B2B Marketers Planning Workbook

Today, the way that B2B buyers research their purchases has changed significantly from just five years ago. Has your marketing organization shifted to keep pace with these changes?

Now more than ever, B2B buyers want to research on their own before reaching out to a company to engage a sales rep. For marketing departments, this means technologies, training, departmental configurations, and staffing and budgeting approaches must be updated to ensure you’re delivering relevant, individualized content that educates and engages prospects, moves them through the buying cycle, and ultimately drives revenue. And if that wasn’t enough, all your efforts need to be communicated across multiple channels to make sure your content is available wherever your prospects are and when they’re ready.

If all this change sounds daunting, particularly given that long “to do” list already on your plate, fear not. To help you navigate this terrain, Silverpop has assembled this “B2B Marketers Planning Workbook.” In the pages that follow, you’ll find strategies, tips and worksheets designed to make the staffing and budgeting processes easier and more efficient.

By investing a little extra planning time, you’ll be well positioned to enter the year ahead with the resources in place to make your marketing efforts more effective than ever. And come next year, you may even find yourself looking forward to the process!

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BUILDING THE DREAM TEAM: 
Staffing Strategies and Organizational Considerations for the Modern B2B Marketing Department

During the last few years, substantial changes have taken place that are transforming the ways B2B buyers engage with potential suppliers. Now more than ever, B2B buyers want to research on their own before engaging sales. According to the 2011 Marketing Leadership Council Customer Purchase Research Survey, customers' first serious engagement with sales occurs when they’re 57 percent through the purchase process.

In the initial phases of customer due diligence, individuals are talking to their trusted networks, engaging social media contacts and performing extensive Web-based research about the market, the vendors and the buying process. They’re performing these activities on their own time and on their own terms. Only when they’re satisfied with what they learn do they reach out to the vendors they believe can address their challenges or improve their business.

For B2B companies, the shift in the buying process requires a change in how marketing departments are configured. Yet many businesses haven’t evolved to meet the demands of today’s more educated, self-reliant and social buyer. The problem is that if you don’t rebuild your department to be more transparent, more helpful and more human, your prospects may seek out a competitor that does. The bottom line is that it’s more important than ever to have a foundation of smart systems-thinking specialists who can leverage technology to drive efficiency within the marketing department.
THE EVOLVING MARKETING DEPARTMENT

The shift in when prospects want to engage with sales has led to a change in ownership regarding early customer education and awareness. These tasks, which used to be the responsibility of sales, now lie solely in the hands of marketing. And this means that marketing organizational shifts and new marketing investments are necessary to accommodate the new responsibilities.

This change represents a great time for marketing leadership to evaluate whether core functions should be performed in-house by employees, in-house by contractors or outsourced to specialty firms or consultants. This could be a unique opportunity to realign marketing duties and communicate anew the roles and responsibilities of the organization. The transition to new marketing models also mandates new skill levels of many marketing employees.

Those organizations that don’t emphasize training and coaching marketing staffers will find themselves woefully out of date and unable to compete in this new era of the empowered customer. The Sirius Decisions Research Brief, “Marketing Automation: Mind the (Skills) Gap,” indicates that just 5 percent of B2B organizations have a formal, systematic marketing training program.

It also indicates that in 75 percent of companies, the only way marketers learn is through trial and error. So for those readers who have marketing management responsibility, let this paper serve as a wake-up call that you must invest in upgrading your employees’ skills. If you don’t, you risk being overtaken by the more nimble, skilled marketers found in your competitors’ organizations. One of the most important skills marketing departments need to develop within their organization is deep expertise in marketing automation.

THE ROLE OF MARKETING AUTOMATION

Marketing automation allows departments to scale communication efforts with both customers and prospects while at the same time employing deep personalization and dynamic content that results in highly personalized, relevant messages. According to Sirius Decisions, more B2B organizations are deploying marketing automation, yet few have realized its full potential.

Skilled resources must be put in place in order to leverage all the capabilities that the technology provides. These skilled resources can either be new hires, retrained individuals or outsourced agency specialists, but they must be obtained quickly to stay abreast with changing marketplace demands.

This workbook will review common marketing organization functions and staffing considerations and highlight key roles and duties in each of the departments in the organization. Please keep in mind that there may be overlap in duties and assignments in the major department or functional areas.

For example, responsibilities around data acquisition may fall under the domain of demand generation or under marketing operations. The ultimate assignment of the data acquisition duties is your choice based on the skills of your employees, contractors or outside resources.

The marketing department also absolutely requires a team approach in order to achieve overall objectives. Between messaging, campaign design, deployment, logistics and measurement, many different groups are involved. It’s imperative that roles be crisply defined and hand-offs be formalized so that all marketing processes are smooth and efficient.

