most diverse, well-trained marketing organizations sometimes lack the breadth or depth in-house to handle everything necessary to achieve both short-term tactical and long-term strategic objectives. Would tapping the skills of a laser-focused outside specialist help you achiever your goals? If your financial resources are limited, boutique firms may be able to supplement your team on a project-by-project basis.

By thoroughly reviewing your proficiency on both the technology and skills fronts, you're bound to find opportunities for both training and digital campaign upgrades.
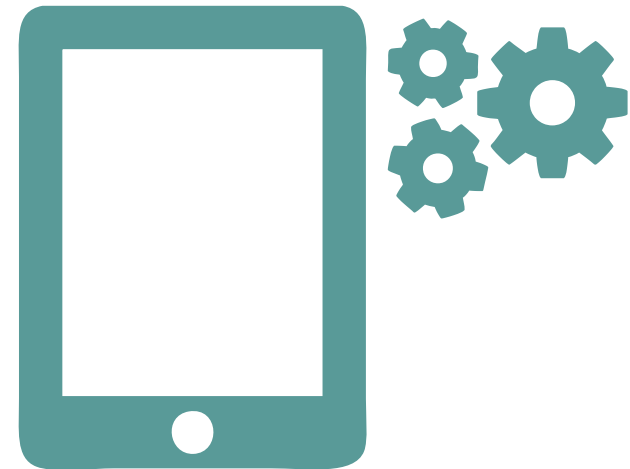
# Technology Worksheet

| Technology Area | Skill Level (0-5; 0 being no experience, 5 being certified expert) | Use of Technology (0-5; 0 being no use, 5 being extensive use) | Action Plan to Increase Use |
|---|---|---|---|
| Data Integrations | | | |
| Scoring | | | |
| Alerts | | | |
| Automation | | | |
| Personalization | | | |
| Dynamic Content | | | |
| Send Time Optimization | | | |
| Snooze | | | |
| A/B Testing | | | |
| Landing Pages | | | |
| Progressive Profiling | | | |
| Preference Center(s) | | | |
| Web Forms/Data Collection | | | |

## Skills Worksheet

| Skill Area | Skill Level (0-5; 0 being no experience, 5 being certified expert) | Action Plan to Increase Use |
|---|---|---|
| Responsive Design/ Mobile Design | | |
| Integrated Campaign Design | | |
| Campaign Setup / Implementation | | |
| Automation | | |
| Sales & Marketing Integration | | |
| Data Integrations | | |
| Campaign Analysis & Reporting | | |
| Content Creation | | |
| Social Monitoring | | |
| Graphic Design | | |
| SEO | | |
| Digital Advertising | | |
| Email Design | | |
| HTML Coding | | |
| Website Design | | |
| Content Management & CMS Operations | | |

## Technology and Skills Tip: Develop a Center of Excellence

Collaboration across disciplines can accelerate your success. So, look for ways to maximize your marketing efforts by aligning with other departments. Figure out who the key players are outside the marketing department. How can they help you, and – just as importantly – how you can you help them? How and when should you bring them into the mix?

As part of this process, consider creating a "Centers of Excellence" in your organization. This group can be a huge help in helping every division in your company get up and going faster and achieve success on a broader scale.

Typically, a Center of Excellence consists of cross-organization experts that can facilitate change and speed the path to success. A sample Center of Excellence might include:

- **Data Expert:** Knows the ins and outs of your marketing database, how the fields map, where the weak spots are, etc.

- **Sales Expert:** Possesses an in-depth understanding of the challenges sales is facing, prospects' pain points and how your lead management process is working (or not) from a sales perspective

- **Content Expert:** Is intimately aware of the available content options and can comment on how they might come to bear in your automated campaigns

- **Product Expert:** Knows exactly what the product can and can't do, as well as what's on the road map and how future products and upgrades are being prioritized

- **Scoring Expert:** Understands all the scoring models deployed across your enterprise and what attributes/behaviors are weighted most heavily

- **IT Expert:** Understands the technical requirements of the integrations needed for sophisticated marketing initiatives and can speak to the best ways to allocate IT resources

The exact team members will vary based on your business and industry, but the bottom line is that your Center of Excellence should consist of a mix of marketing, sales, product and IT experts. By having each group represented, you'll help ensure that you stay ahead of technological and marketplace shifts. Done right, a Center of Excellence increases efficiency by making cross-department buy-in easier to achieve and providing a go-to team of experts employees can rely on when they need help brainstorming solutions.

