

# MARKETER MUST READS

# Digital Marketing

These definitive articles from *Marketer* offer best practices to help your firm's brand thrive in the digital age.

Featuring "Leading the Charge Through Digital Transformation" by Ida Cheinman

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# MARKETER MUST READS

# Digital Marketing



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# SMPS *Marketer* Must Reads: Digital Marketing

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# *Leading the Charge Through Digital Transformation*

By Ida Cheinman

For decades, we've heard about the promise of how digital technology would change the way A/E/C firms do business. We've imagined a future where the cloud, 3D printing, augmented/virtual reality (AR/VR), artificial intelligence (AI), and the internet of things (IoT) would change everything.

This technology has been talked about so much that at a certain point it started to sound like a lot of hype.

Then it happened—the future of digital arrived. Companies in all industries found

themselves standing on the precipice of a new industrial revolution, one fueled by connectivity and one for which many A/E/C firms were unprepared.

Now, digital transformation (DX) is infiltrating every industry and, as a result, broadly impacting how all companies function. The era when firms had a choice about whether or not to step onto the DX bandwagon has long passed.

Like it or not, your firm is on the bandwagon. The question is how to stay on, embrace, and leverage it to create a competitive advantage.



## Digital transformation is a growth generator and disruption fail-safe. It's the doorway to total business transformation.

### What Digital Transformation Is—and What It Isn't

Digital transformation is the process of integrating digital technologies and changing the ways in which a business operates—from strategies and processes to products and services to culture and customer experience.

Digital transformation isn't about technology or becoming more digital just to be more digital. It's not dependent on what a firm does or sells, and its relevance is not reliant on organizational structure or a specific business function or department. It's not a project or a program. It's an ongoing and ever-evolving process.

With this perspective in mind, you must approach digital transformation as a firmwide operational and cultural change. It's achieved by continually identifying and applying innovative processes and business models and by using technologies and data to deliver new value for customers, employees, and other stakeholders.

In this way, digital transformation is a growth generator and disruption fail-safe. It's the doorway to total business transformation.

This means that digital transformation is also the answer to the most pressing challenges facing A/E/C today—specifically, challenges related to:

- People and culture: recruitment, retention, multigenerational workforce, and knowledge transfer
- Differentiation: commoditization, communication, and delivering value
- Workplace: multiple offices, global companies, and remote workforce
- Operations: efficiency, enablement, agility, and integration

Of course, as the linchpin to winning these long-fought battles, digital transformation brings with it technology, software, and data analytics. While these tools are a mandatory part of implementation, they're merely facilitators of the fundamental change that's so desperately needed. They aren't the drivers.

### Deploying Digital Transformation To Evolve Marketing

Challenges facing A/E/C firms and their marketing departments can't be solved by simply acquiring the next, newest digital tool or platform. Successfully deploying digital transformation requires taking a holistic, long-term view of marketing; building cross-functional teams; and owning the engagement, experience, loyalty, and value.

Marketing can have the greatest impact on solving firmwide and industrywide challenges by employing digital transformation to:

- **Make Better Decisions.** Having access to the right data at the right time leads to faster and more accurate decision-making because decisions are made based on real-time information, not guesswork. This not only brings efficiencies but also dramatically improves your firm's ability to deliver greater value to its stakeholders.
- **Modernize the Customer Experience.** Differentiating through customer experience has become a top priority for A/E/C firms. Digital technologies are central to firms'

understanding of audience behavior and using data-driven insights to make the experience more seamless, intuitive, and customer-centric. Digital transformation also facilitates better connection between touchpoints (resulting in a more connected experience) and enables your firm to connect digital channels with physical environments and experiences, opening the door to new opportunities with omnichannel marketing.

- **Personalize Communications.** Today's A/E/C customers expect personalized, contextually relevant experiences and content. Personalization also creates marketing efficiencies because customer engagement grows exponentially with tailored communications—even more so when personalization is done in real time. Digital tools, automation, and analytics are essential to personalizing communications so that they speak directly to an individual customer (by name, company, challenge, need, or any other variable). Fortunately, the increased accessibility of data and proliferation of technologies have put personalization within reach of most companies.

### The Facilitators of Marketing's Expanding Power

Even though it's important to differentiate the concept of digital transformation from the technologies that enable it, the fact is that mobile, big data, AI, machine learning, and digital influence are necessary for taking marketing beyond traditional



The Predictive Index headquarters, Westwood, MA. Little Dragon Decor. ©Sabine Nordberg Architectural Photography, sabinenordberg.com.

communications. Equally, they're the reason for changing customer behaviors and ever-higher customer expectations.

