

PLAYBOOK

Intelligent Marketing Operations

How to scale your marketing organization with intelligence and automation to digitally transform your revenue journey.

“

Modern predictive analytics can empower your business to augment data with real-time insights and human-in-the loop to predict and shape the future business.

IBM The Future of Predictive Analytics 2023

Short on time - Read This:

- Marketing teams are struggling with ROMI, CAC, CLV and drowning under waves of engagement data without powerful tools for real-time customer analysis and next best action often resorting to gut and a tireless sales development motion.
- Lack of resources, disparate systems and growing siloed data make it all but impossible to scale with the growing needs of the organization.
- Intelligent Automation Platform offers an alternative to current challenges, manual processes and disconnected insights that are cost effective, easy to use and deploy.
- **These playbooks and blueprints** show you how to leverage Intelligent Automation for scale, revenue and efficiency.

Table of Contents

The Marketing Landscape	4
Current Challenges	7
Finding the Right Solution	12
Two Blueprints For Marketing Revenue Generation and Capture	15
How Customers Use Put It Forward to Solve End to End Revenue, Operations and IT Challenges	21
Getting Started with Put It Forward Intelligent Marketing Operations	27

The Marketing Landscape & Drivers

It's super fractured, blind and organizationally distributed



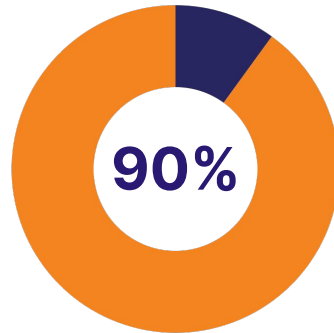
TRUSTED INSIGHTS

Predictable Pipeline

Trust and Promise of Impact is the driving force of why people decide to work with your brand. Without your customers getting these two key ingredients they need they'll likely look elsewhere for their needs.

For the most part marketing spend vast amounts of time on solutions that don't move the needle. They merely keep pace if at all with the market.

Many marketing teams have analytics tell them what has happened - simply counting clicks and not providing insight of what is the next best action. Settling to report their success as "influenced" rather than "created by".



OF COMPANIES REPORT THEIR CUSTOMER INSIGHTS NEED SIGNIFICANT IMPROVEMENT

While the average mid to enterprise size of organization has between 75-125 customer systems of engagement with more being added.

Source: Futurum Research and Microsoft

Current Challenges

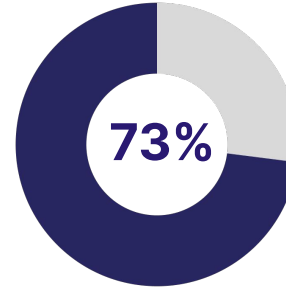


MINING DATA ≠ CREATING INSIGHTS

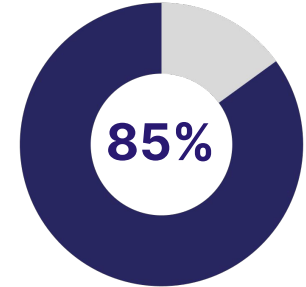
To become a top performing Marketing team you can't just integrate data - you have to surface deep insights to execute your next best action.

The challenge marketing has is generating deep insight to spur action to run more effective and efficient marketing operations.

Faced with increased enterprise costs and tight marketing budgets, CMOs find themselves between a rock and a hard place. To combat these challenges, marketing needs to look at the funnel with three lenses: (i) how to optimize, (ii) how to become more efficient with marketing spend and (iii) how to predict for scale.



plan to increase investment in marketing analytics - 2020

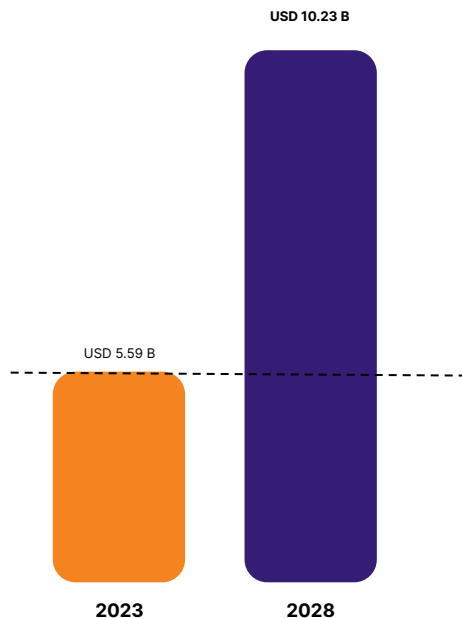


The percentage of respondents who said that by 2022 "significantly more" of their organizations marketing decisions will be based on marketing analytics