### Additional Resources

1) Blog: "Using Marketing Automation to Work Smarter, Not Harder"

2) Video: "Skills: Assembling the Perfect Marketing Team"

3) **White Paper: "15 Tips for Enhancing Your Marketing Team's Vision, Skills and Data"**

4) Blog: "Get More Personal by Making the Most Out of Your Marketing Technology"

5) Blog: "Sifting Through the Marketing Automation Toolbox"

# Section 6: Mobile Marketing

## Mobile Marketing Assessment Overview

How mobile-engaged is your audience? More than 50 percent of emails are now opened on mobile devices[2], and as smartphones are rapidly becoming the dominant phone technology, this is a smart time to evaluate mobile email open rates. If you don't know your mobile open rates, consider using a tool such as Silverpop's Email Insights to evaluate your audience.

If you have high mobile open rates, are you fully leveraging responsive design techniques or other mobile-friendly email strategies? If not, do you need to update your templates? Since many smaller-screen users will be multitasking when they're reading your emails, the design needs to be simpler, more focused and easier to navigate. If yes, have you ensured that tablet and desktop users are still enjoying a strong viewing experience, since in many cases the final conversion will take place on these platforms?

What about any landing pages that your email links route to? If your email looks amazing on a mobile device, but the Web page it directs to doesn't, you won't get the results you want. If conversion rates are flagging, check to see if there are any notable differences between desktop and mobile conversions, and adjust accordingly.

This is also a great time to think about whether you would be well served to begin or expand your SMS or text-based communications. Do you have processes in place to capture telephone numbers? Have you selected a mobile service provider? Are you using SMS interactions to trigger content in other channels, and vice-versa? Do you have any programs that would benefit from a multichannel approach, such as sending automated reminders via a combination of SMS, email, phone and/or print? Done properly, you can greatly increase engagement with some well-timed text messages to your clients.

Finally, if you have a mobile app, there are a few factors to consider. First, do you have a ton of email subscribers but way fewer downloaders of your app? If so, would you benefit from, for example, sending a notification email to all customers that have previously opened your email — or visited your website — on an iPhone next time you release an upgrade to your iPhone app?

Second, how engaged is your mobile app audience? (See "Section 4: Engagement" on p. 13 for more.) Third, is your mobile app integrated with your central database? If not, would the ability to leverage this data in other areas of your marketing make it worth it? If yes, are there areas of the mobile app experience that would be enhanced if you made them more personal using data in your central database?

# Mobile Worksheet

**Mobile Email Experience**

Percent of Emails Opened on ___ Desktop ___ Mobile

**Email Performance, Desktop vs. Mobile**

Avg. Open Rate ___ Desktop ____ Mobile

Avg. Click-Through Rate ___ Desktop ___ Mobile

Avg. Conversion Rates ___ Desktop ___ Mobile

**Preferred Mobile Device Types:**

__ iPhone __ Android __ Other (Note in percentage)

Number of contacts in database: _____

Number of contacts for whom
you have a mobile phone number: _____

Number of contacts who have
downloaded your mobile app (if applicable): _____

TWITTER

FACEBOOK

TEXT

EMAIL

## Mobile Tip: Look for New Ways to Work Location Marketing into Your Mix

In today's increasingly mobile, on-the-go world, not only do your customers expect you to know who they are, but they also increasingly expect you to know *where* they are—and where they've been. Here are three ideas for using a contact's location to trigger messages and serve up content on your website and in your emails that reflects customers' in-store visits and physical mailing address:

### 1) Employ geofence data.

Setting up a geofence – a virtual perimeter around a physical location, such as a store – enables you to track when certain customers enter the area. And if you set up the right integrations to capture this location data (for customers who have opted in) and immediately feed it into a centralized master database, you've given yourself a new way to complement the work of your in-store staff by sending a timely, personalized SMS text to arriving (or exiting) customers that treat them as individuals rather than just another random visitor.

