

A background image showing three people in a library or office setting. On the left, a man in a striped shirt looks at a tablet. In the center, a woman in a white tank top looks at her smartphone. On the right, a man in a white shirt looks at a tablet. The background consists of bookshelves filled with books.

# HOW TO BUILD THE ULTIMATE CUSTOMER DEMAND GENERATION MACHINE USING MARKETING AUTOMATION

Anastasia Pavlova

Sr. Director of Marketing, Marketo

@digijinni, @marketo, #mktgnation



# Bio

- Born in St. Petersburg, Russia
- MBA from UC Berkeley, Haas School of Business
- 15+ years in high tech, digital marketing
- 18 months at Marketo, leading customer cross-sell & new SMB DG



# Today's Agenda

- STRATEGY: Design a winning customer demand generation strategy
- PROGRAMS: Develop and execute programs at scale
- MEASUREMENT: Measure and optimize the results to drive higher cross-sell & up-sell revenue and ROI
- ALIGNMENT: Align Marketing and Sales on the same goals



# The Quest of Every Marketer ...



# Yet, Content Marketers Mostly Focus on Acquisition

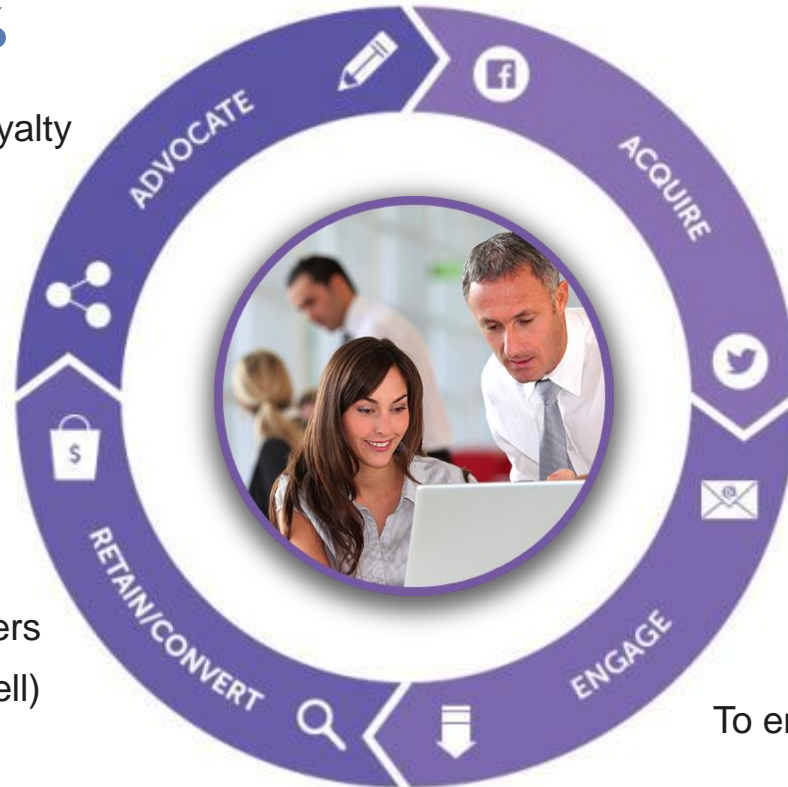
**21%**  
To increase loyalty

**63%**  
To build Awareness

**67%**  
To generate demand

**12%**  
To retain customers  
(cross-sell/up-sell)

**34%**  
To enable sales activities



Source: Forrester/BMA/OMI May 2014 Global Content Marketing Benchmark Online Survey

Q. What are your top objectives for Content Marketing?

# Why Upsell & Cross-Sell Pay Off

3-4X

More likely to drive revenue from an existing loyal customer, than a new prospect <sup>1</sup>

81%

Cheaper to upsell to an existing customer than to acquire a new one <sup>2</sup>

<sup>1</sup>. Marketing Metrics

<sup>2</sup>. Pacific Crest SaaS Survey

Strategy • Programs • Measurement • Alignment

# *How to Design a Winning Customer DG Strategy?*

## Step #1. Start With the Goals





# Step #1. Start With the Goals



# Step #2: Understand Your Target Audience



CMO, Mktg. Exec

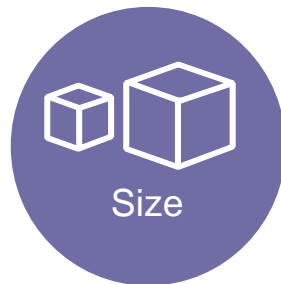


Dir. of Mktg.



Practitioner

# Step #3: Segment Your Customer Base



# Step #4: Map Products to Segments & Prioritize

<b>BUY -&gt;</b> Segments	<b>Product A</b>	<b>Product B</b>	<b>Product C</b>	<b>Service Offer</b>	<b>Support Offer</b>	<b>EDU Offer</b>
<b>Segment 1</b>		X	X			
<b>Segment 2</b>		X		X		
<b>Segment 3</b>	X	X				X
<b>Segment 4</b>	X					

