Demand Marketing Assessment Guide and Orchestration Workbook
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FOREWORD

Gone are the days when marketing can act, operate and report as if they are the Arts and Crafts department. And as funny as that sounds, the bar is far higher right now than you might imagine.

Your CEO expects you to embrace revenue responsibility, to prioritize buyer-centric marketing. That’s also table stakes now.

You’re expected to prioritize not marketing activities, not MQLs, and not even mere sales pipeline contribution. No, you’re expected to own sales.

You don’t manage sales anymore. You’re in the sales development business.

Buying processes are lengthening and increasing in complexity. The internal buying committee is getting bigger. The marketing mix required to navigate those complex waters is more sophisticated than ever.

Adding to this complexity, for most companies, the top of the funnel remains disconnected from sales, disconnected from the active buying process, not to mention key internal systems.

Modern marketing requires a level of orchestration, focus and discipline never seen before. That’s why tools like the Demand Marketing Assessment Guide and Orchestration Workbook are incredibly useful.

Use the following pages as your guide to make that process more manageable, less daunting and more profitable.

Onward.

Matt Heinz

Prolific author and nationally recognized, award-winning blogger, Matt Heinz is President and Founder of Heinz Marketing with 15 years of marketing, business development and sales experience from a variety of organizations and industries. You can read more from Matt on his blog, Matt on Marketing, or follow him on Twitter.
INTRODUCTION
The goals of this assessment guide and workbook

Over the years, we’ve learned a great deal from both our internal demand marketing experiences as well as those of our customers. And along the way we began documenting these learnings, creating worksheets to assess our achievements and guide future efforts, and continuously tweaking these tools as our needs and industry trends changed. The result is a collection of worksheets we at Integrate refer to as the Demand Orchestration Assessment Guide and Workbook.

We’ve spent the last few months revising these internal tools into a general work that we feel will help other B2B marketers like us on a never-ending journey to increase the value of their efforts. Specifically, we created the Demand Marketing Assessment Guide (Guide) and Demand Orchestration Workbook (Workbook) to help B2B marketers accomplish two things:

1. **Assess current demand marketing operations to identify areas of improvement across several categories:**

2. **Apply the fundamentals of demand orchestration to:**
   - **Improve demand marketing performance**
   - **Achieve team objectives, from generating more qualified leads to increasing marketing-attributed revenue**
Demand orchestration is a B2B marketing approach used to coordinate top-funnel marketing activities in order to efficiently scale pipeline, create more customers and increase marketing-attributed revenue. The core focuses of demand orchestration include:

• centralizing data sources and coordinating marketing channels
• streamlining top-funnel demand marketing processes
• increasing targeting capabilities
• improving lead data quality and pipeline integrity
• integrating top-funnel prospect and program performance data with lower-funnel marketing and sales systems

No two marketing teams are the same; each has its own strengths and weaknesses. Further, excelling in one area (for example, performance forecasting) may not be as critical to one team as it is for another. In other words, success is a result of making sure you focus on the areas that are most aligned with organizational goals.

For this reason, we consciously made the assessment guide as flexible to individual needs as possible. The demand marketing efforts to which you choose to devote greater attention are up to you – we simply hope this guide and workbook help you in the process.

Think about your demand creation function through two lenses: strategy and agility. Strategy represents your ability to plan effectively, create standardization in infrastructure programs and templates, and utilize general proactivity. Agility represents your ability to react and course correct when things aren’t going as planned. Keeping both of these axes in balance represents high performing demand marketing.

Ashley Paris
Senior Associate, Inverta

Demand Orchestration
(Demand marketing orchestration)
Why a demand marketing assessment guide?

Demand marketing is becoming increasingly complex.

The larger and more established an organization becomes, the more complex the demand marketing function. This is true for many things, but for B2B marketers, the effect is especially compounded.