Here’s a look at some groups within the marketing department, with an emphasis on key responsibilities and how they’re evolving.
MARKETING OPERATIONS

Marketing operations is a relatively new discipline within the marketing department, but one that’s rapidly being adopted as a result of the shift to the empowered customer. IDC defines the purpose of marketing operations as:

“both to increase marketing efficiency and to build a foundation for excellence by reinforcing marketing with processes, technology, metrics, and best practices.”

Sirius Decisions has also been one of the early proponents of marketing operations and defines its function as:

“responsible for the capture and dissemination of marketing information to the enterprise, be it performance metrics, data or strategy/planning and initiatives and budgets, as well as the systems and processes that help generate this information in a systematic, predictable fashion. It drives both visibility into—and productivity for—the marketing organization, which in turn benefits the functions that work with marketing on a regular basis.”

Individuals in this organization have strong communications skills and are proficient in process design. They also must have good technical aptitude, as they are often called on to articulate and document the system-level integration requirements between marketing automation, customer relationship management (CRM), order management and other production systems.

According to the IBM October 2011 CMO Study, one of the biggest challenges CMOs face is the proliferation of marketing data. The marketing operations group can take ownership of turning data into actionable insight for the company, communicating anecdotes, trends and results to the product, sales, service and executive functions.

Core duties of marketing operations include:

- Marketing Processes & Alignment
- Definitions
- Handoffs
- Recycling
- Service Level Agreements
- Data
- Strategy
- Analysis
- Acquisition
- Systems
- Email
- Marketing Automation
- CRM Integration Technology & Process
- Reporting
- Analytics
- Dashboards

BUDGETING

The budgeting function may reside within the marketing operations group. Budgeting in the marketing department can be a significant undertaking due to the sheer numbers of vendors and line items required to achieve all of marketing’s objectives. It’s imperative that you have a person or group (depending on the size of your budget and organization) who’s tracking budget versus actual, spending trends and allocations. This role can also provide valuable insight on compensation for both internal employees and outsourced vendors.
• Segmentation
• ROI Measurement
• Planning
• Goal Setting
• Measurement
• Best Practice Compliance

How to Evolve: If you don’t have a formal marketing operations organization within your company, consider building these capabilities into your department by either hiring the talent or retraining existing staff to assume these duties.

Keep in mind that the best marketing operations candidates may not have a background in marketing at all; rather, they’re experts in systems thinking, hands-on technologists who also have a creative flair.

DEMAND GENERATION
In short, the mission of the demand generation group is to generate incremental revenues for the company. This group is responsible for both the top of the funnel (finding net-new leads) as well as middle-of-the-funnel activities (strategies and tactics that progress individuals and companies through the marketing-owned portion of the buying cycle). It’s responsible for designing, deploying and measuring campaigns and tactics that over time bring in revenue for the company.

Depending on the mission of this group, it may or may not be responsible for implementing programs for existing customers. In some organizations, the demand generation group may be solely responsible for identifying net-new customer opportunities, while in other companies it will also have the charter to find growth areas within the existing customer base.

Many demand gen groups also have a telemarketing function and are responsible for lead qualification and inbound lead follow-up.

Core functions of demand generation include:
• Campaign Design (nurture marketing and net-new name acquisition)
• Campaign Management
• Marketing Automation Setup and Execution
• Landing Pages
• Web Forms
• Email
• Lead Scoring
• Lead Routing
• Data Management (can overlap with marketing operations)
• Data Entry
• Lead Distribution and Management
• List Acquisition
• Campaign Reporting
• Telemarketing
• Lead Follow-up
• Inbound Call Handling

How to Evolve: This department has both a creative and a tool/technology focus. If your demand generation group is small, make sure you have individuals that are comfortable with both left- and right-brain activities, as the best demand gen marketers have both a flair for the creative and the discipline for tasks such as project management and measurement.

Also, if your organization still has individuals with titles of email marketing manager or marketing manager, it’s strongly recommended that you upgrade their skills and change their titles. The title change alone will drive home the message that these employees have a new focus in the company.
PRODUCT MARKETING

Product marketing has a primary focus on ensuring that sound marketing and sales strategies are developed to allow the company to continue to win and succeed in the marketplace. Product marketing typically includes the most senior staff members in the marketing organization, and they often have experience working for either a client or a competitor.

The role that product marketing plays in sales situation support varies widely from company to company. In some organizations, product marketing gets very involved in being a second-level sales resource. It can often get introduced in sales situations for large opportunities or when a prospect’s requirements are unique.

Core duties of product marketing include:

- Product Messaging and Positioning
- Competitive Analysis and Market/Customer Intelligence
- Industry Influencers
- Go-to-Market Strategy
- Buyer Personas
- Sales Readiness and Situation Support
- Launch/Rollout Planning and Execution
- Customer Marketing
- Partner/Alliance Marketing
- Selection
- Co-Marketing

How to Evolve: In many cases, sales support can literally take up all the time and resources of the product marketing department. This then leaves important duties such as messaging, positioning and strategy on the back burner, and the entire company can suffer as a result.