MARKET INSIGHTS

Marketing Analytics to Grow to USD 10.23 Billion

Marketing Analytics Market
Market Size in USD Billion
CAGR **12.84%**

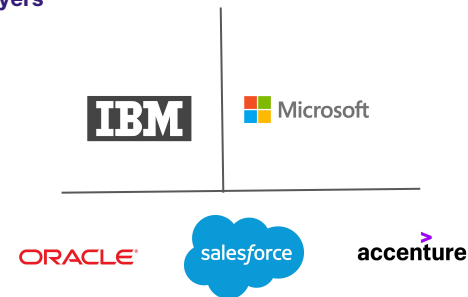


Study Period	2018 - 2028
Market Size (2023)	USD 5.59 Billion
Market Size (2028)	USD 10.23 Billion
CAGR (2023- 2028)	12.84%
Fastest Growing Market	Asia Pacific

Largest Market

North America

Major Players



*Disclaimer: Major Players sorted in no particular order

Source: Mordor Intelligence

Challenge #1

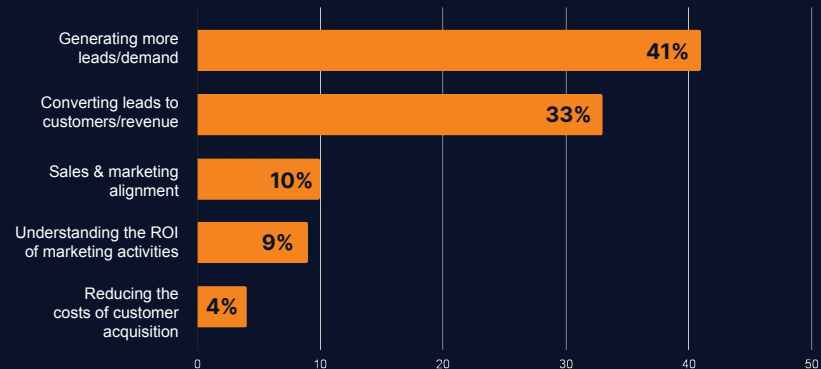
Not generating enough or any Sales Qualified Leads (SQLs)

For most marketing teams, lead generation is one of the biggest challenges across industries, with 58% saying they struggle. Some common lead generation challenges for marketing agencies include:

- Not knowing exactly where to start to up your game / lacking the data insight
- Focusing only on bottom-of-the-funnel conversions
- Not attracting the best kinds of prospects that fit your ideal customer profile
- No tools to perform data mining to generate insights for the next best action
- No solid lead nurturing strategy or use of automation

58% Struggle with Lead Generation

Better marketing performance starts with complete insightful data



Source: Chief Marketer | Published in Marketing Charts.

Challenge #2

Build a Scalable and Predictable Demand Generation and Capture Model

Disparate systems and siloed data lead to analysis paralysis, slow decision making and lost opportunities. As your organization's siloed data grows exponentially, your team's time to analyze it does not. Increasing staff counts works up to a point.

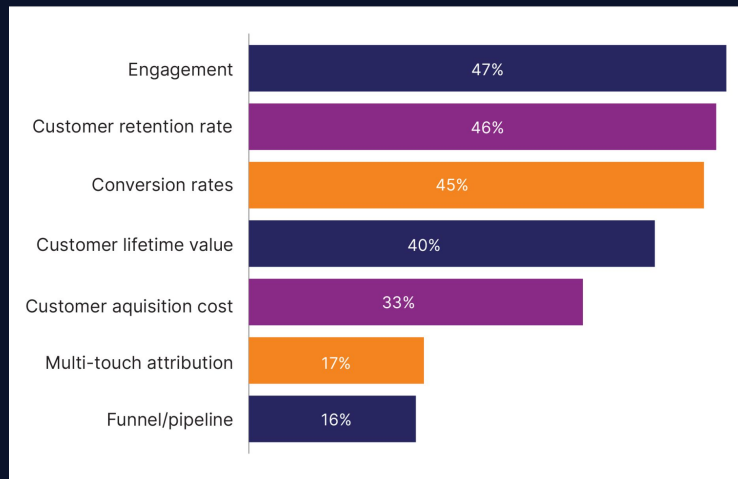
This is the marketing team's conundrum. More data, locked in disparate systems with no ability to integrate and surface real-time insights to marketers, determine where to scale and descale investments.