As a business grows (or transforms due to industry demands), so does its pipeline volume requirements – and much more rapidly than the total available market. This means that, as our organizations’ revenue goals increase or change, we must continuously create, expand and/or refine marketing programs, engagement strategies, channels, nurturing tactics, data sources, analytical and optimization efforts, and more. This growth creates complexity and often leads to greater demand generation challenges.
Why a demand marketing assessment guide? (cont.)

These demand marketing complexities drive us to adopt various marketing technologies, acquire additional data sources, and test numerous new channels, messaging and content to attract decision-makers and accounts.

Controlling the chaos of demand marketing (i.e., those B2B marketing processes at the top of the funnel) isn’t easy. In the quest to maintain pipeline growth and generate more marketing-attributed revenue, our demand marketing infrastructure becomes a labyrinth of data, tools and processes that we can’t effectively – let alone efficiently – manage and optimize.

Demand marketers must balance and align a growing list of data, tools and processes
That’s when previous successes hit a wall. The law of diminishing returns sets in.

Though many organizations can keep a good eye on what’s working and what’s not, such growth pains often incrementally hinder key aspects of demand generation programs.

We developed the assessment guide to encourage marketers to take a step back, analyze their infrastructure and processes holistically, and identify where they should focus their efforts to make significant strides toward overall business goals.

Focus your efforts to grow (that’s when previous successes hit a wall). Because the journey to demand marketing maturity is so complex, an assessment tool like this helps you break down your processes into discreet categories with clear objectives. The assessment process helps you to peel back the layers within your marketing function to expose the people, process and technology that contributes to overall maturity.

Ann Roskey
Senior Associate, Inverta
Why a demand orchestration workbook?

Identifying your challenges means little if you can't solve them. The demand orchestration workbook helps B2B marketers strengthen the demand marketing efforts that are most vital to their specific organizational goals.

Demand marketing is like an orchestra – you have numerous specialized musicians, instruments and pieces of music, all of which are interconnected. If anything is overlooked, it affects the entire orchestra's performance.

Orchestras handle the complexity with sheet music. Similarly, most B2B marketers use demand conversion spreadsheets to guide their efforts, but this merely captures one aspect of the job, namely lead funnel conversions. There's much more to generating and managing demand initiatives:

- What about lead data quality and pipeline integrity?
- Is your infrastructure of data sources and technologies aligned to your needs?
- Which processes, systems and partnerships are influencing real wins?
- How do you measure yourself against the rest of the industry and identify areas of improvement?
- What can you tell the C-suite suite to expect next quarter?

Marketers have found that answers to such questions have greatly grown in breadth and complexity. Doing things the way they've been done for years isn't good enough.

For all the above reasons, B2B marketers are increasingly switching from singular focuses on individual channels, technologies and campaigns to holistic coordination of all the moving parts – an approach known as demand orchestration.
Why a demand orchestration workbook? (cont.)

More specifically, demand orchestration is an approach to B2B marketing used to efficiently increase the performance and value of demand marketing activities by:

- Expanding, unifying and coordinating data sources to efficiently scale demand volume
- Improving lead data quality and database integrity to ensure more accurate nurturing and higher conversion rates
- Streamlining and automating manual processes for greater efficiency
- Providing holistic measurement of all demand gen efforts for improved program optimization
- Integrating top-funnel systems and tools with lower-funnel technologies (i.e., marketing automation, CRM, etc.) for quicker velocity

The workbook is intended to support B2B marketers’ efforts to strengthen the areas of demand marketing that are most crucial to their organizational goals. It includes prescriptive advice and 11 worksheets to help you apply the fundamentals of demand orchestration.

Best-of-breed marketing technology and a trend toward skills specialization can create a lot of really great work happening on parallel paths with no plan or vision. Focusing time and energy on orchestration can unify the efforts of singular roles and departments, create better performing, multi-channel programs and expose opportunities for cross-training within the marketing function.