To help overcome this challenge, product marketing needs to make sure it has a comprehensive framework of sales tools, slide decks, client case studies (in both slide and collateral format) and RFP response templates to address the widest array of sales situations in an “off the shelf” manner.

MARKETING COMMUNICATIONS

The marketing communications organization acts as a central hub for written, printed and digital communications. While this organization may not write every piece of content produced for the company, the staff plays an important role in editing to ensure you’re depicting a

PRODUCT MANAGEMENT

Although the product management organization typically reports to the vice president of engineering—and, in companies with a history of acquisitions, can even report to the CEO—occasionally it resides in the marketing organization. Product management’s responsibilities include feature/function lists, priorities, make/buy/build decisions and product road map.

It’s important to note the distinction between product marketing and product management. Product management’s primary role is determining the features, functions and capabilities that could be added to a company’s product line. The product management group also can orchestrate the “make versus buy” analysis for new products. In addition, it plays a major role in determining the priorities and order of development and design tasks.
consistent voice and tone in all company communications. If you employ outside resources to help you in content creation, you'll need to invest the time and effort to bring them up to speed on your solutions and standards.

Core duties of marketing communications include:

- Content
- Presentations
- Collateral
- Sales Tools
- Blogging, Guest Posts
- Case Studies
- Web Content
- Public Relations
- Social Media
- Production & Logistics
- Traffic Management
- Show Logistics
- Event Management

**How to Evolve:** Consider hiring staff members with journalism degrees or experience. Obviously, the more they understand the challenges your industry faces and the features and benefits of your products, the more effective the team will be.

Given today's more social buyer, it's imperative that the marketing communications group also become more social, crafting a strategy that connects the company/brand message with critical social channels and influencers to build its social audience. In addition, your team should also be prepared to respond to social critiques and stream helpful social PR snippets where applicable.

**DECENTRALIZING YOUR MARKETING: FACTORS TO CONSIDER**

Another important consideration for today's marketers is whether to centralize the marketing function or have resources decentralized across the organization. Typically, when organizations elect to decentralize the function, they feel there...

**BRANDING AND BRAND MANAGEMENT**

The importance of branding cannot be overemphasized for marketing organizations from all industries. While branding can mean the logos, symbols and visual iconography that identify your goods or services, it can also encompass the experiential feeling and preference individuals have for your products or company.

While this group typically resides within the marketing communications organization, it's highlighted here as a distinct function due to its importance and the fact that certain aspects of branding and brand management can be assisted by specialty branding agencies. The duties within this department can vary dramatically depending on the types and quantity of products your company offers, the size of your company, the geographies in which you operate and the competitive environment you are facing. Typically, though, these responsibilities will include visual identity, product and company naming, company messaging and positioning, asset library and design templates.
are benefits with closely aligning marketing talent to a business unit, geography, product or industry organization. If decentralized resources provide increased responsiveness, then there may be a strong case to staff with this model.

It’s important to make sure that these field marketing resources have the skills and depth of capabilities to provide proper service to their organization. To back them up, you may want to consider having a “center of excellence” at the corporate level. This elite organization would reside at the corporate level and has a charter to coach and mentor the field marketing organization. For example, you may have mobile marketing or marketing automation resources at the corporate level who can be “on call” for assistance to the field marketing organizations. They can provide vital education, guidance and strategic assessment assistance to the decentralized organization.

OUTSOURCING: YOUR 5-STEP GUIDE

Because marketing often requires a myriad of specialized resources, it’s rare that your marketing organization has the breadth or depth of resources in-house to handle everything you need to effectively achieve both your short-term tactical and long-term strategic objectives. In the pre-Internet era, companies could hire an advertising agency that would be a long-term partner and manage everything from messaging and creative to direct mail and advertising. Today, those all-encompassing relationships are rare.

Instead, modern organizations usually rely on a melting pot of specialist outside resources that can include consultants, technical resources and creative talent. And while there used to be a sense of pride associated with hiring a Madison Avenue agency, most companies today don’t have qualms about hiring a solo practitioner as long as he or she provides deep, specialized skills or a large portfolio of top-notch past creative work.

Marketing areas to consider for outsourcing include:

- Marketing Database Design and Analysis
- Integration to Other Systems such as CRM, Order Management and Shopping Cart Technology
- Search Engine Optimization
- Email & Marketing Automation Campaign Design and Setup
- Competitive Analysis
- Event Registrations and Trade Show Logistics
- Lead Score Definitions & Assignment
- Social Media Strategic Planning
- Website Design and Programming
- Content Creation
- Corporate and Product Positioning and Messaging
- Media Planning and Press Pitching
- Online Ad Buying & Placement

Here are five steps to help you make the right choice if you’re considering outsourcing:

1) **Do an honest and thorough evaluation of the skills you have in your company.** Identify the gaps in talent and decide if you want to hire permanent employees to address the need or hire longer-term on-site contractors to address your requirements.

