



## MARKETING AUTOMATION RELAUNCH FOR ADTECH DRIVES ROI

### CHALLENGE

Adtech Global had purchased the Pardot marketing automation system about six months prior to my hiring. The system was not properly connected to the Microsoft Dynamics CRM system to enable closed-loop reporting and email segmentation with the marketing automation platform. Email lists had to be extracted from the CRM system and then manually imported into the marketing automation platform for one-time only use. This limited marketing's ability to fully leverage the marketing automation platform and its dynamic list-building capabilities. In addition to the marketing challenges, sales was not trained on how the marketing automation system could benefit them from a sales enablement perspective in terms of account targeting. Furthermore, the company had an outdated and limited database for email segmentation and it was sending out mass blasts of emails to customers with limited success in creating demand. The company needed to drive incremental value out of the existing marketing automation platform short-term while also weighing the value of a tool that was built primarily for outbound marketing vs. a tool designed for a more integrated inbound and outbound marketing approach.

### ACTIONS

- Developed a short-term plan to re-launch existing marketing automation platform to sales to drive alignment with marketing.
- Built out training on Pardot's sales enablement features for sales and worked with IT to get the software properly configured and installed.
- Developed a long-term strategy for implementing the HubSpot marketing automation platform to focus more on inbound marketing due to the limitations of the existing marketing database.
- Negotiated a deal with HubSpot while three months remained on the contract with Pardot to allow for transition time and overlap.
- Trained junior marketing campaign team on the value of inbound marketing relative to outbound marketing to get them engaged on a more integrated approach.
- Connected HubSpot with CRM using a third party API and mapped data fields to allow for segmentation inside the marketing automation platform instead of having to pull lists manually while also allowing HubSpot to track effectiveness of various tactics.

### RESULTS

- Provided immediate value short term on marketing automation investment by giving sales people visibility into prospect and customer online behavior as a sales enablement tool to help improve their interactions with customers and prospects.
- Put the company in a position to measure business outcomes and closed-loop ROI based on various marketing activities such as search, social, email, etc.
- Streamlined the company's email deployment process by eliminating two days from all email production timelines by giving the campaign team the ability to pull their own lists and create their own segments inside the marketing automation platform.