Putting the bigger vision of digital transformation first is essential, but executing that vision is impossible without an understanding of, well, what is possible.

Tools, technologies, processes, and approaches are what enable digital transformation to turn marketing into the growth engine for your firm.

- **Unified Data.** An accurate and comprehensive view of the customer requires robust and connected customer relationship management, data-mining, and analytics platforms. It also requires sharing customer data and insights

across departments and offices, with vendors and partners, and, ideally, with customers.

When deploying new processes and technology platforms, think beyond the marketing department and consider how all your firm's functions must collect, analyze, and share data to create and deliver a seamless, unified, and modern customer experience. Do your due diligence to learn what safeguards a technology provider offers to eliminate any chance of data loss and to stay compliant with data privacy laws.

- **Automation.** Leveraging the value of unified data enables you to present personalized communications and experiences to individual customers, while

addressing their wants and needs in real time, at each stage of the decision-making process. Delivering these experiences simultaneously is essential—and impossible without technology.

Choose technology that's intuitive, easily integrates with other systems you already have, and allows unlimited customer segments and workflows for maximum scalability. (A workflow is a series of automated actions triggered by an individual's behavior and/or based on a segmentation strategy.)

- **Continuous Optimization.** In today's fast-changing marketing environment, your firm must continually test and improve based on real-time feedback. Marketing's ability to iterate quickly and cost-effectively requires agile approaches and technologies that reduce the risk of wasted time and resources.

## Digital Transformation in Action

### Imagine a traditional A/E/C firm.

Customer data may or may not be collected. If it's collected, it's fragmented across multiple systems and teams. If marketing and sales communicate, it's often to assign fault, not share customer insights. Operations and marketing rarely cross paths. Project management holds a great deal of valuable information but keeps it close. And then there's IT, frustrated that embracing the inevitable is happening at a snail's pace.



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As a result, employee relationships break down and silos take hold, preventing cross-functional collaboration. Lack of unified and engaging employee experience results in poor customer experience. This leads to the firm being seen as a commodity, stuck in the “lowest price wins” RFP cycle—while competitors charge a premium.

**Now imagine a digitally transformed firm.** Marketing works closely with the CEO and IT to modernize internal processes, implement data-driven decision-making, and unify all functions of the firm around creating a better customer experience.

As a result, data is now collected across the entire customer life cycle and includes insights on trends, regulations, performance, and more. No single department owns a piece of data. Rather, the data is amassed by and accessible to every department, enabling cross-functional teams to tackle major challenges and contribute to the future success of the firm. Internal collaboration flourishes, and people are more inspired to develop and share ideas.

Adoption of new tools, technologies, processes, approaches, strategies, and tactics happens quickly due to the firm’s ability to make data-driven decisions. Best of all, the improved employee productivity, engagement, and loyalty translate to customers’ views of the firm as a true collaborative partner, worthy of paying premium.

Think it’s impossible to get your firm out of the commodity game and into a new way of operating and growing?

Then it’s time to take a harder look at the underlying reasons those common A/E/C challenges exist.

### **What Will Get in Your Way**

Deploying digital transformation is a complex, lengthy, and expensive initiative. Becoming more familiar with the process and what’s possible involves understanding the common roadblocks you should anticipate and prepare for:

- Limited or no integration between systems
- Lack of marketing professionals with multidisciplinary knowledge and digital skill sets
- Challenges securing leadership buy-in and companywide adoption of new technologies
- Lack of cross-functional collaboration that would enable marketing to more quickly leverage knowledge and information
- The need for broader cultural change
- Risks associated with data security and privacy

As with any large-scale effort, start with a sound strategy and assess your firm’s digital capabilities, including people, processes, systems, and tools. Establish benchmarks and identify any gaps that exist in skills, technologies, and cross-departmental practices and communications.

### **The New Role of the CMO: Leading Firms Into the Future**

The responsibility for digital transformation and its associated

budgets no longer lives in the IT department alone. The CTO now shares the leading role with the rest of the C-suite, especially the CMO.

To help its firm grow and thrive, the marketing department needs the right technology and the ability to use it without relying on IT or outside consultants. It also needs to be able to influence technology purchasing decisions.

Aside from technology, marketing’s job has already expanded beyond traditional responsibilities. It encompasses everything from increasing customer lifetime value and growing brand equity to managing the total experience across all touch points and end-to-end customer and employee journeys, including the firm’s every strategic function, department, and communication.

This expanding reach of marketing leads to the expanded role for the CMO as Chief Growth Officer, making marketing an ideal partner to help the CEO lead the digital transformation charge.