You can also use geofence data to create excitement around your brand, increase store and venue/event traffic and provide new opportunities to grow your email list. For example, you could award prizes based on when or how often someone visits a specific store. When a customer crosses the select geofence a certain number of times, business rules you've set up could trigger your marketing platform to send an automated communication thanking them for frequenting the store and offering a reward.

### 2) Use ZIP code information.

Send messages to contacts within the ZIP code radius you specify, making your messages more relevant than ever. Or, insert dynamic content blocks on your website that display different content based on the visitor ZIP code. With additional integrations, you could even take it up a notch by having local weather trigger emails related to temperatures or precipitation levels in the contact's area.

### 3) Check out iBeacon.

The increased prevalence of iBeacon technology on smartphones is opening up exciting new possibilities for marketers. This technology enables a form of micro-location geofencing that makes it much easier for retailers to use a person's exact location within a store to deliver targeted, relevant content. For opted-in contacts, this could allow you to get much more specific with your targeting, such as sending a push notification at the exact moment the customer strolls into Aisle 12 with offers or content related to where they're standing (along with other relevant info from your database).

### Additional Resources

1) Blog: "3 Questions to Drive Your Multiscreen Email Design Decisions"

2) Infographic: "Mobile Email, Search and Purchase Behaviors"

3) Tip Sheet: "7 Tips for Incorporating SMS into Your Marketing Efforts"

TIP SHEET

**7 TIPS FOR INCORPORATING SMS INTO YOUR MARKETING EFFORTS**

SILVERPOP
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4) Video: "iBeacon and the Next Generation of Location-Based Marketing"

5) Blog: "Mobile Apps, Meet Marketing Automation"

# Section 7: Social Media

## Social Assessment Overview

Social isn't just a place where people are checking for the latest news updates while waiting in line or providing a running commentary during their favorite TV show – it's also a place where many people are discovering new brands, chatting with social connections about product options, and reaching out to companies with questions or support requests. And it serves an increasingly larger role in brand awareness, lead generation and customer retention.

You must take stock of your social presence to ensure that you're easily found and fully engaged in social conversations with customers, prospects and shareholders (or other interested stakeholders), and ensure that your content is easily digestible for the folks who are always checking their networks while on-the-go.

Do you have processes and resources in place to listen, evaluate and respond to social conversations? Social media is often "ground zero" where you can make or break individual relationships. Your followers expect responses on social – a short reply can go a long way toward humanizing your brand.

Make sure your email templates are designed to highlight and encourage your subscribers to share your messages. Where's your social call to action, and are you highlighting the best social networks (e.g., the ones you spend the most time on and your customers are most engaged with)? Would you benefit from a one-off email (or a campaign) specifically geared toward outlining the benefits of following your business on social media?

When customers buy a product or use your service, are you encouraging them to share their experience on social media? Setting up business rules that listen for certain behaviors (e.g. positive reviews) and then using them as triggers for delivering email or Web content encouraging customers to share their reviews via social can drive engagement in a hurry, so assess where you stand in this area.

How are you using social to drive database growth? Have you added an opt-in tab on Facebook and Tweeted links to your sign-up page, for example? Also, do you offer a social login option to make it easier for contacts to fill out forms on your site (and for you to gather key data points)?

Is social access limited to the marketing team? If so, would you benefit from adding shareholders from other parts of the company, such as customer service or product development? Within the marketing team, are social campaigns aligned with other team members' initiatives, or are your efforts out of sync?