Ashley Paris
Senior Associate, Inverta
Using the assessment guide and workbook together to orchestrate demand

The Demand Marketing Assessment Guide will first help you identify areas of needed improvement. The Demand Orchestration Workbook then covers individual Demand Marketing Categories to provide guidance on ways to orchestrate and improve performance regarding specific efforts.

Each Category section includes one or more demand orchestration worksheets. These worksheets should be used as tools to help you organize and coordinate your efforts, and advance your results relative to a category's (or subcategory's) specific objectives. Further, the orchestration worksheets should be used in line with your team’s current stage (as identified in the Assessment Guide) and the specific advancement you wish to make (for example, advancing from the Demand Generation Stage to the Opportunity Generation Stage regarding content creation).

Category 1: Marketing Program Composition
- Worksheet A: Persona Development
- Worksheet B: Persona Messaging
- Worksheet C: Content Strategy
- Worksheet D: Content Map
- Worksheet E: Quarterly Content Calendar
- Worksheet F: Sales-Marketing Goal Alignment and Performance Measurement

Category 2: Demand Marketing Data Sources
- Worksheet G: Data Source Organization

Category 3: Data Integrity
- Worksheet H: Data Integrity Checklist

Category 4: Measurement, Optimization & Forecasting
- Worksheet I: Inbound Metrics
- Worksheet J: Third-Party Lead Gen Performance Metrics
- Worksheet K: Campaign Influence Analysis
- Worksheet L: Pipeline Metrics
Using the assessment guide

Diligently tracking and assessing the individual aspects that make up your demand marketing operations is vital to progress. This assessment tool will help you identify required improvements and hone in on ways demand orchestration can improve overall results.

A demand marketing maturity model

Of course, it would be counterproductive to assume all demand marketing teams are starting from the same level of sophistication; there are numerous stages of demand marketing maturity. And just as an introductory musician shouldn't expect to play Mozart immediately, not all marketing teams can or should hope to jump from a lead-gen focus to a revenue-responsible demand center overnight.

The Demand Marketing Maturity Model is a helpful tool to visualize the evolution of the modern demand marketing organization.
Note that in some categories your team may be advanced (for example, it may be at the *Opportunity Generation* stage for *Program Composition*), while lagging somewhat behind in other categories. This is to be expected. Factors such as industry, team size, market/company maturity, business model, target audience and more will affect your organization’s needs, capabilities and sophistication. The main idea here is that all demand marketing teams should eventually strive to be revenue-accountable, and by using demand orchestration to advance abilities in the various categories, you’ll be in a better position to drive business value.

**Demand marketing maturity stages**

As illustrated in the maturity diagram, we’ve divided demand marketing progress into four stages, based primarily on the level (or depth) of team responsibility:

**LEAD GENERATION STAGE**

- **Goal** – Generating contacts
- **Success Metrics** – Top-funnel lead/inquiry volume

**DEMAND GENERATION STAGE**

- **Goal** – Boosting MQLs
- **Success Metrics** – MQL volume and conversions rates; top-funnel lead velocity

**OPPORTUNITY GENERATION STAGE**

- **Goal** – Creating opportunities
- **Success Metrics** – Marketing-attributed sales pipeline (opportunities/SQLs); top- and mid-funnel lead velocity

**REVENUE GENERATION STAGE**

- **Goal** – Closing business
- **Success Metrics** – Marketing-attributed revenue and new customers; full-funnel lead velocity; vision/deal expansion

Select one of the four stages of maturity as you assess your abilities based on each of the demand marketing categories (see page 15). We realize designating your current stage is not an exact science.
Demand marketing categories

The assessment guide covers a comprehensive, but not exhaustive, list of demand marketing elements and tasks. Much effort was put into diving deep enough into the categories to provide prescriptive advice, without going so deep as to lose the guide’s overall focus on a holistic approach to demand orchestration and improvement.

**Program Composition** – The breadth, integration and sophistication of various aspects of demand marketing programs, including:
- Buyer targeting
- Messaging and content strategy
- Engagement tactics
- Sales-marketing alignment
- Technology

**Demand Marketing Data Sources** – The collective list of all lead data sources that feed and refine your demand funnel, and how well-integrated and customizable this ecosystem is.