# Step #5: Design the Programs Mix



Strategy • Programs • Measurement • Alignment

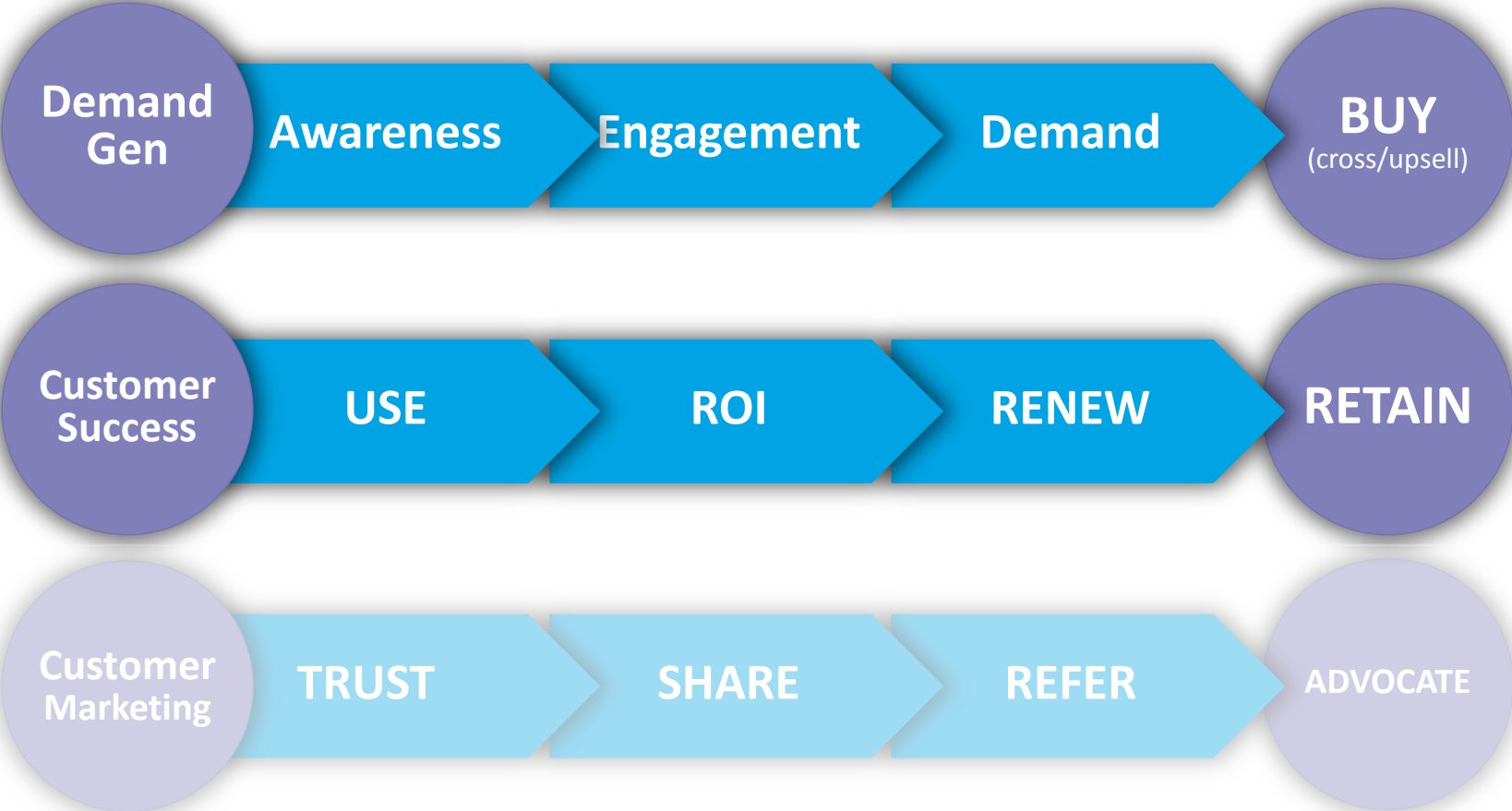
*Develop and Execute  
Programs at Scale*





Nurturing is the process of building *relationships* with customers throughout their buying cycle *by engaging them in personalized, relevant conversations*, across multiple channels.