Finally, many social networks have started adding advertising tools that enable marketers to connect with prospects that meet certain key criteria. Are you using these tools, and if so are they effective? Don't forget to keep your updates in line with your overall brand messaging. Cheekiness is accepted and expected on social, but try to use relevant keywords so your social channels rank high in search results. Most importantly, check to see if your advertising is in line with your goals – even if you're generating a lot of followers, for example, you may be underperforming if your efforts are yielding low-quality leads or fans.
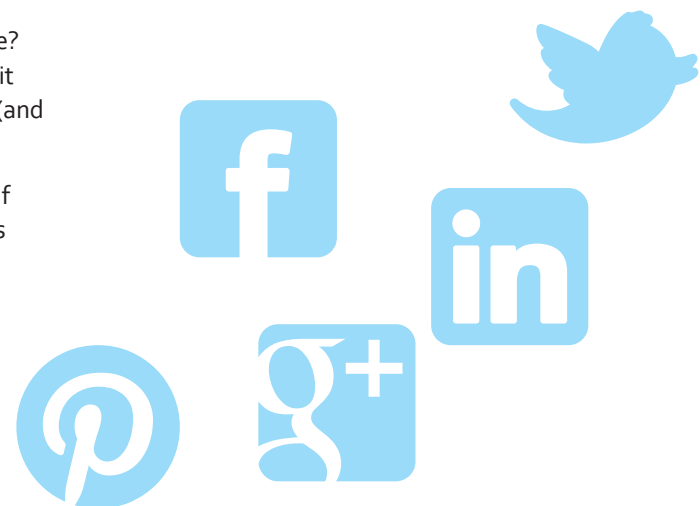
## Social Worksheet

There are lot of social analytics tools on the market for a variety of price points. If you haven't already selected one, choose one that best fits your needs and use it to help fill out the spreadsheet below.

| Social Network | # of Followers | # of Followers for Competitors | Sentiment of Posts (positive/ neutral/negative) | # of Mentions | # of Competitor Mentions | Leads Generated/ Purchases |
|---|---|---|---|---|---|---|
| Facebook | | | | | | |
| Twitter | | | | | | |
| Linked In | | | | | | |
| Pinterest | | | | | | |
| Google+ | | | | | | |
| Instagram | | | | | | |
| | | | | | | |
| | | | | | | |

**Social Tip:** Strike the Right Balance Between Promotional and Nonpromotional Posts

It can be easy to forget amidst the race to acquire followers and drive revenue, but social media is about being social. And there are few things less social than a one-way stream of promotional posts, Tweets and pins.

If you find yourself sharing a disproportionate number of product-centric posts rather than providing helpful content, sharing humorous tidbits and interacting with contacts, take some time to consider how you might work more nonpromotional posts into your mix.
Here are few ideas:

### 1) Use video to drive engagement

If you have compelling video content – helpful how-to videos, for example – embedding them on your wall or linking to them in your Tweets can be a powerful tool for increasing brand awareness and driving engagement. As an added bonus, videos automatically play in a user's news feed, so they are hard to miss. If the content is compelling enough, the user will likely view and share the video to their own networks – potentially exposing it to peers who may not have previously connected with your brand.

### 2) Newsjack wisely.
Be on the lookout for headlines that you can build off to serve up humorous, helpful and/or timely social content. Since these posts seem less "canned" and more spontaneous, they can give your social presence the more human feel you want to strive for.

### 3) Host sweepstakes or contests.

Social contests can be a powerful way to get new fans in the door. Enticing prizes, whether it's a weekend getaway to Napa or something as simple as a gift card, make people notice your brand. Once these new fans are intrigued, they're more likely to see what else you have to offer. Contests aren't just a way to gain new followers, however. They are also a great way to encourage existing customers to stay loyal to your brand. Many social networks' sweepstakes policies are much simpler than they used to be, so the barriers to running a successful contest are now much lower.

### 4) Offer non-gated content in your social ads.

Rather than making all of your ads strictly lead-gen oriented, mix in occasional ads that link to content that doesn't require a form submission – blog posts, non-gated guides, etc. You might be surprised at the engagement this tactic generates.