And there’s no better way for marketers to secure a seat at their firm’s strategic table than by being in charge of guiding their firm into the future. ■



# Identifying Metrics That Matter

## How To Design a Winning Analytics Strategy

By Ben Magnuson

As an A/E/C marketer, you've undoubtedly received emails on the importance of using web and email marketing analytics.

Data about your website and its users has become easier to access in the last decade or so, thanks largely to products such as Google Analytics. But ease of access should not be confused with ease of use. Due to a fair amount of overpromising, many marketers expect to log in to their analytics and immediately know what they should focus on and how to make changes. Instead, faced with dozens of metrics and graphs, many become discouraged and overwhelmed.

For B2B marketers, especially those in professional services, it's important to understand that much of the analytics ecosystem is designed for e-commerce. Many mainstream metrics became so because of their importance in reporting both the effectiveness of paid ads and efficiently funneling users through a shopping cart purchase.

However, the good news is that free products, such as the Google Suite (e.g., Google Analytics) still include much of the data you need. But how do you decide which metrics are important for your digital marketing program? The process starts with logging off and sitting down with a pen and paper.

### Establish User and Business Goals

A common mistake marketers make is trying to fit the goal to the metrics rather than fit the metrics to the goal. Instead of immediately diving into Google Analytics and looking for what should be important, sit down with the marketing team and walk through a specific user journey with some example questions in mind, such as:

- What is our ideal user journey?
- Where do users arrive? Where do they finish?
- What are the most important actions the user will complete during the visit?





## A common mistake marketers make is trying to fit the goal to the metrics rather than fit the metrics to the goal.

Do not try to answer these questions with metrics at this point, that will come later. Instead, describe the journey in actions taken (i.e., visitor reads the article, clicks on the “Subscribe” button and fills out the form).

During these exercises, you’ll typically find that users go through various journeys on the site. For example, the journey for a college recruit will likely differ from that of a client prospect. That is expected. Professional services websites are often multipurposed, and identifying which site sections (such as “Careers”) should perform specific tasks is important.

### Determine How To Influence Goal Performance

Now that goals have been discussed, ask team members what they would do if they received a report that a goal was performing below trend. What would they change to improve it? If they cannot come up with an answer, ditch the goal, even if it seems important.

It’s critical to ensure metrics are actionable, and the changes that you’ll experiment with can make a positive, discernable impact. If the first reports deliver several metrics that seem to be static month to month, and the recipients don’t know what to do with them, they will lose trust in the value of future reports and investment efforts.

### Map Goals to Measurement

Now that goals have been established, someone familiar with the analytics tool needs to map them to metrics that accurately measure performance. In some cases, multiple metrics may be required.

Some common examples include:

- Marketers that **align to an inbound philosophy** may want to use subscription sign-ups as a metric. In this case, you may be able to track page views to your subscription form’s “Thank You” page.



UVa-Wise Library, The University of Virginia’s College at Wise, Wise, VA. Cannon Design.  
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- **If building brand awareness** is a key goal, you’ll want to pay attention to metrics such as page views, impressions, and branded keyword ranking.
- **Lead generation** may target conversions, bounce rate on organic search landings, form drop-offs, and click-through rates to help gauge your performance.
- Finally, if you’re focused on **engagement**, adding custom tagging for scroll tracking, button-clicks, and social sharing could be a place to start.

You may need to set up additional measurement if it does not exist out of the box. Great (and free) tools such as Google Tag Manager allow even non-web developers to set up metrics such as form conversions or scrolling.

### Start With Baselines, Not Benchmarks

For good reason, marketers are obsessed with their competition’s performance. What should my conversion rate be? What are others doing?

When it comes to reporting, focus instead on baselining your current performance:

How has this goal performed in the last three to six months? Establish a gut check prior to viewing the numbers (this can literally just be a hypothesis to start), and then identify where you are. If any areas feel like they’re underperforming, prioritize them for improvement.

Especially in B2B, acquiring useful benchmark analytics can be expensive, and they don’t always translate easily to your own goals. It’s much more important to begin the feedback loop of using analytics to improve performance.

Introducing a new set of metrics and programs can be both exciting and daunting. But the process should be very familiar to marketers: Identify your goals, create a plan to achieve them, execute and then evaluate. ■



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# Project Data

## A Marketer's Arsenal for Customer Engagement and Business Development

By Elena Lelchuk

Digital transformation. Disruption. Innovation. As a professional in the A/E/C industries, you know these buzzwords all too well. Project teams are accustomed to adapting, testing new solutions on their project sites, and reaping the benefits of quicker workflows and access to data in real time. But what does it mean for marketers?