**Data Integrity** – The level of governance and automation used to ensure the validity, accuracy and completeness of lead and program data, as well as the efficiency in processing such data between systems.

**Measurement, Optimization and Forecasting** – The level and regularity with which you can track, report on and adjust programs, as well as forecast their results.

*Note: These categories are not concrete – they’re very much dynamic and continuously adjusted per industry needs and feedback.*
DEMAND ORCHESTRATION WORKBOOK

• Marketing Program Composition
• Demand Marketing Data Sources
• Data Integrity
• Measurement, Optimization & Forecasting
Category 1

MARKETING PROGRAM COMPOSITION

- Buyer Targeting
- Messaging & Content Strategy
- Engagement Tactics
- Sales-Marketing Alignment
- Technology
Category 1: Marketing Program Composition

Most marketers today understand the importance of the customer journey. It's essential to focus messaging and content on customer needs rather than your products or services. Such customer centrality is dependent on a marketing team’s ability to enable its audiences (prospects and customers) to access the information they need when they need it – from initial education of the issues to discovery of solutions to sales follow-up.

Needless to say, this puts a great burden on marketers to not only envision numerous possible paths to purchase, but also integrate all engagement touchpoints to facilitate each possibility. Programs must therefore become more sophisticated as demand marketing efforts scale.

Demand marketing program composition includes five foundational elements, each becoming more multifaceted as you ascend the maturity curve:

- Target buyers
- Engagement tactics
- Messaging & content strategy
- Sales-marketing alignment
- Technology

Getting all these elements right – that is to say, aligned to organizational success metrics – is a crucial first step for any B2B marketing team. For example, if your team is simply responsible for top-funnel demand (i.e., MQLs), your target audiences may not need to be highly developed nor must your content run the gamut from educational to sales cross-sell. However, you'll still need to have target personas, a holistic top-funnel content strategy and an understanding of lead hand-off triggers with sales.
Target buyers

Understanding your personas is key, even for the most basic B2B marketing programs. Listing specific industries, job titles (roles within companies) and their pain points is the starting point. If you plan to jump right into account-based marketing (ABM), that’s fine, but DO NOT neglect to understand the target personas within these accounts; remember: you still need to engage decision-makers that sign the checks at those targeted accounts.

Worksheet A helps you develop your target personas. The higher you intend to ascend the maturity model, the more specific your target personas (and possibly target accounts) should be.

“When developing personas, it’s essential to consider how that persona will be used within your demand marketing activities. Personas have many purposes within the organization, but for automated marketing campaigns, personas are only effective if they are connected to a set of data. Only then can they be used in segmentation, where the right messaging and treatment can be applied.”

Ann Roskey
Senior Associate, Inverta
Messaging and content strategy

With your personas (and possibly accounts) outlined, it’s time to create your messaging and content strategy.

For the purposes of the workbook, we won’t focus on website content since that topic alone would require an entire book. Rather, let’s focus on the messaging and content needed to:

- Providing a consistent customer experience with personalized messaging across channels is becoming increasingly difficult with all the different ways they can interact with us – across mobile, web, social, events. We must continue to find better ways of connecting the dots of customer and prospect experiences in ways that are valuable to them.

    Alexa Bleecker
    Demand Generation Manager, IBM Security

It’s important to understand that your messaging and content must continually evolve as dictated by a range of factors, such as:

- improvements to your products or services
- changes in the market
- upcoming events and partnerships
- shifting organizational goals

For this reason, it’s good to develop a content strategy on a quarterly basis and revisit your overall messaging annually.
Use **Worksheet B** to hone your persona messaging and **Worksheet C** to develop your quarterly content strategy.