2) **Determine how you want to address the remaining needs within your organization.** Perhaps you’ll want to bring on a resource that can lead a skills transfer effort so
that your own employees can assume the responsibilities over time. If that’s your plan, make sure you’re setting internal deadlines to make this happen or you might find that the outside talent is staying on for far longer than you had planned or budgeted.

3) Give each firm a “blank slate” from which to begin its capabilities presentation. When interviewing agencies and other resources, this can help you evaluate the best fit. The firms usually prominently present the work that they’re best and most comfortable performing—and the topics and capabilities they don’t present can be equally telling.

4) Clearly communicate objectives, results expected, time frames and work scope. When hiring outside talent, good communication will help prevent any unforeseen disagreements or misunderstandings that could be costly, embarrassing or worse. This can be challenging in today’s environment, where many marketing organizations have contracts with a number of different specialty firms. To overcome this challenge, make sure you allocate permanent employee resources to actively manage these firms and ensure you’re receiving full value on your terms.

5) Build a review period into your calendar. This will enable you to assess the performance of the firm and the impact they’re having on your overall marketing efforts. If the firm or resource isn’t performing up to snuff, then by all means make a clean break and either bring the function in-house or look for other outside talent.

**SOLVING THE SKILLS CHALLENGE**

According to Sirius Decisions, there’s “a widening gap between the skills of b-to-b marketers and the processes and technologies they are now being expected to employ.” Yet Sirius reports that 81 percent of organizations spend less than $1,000 per year on marketing training—and 36 percent spend nothing at all. This is clearly unacceptable for both employees and the companies depending on them to drive incremental revenue, create preference in the minds of prospects and clients and win in the marketplace.

So how can you go about solving the skills challenge? You can hire individuals who already have the experience with the marketing processes and with the technology you’ve selected, or you can train existing employees to assume new duties. Either way, carefully assess the aptitude of the individuals you want to train. If someone in your department has had a specialized role in media planning and advertising, for example, it may be a stretch for that person to learn the skills he or she needs to be a top contributor in a marketing operations role.

Rely on your technology vendors to provide training (either online or in person) and certification programs to get your employees up to speed as quickly as possible. User group meetings and other regional events can also provide valuable education and networking opportunities.

**TWEET THIS!**

Reading Silverpop’s “B2B Marketers Planning Workbook”
Marketing Staffing Checklist
When looking at the organization of your marketing department, are you striving to or already meet these requirements?

- Do your personnel have the knowledge to tackle rule-based logic and advanced segmentation queries in order to leverage more technical digital marketing tools? □ Yes □ No
  - If not, what training programs could help bring them up to speed? __________________________
  __________________________
  __________________________

- Does your marketing department align with current buyer patterns? □ Yes □ No
  - If not, how could each group within your marketing department shift to keep up with changing buyer patterns? __________________________
  __________________________
  __________________________

- Would your department benefit from the creation of a new position, such as one dedicated to marketing technology or content? ______________
  __________________________
  __________________________

- Are you able to accurately and efficiently track ROI across channels and campaigns? □ Yes □ No
  - If not, what areas, processes or technologies need better tracking? __________________________
  __________________________
  __________________________

- Do you allow room in your budget to experiment with the latest technologies and emerging platforms or channels that have the potential to improve your marketing performance? □ Yes □ No
  - If not, what adjustments could you make to stay on top of the latest innovations and communication trends? __________________________
  __________________________
  __________________________

- Are there changes you can make in your budget to help the department transition from broad segmentation to one-to-one messaging? □ Yes □ No
  - If yes, define those areas: __________________________
  __________________________
  __________________________

- Does your marketing department resemble the general structure outlined below? □ Yes □ No
  Note the areas where you might be different as well as the functions that might need investigating:

  • Marketing Leader
    - Demand Generation
      □ Campaign design
      □ Campaign management
      □ Marketing automation setup and execution
      □ Data management
      □ Telemarketing
    - Marketing Operations
      □ Marketing processes and alignment
      □ Service level agreements
      □ Data
      □ Systems
      □ Reporting
    - Product Marketing
      □ Sales enablement tools
      □ Slide decks
      □ Case studies
      □ RFP response templates
    - Marketing Communications
      □ Written, printed and digital communications
      □ Content creation
      □ Social media
      □ Media and analyst relations

  • Additional notes: __________________________
  __________________________
  __________________________
For most marketers, budgeting and planning for the next year is a substantial undertaking. But budgeting season is also a time to step back, assess what’s working, make plans to change or improve, and see what peers are doing in similar industries. It’s no easy task, but taking a moment to reflect, review and refine before getting into detailed budget planning mode is the best bet in today’s topsy-turvy environment where so much is at stake.