There's a tremendous amount of transformation happening in today's business landscape, particularly as it pertains to the evolving digital space. As builders, it should come as no surprise that in A/E/C we're well poised for the quick adaptation required for businesses to function in the digital age.

The ability to implement new solutions is no longer an option, but an imminent necessity to meet customer's evolving expectations. Software solutions make design-and-build workflows more efficient, but the most significant advantage is presented by the access to data captured by project teams. Most important, how is that data being used to proactively make improvements and predict project outcomes?

While this data is extremely important to the project teams, it holds just as much value for marketers. It feeds your marketing team with educated insights, enhanced consumer profiles, and measurable KPIs. The result is analytics that allow your firm to differentiate its offerings, thus improving your competitive advantage.

Based on findings, project teams can course-correct operations, reduce safety-risk, and even improve profit margins. Data can play an equally significant role in developing marketing plans. It offers a direct link between the customer and the firm. The project team is the connector.

Wide adoption of technology solutions encourages a direct line of communication that has historically been lacking between marketing and field staff. How do we, as marketers, take advantage of this new opportunity and join forces with our technical peers to enhance our marketing efforts?

### Tap Into Project Data for a Winning Marketing Campaign

Four benefits your firm can expect with its newly acquired technology solutions include:

1. Visibility into project data builds a connection between marketers and project teams. To a project manager, a data point might mean nothing more than being a week ahead of schedule or avoiding a lost-time accident. That same data is a success factor a marketing

manager can craft into a case study, webinar, article, award submission or competitive advantage highlighted during an interview. It just might be the differentiating factor that beats the competition.

2. Project successes in real time pack a bigger punch than a pretty picture of a finished building. A/E/C is a service industry. Technology allows marketing to highlight your team's unique differentiators and showcase results as they happen, proving how you exceed competition during the entire lifecycle of a project.
3. Data is an objective resource and the backbone to meaningful stories. Marketing is no longer anecdotal; it is backed up by undeniable statistics a customer can trust. This shift allows marketing teams to present strong case studies of your firm's much-deserved accomplishments.
4. Finally, data enables marketing and business development teams to collaborate with field and operations staff to win work. Data paints part of the picture for the marketing team. But now, they have access to the success metrics that will guide their dialogue with the project team. Team members are proud to share their role in reaching project success. The details you'll uncover will craft project statistics into an effective marketing piece or sales tool.

Marketing teams are in a unique position, as they interact with a wide range of stakeholders in an organization. Marketing connects the dots between external demands and the internal strategy created to remain competitive. A firm's execution must be aligned with the current market pressures and industry trends.

BG Group Place, Houston TX. Pickard Chilton. © G. Lyon Photography, glyonphotography.com.

## Let the Project Team Come to You

Build credibility with your technical peers. Don't add another meeting request to their already crammed calendars. Assess which meetings are best suited to fit marketing on the agenda and tap into that engaged audience with thoughtful questions. You'll gain insight you'd never have access to otherwise by sitting in on the team's schedule review or safety meeting.

Don't miss out on credible marketing opportunities. Go straight to the source of truth. Start to ask questions—what is the project data telling you? How did this happen and why should anyone care? Build stories on top of data and watch your marketing efforts gain the respect they deserve.

Marketing no longer has to wait for the ribbon-cutting ceremony months away. Is the project ahead of schedule? Is it trending positive on diversity goals or under budget? Did the team catch a costly constructability issue early? Did they save the owner money during preconstruction? There are countless success stories tucked away in every phase of a project cycle. Now you have the tools to zoom in and explore the possibilities.

Technology promotes synergy among teams that otherwise work in silos. Informed employees from diverse functions are empowered to advocate for your brand and help propel company development. A shared technology platform facilitates distribution of knowledge and information that fosters cross-functional team engagement.

Access to key project data and insights empowers marketers to develop an integrated approach to marketing, storytelling, and differentiation. A unified vision that engages the entire organization will effectively drive financial performance and extend your reach to current and future customers. ■



# Key Questions To Ask Before Adopting New MarTech

By **Tim Asimos, CPSM**

Over the last decade, marketing technology (MarTech) has become an increasingly critical component of a firm's overall marketing strategy. And the growth of the MarTech industry continues to explode, with more than 7,000 marketing software vendors providing a wide range of tools to support today's modern marketer.

**A**s MarTech increasingly commands more time and budget from A/E/C marketers, it's essential to properly evaluate potential solutions. Here are some key questions to ask before moving forward with any new technology your team is considering.