Both worksheets can be used at each stage, from lead gen to revenue gen. What changes is how specific and far down the funnel you take your content strategy. For example, at the lead gen stage (where success is defined by lead volume), a handful of pieces of top-funnel content (such as white papers that introduce audiences to a specific product category) would typically suffice. However, as your focus actions drive deeper down the funnel, so should your content with nurture, sales enablement and eventually upsell/cross-sell material.
Engagement tactics

Prospect engagement can become very complicated, very quickly. For purposes of organization, it's helpful to think in terms of owned and paid media channels and tactics – which complement each other well.

Owned Channels (Inbound Tactics)

Most B2B marketers today have at least a vague understanding of inbound marketing's importance. By this I mean that most B2B marketing teams have a website, a blog and at least a couple landing pages. What they do with that blog and the rest of their website-hosted content varies incredibly. (We can also include webinars as owned channels if internally hosted).

At the lead gen stage, inbound efforts may merely consist of a basic blog with irregular posting and be only loosely connected to the company website and landing page content. In other words, there's a lack of any holistic content strategy. Moreover, when prospect inquiries and leads do come through the inbound door, they're either immediately handed off to sales or met with a one-size-fits-all, batch-and-blast email.

Worksheet D will begin to rectify these issues by helping you to develop a more comprehensive approach using a content map. Worksheet E will then further help you organize your blog content as well as the promotional social posts, SEO tactics and hosted webinars needed to continually increase visitors and inbound leads.
Paid Channels (Outbound Tactics)

Paid tactics refer to any type of paid engagement, including: content syndication, display, paid search and social, and third-party lead gen via sponsored webinars, for example. These channels are what allow marketers to scale beyond the fruits of their inbound tactics, which will often hit a point of diminishing returns for most organizations.

As you ascend the maturity curve, the breadth of channels and partners leveraged typically expands. This means you can and should measure various combinations of channels, partners, content, audiences and offers – and then optimize programs accordingly. The key here is to aim for gradual increases in sophistication, not complication. This will allow you to begin scaling results with minimal increases in resources. It can be done manually, but top-funnel marketing automation will provide much more efficient scale.

Worksheet F will help you organize your paid media (paid prospect acquisition) efforts to gain such efficient growth.
Sales-marketing alignment/integration

Alignment between sales and marketing teams – as well as with customer success and product development – is pivotal. And it only becomes more crucial as your programs and goals expand. This is especially true as a greater number of B2B marketing organizations embark on account-based marketing (ABM) initiatives.

Sales-marketing alignment (and later “sales-marketing integration” as your organization moves up the maturity model) is mostly a matter of communication, expectations setting and common goal/strategy creation. Worksheet F is designed to help communicate and set specific demand marketing objectives (pipeline and lead volume requirements) needed to hit sales goals. This can be done on a monthly or quarterly basis, or pivot on the number of sales required or the number of targets you have – customization of the model is up to you. The key, however, is starting your demand marketing programs with a clear sense of what’s required for sales and marketing to hit your goals at the end of the year.

The most important component in the digital ecosystem is the bond between Sales and Marketing. They are the most critical competencies for generating demand and capturing revenue and their ability to share strategies, processes, and best practices ultimately results in a competitive advantage.

Kathy Macchi
VP Consulting Services,
Inverta
Marketing Technology

Marketing technology (MarTech) adoption and stack development will likely expand markedly as you move up the maturity curve. Your marketing tech stack should evolve as your programs become more sophisticated, and it's good to start planning early. We've developed a workbook dedicated to creating a customizable MarTech blueprint, which you should begin early in your development.

The workbook provides guidance regarding:

- Taking inventory of your current marketing technologies
- Understanding your marketing processes in relation to your technologies
- Creating your custom MarTech blueprint
- Analyzing the blueprint
- Using the blueprint to effect positive change

Technology is foundational and very important, but it’s just a tool. If you’re just adopting technologies to be innovative, and not strategically implementing it, measuring it and integrating it into your overall business strategy, you’re going to fail.