During the last few years, business has changed for marketing. In part, marketing is under the same strain as other departments as companies strive to do more with less. But there’s more to it. Now more than ever, marketing is held directly responsible for revenue and more deeply accountable for business metrics. Marketing is finding its staff and resources are more involved farther into the so-called “funnel.” This means less demarcation of when and where it hands off to sales and more overlap with the sales team in nurturing leads to ultimate revenue. Additionally, CEOs are pressuring their marketing execs to report where they are in the pipeline and how much revenue can be attributed directly to marketing’s efforts.

On the flip side of the same coin, marketing has had to change the way it plays the game because today’s consumers are much different from their predecessors. With more resources at their disposal, the Internet at their fingertips and an arsenal full of research options, this is one empowered group. In fact, a recent study by the Marketing Leadership Council found that on average, buyers are 57 percent of the way through the buying cycle before they’re even willing to engage a sales resource. This doesn’t just turn the screw on sales, it means marketing has to step up and provide more support and creative new tactics to manage the care and feeding of the self-service buyer.

In its first-ever Global Chief Marketing Officer Study, IBM found that CMOs and CEOs across all industries see market and technology as the two most influential forces affecting companies today. All of this mandates an approach to your budget that’s judicious and strategic. If 2012’s trends continue, it will likely mean a bump up in dollars with a significant portion going toward digital marketing, often with some form of improved marketing automation. But whatever final shape those dollars take, here’s our advice for how to ensure the most effective marketing budget possible.
GET BUY-IN
First things first. Don’t assume your company’s C-level execs understand every detail behind the multiple facets contributing to today’s B2B marketing world. More importantly, don’t assume they immediately understand how marketing and sales roles have shifted or how that shift affects your company. That education is up to you. Get time on the appropriate calendars and ensure there is a general understanding of today’s digital marketing dynamics.

Before you go eyeball to eyeball with the executive ranks, spend some time talking about the organization’s goals in general. Make sure you’re current on the targets your company is working to hit and the key strategies behind those objectives. This is a critical first step in establishing that marketing’s goals, which will be reflected in your budget, are in line with the company’s goals. This conversation should also produce some excellent functional knowledge that can later be used when pitching your proposed budget.

Finally, the technology that serves as the foundation for your digital marketing platform isn’t going to come for free. Whether such a system is already in place and your team needs to ramp up skills on how to use it more effectively, or you’re about to make a first-time purchase, getting buy-in from top management about why this is necessary and how it will help improve marketing’s effectiveness (and ultimately the bottom line) is important.

PLAN FOR TECHNOLOGY’S INCREASED ROLE IN MARKETING

Virtually every marketing department should have a defined budget for technology in their 2013 plan. In the past, those budgets may have existed in or been rolled up with the IT department, but technology’s function within marketing has become so multifaceted, specific budgets within marketing are emerging.

Technology and its benefits affect every aspect of how marketers successfully do what they do. The myriad technologies available to marketing today affect content, interaction with prospects, efficiency, benchmarking, accountability and ROI. No wonder Gartner found that by 2017, the CMO will spend more on technology than the CIO.5

In presenting that report via the January 2012 Webinar, Laura McLellan, Gartner’s vice president of marketing strategies, said, “All of us who work in marketing organizations and follow marketing see that today, digital is reinventing marketing. Put another way, technology and transparency are changing marketing.”

Among other things, McLellan was referring to the marketing automation solutions that allow companies to increase the intimacy and engagement with clients by managing that interaction based on behavior and existing customer data. Furthermore, truly integrated marketing automation software provides insight into how much influence various efforts are having on outcome, an invaluable metric for reference when the time comes to make the hard decisions about what stays in a budget versus what gets the axe.

In its “Marketing Tactics of Top Tech Performers” report, Forrester Research concluded that a standout commonality of leading tech companies is that they have all embraced marketing automation.
In its summary, Forrester communicated the benefits beyond the scope of just tech companies: “With deep insight into buyer behavior and engagement, and (increasingly) sophisticated analytics, it is becoming possible for marketers to move beyond simple attribution models and gain deeper and more complete insight into the marketing performance of various marketing tactics and campaigns.”

Email is an excellent example of how smart technology can improve results. Using the latest in behavioral analytics, marketing automation solutions can help marketers set up actively evolving targets for precisely placed email campaigns. If triggered email messages garner a click-through rate of 119 percent higher than normal messages, adding personalization and dynamic offers have huge potential pay-offs. Similarly, a recent report by SiriusDecisions found that when augmented by a marketing automation program, social media activity connects with contacts for aggregate-level social media reporting on activity and behavior.

In the era of the empowered consumer, the batch-and-blast method no longer works. Instead, marketing is now obligated to look at all the data points across the entire customer existence and combine that information with behavioral analytics to make its communications personalized and relevant. Because marketing automation does that and so much more, it behooves every CMO and marketing manager to make the case for putting the right technology for their organization in place.