## **Does the technology align with your marketing strategy?**

As exciting as many MarTech tools are, or as persuasive as a salesperson or demo may be, marketers need to first ask the question regarding how this particular tool or software aligns with your marketing strategy. In other words, what challenge or goal, specifically, does the software address? How will it help you solve that problem or achieve that goal? Like the growing number of tech gadgets for the home, not all MarTech tools are essential and may fall into the "want" category more so than the "need" category. In other cases, adopting a MarTech tool may be a tremendous idea, but one that needs to be put on hold.

If adopting the software was not part of this year's marketing plan, it could actually distract from other initiatives that may be more valuable to the firm.

## **How will this tool impact clients and/or the rest of the firm?**

Sometimes, you can be so focused on the tool and enamored with the benefits of its functionality that you fail to consider the implications on clients and our internal colleagues who are not in the marketing department. In a perfect world, technology should be seamless and transparent to the client. But sometimes a change in platforms or a new technology altogether can cause temporary growing pains. You need to consider any and all impacts the MarTech will have on clients and colleagues, assess how to best mitigate risk, and diminish impact as much as possible.

If the adoption of the MarTech has the potential to cause disruption (or even outrage), your strategy for dealing with

potential reactions should be thoroughly addressed in the rollout plan. In many cases, the internal staff will make the most noise, so be prepared to communicate the coming changes and address their concerns proactively.

## **Do you have the people and processes to support this tool?**

Adopting some tools, like Vimeo to host video content, will have negligible impact on people and processes. But other tools, such as marketing automation or CRM, will require a significant amount of human resources and may also require the hiring of additional staff to support the effort. Undoubtedly, larger MarTech initiatives will require thorough processes to guide and manage the application of the technology.

## **Do you have the time to devote to learning, launching and maintaining this tool?**

Before jumping into adopting a new tool, you need to stop and assess whether or not your firm has, or is willing to, make the time required to successfully learn, launch, and maintain the technology. The more sophisticated the technology, the steeper the learning curve and the more time-intensive the launch will be.



Most firms are fully aware of the effort needed to launch a CRM tool such as Salesforce, Deltek, or Cosential. But many marketers underestimate the learning curve and time needed to successfully implement a tool like HubSpot.

### **How will this integrate with your other marketing tools?**

One of the many benefits of new MarTech tools is their ability to integrate with other platforms. Integration allows the tools to essentially speak to one another and share data in a push/pull environment. For example, MailChimp has a native integration with Salesforce, allowing you to easily connect the two platforms and sync contacts and lists to support your email marketing efforts.

As you evaluate a new tool, take a look at what native, built-in integrations exist and make sure that the most essential integrations are covered. If a native integration doesn't exist, you may be able to leverage a tool such as Zapier to make the connection.

### **Will this allow you to consolidate other tools in your MarTech stack?**

In many cases, the adoption of one MarTech solution may negate the need for one or several other tools your team already uses. Look for overlaps in what the new tool provides with technology you already have in place. Sometimes overlap is a sign for consolidation. Other times, upon further consideration, it might mean that the new tool is unnecessary.

Prior to deciding on a new tool, make sure your team clearly understands the features, functionality, integrations, and value of your existing MarTech solutions.

### **Is this platform scalable for your growing needs?**

While there is a danger in purchasing a tool that far exceeds your needs and level of sophistication, there is a similar danger in adopting technology that fits you now but may not suffice in the near future. It's best to look for solutions that you can grow into and provide a level of scalability and functionality that you can leverage as your firm, team, or marketing strategy grows.

### **What is the total cost of adopting this technology?**

When evaluating new MarTech, it's critical to understand the full picture when it comes to the cost of the technology. Depending on the type of solution, there may be one-time, monthly, or annual costs. Some vendors charge you an implementation fee, and others require a support plan in order to get the level of service that's needed. Larger MarTech solutions such as CRM or marketing automation may require the services of a third-party implementation consultant to get you onboarded and up and running. Another consideration is how the contract is structured, as some vendors will sweeten the deal for Year One and then escalate costs in Year Two and beyond.

### **Have you thoroughly considered all options?**

While this should go without saying, make sure you have thoroughly considered all of your options prior to making a decision. For small, task-oriented tools that require little time and investment to get up and running, you may choose to try them out one at a time. For larger investments, such as a digital asset management platform, it's better to do your due diligence and set emotions aside. Don't just be swayed by the most persuasive salesperson, nor the big name in the category.

Create a ranked wish list for the technology before beginning research and carefully consider all viable solutions. Read online reviews, talk to other marketers who use or have used the platform, and assemble a list of questions to ask each vendor you're considering. Take advantage of free demos—multiple demos if necessary. Most people look at a house more than once before making an offer, so be sure you give the software a thorough look as well. Choose the best option or decide that the timing isn't right to move forward. Just don't make a rushed decision you may regret.