### Additional Resources

1) Blog: "10 Tips for Using Social in Your Digital Marketing Strategy"

2) Blog: "Social Couponing Comes to the Marketing Platform"

3) White Paper: "20 Ways to Personalize Content and Enhance the Customer Experience"

**20 WAYS** TO PERSONALIZE EMAIL AND WEB CONTENT TO DELIVER AN AWESOME CUSTOMER EXPERIENCE

SILVERPOP

4) Blog: "6 Pinterest Holiday Marketing Tips"

5) Blog: "Using Email to Promote Social Channels: A Real-World Example"

# Bonus Section: 6 Common Assessment Mistakes – and How to Avoid Them

Optimizing your assessment process means sidestepping a few mistakes marketers commonly make when performing a self-evaluation. To help you avoid these pitfalls and make the most of your assessment, check out this list courtesy of Rich Wilson, creative director at Big Scary Cranium:

### Mistake #1: Not Thinking About Overall Goals

What are you trying to achieve over the next six months, and how has that changed from the previous six? The answer(s) will vary based on your company, industry and marketing automation experience level, but taking the time to consider the question is an important initial step in the assessment process. As the year progresses, you may set new objectives that will require different plans of attack.

### Mistake #2: Neglecting to Tie Features to Goals

For marketers interested in employing more of the features available in today's sophisticated marketing automation platforms, the obvious question is "where do I start"? Don't assume your organization will tackle it all at once. As part of your assessment process, consider what platform capabilities tie must closely to the goals you're trying to reach, and focus on these areas first

### Mistake #3: Ignoring the Metrics That Matter

It's important not to overemphasize "process" metrics – email opens, website visits, social followers, etc. Your success should be measured by conversions or revenue generated. Process metrics are good measures of tactical effectiveness, but strategic metrics show ROI.

### Mistake #4: Underestimating Your Database

Data is the foundation from which you'll build a more sophisticated marketing program. So, make sure you pencil in adequate time and resources to evaluate your database, take the necessary steps to clean it up, and build in integrations where applicable.

### Mistake #5: Overlooking the Customer's Buying Process

To truly hand-hold customers through the buying process with marketing automation, you have to have an intimate understanding of questions customers have at different stages. Use your assessment as an opportunity to gauge just how much you know and how much content is based on guesswork. You might be doing an excellent job at generating initial interest from prospects, but a less stellar job at nurturing them to conversion. Or you might be great at getting that first purchase, but weaker at driving loyalty and repeat purposes.

### Mistake #6: Not Testing Assumptions

You may think you have a solid grasp of the buying path your prospects take, how they're talking about you on social, what content resonates with them most strongly, etc. But if you don't test your assumptions to confirm you're correct, any related assessments you make – and the conclusions you draw from them – could be inaccurate.

*Big Scary Cranium, an agency that helps companies make the most of their marketing efforts, has developed a scorecard methodology to help marketers evaluate their programs. For more information, visit BigScaryCranium.com.*

## Conclusion

Performing a digital marketing assessment will go a long way in helping you evaluate where you've been, identify key areas that need improvement and set the stage for major upgrades to your program.

Just remember: Be honest in your self-evaluation to ensure you get the most out of your assessment.

Finally, while this assessment is large in scope, keep in mind that you don't have to tackle each area for improvement. Rather than trying to do everything at once and becoming overwhelmed, pick a few strategic areas to focus on and take a few incremental baby steps to move you along the path to success. Before long, you'll find that the small steps you've taken have helped you realize some big goals!



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**Bonus Tips for Each Assessment Area**

**Footnotes**

1-"B2C Content Marketing 2014: Benchmarks, Budgets and Trends," Content Marketing Institute and MarketingProfs, 2014

2-"Mobile Opens Hit 51%, Android Claims #3 Spot," Litmus, Dec. '13

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Silverpop, an IBM Company, is a cloud-based digital marketing provider that offers email marketing, lead-to-revenue management and mobile engagement solutions. Silverpop Engage — the foundation of the IBM Marketing Cloud — uses customer data and individual behaviors, collected from a variety of sources, to inform and drive personalized interactions in real time. IBM Marketing Cloud powers the delivery of exceptional experiences for customers across the buyer journey by leveraging key data, providing analytical insights and automating relevant cross-channel interactions. As part of IBM Marketing Solutions, Silverpop helps make it easier to design meaningful customer experiences across applications, devices and time, accelerating today's results and tomorrow's ambitions. Silverpop is trusted by more than 5,000 brands around the globe.
For more information, view our demo and visit silverpop.com.