# Nurture Goals





# Types of Nurture

- Cross-sell Nurture
- Retention Nurture
- Multi-channel Nurture



# Cross-Sell Nurture :: Dimensions

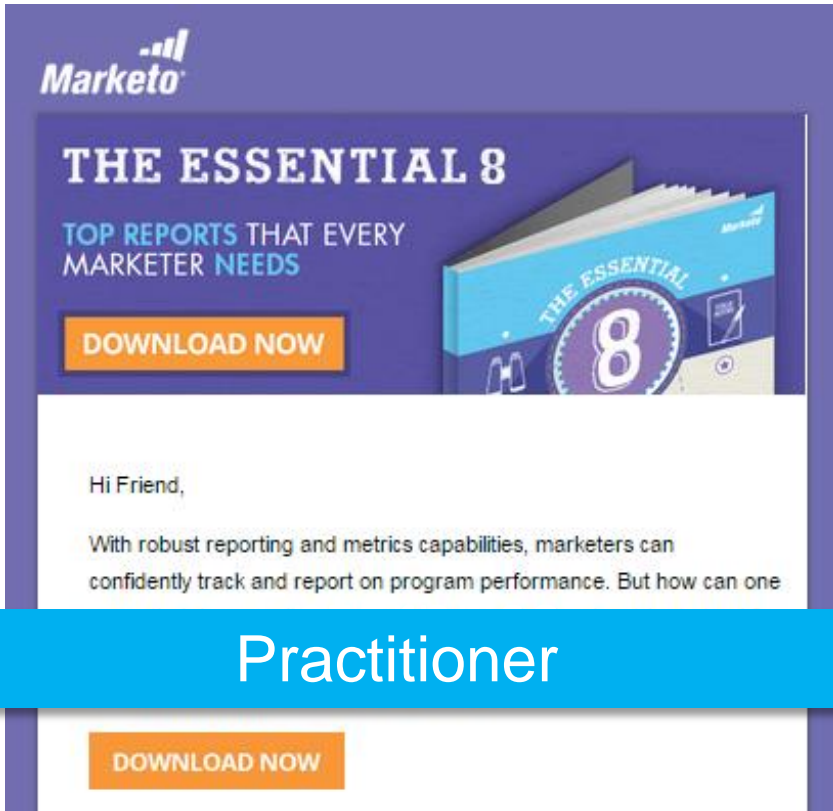


# Cross-sell Nurture :: Marketo CEE

The screenshot displays the Marketo CEE user interface. At the top, there is a navigation bar with the Marketo logo and a search bar. Below this, a secondary navigation bar contains links for 'Marketing Practitioner', 'Streams', 'Setup', 'My Tokens', and 'Members'. The 'Marketing Practitioner' section is active, showing a 'View: Content' dropdown and buttons for 'New', 'Program Actions', and 'Add Stream'. A left-hand sidebar lists various marketing activities, with 'Marketing Practitioner' highlighted. The main content area shows three nurture programs: 'ENC - RTP Nurture', 'ENC - Calendar Nurture', and 'ENC - Edition Upgrade Nurture'. Each program has a frequency and time schedule and a list of associated assets.

Program Name	Frequency	Assets
ENC - RTP Nurture	Every 2 weeks on Wed   8:00 AM PDT	<ul style="list-style-type: none"><li>Nurture - Asset - Web Personalizati...</li><li>Nurture - Asset - Unmask Inbound ...</li><li>Nurture - Asset - Website as Perso...</li><li>Nurture - Asset - Account-Based M...</li><li>Nurture - Asset - RTP with Google ...</li><li>Nurture - Asset - Who, What, and ...</li><li>Nurture - Asset - RTP: Top 5 Use C...</li></ul>
ENC - Calendar Nurture	Every 2 weeks on Tue   8:00 AM PDT	<ul style="list-style-type: none"><li>Nurture - Asset - Marketing With a ...</li><li>Nurture - Asset - Marketing Quarte...</li><li>Nurture - Asset - Intro to Marketin...</li><li>Nurture - Asset - Activate Your CaL...</li><li>Nurture - Asset - Calendar Demo (...</li></ul>
ENC - Edition Upgrade Nurture	Every 2 weeks on Thu   7:45 AM PDT	<ul style="list-style-type: none"><li>Nurture - Asset - What to Test in Y...</li><li>Nurture - Asset - Marketing Measu...</li><li>Nurture - Asset - 2015 Sample Soci...</li><li>Nurture - Asset - The Essential 8 R...</li><li>Nurture - Asset - Marketo Social M...</li><li>Nurture - Asset - How Marketers C...</li><li>Nurture - Asset - Fun with Webhoo...</li></ul>

# Cross-Sell Nurture :: Email Example



**Marketo**

## THE ESSENTIAL 8

TOP REPORTS THAT EVERY MARKETER NEEDS

[DOWNLOAD NOW](#)

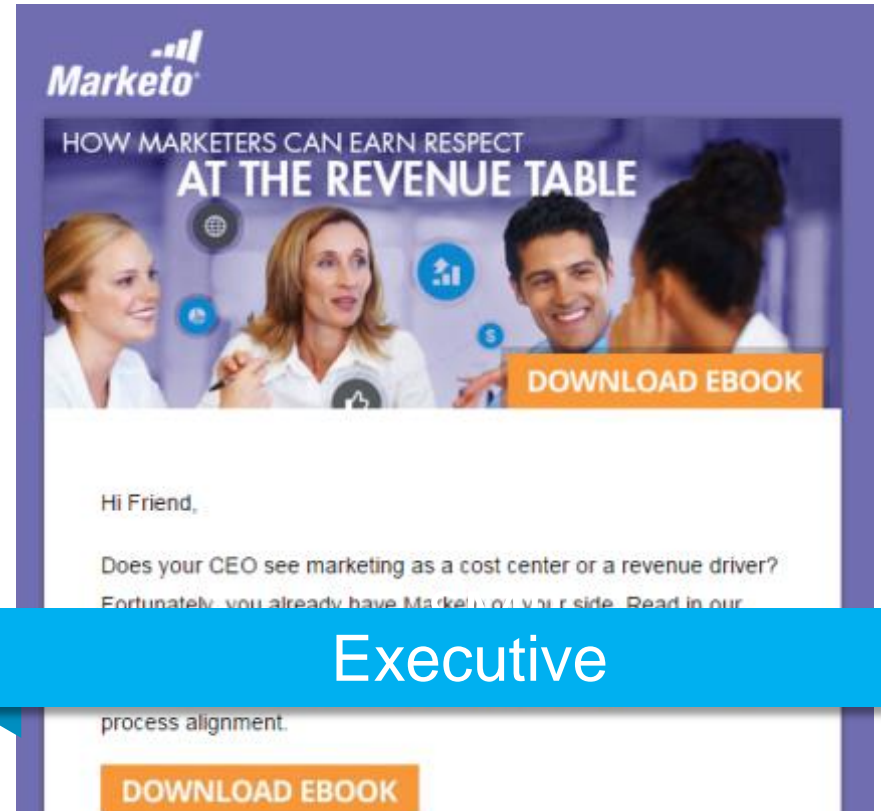
Hi Friend,

With robust reporting and metrics capabilities, marketers can confidently track and report on program performance. But how can one

[DOWNLOAD NOW](#)

This email template features a purple header with the Marketo logo. The main content area has a dark blue background with a stack of report covers. The title 'THE ESSENTIAL 8' is in large white letters, with '8' inside a circular graphic. Below it, the text 'TOP REPORTS THAT EVERY MARKETER NEEDS' is in white. An orange button with 'DOWNLOAD NOW' is positioned to the left of the report covers. The body text is white on a white background, starting with 'Hi Friend,' and a paragraph about reporting capabilities. A second orange 'DOWNLOAD NOW' button is at the bottom.