### **What is the business case for adopting this technology?**

Any MarTech investment that's going to demand staff time and firm dollars ultimately should be tied to helping the firm achieve its strategic objectives. While some decisions won't require leadership approval, others with larger price tags and broader firm impact will require a green light from firm leaders. Before asking for their blessing, compile a compelling business case for adoption. Marketers need to be able to demonstrate how the MarTech will specifically work to address a particular goal or strategic objective. If you really want to get buy-in for the technology, don't start by explaining the cure, start by describing the disease.

### **MarTech From All Angles**

As exciting as MarTech can be, and as enamored as marketers can become at the prospect of a powerful new toy, you have a duty to thoroughly vet both the needs and the solutions prior to committing your firm's time and dollars. By asking these (and other) questions, marketers can avoid making uninformed or ill-advised decisions related to MarTech. ■

By Tiffanie Reynolds

# Getting Started With MarTech

In an overwhelming sea of marketing platforms, you must choose new marketing technology (MarTech) wisely according to organization size, marketing goals, and leadership expectations.

Two decades ago, MarTech was as simple as published media contact lists or basic database systems that captured client and project information, but little else. In recent years, things have changed, and rapidly. These major advances have ushered in an overwhelming array of technology platforms and systems to choose from—and it's easy for a marketer to become confused.

According to Sylvia Jensen's post, "10 Surprising Statistics About Marketing Technology," published on the Oracle Marketing Cloud blog, 66 percent of those investing in MarTech don't have a clearly defined budget. Even more shocking is that only a mere 10 percent of companies are using MarTech for improving the customer experience as a whole.

Today, marketers of professional consulting services use technology in a variety of ways—to manage client information and touchpoints, build brand awareness, automate digital media functions, and streamline analytics and performance. However, the end goal is the same as it has always been—to better position our firms to enhance client service, win additional work from existing clients,

Ed and Gwen Cole STEM Building, Stephen F. Austin State University, Nacogdoches, TX. Kirksey Architecture.  
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or capture new clients or projects. To help us achieve our goals, a technology exists for virtually any task a marketer or communications professional needs to execute.

No matter what a professional services marketer hopes to achieve, it can be more easily accomplished by the right technology or platform. So how do you know what software or service is right for your organization? And, which ones will address your resources, budget, and timeline requirements? Most important, where do you start in understanding how to select the tool that is right for you?



- **Begin with a needs assessment.**

Each firm is different, so it is essential to clarify your strategy, structure, processes, and end goals to help your team perform at an efficient level. Establishing a strong foundation now will allow you to create a shortlist of technology options and eliminate the frustration caused by too many solutions.

- **Consolidation is key.** There are individual service providers and applications that can assist the diligent marketer in performing a variety of functions. But why select individual applications when you could consolidate and look to “platform ecosystems” that provide the options you want under a single umbrella? Take Salesforce as one example—it not only offers a robust client relationship management system, it also has an entire suite of plug-in apps (i.e., analytics, chatter, geolocation, human resources, etc.). It also partners with services like Pardot, which facilitates marketing automation and drip campaigns. And, consider WordPress, an all-in-one web builder used by many firms (mine included). It has more than 54,000 plug-ins, which is impressive but could be costly. Make sure you identify goals up front to reduce the price tag, regardless if you purchase individual services or an entire platform.

- **Focus on account-based marketing versus a one-size-fits-all marketing approach.** Long gone are the days when you could push out an email marketing campaign that appealed to the masses, generating a high volume of leads. Today’s world requires personalization, and an answer to the client’s question, “What’s in it for me?” If you employ account-based marketing, coupled with the right campaign technology, you will flip the funnel and start with a smaller subset of your client base to nurture relationships, customize content, and turn emails into real opportunities—and ultimately, real project wins!

- **In the eye of the storm, a few key players emerge.** Once you conduct your needs assessments, investigate platforms, and employ a strategic

approach to client management, you will see a few key players in the technology space emerge. Some cost-effective solutions I’ve encountered include Hootsuite, Canva, Constant Contact, Campaign Monitor, WordPress, Wix, GoDaddy, and HubSpot. If you are a small-to-medium sized business, these platforms may be beneficial as many offer free subscriptions and only cost as your campaign sophistication grows.

- **Always embrace a learning mindset.**

Finally, there’s one way to prepare our teams for the advancements in technology that will inevitably occur. We can equip them with access to the latest and greatest literature and expertise in the space, along with offering to provide further exposure, training, and specialization as it makes sense for your organization. A good practice is to encourage your teams to monitor MarTech blogs and conferences. You can also institute a “technology moment” on team calls to encourage group discussion and sharing of best practices on a regular basis.