Yet most B2B organizations are not using a marketing automation platform. SiriusDecisions also reported that only 18 percent of B2B companies have implemented one. Further, that same report found that of those who have purchased such a system, 85 percent felt they were not utilizing it to the fullest potential.

If you’ve not yet implemented a full-featured marketing automation system, you’ll need to budget for the purchase and implementation of the system. And the more data you have integrated into your installation, the richer, more relevant and more successful your campaigns will be. So you may want to consider getting outside assistance for your data integration requirements. Don’t make the mistake of so many organizations and just look at the price tag for the software itself and ignore the price for data integration and setup, which should include a plan for training your staff over time to use it effectively.

Speaking of your department’s self-sufficiency, even if you’ve already implemented a system, remember to build in money for ongoing training in technology and best practices to ensure employees are up to speed on all the capabilities and actually ahead of the curve. In fact, technology alone will not yield the results you’re hoping for and may even be detrimental to the ROI. In the Sirius report referenced above, researchers found that, “Technology alone — without proper skills, knowledge and processes — will not show measurable returns.” Because companies aren’t using the fullest extent of their marketing automation tools, they’re losing dollars. Make sure your budget reflects the expectation to continuously improve what you’re already doing today.
PLAN FOR CONTENT AND KEEP YOUR FINGER ON VIDEO’S PULSE

In the land of the empowered consumer, there is the expectation that marketing’s efforts will at least be authentic if not all-out dazzling. Therefore, a content marketing strategy isn’t an option, it’s a necessity and must be budgeted for accordingly.

Because strong content is so pivotal in buyers’ decision-making, your content strategy should consider integration across the brand-management scope of the organization. In short, you want to make sure your company’s point of view and materials and solutions — how you’re solving customers’ problems — is front and center on search engines and social networks when clients are interested in consuming that information.

Recently, more companies have assigned dedicated resources to content marketing, and this is not a trend that’s going away, because substantive content is crucial to marketing’s role and its contribution to ROI. Some companies are even creating senior management content roles, because content covers such a large chunk of the marketing value chain — from hard-copy collateral to every inch of digital space, including social networking plan dialogue, blog posts and the ever-emerging video component.

Video is definitely a content trend to consider incorporating into your budget. Look for 2013 as the year consumers search for more content in video format. But remember, consumers are seeking out a variety of content, and it all must be smart and relevant. Some may just want a blog post, while others may appreciate a series of white papers. Likewise, many may not want to read anything at all and will only be interested in snappy video pieces. Budgeting for this multifaceted face of marketing will become increasingly important, and for most marketing organizations the content line item, including video, will increase in 2013.

REVIEW LAST YEAR’S RESULTS

Hindsight is more than just 20/20; it’s a wonderful educator, and marketing managers must carefully analyze what happened last year. Review 2012 closely and look at where dollars were spent and what worked versus what didn’t — and don’t be afraid to be honest.

In an ideal world, there’s some level of review that’s ongoing throughout the year, but if you’ve waited until budget time to take a hard look at last year’s budget and align it with the actuals, do it with as keen an eye as possible, then have the guts to realize that if something isn’t working, 2013 is the year to just stop doing it.

Review marketing’s 2012 contributions to the sales pipeline and assess what closed the most business, then prioritize those things. This requires candid conversations and honest relationships with the sales team. This should be a business-focused conversation based on ROI, revenue and results (minus opinion and emotion). What will emerge will be clarity on what items you keep and what you cut. If you already have a marketing automation platform or CRM system, use these products to give you fact-based answers.

CAREFULLY CONSIDER PROCESSES, GOALS AND BENCHMARKS

Because you began this process with company execs, you should already have information about the organization’s goals. Now is the time to define your inter- and intra-department processes and identify where you might have some gaps. Ensure marketing’s goals line up with the company’s overall objectives and that marketing and sales are communicating well.
This should be an ongoing exercise. It’s much easier to fix problems when they first arise. And good communication doesn’t happen overnight. If your processes are a problem, vow to do better in 2013 — throughout 2013.

The budget-drafting process is the time to clearly document what it is you want to accomplish in the coming year. Next year’s key initiatives should include both the anticipated ROI and what will be required in terms of budget and headcount.

Similarly, compare your budget details and goals to industry benchmarks within your segment. Use any associations or consulting organizations you have connections with to rely on their analysts to review and refine some industry benchmarks. Those aspects will prove helpful in putting your budget together and then defending it to management.

TAKE A MOMENT TO THINK OUTSIDE THE BUDGETING BOX

There are a few “outside the box” items you should add to your checklist so that you don’t find yourself in the throes of budget delirium and miss something that could prove important to your department and company.

The first is the rise of boutique agencies. This is in contrast to the days of old when organizations often employed one “agency of record,” which provided a variety of services. Today, there are groups and consultants to provide everything from digital creative work to automated programs to social monitoring or strategy. Consider that one or more of these agencies might be helpful and even cost-effective. If you run the preliminary numbers and see that this is a route to pursue, start interviewing these firms now.