With a vital need to improve ROAS, reduce CAC, extend CLV and demonstrate ROMI, marketers' need for real-time insights is critical. With a shift from growth at all costs to profitable growth, marketing teams need to get more precise on where they spend to generate and capture demand.

Conversion & Engagement Data Insights Most Required

Too much data, without clarity on the data that matters most, can cause confusion and indecisiveness. Nearly half (47%) of marketers agree that engagement data is most valuable in making strategic decisions. Customer retention rate and conversation rates are also among the most helpful data to harness and utilize according to 45% and 45% of marketers, resp

What is the most HELPFUL DATA for making better marketing decisions?



Source: Using Marketing Data to Make Better Decisions, <https://research.ascend2.com/marketing-data-decision-making>

Challenge #3

Building & Delivering the Right Content for Personalized Customer Journeys

To put it lightly, being a marketer in today's business climate is not easy. Most budgets are being slashed, and while targets are expanding.

Most marketers have doubled down on content marketing to support that 95% of potential buyers are not actively looking for a solution. Investment in content is growing, yet most marketers need to know what content formation drives their demand generation and capture.

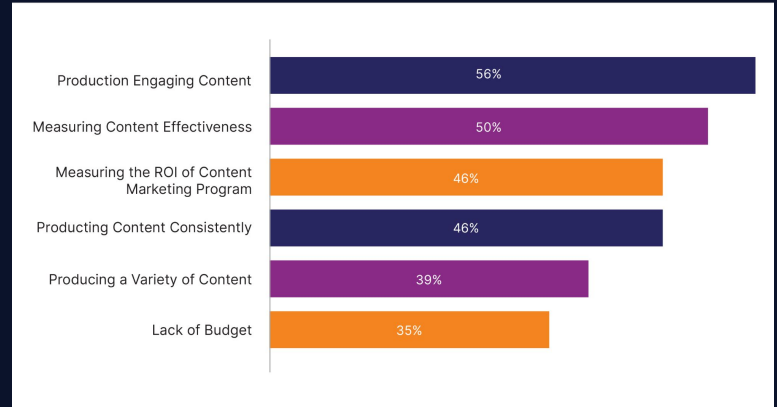
According to McKinsey, brands that get real-time personalization right can deliver five to eight times the ROI of their marketing spend and lift sales by 10% or more. 39% of marketers believe the lack of data stands in the way of adopting personalization.

Data mining with predictive insights at the right step unlocks what content to build and deliver in the customer journey drives personalization value.

94% of Marketers Say Customers Expect a Personalized Experience

Only 26% Can Deliver

TOP CHALLENGES FOR B2C CONTENT MARKETERS



46% of Marketers Struggle to Measure ROI of Content Marketing

Source: Salesforce Trends in Personalization Survey LaptrinhX

Finding the Right Solution



**Address Unmet Needs.
Segment Precisely.
Provide More Value.**

**You already know that
competitors are
changing how they
work around you.**

Insights and scalable decisions require analytics to be part of how people work - not just in a checkpoint or a scheduled review.

Intelligent Automation (IA) solves this barrier to high-quality decisions. It's a modern insights technology that combines predictive analytics, process and human-in-the-loop decision support.

The best part is this technology is designed for people to be easy to use, turning your employees into insights specialists and analysts into business movers.

Challenges

Solved

#1 - Not Generating Enough or Any Sales Qualified Leads

Intelligent Automation helps to automate engagement campaigns and connect customer data to create an integrated customer profile. This makes tracking a whole customer journey with multiple touchpoints possible. Using real-time actionable insights, marketers can target and reach out to the most engaged customers and define who is still interested in keeping the conversation and who is ready to connect with the sales team.

Challenges

Solved

#2 - Building a Scalable and Predictable Demand Generation and Capture Model

Getting real-time insights into customer behavior, needs, and preferences helps to segment the audience by their readiness to talk and purchase. Target and reach out to the audience ready to start the communication and purchase. Forecasting business outcomes of running personalized marketing campaigns on a specific segment allows for decreased acquisition cost and avoid risks.

Challenges

Solved

#3 - Building & Delivering the Right Content For Personalized Customer Journeys

Intelligent Automation helps marketers understand customer behavior better and create personalized marketing campaigns. Getting real-time customer insights allows digital marketing managers to define the target audience faster, shorten the engagement cycle, and minimize the acquisition cost.

Understand which content is driving high-quality conversions and which content is not. Build a content roadmap that aligns across all 3Cs - Content, Cost and Conversion.

