

Marketing Software Scenario Mapping Exercise

Many COE administrators are intrigued by the idea of acquiring a marketing automation system to more effectively manage their marketing channels, generate leads, and automate repetitive tasks and workflows. However, without carefully identifying gaps in their current processes prior to acquisition, it is impossible for institutions to determine whether marketing automation is the appropriate solution to reach their desired future state. Through a series of scenarios, this exercise is designed to help units identify and prioritize their current marketing challenges and determine whether marketing automation or another solution is best suited to solve their problem.

First, answer the list of questions in the table below under “Problem Scenario” to determine whether the particular scenario applies to your institution. If it does, review the second and third columns to determine whether marketing automation offers a solution to that scenario or whether alternative options may be more practical. Please note that the solutions offered by

either marketing automation or alternative options may not necessarily apply to every vendor option available, but rather indicate that certain products within each category could address the problem scenario and require further investigation. Designate whether the problem scenario is relevant to your institution by checking the box in the last column. When finished, examine whether the scenarios you’ve identified necessitate the acquisition of marketing automation software or whether a different product might better fit your needs. The results of this exercise can also be used to inform software vendor assessment; use the exercise to ensure that potential vendors can articulate how their product addresses the challenges identified.

Once this exercise has been completed, proceed to the readiness diagnostic in Tool 5: Marketing Automation Readiness Diagnostic to assess whether your institution is prepared for the adoption of marketing automation software and where improvements or attention may be needed before acquiring a system.

Problem Scenario	Potential Solutions Based in Marketing Automation	Alternative Solutions	Applicable to Our Unit? (Check if Yes)
Lead Management			
Lead behavior on our website isn’t captured effectively, which is causing us to miss out on opportunities to better engage with these prospects both pre- and post-identification.	Marketing automation systems can track both known and anonymous prospect behavior on your website, helping to further engage with known leads while building a profile for anonymous leads prior to identification.		
We don’t know what happens to our leads after they begin an application or are handed off to other departments.	Marketing automation systems can track prospects across the funnel.	A CRM system can also establish a record of contact between the prospect and the institution.	
All of our prospects are considered equally viable candidates for conversion, regardless of when they identified or how often they’ve engaged with our institution.	Marketing automation systems enable institutions to score leads, factoring in their level of engagement and activity to determine their warmth and likelihood of conversion.	Some CRM systems can also accomplish lead scoring and identify warmer prospects.	
Our prospect data is housed across several databases, spreadsheets, and departments.	Marketing automation systems can aggregate disparate information on prospects to form comprehensive profiles. Systems collect data on a prospect’s interactions across a number of channels, such as their webinar and event attendance, email response rates, and web browsing patterns.	A CRM system can also aggregate prospect information although the profiles will be more focused on a record of communication between the institution and the prospect.	

Problem Scenario	Potential Solutions Based in Marketing Automation	Alternative Solutions	Applicable to Our Unit? (Check if Yes)
Our follow-up with prospects is often delayed because we don't know the timing of initial inquiries, web activities, or email engagement.	Many marketing automation systems can provide real-time feedback when prospects engage in specific behaviors or take certain actions.	Some CRM systems can also be customized for this functionality.	
We don't have insight into whether we've contacted a prospect, how frequently we've interacted, and through what channels interaction has occurred.	Some marketing automation systems can track interactions between groups of prospects and the institutions but typically lack a comprehensive record of an individual prospect's interaction with an institution.	A CRM system will track all interactions between the prospect and the institution and is designed to specialize in relationship monitoring of this nature.	
Our marketing emails and campaigns don't target narrow groups of prospects. Instead, all of our prospects typically receive the same marketing messages.	Marketing automation systems specialize in offering drip email marketing campaigns that capitalize on granular detail about prospects, effectively segmenting messages to different groups of prospects.	Email marketing systems can also accomplish this feature.	
We're using social media for brand building but we haven't been able to convert or find leads through those networks.	Marketing automation systems have a number of capabilities that capture new leads from social media and track social media engagement with prospects.	Some niche products such as Meltwater Buzz (http://www.meltwater.com/) specialize in social media marketing capabilities.	

Content Creation and Management

We have many diverse, niche programs, but all of our institutional leads are being funneled to the same form/website regardless of the program they're interested in.	Marketing automation systems are able to design landing pages tied to individual programs. This is easier to do with a marketing automation tool and also allows linkages to program-specific banner ads.	Some CRM systems can also design landing pages tied to individual programs. Unbounce (http://unbounce.com/) is an inexpensive software alternative that focuses solely on landing pages.	
We've thought about creating comprehensive online ad campaigns that tie together banner ads, email ads, landing pages, and other resources, but we don't have the time.	Marketing automation systems can create online ad campaigns with multiple dimensions that include email marketing, landing pages, banner ads, webinars, and more.	Email marketing systems can create comprehensive campaigns solely centered on email drip campaigns.	

Analytics and Reporting

We pay for search keywords and pay-per-click ads but we aren't sure whether we're getting reasonable ROI.	Many marketing automation systems can provide insight into marketing spend and campaign ROI.		
We can't determine what lead sources are producing the highest quality leads, making it difficult to adjust spend.	Marketing automation systems heavily focus on providing reports on lead source efficacy and where prospects are most likely to come from, although the specific design of those reports varies by system.	Some CRM systems may be able to offer some basic reporting functions, but this is not guaranteed or as robust.	

Problem Scenario	Potential Solutions Based in Marketing Automation	Alternative Solutions	Applicable to Our Unit? (Check if Yes)
We have a high volume of emails and many banner ads, but we don't know which ones are most effective at garnering clicks and reads.	Marketing automation systems provide insight into email and ad effectiveness by offering A/B testing options.	Email marketing systems can provide insight into the effectiveness of different emails at generating clicks and reads, but will not provide insight into banner ads.	
We need better insight into how our website leads to conversions and how visitors engage with our site content.	Marketing automation systems can provide web analytics that identify how known and anonymous prospects use and browse the website, and how they convert from the site.	Software solutions such as Google Analytics , Optimizely (https://www.optimizely.com/), and Visual Website Optimizer (https://vwo.com/?v=3) can provide data on website usage and conversion success.	

Email Marketing

We spend too much time manually drafting emails to prospects.	Marketing automation systems can send automated emails as part of a broader campaigns, but can also respond to specific actions taken by prospects across different channels.	Email marketing systems also perform this function at a lower cost. Some CRM systems can also carry out automated email messages on a smaller scale.	
Staff time is spent on prospect follow-up rather than content creation.	Marketing automation systems automate the process of email follow-up.	Email marketing systems also automate the process of email follow-up.	
Our prospect follow-up (phone, email) is not standardized and too often dependent on staff availability.	Marketing automation systems can help automate interaction with prospects who take certain predetermined actions, saving staff time.	Email marketing systems can also accomplish this but automated follow-up may not be triggered by web-based activities and is solely through one channel.	

Planning

We have trouble coordinating and maintaining our calendar across the entire marketing department.	Some marketing automation systems offer calendaring tools.		
We often deviate from deadlines for campaigns or lead follow-up.	Marketing automation systems can send emails to prospects on a pre-set schedule.	Email marketing systems can also follow preset schedules for follow-up.	
We have trouble creating easy-to-follow and transparent marketing budgets.	Some marketing automation systems offer budgeting tools.	Some niche marketing software products such as Allocadia (http://www.allocadia.com/) specialize in budgeting tools.	