Practitioner



**Marketo**

## HOW MARKETERS CAN EARN RESPECT AT THE REVENUE TABLE

[DOWNLOAD EBOOK](#)

Hi Friend,

Does your CEO see marketing as a cost center or a revenue driver? Fortunately, you already have Marketo on your side. Read in our

process alignment.

[DOWNLOAD EBOOK](#)

This email template features a purple header with the Marketo logo. The main content area has a light blue background with a photo of three people in a meeting. The title 'HOW MARKETERS CAN EARN RESPECT AT THE REVENUE TABLE' is in white. An orange button with 'DOWNLOAD EBOOK' is positioned to the right of the photo. The body text is white on a white background, starting with 'Hi Friend,' and a paragraph about CEO perception. A second orange 'DOWNLOAD EBOOK' button is at the bottom.

Executive

# Retention Nurture :: Dimensions

Dimensions	1
A	
B	

## WHERE: EMAIL STREAMS

### TRIGGERS: PRODUCT USAGE

- # of email, landing pages, forms
- use triggers, A/B testing, nurture, personalization, events/webinars, basic reporting
- scoring/lead management, advanced analytics

## WHO: SEGMENTS

- Practitioner (novice, intermediate or advanced user)
- Executive

## WHAT: CONTENT

- Educational, best practices
- How-to
- Tips & Tricks

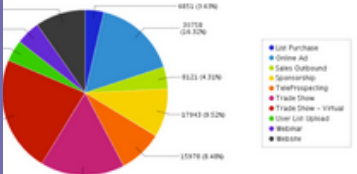
# Retention Nurture :: Email Example

**Marketo**

## REVENUE CYCLE ANALYTICS

g Executive,

g where your leads come from is an important part of demand lead source with Revenue Cycle Explorer helps marketers here their efforts are driving the most traffic.



With the opportunity influence analyzer, you will be able to:

- Clearly demonstrate the programs, events, and activities that influenced an account prior to opportunity creation and close
- Build credibility showing how marketing investments drive conversation and accelerate leads through the revenue cycle
- Focus your marketing investments on those activities that drive opportunity creation and closed revenue

This product is already part of your subscription, simply navigate to the Analytics tile to configure your opportunity influence analyzer.

If you need help creating your opportunity influence analyzer:

- Check out this self-guided resource: [Create an Opportunity Influence Analyzer](#)

If you would like to learn more about Marketo, Education or Professional

**REVENUE CYCLE ANALYTICS**

g Executive,

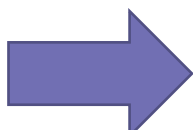
g where your leads come from is an important part of demand lead source with Revenue Cycle Explorer helps marketers here their efforts are driving the most traffic.

that each virtual tradeshow you launch drives over 40,000 new post 23% of all new names generated, you know to invest more channel.

en further to understand the value of each lead source throughout

Lead Closed Quater	2009 Q4	2010 Q1	2010 Q2	2010 Q3	2010 Q4
Number of Leads	1896	9518	2214	3914	7772
1896	1056	5482	1463	8292	
11261	2	5	2621	747	
854	1065	2613	4395	2217	
735	2551	2412	1302	1763	
1995	2638	736	294	1688	
648	3143	742	621	857	
1443	2177	1061	315	44	
338	760	1066	781	1595	
-	222	5	1768	2134	

shows tend to yield a much larger number of new leads during Q4 is takes the guess work out of choosing when to invest in



**02 - Revenue Cycle Analytics.04 - Top Ten Lead Sources**

Revenue Actions | Demo Sample | Show Live Data

HTML: View Default

From: Maria Pousadina (mpousadina@marketo.com)  
 Reply-to: mpousadina@marketo.com  
 To:  
 Subject: [Analytics Best Practices] Do you know where your leads are coming from?

Reporting: Revenue Cycle Analytics / Revenue Explorer


### Create a Revenue Explorer Report

The Revenue Explorer report allows you to track the ROI on your marketing initiatives.

**Availability**

Not all customers have purchased this functionality. Contact your sales rep for details.