Next, remember to budget for marketing education. This was alluded to earlier, but it extends to every area of marketing’s value chain. Virtually everyone forgets this crucial component, and that is a huge problem. Too many departments are full of self-taught people who have cobbled together bits of information here and there to muddle through. Some reports indicate that fewer than 20 percent of organizations spend more than $1,000 annually on training their marketing staff, and as many as 36 percent spend nothing at all. Everything from workshops about emerging trends and creating better content to training for technology benefits your staff, your goals and ultimately your company’s bottom line.

Finally, take a step back and take a multidimensional view of everything. Slice and dice and look at your budget in a number of different ways to ensure you’re meeting all the needs.

Consider the multiple ways your department reaches its audiences, such as social, events, telemarketing, and branding in general. Look at your marketing segment — your industry along with the business, corporate and strategic accounts that need nurturing. Evaluate by company division, brand and product or service. All of these are aspects that fall under your domain and require appropriate consideration.

TWEET THIS!
Reading Silverpop’s “B2B Marketers Planning Workbook”
Marketing Budgeting Worksheet

STEP 1: LOOK BACK

Begin by reviewing last year’s results, with an eye toward using these learnings to inform your decisions for the upcoming year.

List the marketing areas that contributed the most to the sales pipeline and what closed the most business:
1) ____________________________________________________
2) ____________________________________________________
3) ____________________________________________________
4) ____________________________________________________
5) ____________________________________________________

List the areas that contributed the least:
1) ____________________________________________________
2) ____________________________________________________
3) ____________________________________________________
4) ____________________________________________________
5) ____________________________________________________

Use the above as a guide for what to keep and cut in the year ahead.

STEP 2: LOOK AHEAD

Think through your department’s role in the company and put significant numbers on what you’ll need to contribute toward marketing ROI and companywide revenue growth.

List your organization’s overall goals for the upcoming year:
1) ____________________________________________________
2) ____________________________________________________
3) ____________________________________________________

For each organizational goal, outline the related marketing goals you need to achieve success. Use the supporting questions to ensure you’ve developed a budget that will allow you to adequately address all aspects of what you’d like to accomplish:

Organization goal #1 ____________________________

Marketing Strategy and Tactics

Imagine it’s Dec. 31, 2013. What did you and your department do that caused this goal to be achieved with phenomenal success? __________________________

What is the marketing strategy you’ll undertake that will allow the company to achieve this goal? __________________________

What are the key ingredients you need to ensure success? __________________________

What are the primary tactics you’ll use? Check all that apply and annotate details as necessary.

Email □ Notes: __________________________
Direct Mail □ Notes: __________________________
Tele □ Notes: __________________________
Content Marketing □ Notes: __________________________
Events □ Notes: __________________________
Shows □ Notes: __________________________
Website □ Notes: __________________________
Affiliate Marketing □ Notes: __________________________
Partner Marketing □ Notes: __________________________
Location-Based Marketing □ Notes: __________________________
Customer Marketing □ Notes: __________________________
PR □ Notes: __________________________
Search □ Notes: __________________________
Video □ Notes: __________________________
Social □ Notes: __________________________
Mobile □ Notes: __________________________
Data Append □ Notes: __________________________
Other □ Notes: __________________________
Other □ Notes: __________________________
Other □ Notes: __________________________

What technologies will be needed in the marketing department to make this happen? __________________________
Resources and Training
What resources will be needed?
Internal Headcount ___________________________________
Agencies or other External Resources ____________________
Program Budget ________________________________________
Capital Requirements ___________________________________
What training will be required? ___________________________
Are there any other organizational, planning or resource gaps that need to be addressed? ____________________________

What will you need from other departments in order to be successful?
Department Need
_____________________________________________________

Metrics and Benchmarking
How will you measure success? ____________________________
______________________________________________________
Are there any interim milestones that could/should be captured to allow you to know if you’re on the right track?
______________________________________________________
How are others pursuing this? _____________________________
Are there any industry benchmarks, industry analyst guidance or other consultants’ perspectives that would be helpful? __________________________________________
How are my competitors addressing this opportunity? __
______________________________________________________
What will I do better or differently? ________________________
______________________________________________________