Leslie Cocco Alore
Head of Global Marketing Operations & Automation, Iron Mountain

Click to download Integrate’s MarTech Blueprint Workbook.
Category 2

DEMAND MARKETING
DATA SOURCES

- Lead/Contact Data
- Program Performance Data
- Predictive Data
- Account Data
Category 2: Demand Marketing Data Sources

Demand marketing is evolving quite rapidly. And as discussed previously, to generate more revenue, demand marketers must continually create and refine new strategies that scale pipeline and generate the business opportunities sales teams depend on and the C-suite expects. The development of successful strategies depends on leveraging specialized data (e.g., account and decision-maker data, predictive data, account-targeting data, lead scoring and enhancement data, etc.).

Take account-based marketing (ABM) for example; no longer as simple as creating a list of named accounts for sales reps to target, ABM strategies rely on a complex ecosystem of data providers:

- **Predictive data** (itself aggregated from numerous data sources) – allows you to create look-a-like models and initial account lists based on current customer data
- **IP-tracking data** – highlights which accounts are visiting your website and showing buy signals so you can prioritize lists accordingly
- **Lead/Contact data** – intelligence on and contact info for individual decision-makers at targeted accounts (often acquired via numerous lead gen partners)
- **Surging interest data** – further highlights which accounts and contacts are showing buy signals by interacting with relevant content
- **Lead enhancement data** – provides further intelligence on accounts and contacts

Some of these types of data can be obtained from a single vendor; predictive data can be acquired from predictive analytics vendors. Others, such as account decision-maker data, often depend on relationships with a diverse set of lead gen partners and data providers, each with their own specialized audiences.
Every marketing organization has a unique and dynamic audience. The needs of these audiences are constantly changing, and marketing teams must develop customized groups of data providers (that should remain fluid based on performance) to provide the specialized information needed to continually engage the right targets with the right messages. This is the only way marketers can match the fluidity of their audiences and enable program strategies to succeed.

**Worksheet G** will help you organize and align various data sources with the needs of your specific demand marketing programs.

After you've created a preliminary draft of **Worksheet G**, talk to your current media partners. Ask them what kinds of data solutions are in the works (or are already available). As mentioned above, there's a lot going on in the B2B media industry right now, and you'll likely be surprised by what you find.

Then, reach out to fellow marketers at other organizations and inquire into what types of data they're using, how they're using it and what the results have been so far. Conferences are obviously a great place to have these discussions, but don't hesitate to reach out on social media or ask questions in the comments sections of blogs and articles – marketers love to share their learnings and only rarely treat them like secrets.

Once you've identified the data types and sources that make sense for the development of your unique ecosystem, start testing. It's usually a good idea to test incrementally, but some types of data go together, especially when developing an ABM program.

On a quarterly basis, update **Worksheet G** to highlight what's working, what's not and where you may want to expand into new sources.

**There's a famous parable that describes a group of blind men touching an elephant and describing how it felt to each other. Because each man touched a different part of the elephant – the side, or the tusk – they were in complete disagreement about what the elephant was. Your data sources act like disparate parts of the elephant. Only when they are integrated can you get a comprehensive picture of your prospect.**

**Kathy Macchi**  
VP Consulting Services, *Inverta*
DATA INTEGRITY

- Validation
- Deduplication
- Standardization
- Enhancement
**Category 3: Data Integrity**

An Ascend2 Research survey found that “Improving data quality” was overwhelmingly the No. 1 “Most Challenging Obstacle to data-driven marketing success.” In fact, [Integrate has published a report](https://www.integrate.com) that shows the extent to which poor lead quality pervades the B2B marketing industry.

Reasons abound for the causes of poor data quality, and many publications have covered these reasons at length. Rarely discussed, however, is how the negative effects of these data issues are only multiplying as the demand marketing discipline advances. As marketing tech stacks grow and programs become more integrated, data quality becomes more important – because any piece of erroneous data affects the entire demand marketing engine. The lower your data integrity, the more your targeting, conversions, performance measurement and optimization efforts are thrown off, and the less revenue your organization will produce.