1. Go to the **Revenue Explorer** area.



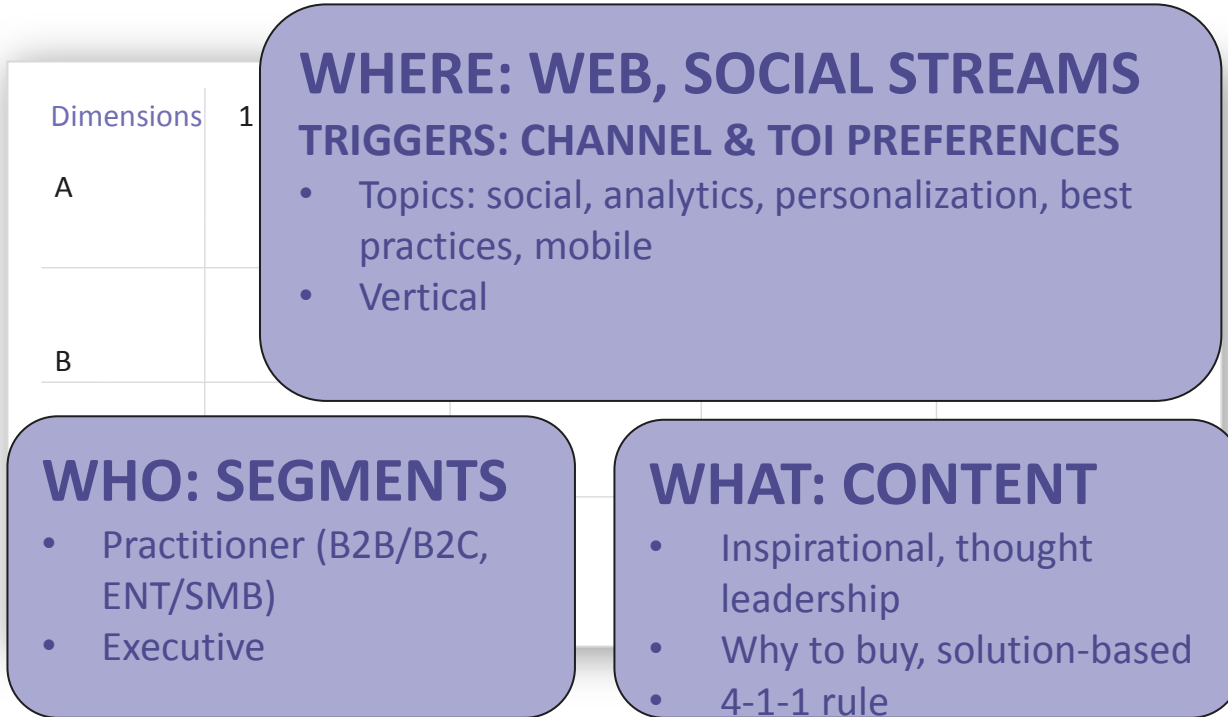
- Revenue Explorer
- Reporting
- Basic Reporting
- Revenue Cycle Analytics
- Easy
- Powerful
- Complete
- Revenue Cycle Woods
- Revenue Explorer
- Create a Revenue Explorer Report**
- Adding Points to a Revenue Explorer Report
- Creating a Filter in a Revenue Explorer Report
- Saving a Revenue Explorer Report
- Exporting a Revenue Explorer Report
- Subscribing to a Revenue Explorer Report
- Revenue Explorer Report

# Multi-Channel Nurture :: Main Concept





# Multi-Channel Nurture :: Dimensions





# Multi-Channel Nurture :: Website Personalization

Email Marketing, Lead Management, Lead Nurturing, Social Marketing, and more...

RESOURCE CENTER

MARKETING BLOG



Lead Nurturing For Beginners and Experts  
Read The All New Definitive Guide

DOWNLOAD THE GUIDE



The Economist Intelligence Unit & Marketo  
Explore The Next Era of Marketing

SEE WHAT'S NEXT



Learn the Basics:  
This eBook Has

DOWN



The Essential 8 Marketing Reports  
Find out What They Are Now

DOWNLOAD EBOOK



Prove, and Improve, Your Marketing ROI  
Focus on the Metrics that Matter

DOWNLOAD THE EBOOK



Land Your Goals with Your Marketing Calendar  
Learn How in This eBook

DOWNLOAD EBOOK

Get hundreds of best practices on topics including Marketing Automation, Email Marketing, Lead Management, Lead Nurturing, Social Marketing, and more...

RESOURCE CENTER

MARKETING BLOG

# Multi-Channel Nurture :: Engage Everywhere



Website, Display, Social



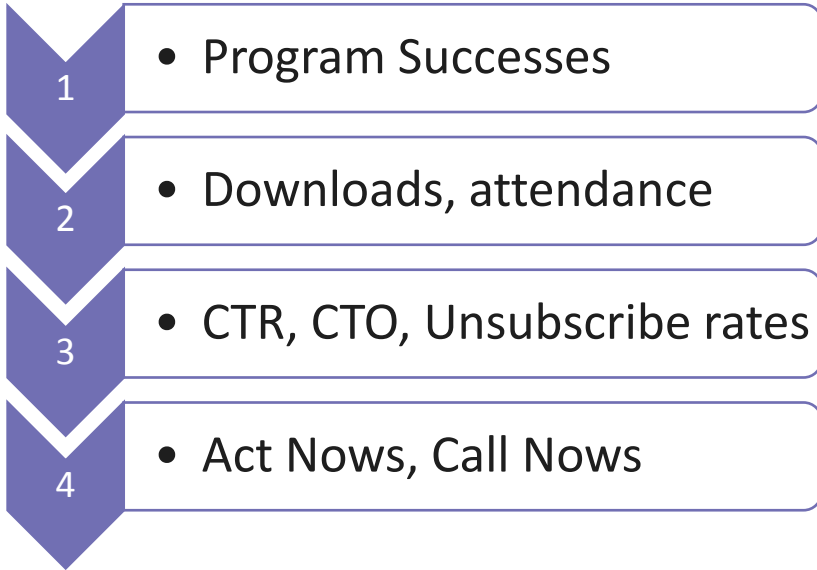
Strategy • Programs • Measurement • Alignment