As we continue to see the consolidation of MarTech platforms, take heart that your organization has customized its approach from the very beginning, and can now pinpoint exactly what applications will further its marketing and business development goals.

There are many technologies to choose from, but with a solid strategy as the foundation, it will be easier to navigate and select the most cost-effective solutions right for your company. But don’t worry, there will be more platforms to choose from next year should your goals or strategy shift! And, always embrace change—technology in our space is a good thing—one that can provide real competitive advantages if employed with thoughtfulness. ■

## The Emerging Role of Marketing Technologist

By Lindsay Diven, CPSM



**Remember when A/E/C firms had separate marketing and IT departments? The former did the creative work while the latter kept our technology running. When they interacted, it was usually about software licenses and password resets.**

Now, marketing is heavily data driven. Success is measured using marketing automation platforms, CRMs, big data analytics, social media analysis, and content personalization. Technology and creativity play key strategic roles in the marketing process.

Progressive firms realize this and are merging marketing and technology skillsets. I recently interviewed two A/E/C professionals who are leading technology strategies to streamline marketing and other business efforts for their firms.

Rebekah Casey (RC) is an IT manager - user experience for Brasfield & Gorrie in Orlando, FL. She has worked in multiple departments within the firm, including several years in marketing. She continues to support not only marketing, but all departments to improve user experience for all of the firm's technology.

Zirah McGrath (ZM) is the operations manager at England-Thims & Miller, Inc. Her role focuses on improving performance for the entire firm. However, for the last several years she supported the marketing and executive teams in providing data analytics, research, and information management related to marketing and sales.

I asked each about their specific roles and how they have evolved related to the convergence of marketing and technology.

### **What is your background and how did you get into the technology side?**

**RC:** I majored in Industry and Technical Education in college. I started at Brasfield & Gorrie in the safety group. I had an opportunity to join the team that was implementing a new enterprise resource planning (ERP) software. I then moved to the marketing department and eventually supported their technology efforts.

**ZM:** I had a double major of Transportation Logistics and Business Administration. I began working for an A/E/C firm as an analyst in the transportation business unit. I spent over a decade working with project

managers and the group's management team developing reports, doing research, and conducting analysis to help solve a variety of project and business questions. The last few years have been spent primarily with marketing and the executive teams.

### **What does a typical workday look like for you?**

**RC:** I am currently on a team that is rolling out a new custom-built safety mobile app for our field users. I work with the team to formulate communications and implementation strategies for the app.

I am typically called in to assist any time there is an impact to the user (our employees). I am part of the conversations to determine how to communicate or lessen that. This means I often serve as part of the team in special projects like the new safety app or the new CRM our marketing team is transitioning to. I also help put together training materials, for example, to educate new employees on phishing schemes.

**ZM:** While no day is typical due to the amount of ad hoc research required, I generally prepare reports for company



Above: West Texas A&M University, Canyon, TX. Kirksey Architecture. © G. Lyon Photography, glyonphotography.com.

Below: The Treehouse at Memorial City, Houston, TX. Aerial drone shot for Metro National Development. Acumen Design, Studio RED Architects, Anslow Bryant Construction. © G. Lyon Photography, glyonphotography.com.



leadership, research information using Deltek, and work with a traditional developer in IT to customize and integrate our systems. A more specific effort this year has been formalizing our business intelligence program, which continues in my new operations role.

### **How do you balance the needs of and support for multiple departments?**

**RC:** I focus on whatever is the highest priority right now. I am looking to grow my team to support the growing need.

**ZM:** My project list is heavily informed by the strategic direction of the business. As the company chooses to expand their technology and analysis capabilities, my assignments evolve to help meet those goals.

### **The tipping point: When did your firm realize they needed your specific role?**

**RC:** I replaced someone in the marketing department who was doing mostly data entry. When I took over that role, I started focusing more on technology strategies. I was asking if we were using all our software to its fullest extent, what would be the best software to use, etc. When our IT group restructured, they realized that they needed a user experience role. I already was working with our IT group on some communication and implementation strategies, so it was a natural progression for me to move into the new role.

**ZM:** I have a natural talent in technology and started developing tools to answer business questions early in my career. When I started in the industry in 2003, it was just custom spreadsheets but evolved into more complex analysis requests. Eventually, I ended up supporting all five business units with these types of requests. Then I moved full-time to IT.

### **What are the characteristics, skills, and experience needed to be a successful technologist in our industry?**

**RC:** I believe communication is very important. My marketing background helps me to communicate impacts or issues and how our users may respond to them. You must also have very strong problem-solving skills and be self-motivated. You must be able to see a problem and ask if we can do this better. Another skill is asking the right questions to get to the root of what you are trying to do. People know their process but may not know why they need to do it. I try to get them the best route to get where they want to be. Last, you must be able to talk to a variety of people and roles, from the C-suite down.