In the rapidly advancing B2B marketing environment, marketers must become far more vigilant in maintaining data integrity. And this all starts with the data that enters the top of your marketing funnel. If you wait until prospect data is already in your database (marketing and sales systems), the consequences can be significant:

- **Wasted media budget.**
- **Drained resources and misused time due to manual database cleanup.**
- **Delayed program launches.**
- **Skewed performance measurement and ineffective optimization.**
- **Depleted pipeline value.**
- **Lower conversion rates.**
- **Mistargeted sales efforts (and tarnished sales-marketing relationship).**

*These are just a few of the consequences that demand marketers should strive to avoid.*
Prospect data cleansing, validation, deduplication and standardization is key here – and it must be done before leads are uploaded to the database.

We've run various scenario models on the costs of neglecting prospect data integrity and the results are sobering. Poor data quality typically results in a 26-52% reduction in pipeline value depending on average contract size, channels used, level of manual lead filtration, etc. Needless to say, ensuring the accuracy, completeness and marketability of the data that fuels your programs and marketing tech infrastructure is important to boosting demand marketing performance.

**Worksheet H** provides a checklist of steps needed to incrementally increase the integrity of your contact and program performance data.

The number of channels used to drive demand is so vast – it's not hard to get leads, it's hard to get the ones you need and convert them.

**Ben Staley**
Marketing Programs Manager, Rackspace

For a deeper dive on the effects of poor data quality, download the **Integrate Data Quality Index**.
MEASUREMENT, OPTIMIZATION & FORECASTING

- Inbound Marketing
- Third-Party Lead Generation
- Integrated Programs
- Conversion Funnel Stages
Category 4: Measurement, Optimization & Forecasting

Measuring and analyzing the effectiveness of diverse program strategies, engagement channels, data sources and tech systems that drive demand is one of the most difficult jobs in B2B marketing.

As a demand marketer, you’re responsible for understanding how various elements of a demand program are contributing (or not) to overall company goals. Fine-tuning all these elements offers great opportunity to boost results, but you must first navigate an incoherent mess of data and processes to measure past performance, let alone forecast the effectiveness of future efforts.

Creating a predictable, revenue-accountable demand center, however, should be every B2B marketer’s goal. Like everything else, you must work toward this level over time. The easiest way to do this is to set measurement milestones across the funnel.

Creating a customized conversion funnel

Assembling a conversion funnel (often referred to as a demand waterfall; see SiriusDecisions) is daunting, especially without the right tools (e.g., measurement and analytics software).

Organization here is key. Without the ability and discipline to timestamp lead entries and exits at each stage, you won’t know the amount of time a lead spent in each stage or its individual movement through stages. And without that data, you won’t see where your processes are breaking down.

Many marketing teams will use more than four stages (e.g., sales qualified leads stage). Metrics used here are merely examples, not goals.
Category 4: Measurement, Optimization & Forecasting

Worksheets I through L will help you hone your KPIs and develop your own conversion funnel. You can then organize and measure the performance of each stage of the funnel and the channels that feed into them. (However, for the highest levels of analytical and forecasting requirements, technology will become critical to help execute your strategy effectively; there's simply too much data shifting between audiences, programs, teams and systems to track and analyze manually.)

The four worksheets (I through L) facilitate the organization, measurement and analysis of:

- Inbound marketing efforts (Worksheet I)
- Third-party lead generation efforts (Worksheet J)
- Integrated campaigns/programs (Worksheet K)
- Conversion funnel stages (Worksheet L)

It's important to note that while the funnel is a useful framework, the customer journey doesn't always translate to a linear path in the conversion funnel, which can make manual tracking and measurement very difficult.

By breaking down silos and looking at the health of your funnel with a common lens, you’re better equipped to diagnose areas of poor performance. For example: Where do we need to fill the funnel this quarter? Is there an obstacle in the sales process where a dedicated nurture campaign could help overcome hesitation to purchase? Are the leads from advertising closing as quickly as the leads from tradeshows? Getting the visibility to be precise in how you optimize the funnel requires strong sales and marketing alignment.