*Measure and optimize the results  
to drive revenue and ROI*

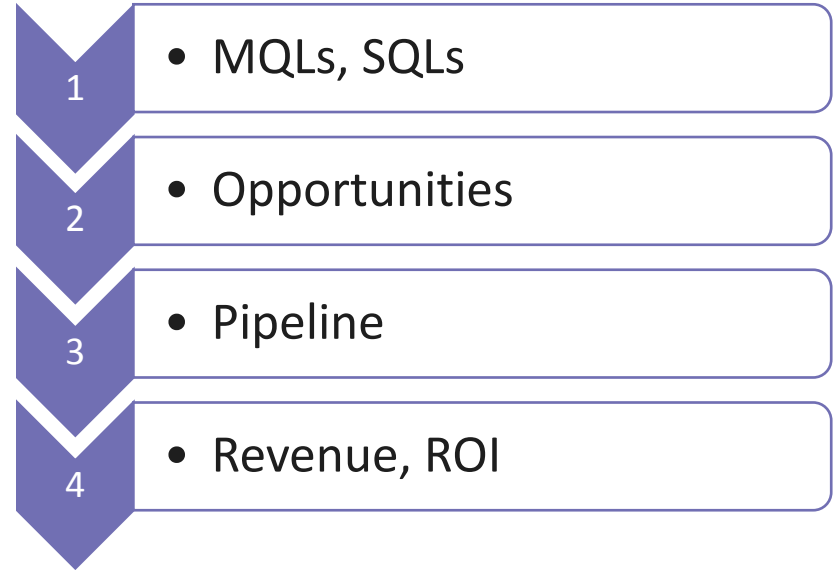


# What to Measure :: Consider Your Audience

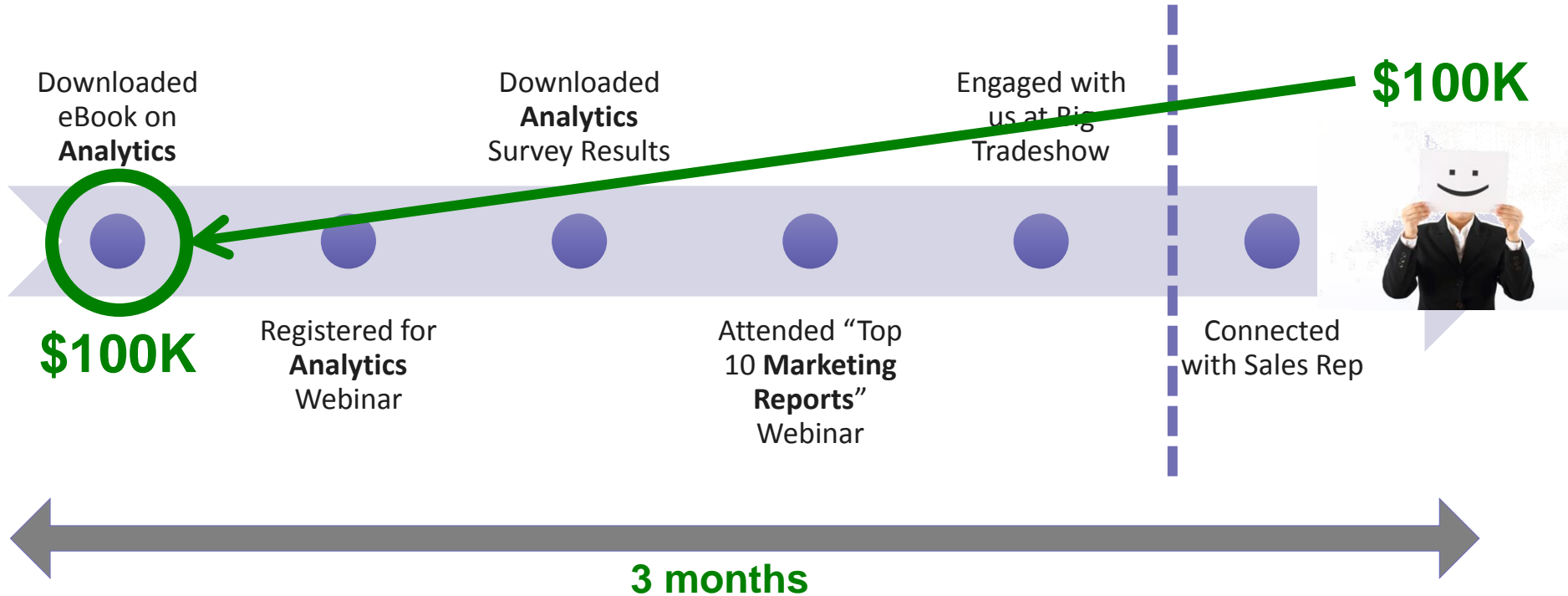
## Engagement Metrics



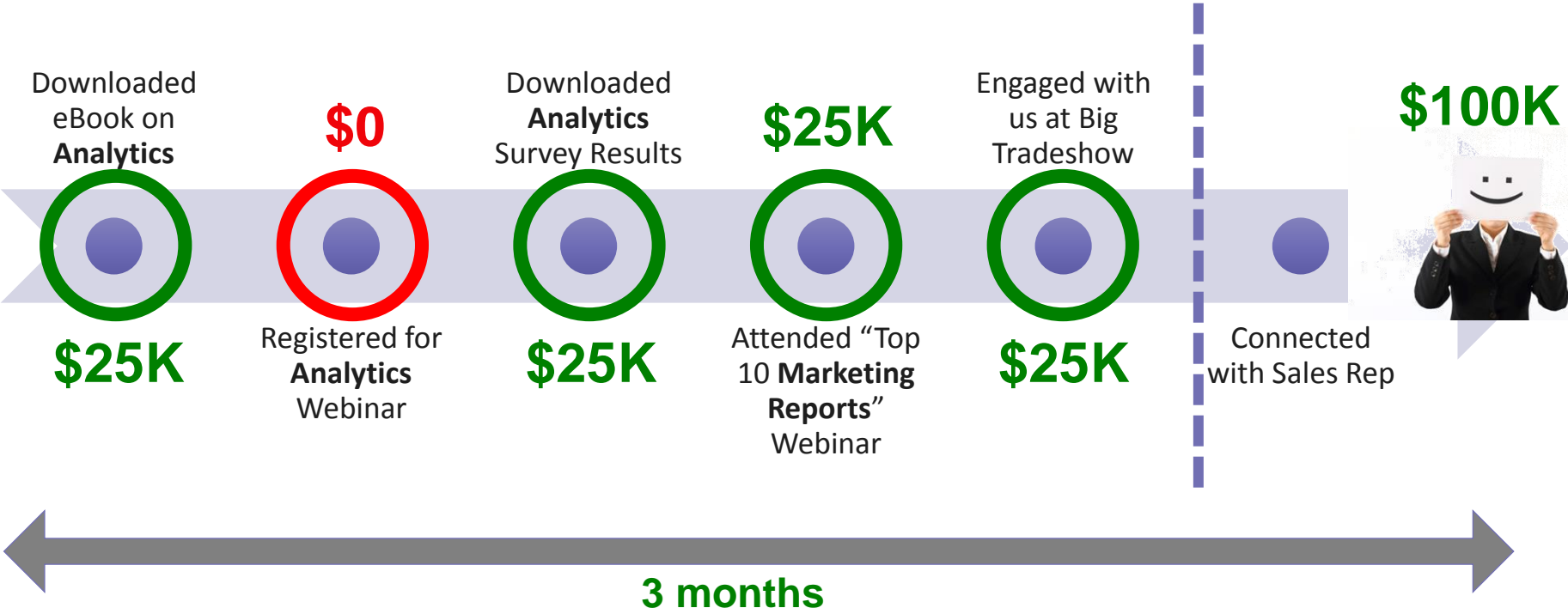
## Revenue Metrics



# First Touch Attribution



# Multi Touch Attribution



# Design Programs to Be Measurable

Example:

---

**Nurture  
Program One  
Set-Up  
Complete**



**Jan**

**Engagement  
Score = 70**



**Feb**

**With  
Optimizations,  
Engagement  
Score = 80**



**Apr**

**4x the # of fast  
leads (<1  
month)  
compared to  
pre-nurture**



**May**

**2x the # of  
MQLs  
compared to  
pre-nurture**



**May**

**2x the # of  
opportunities**



**Jun**

---

Strategy • Programs • Measurement • Alignment

*Align Marketing and Sales on  
the Same Goals*





# Agree on Definitions

- Program Success
- Marketing Qualified Lead (MQL)
- Sales Qualified Lead (SQL)
- Opportunity (BANT)
- Act Now, Call Now (Priority)



# Align Teams to Big Picture Goals

- Display full HD views of your programs calendar and goals on office walls
- Provide visibility to sales, C-suite and business stakeholders



# Use Scoring

- Sort Score
  - Demographic (fit)
  - Behavior (activity)
  - Decay (inactivity)
- Asset scoring
- Product interest scoring
- Deal size & account scoring

Latent Behaviors (Engagement)	Active Behaviors (Buying Intent)
<ul style="list-style-type: none"><li>• Early Stage Content: +3</li><li>• Attend Webinar: +5</li><li>• Visit any Webpage/Blog: +1</li><li>• Visit Careers Pages: -10</li><li>• Decay Inactivity: -1, -5, -10</li></ul>	<ul style="list-style-type: none"><li>• Pricing Pages: +10</li><li>• Watch Demos:<ul style="list-style-type: none"><li>• +5 Overview</li><li>• +10 Detailed</li></ul></li><li>• Mid-Stage Content: +8</li><li>• Late-Stage Content: +12</li><li>• Searches for Branded Keyword "Marketo": +8</li></ul>

# General MQLs or Product MQLs?

- Marketo example: transitioned from general MQLs to Product MQLs
  - Based on Product Interest score
    - Threshold: x points
  - Can be an MQL for multiple products at once
  - Can become an MQL once every 3 months