Two Blueprints

For Revenue Creation and Data Science



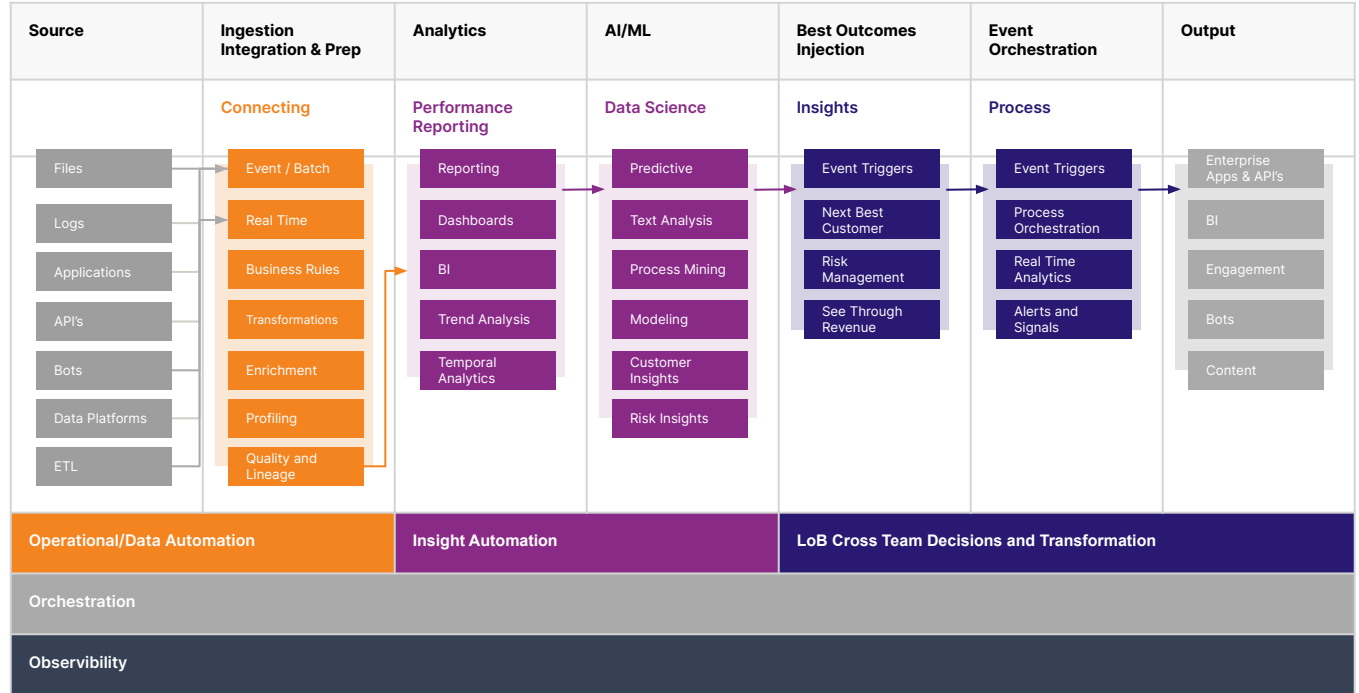
How it fits together

When things run smoothly people gain value when they can make effective decisions and operate effectively.

It starts with making the right data accessible and information available to the resources that need it most when the it's needed.

This platform view of how Put It Forward Intelligent Automation Platform fits into your data stack and how it works with solutions you have and processes that you need to improve.

In the following pages you'll see two common use cases solved by Put It Forward Intelligent Automation Platform that customer success teams are solved for.