Ann Roskey
Senior Associate, Inverta
Category 4: Measurement, Optimization & Forecasting

Two Primary Benefits of Developing a Conversion Funnel:

If each part of the funnel is staying similar in proportion to each other part, then that’s usually good. If you see the number of MQLs (or leads, opportunities) start to inflate respective to the rest of the stages, that’s something to consider. Is there a bottleneck? Or maybe sales just crushing it at the end of the quarter.

This all requires a lot of manual report manipulation to find conversion rates. If your company is ready to become predictive and start truly pulling the levers to keep the pipeline charged, consider investing in funnel reporting software like Bizible, Funnelwise, Full Circle or Brightfunnel. Otherwise, stay focused on what you can measure and act on to be better at your job (without going crazy).

The ultimate goal of a metrics-driven approach is predictability. ‘Based on what I know now, what can I expect in the future?’ However, the inarguable predecessor to predictability is consistency: in business process, in nomenclature, in execution, in reporting. If you can’t achieve consistency in those areas, you’ll struggle with realizing the full value of a metrics-driven approach.

Ashley Paris
Senior Associate, Inverta
At Integrate, we believe that technology won’t fix a bad process. That's why this assessment guide and workbook have discussed technology only to a limited degree. We hope the assessment guide and worksheets help you first manually hone your demand marketing. With your processes on track to strengthen individual demand marketing efforts, you can then adopt the tools and systems that will automate and facilitate those processes. The chart below should help you pin point some of the right technologies for specific demand marketing efforts.

### Recommended Marketing Technologies

<table>
<thead>
<tr>
<th>MARKETING AUTOMATION</th>
<th>DEMAND ORCHESTRATION SOFTWARE</th>
<th>ANALYTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketo</td>
<td>Integrate</td>
<td>Full Circle Insights</td>
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<td>Oracle Eloqua</td>
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<td>Hubspot</td>
<td>Moz</td>
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| WEBSITE PERSONALIZATION       | CONTENT MANAGEMENT            |                      |
| Unbounce                      | LookBookHQ                    | ClickTale           |
| Optimizely                    | Vidyard                       | Crazy Egg           |
| Typeform                      | Brightcove                    | Tableau             |

| ADVOCATE MARKETING            |                                | EVENT MANAGEMENT    |
| Influitive                    | Cloudwords                    | ON24                |
|                                | Uberflip                      | BrightTALK          |

| TEAM ORGANIZATION             | ACCOUNT-BASED MARKETING       | PREdictIVE ANALYTICS|
| Trello                        | Demandbase                    | Everstring          |
| Slack                         |                               | Lattice Engines     |
| Worklife                      | Engagio                       | Mintigo             |

| DATA INTELLIGENCE             |                                | SALES TOOLS         |
| Spiderbook                    | Leadspace                     | Salesforce           |
| Social123                     | LeanData                      | HighSpot             |
| InsideView                    | Terminus                      |                    |
| InsideView                    | Vendemore                     |                    |
| LeadGnome                     | Triblio                       |                    |
| Bombora                       | ZenIQ                         |                    |
Related Resources

Iron Mountain Case Study
Integrate’s Demand Orchestration Software Preview
Developing an Account-Based Marketing Program: A Workbook

Master demand marketing.

Integrate is a marketing technology provider of Demand Orchestration Software, enabling marketers to automate top-of-funnel demand marketing efforts. The software works with marketing automation and CRM systems, as well as ABM and predictive software, to build holistic, predictable demand marketing engines. The end results are more efficient marketing organizations; cleaner, faster prospect data; and scalable contributions to pipeline and revenue. Visit www.integrate.com or follow @integrate to learn why innovative companies like Dell, Rackspace, Salesforce and Intacct choose Integrate.