# Define Hand-Off Process



Marketing



Sales Development  
Representatives



Account  
Executives

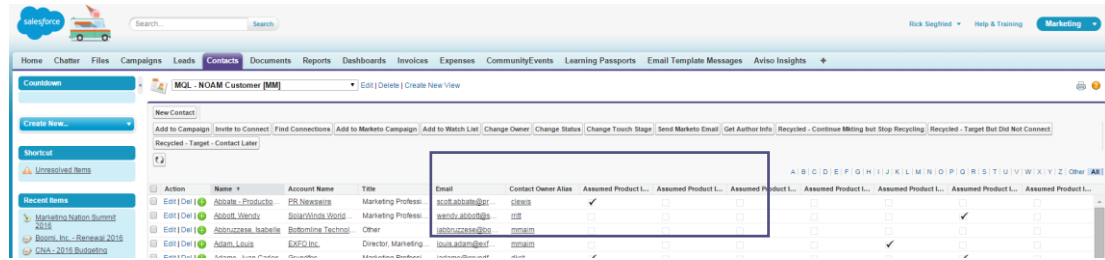
# Prioritize Leads for Sales

The screenshot shows the Salesforce Marketo Sales Insight dashboard. The main content area displays a table of 'Last Interesting Moments' for various leads. The table has columns for Name, Account, Last Interesting Moment, Status, and Priority. The Priority column uses a combination of flame icons (representing urgency) and star icons (representing interest) to indicate lead priority. A blue callout box points to the Priority column with the text 'Stars and Flames show priority'. Another blue callout box at the bottom left contains the text 'List of Interesting Moments'. On the right side of the dashboard, there is a 'Lead Feed' section showing a list of recent activities for leads like David Lewis and DemandGen, with a 'Subscribe' button for each.

Name	Account	Last Interesting Moment	Status	Priority
Jeffrey Waits	marketo	Web: Searched for "Marketo Pricing" 1 week ago	Lead	🔥🔥🔥 ⭐⭐⭐
Sue Morber	Fixote Inc.	Web: Visited the pricing page 1 week ago	Needs Analysis	🔥🔥🔥 ⭐⭐⭐
Marc Lakowski	Eble Systems	Sales Email Clicked: Clicked link in email Eble Systems - Marketo Customers Milestone from patricia.roosa@demo.marketo.net 1 week ago	Contacted	🔥🔥🔥 ⭐⭐
Jon Miller	Marketo			
Rosa Simonich	Simonich F			
Jessica Cephus	Dbax Limite			
Daborah Willman	Qieval Inc.			
Dennis Guenther	Bsize Assoc			
Bruce Aquiler	Etive Inc.	Sales Email Opened: Opened message Etive Inc - Marketo Lead Management from patricia.roosa@demo.marketo.net 1 week ago	Contacted	🔥🔥🔥 ⭐⭐⭐
Gabriel Saetern	Zetzeus Enterprise	Web: Repeat web visits in one week 2 weeks ago	Customer	🔥🔥🔥 ⭐⭐⭐
Julia Fedorchak	Lanvet Technologies	Milestone: Registered in Montpellier 1 week ago	Qualified/1st Demo Done	🔥🔥🔥 ⭐⭐⭐
		Submitted May	Open - Not Contacted	🔥🔥🔥 ⭐⭐⭐
			Deferred	🔥🔥🔥 ⭐⭐⭐
			Opportunity	🔥🔥🔥 ⭐⭐⭐
			Deferred	🔥🔥🔥 ⭐⭐⭐
				🔥🔥🔥 ⭐⭐⭐

# Create Special Views for Sales

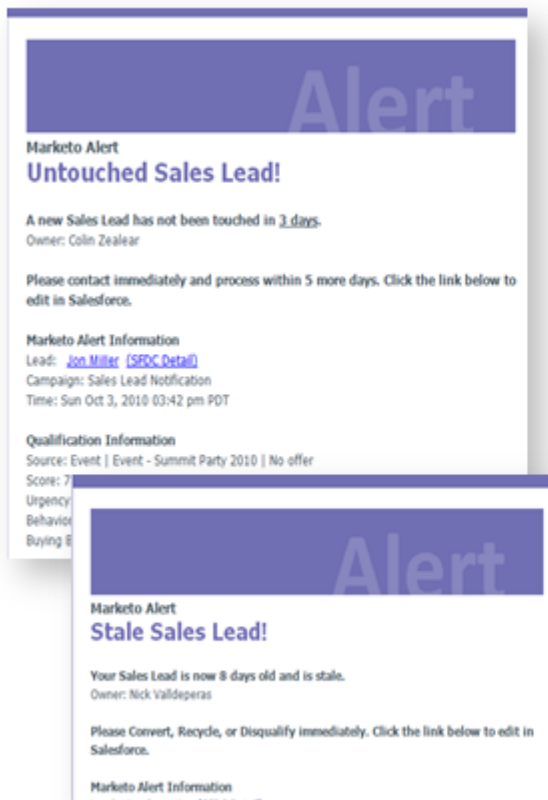
- Focus on MQLs & Act Nows
- 100% visibility
- Easy 1-step follow-up process



Contact owner	Assumed Product Interest - RTP
<a href="#">cport</a>	<input checked="" type="checkbox"/>
<a href="#">mkoss</a>	<input checked="" type="checkbox"/>



# Enforce SLAs: No Lead Left Behind





# Communicate & Train Frequently

- Weekly email updates
  - Monday “To help you sell” email
  - Thursday global forecast notes
- Weekly SDR / Sales / Mktg. meetings
- Monthly training for SDRs and new hires
- Quarterly business reviews
- Ongoing conversations



# Takeaways

1. Focus on driving revenue first throughout the ENTIRE customer lifecycle
2. It's 81% cheaper to upsell to an existing customer than to acquire a new one\*
3. Design your programs to be measurable
4. Create personalized experiences across multiple channels
5. Don't set it and forget it – have regular checks and balances for scoring and input from sales



@digijinni  
@marketo  
#mktgnation

\*Source: Pacific Crest Saas Survey



email

mobile

social

web

events

Learn more at [Marketo.com](http://Marketo.com) or visit **Marketo Booth #202**



marketing  
automation



analytics and  
attribution



account based  
marketing



Thank you! Questions?