Blueprint #1: OpenTable

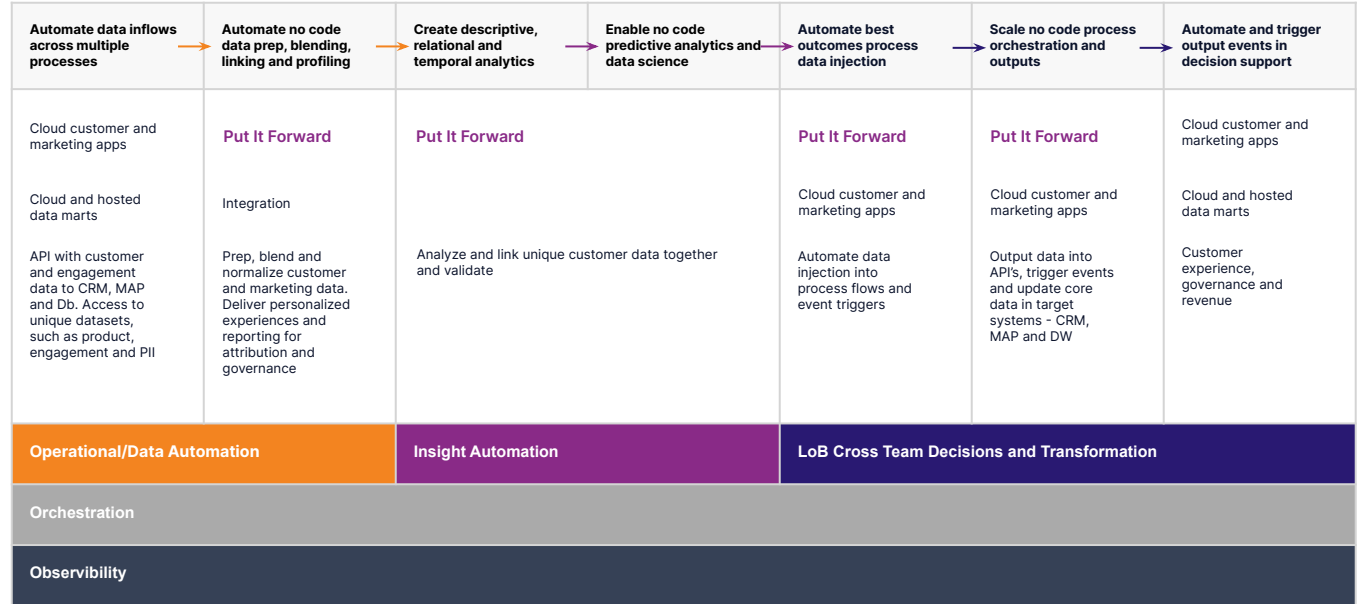
Process Automation and Data Insights for Customer Experience

Each year over a billion people choose their seat at a restaurant or bar by creating a booking through OpenTable. Owners and managers of experience destinations need to know exactly how things are performing.

Whether it's booking a table at your favorite restaurant, when you're travelling or you're an owner or manager of a restaurant it's success comes down to customer experience.

OpenTable who is a leader in the customer experience booking category needs to ensure that their customers, the owners and operators of customer experiences are themselves having the best possible experience.

Using Put It Forward Intelligent Automation Platform they can now deliver highly personalized and targeted experiences to organizations looking to leverage the OpenTable Platform.



This blueprint represents a generic use case scenario for customer experience process automation and insights

• OpenTable®

- Deeply Personalized Experiences
- **80% Annual Cost Savings**
- Largest Global Booking Platform



Blueprint #2:

Revenue Creation Automation - Better Decisions at Scale and IoT

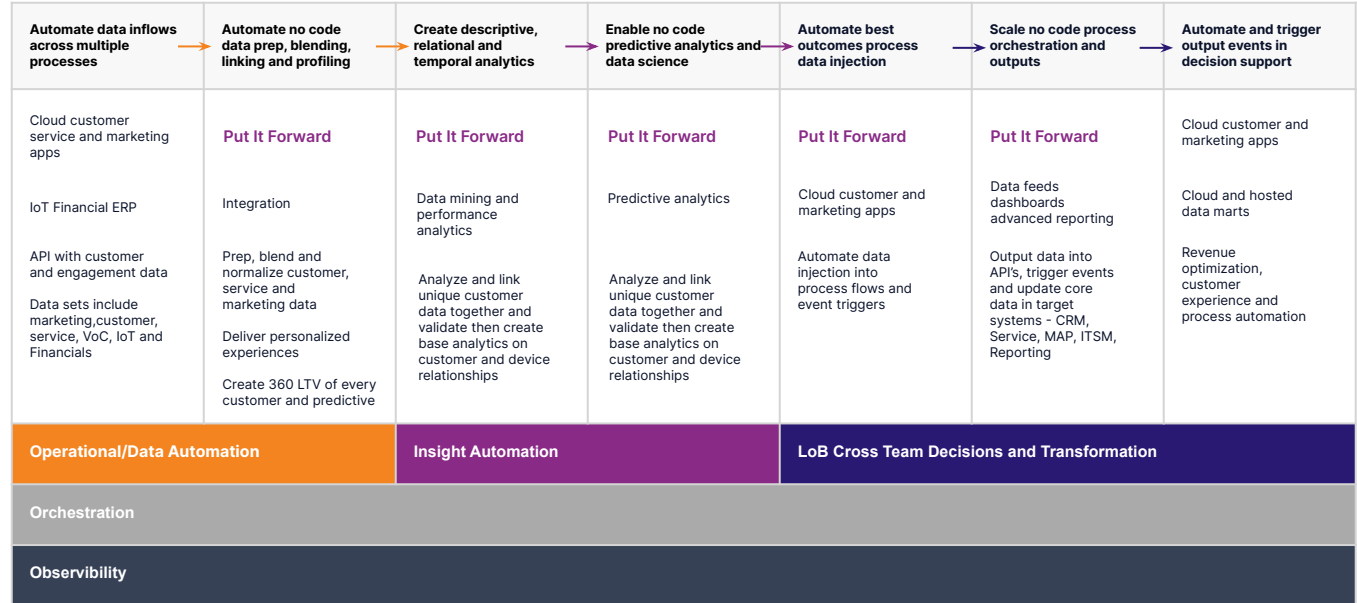
Some say that the sounds we hear and feel are the ultimate experience which connect us all together.

