Digital takes all:

The 8-step checklist to successful marketing transformation

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Steps for a successful marketing transformation

Understand your company's business strategy:

- Scale for growth
- Efficiency for profitability
- Adaptability to disrupt

Read more: **Executive guide for marketing: 3 models for digital transformation**

Next, know how marketing is expected to contribute:

- New customers
- Increased customer lifetime value (CLV)
- Reduced customer acquisition costs (CAC)

Collaborate with peers in product, sales, and finance – discover what's important to them.

Get their buy-in by articulating how your digital strategy will provide a plus one for their organizations.

☐ **Assess what other technologies your company has implemented.**

These are the general categories with multiple vendor products in each. Who owns the in-place products, how are they integrated? Document how you plan to integrate and leverage in-place investments. Show how 1+1=3.

Here's a sample list:

- DAM (digital asset manager) - Bynder
- CRM (customer relationship manager) – Salesforce
- CSM (customer service manager) – ServiceNow
- MAP – (marketing automation platform) – Hubspot
- CMS – (content management system) – Drupal
- BI – (business intelligence) – Sisense
- Emerging tech – virtual assistants, virtual reality, AI

Mapping martech to business needs

Category	What is it?	Why you need it
DAM: Digital Asset Management Bynder	Enables a business process for organizing, storing and retrieving rich media and managing digital rights and permissions; creating and managing digital content in a collaborative environment	Brand governance; enables self-service Agile response to changes in business ABM (account-based marketing) enabler Integrate across the martech stack
CRM: Customer Relationship Management Salesforce.com	Application to standardize practices that a company uses to manage and analyze customer interactions and data throughout the customer lifecycle	Optimize the customer experience Sales activity governance; standardize pipeline management and forecasting Integrate with MAP
MAP: Marketing Automation Platform Marketo, Hubspot, Pardot	Allows companies to effectively target customers with automated marketing messages across channels including email, websites, social media and text messages to generate sales leads	Efficiency of staff by removing repetitive tasks Personalization improves effectiveness of demand creation Integrate with CRM
MA: Marketing Analytics Sensei, Quantzig, SAS and packaged with other tech	Operates against data in DAM, CRM and MAP providing insight in buyer behaviors; used to create more precise personalization of content to individual customers	Drives engagement and revenue Growth at scale Foundational for ABM
WCMS: Web Content Management System WordPress, Squarespace	Tools used by nontechnical users to organize and manage digital information on websites; a headless CMS provides back-end capabilities for editing, organizing and storing all types of digital information, without regard to how that content is published, displayed or used	Agility Efficiency Adaptability
CSM: Customer Service Management	The CSM (customer service/customer support) may include: – call management system logs incoming phone calls, routes them to the proper person or department – contact center: central point for managing customers; may provide omnichannel support (email, voice, chat, and websites); with e-service suites designed for consumer self-service – field service system dispatches technicians to service a product when the need arises	Efficiency of staff by removing repetitive tasks Personalization improves effectiveness of demand creation Integrate with CRM

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There is no shortage of tools when building your digital marketing platform. You may be considering or already have in place: Hootsuite, Ready for Social, xIQ, Kapost, Pivotal IQ, Outreach and more.

The focus for a CMO is which technologies are business critical? By aligning your tech decisions to the marketing strategy, you avoid the "more tech is good tech" syndrome. By aligning the marketing strategy to the business strategy you create a framework for assessing the value and importance of technology decisions.

After determining how marketing technology will impact your company's business and advance your marketing strategy the next step is making strategic additions to your tech ecosystem. Take into consideration the maturity of your team and available bandwidth for implementing and using new technology. Ensure that what you have already invested in is working before you layer on additional capabilities.

Next, take these steps to reduce the risk of rejection and accelerate time to value.

☐ **Engage relevant stakeholders and collaboratively build a story explaining your digital transformation.**

Name your transformation and use the story for internal marketing. Clearly articulate what success will look like and be specific with KPIs. Use your digital platforms to tell the story and familiarize all stakeholders with the value.

☐ **Identify the processes and workflows that technology will automate.**

Clearly identify current operational and technology silos, i.e. between the web (CMS), creative (MAM), marketing operations teams (MAP, CRM), product management (PIM) and the creative operations team (DAM) to tie it all together. Then develop cross-functional representatives to build and implement the necessary project collaboration and communications processes. Select stakeholders to document processes and ensure the technology you choose will increase marketing productivity and speed up the time to market.

☐ **Quantify the impact of the digital investment on your budget for labor and service turnaround time.**

Here are some pointers: what's the potential cost of outdated assets on revenue coming through partners or channel? How much time are resources spending tagging, uploading and tracking – more important what could they be doing to create more?

☐ **Photos, videos, graphics and content use up a lot of your program dollars. How does this spend compare to spend earmarked for promotion?**

Show how you will optimize the budget for assets and content enabling you to spend more on promotion like mobile applications, progressive websites, digital advertising, content syndication, SEO and more? Content ROI improves when you automate repurposing, upcycling and use analytics to make content decisions.

☐ **Optimize internal processes.**

Identify the bottlenecks in marketing and show how transforming processes using digital technologies will accelerate growth, improve efficiency and will help your company adapt to rapidly changing market landscapes.

☐ **Evangelize your digital transformation initiatives.**

Be prepared to tell your story over and over - internally and externally, to business partners and your channel. Borrowing a popular saying – "high water floats all boats and your digital transformation plan will benefit everyone."

Learn why over 1500 brands chose Bynder for their marketing transformations.

Hear from our customers

Some facts

About Bynder

Bynder gets teams working on the same page with a cloud-based digital asset management solution to store, manage, and share brand content.

More than 500,000 marketing professionals use Bynder every day to produce, review, and approve their marketing collateral.

For more information please visit our website www.bynder.com