Organization goal #2 _________________________________

Marketing Strategy and Tactics
Imagine it’s Dec. 31, 2013. What did you and your department do that caused this goal to be achieved with phenomenal success? ____________________________
What is the marketing strategy you’ll undertake that will allow the company to achieve this goal? ____________________________
What are the key ingredients you need to ensure success? __________________________________________
What are the primary tactics you’ll use? Check all that apply and annotate details as necessary.
Email ☐ Notes: ____________________________
Direct Mail ☐ Notes: ____________________________
Tele ☐ Notes: ____________________________
Content Marketing ☐ Notes: ____________________________
Events ☐ Notes: ____________________________
Shows ☐ Notes: ____________________________
Website ☐ Notes: ____________________________
Affiliate Marketing ☐ Notes: ____________________________
Partner Marketing ☐ Notes: ____________________________
Location-Based Marketing ☐ Notes: ____________________________
Customer Marketing ☐ Notes: ____________________________
PR ☐ Notes: ____________________________
Search ☐ Notes: ____________________________
Video ☐ Notes: ____________________________
Social ☐ Notes: ____________________________
Mobile ☐ Notes: ____________________________
Data Append ☐ Notes: ____________________________
Other ☐ Notes: ____________________________
Other ☐ Notes: ____________________________
Other ☐ Notes: ____________________________

What technologies will be needed in the marketing department to make this happen? ____________________________

Resources and Training
What resources will be needed?
Internal Headcount ____________________________
Agencies or other External Resources ____________________________
Program Budget

Capital Requirements

What training will be required?

Are there any other organizational, planning or resource gaps that need to be addressed?

What will you need from other departments in order to be successful?

Department
Need

Metrics and Benchmarking

How will you measure success?

Are there any interim milestones that could/should be captured to allow you to know if you’re on the right track?

How are others pursuing this?

Are there any industry benchmarks, industry analyst guidance or other consultants’ perspectives that would be helpful?

How are my competitors addressing this opportunity?

What will I do better or differently?

Organization goal #3

Marketing Strategy and Tactics

Imagine it’s Dec. 31, 2013. What did you and your department do that caused this goal to be achieved with phenomenal success?

What is the marketing strategy you’ll undertake that will allow the company to achieve this goal?

What are the key ingredients you need to ensure success?

What are the primary tactics you’ll use? Check all that apply and annotate details as necessary.

Email

Direct Mail

Tele

Content Marketing

Events

Shows

Website

Affiliate Marketing

Partner Marketing

Location-Based Marketing

Customer Marketing

PR

Search

Video

Social

Mobile

Data Append

Other

What technologies will be needed in the marketing department to make this happen?

Resources and Training

What resources will be needed?

Internal Headcount

Agencies or other External Resources

Program Budget

Capital Requirements

What training will be required?
Are there any other organizational, planning or resource gaps that need to be addressed? ____________________________
__________________________________________________

What will you need from other departments in order to be successful?

<table>
<thead>
<tr>
<th>Department</th>
<th>Need</th>
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</tbody>
</table>

Metrics and Benchmarking

How will you measure success? ____________________________
__________________________________________________

Are there any interim milestones that could/should be captured to allow you to know if you’re on the right track? ____________________________

How are others pursuing this? ____________________________

Are there any industry benchmarks, industry analyst guidance or other consultants’ perspectives that would be helpful? ____________________________

How are my competitors addressing this opportunity? ____________________________

What will I do better or differently? ____________________________
__________________________________________________
FINAL THOUGHTS

There are no shortcuts to make staffing and budgeting easy, but there are ways to make the most of your time and resources. Thinking through as many aspects as possible, confirming your department’s role within the company, and then putting specific numbers on what you’ll need to contribute significantly toward the common goal of profit, revenue growth and ROI puts you on the right path for building a modern marketing department capable of delivering highly relevant, individualized content and creating a strong, defensible budget that sees results and earns respect for your department.

By combining staffing strategies and organizational considerations that reflect the new era of B2B marketing, with an increased emphasis on training and automation, you can ensure you meet and exceed the expectations placed on today’s marketing departments.

You’ll help maintain alignment within the department, deliver a consistent voice and message across multiple communication channels and, most importantly, deliver a more rewarding experience for customers and prospects.

Finally, let 2012’s lessons result in valuable insight into 2013 for the marketing budget, your staff and your evaluation process going forward. Adjust the numbers accordingly and hold yourself accountable to an improved system next year. With the same best practices in place for budgeting that you have for marketing, a refined template will emerge that makes this part of the job less challenging and maybe even enjoyable.

Regardless of how you do it, focus in terms of staffing and budget is needed to bring the skills of marketers up to date in this new era of marketing. But it’s well worth the investment.

FOOTNOTES

5 – IBM Chief Marketing Officer Study, “From Stretched to Strengthened: Survey of 1,700 Global CMOs,” October 2011
6 – Gartner Webinar, “By 2017 the CMO will Spend More on IT than the CIO,” January 2012
7 – Forrester Research, “Marketing Tactics of Top Tech Performers,” February 2012
8 – Epsilon and Direct Marketing Association’s Trend Report, “Q1 2012 North America Email Trends and Benchmarks,” June 2012

Silverpop’s digital marketing automation platform was designed to make it simple to build hyper-personalized campaigns, creating individualized experiences for every relationship. Watch our demo to see our product in action, and contact Silverpop to see how we can help you accomplish your marketing goals for 2013.