SoundUnited which creates some of the most iconic brands in the world of audio centered experiences has customers which engage across multiple brands and channels.

Using the Put It Forward Intelligent Automation Platform Sound United is able to unite the end to end customer experience across channels, devices and media.

They can now quickly market cross brand and channel with messages that resonate and understand at a detail level what each customer is doing along side of their lifetime value.

This let's Sound United be highly targeted with it's messaging, spend and marketing reducing cost, improving experience and leveraging the network of connected devices to a new level.



This blueprint represents a generic use case scenario for revenue automation



**SOUND
UNITED**

- Complete Customer Experience Automation
- Predictive Revenue
- **#1 Category Leader for Revenue Per Customer**

How People Use Put It Forward to

Solve Customer Success Challenges



Because your future marketing operational challenges are uncertain

Leaders in marketing and revenue need an automation strategy to maximize their data's value. They also need to shorten the time to better quality decisions and handle upcoming marketplace changes.

The Put It Forward Intelligent Automation Platform is the superior market offering to unlock your organization's true potential.

Put It Forward's Intelligent Automation Platform offers integrations between hundreds of your solutions, including Microsoft, Oracle, Adobe, SAP, Salesforce, etc.

Create insights at scale with an all-in-one comprehensive, scalable pay-as-you-go platform with an easy-to-use visual interface.

Hundreds of included integrations



ORACLE®



But don't take our word for it alone.

Some of the best brands and organizations in the world rely on Put It Forward everyday for their mission critical decisions.

“

Put It Forward takes us where no others could - we struggled for years with an enterprise data story - this solved it across the board.”

Udo Waibel
Sitecore

“

“For me when our internal teams tried to replicate the Put It Forward technology that was when the pin dropped ... these are really smart people.”

Sarika Saoji
Symantec

“

“Having our global teams all working from the same page is critical to our success. Put It Forward exceeded way beyond where others died.”

David Hrynk
Brookfield

“

“You guys showed us what was possible by bringing all the pieces together and making it all work seamlessly. Really truly impressed, thank you.”

Lindsay Drake
OpenTable

Want to deepen your understanding of how you can use Put It Forward IA for Revenue, Operations and IT to scale better decision making?

Here's a look at some of the top use cases across the enterprise.

Revenue and Marketing

- ✓ Customer 360
- ✓ Predictive Insights
- ✓ Order to Close
- ✓ Fraud Detection
- ✓ Customer Experience

IT

- ✓ Cross Dept Automation
- ✓ RPA
- ✓ Platform Orchestration
- ✓ Integration
- ✓ Data and Process Mining

Operations and Finance

- ✓ Process Automation
- ✓ FP&A
- ✓ Order-to-Cash
- ✓ Procure-to-Pay
- ✓ Risk Analysis

Analytics

- ✓ End User Predictive
- ✓ Data Platform
- ✓ Performance Analytics
- ✓ Customer Insight
- ✓ LTV

Getting Started With Put It Forward

Automating processes and decisions while layering in predictive analytics can be complex. It doesn't have to be. When you use the Put It Forward IA platform you're uniting the power of your data and systems with automation directly into the hands of your people so they can make better decisions at scale.

Ready to start?

Download the guide from IDC on Put It Forward predictive analytics solution for competitive advantage.

[Download IDC Guidebook](#)

Discover the value of intelligent automation in your organization with our interactive calculators.

[IA ROI Calculator](#)

Learn more about best practices for intelligent automation, methodologies and success patterns.

[Book a Discovery Discussion](#)