**ZM:** A technologist must have not only a good grasp of technology, but the ability to work in unfamiliar environments. I think you need to be comfortable being an early adopter of ideas that are new and different. You also have to be persuasive because you are trying to encourage people to adopt new tools and, often, disrupt how they tackle their daily work. I think communication is important, especially around new concepts.

How do marketing and technology interact in your firm? This emerging role in the A/E/C industries demonstrates how marketing and technology are merging to create new opportunities for career growth. ■



## Integrate Inbound Marketing Strategies Into Your Plan

By Angie Gensler, MBA

Marketing tactics have evolved drastically over the past 10 years and will continue to evolve at a rapid pace. For years now, traditional outbound methods such as trade shows, print ads, direct mail, and cold calling have not produced the same results. It's become increasingly difficult for A/E/C marketers to break through the noise and generate leads.

Google, Facebook, Twitter, and LinkedIn have transformed customers into savvy researchers. According to the Social Buying Study conducted by the International Data Corporation, 75 percent of business-to-business buyers use social networks to research products. That's a staggering number that can't be ignored.

However, many A/E/C firms are risk-averse, and leadership is hesitant to make investments in new methods of lead generation. Many think the solution is to double-down on current strategies or hire additional salespeople. Unfortunately, these methods magnify, rather than solve, the issue.

To break through the noise and generate qualified leads, you must integrate inbound marketing strategies such as social media, search engine optimization (SEO), paid search, and content creation into your existing marketing plan.

Convincing a risk-averse leadership team to shift investment dollars and commit 12-plus months to test new strategies is easier said than done. Here's a five-step

process A/E/C marketers can follow to integrate inbound marketing strategies into their existing plans.

### 1. Start Small

Luckily, a number of inbound marketing tactics can be implemented with a small budget of \$10,000. If your firm is unwilling to allocate new funds, shift some of your existing funds. Conduct a strategic return on investment (ROI) analysis on your tradeshow, events, and sponsorships from the previous year. If you can't prove a solid ROI, shift those funds for one year.

### 2. Find Your Champions

First, find a consultant or digital marketing agency willing to start small and help you get some quick wins. Working with



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a professional will help you maximize your investment dollars and expedite the learning process. Next, identify one or two salespeople at your firm who embrace technology and are hungry for new business. Enlist them to serve as your beta group. They will help you develop the strategy, create content, follow up with leads, and ensure the new strategies not only work, but are embraced by the entire sales team.

### **3. Focus on Quick Wins**

If results don't come fast, your champions will lose momentum and your leadership team may demand a premature shift in the plan. To avoid this fate, focus on quick wins. Find your highest converting offers with the shortest sales cycle.

### **4. Leverage Existing Resources**

Creating content consumes the largest chunk of an inbound marketing budget. To save precious budget dollars, brainstorm the existing content assets you own. This can include white papers, case studies, and PowerPoint presentations. Transform what already exists into a compelling offer that provides your ideal customer with actionable advice. For example, instead of a typical case study on XYZ Company, offer a free download to “learn how to lower construction costs 10 percent without sacrificing quality.”

### **5. Track Results and Tell the Story**

Once your strategy has been implemented, track everything—every click, lead, phone call, and meeting. Create

a regular cadence to share the results with your leadership and sales teams, and go beyond just sharing facts and figures. Tell the story of each win, big or small. Tell the intangible details that connect emotionally, and use the facts and figures as supporting evidence. What's the potential lifetime value of that customer? Is this someone the sales team hasn't been able to get a meeting with in years? Is this an existing contact who didn't realize your firm provided this service?

Telling the story, instead of just sharing facts, will inspire your leadership team to enthusiastically increase your budget and beg you to scale up your efforts. When this happens, walk through the five steps again, this time expanding on each one as investment dollars allow. ■



### **About the Society for Marketing Professional Services**

#### **BUSINESS TRANSFORMED THROUGH MARKETING LEADERSHIP.**

The Society for Marketing Professional Services (SMPS) is the only organization dedicated to creating business opportunities in the A/E/C industries. With more than 7,100 members, SMPS provides leadership and professional development programs, industry research, business-building events, and vital marketing resources. Through SMPS, A/E/C professionals in North America tap into powerful networks to form project teams, secure business referrals and intelligence, and benchmark performance. The Society is committed to validating the practice of marketing and business development as essential to the success of all professional services firms. Learn more about SMPS at [smps.org](http://smps.org).