

A blue-tinted photograph of a modern office hallway. In the foreground, a man in a dark suit and striped tie stands on the left, holding a white folder and looking towards a woman on the right. The woman is wearing a dark blazer and a light-colored skirt, smiling back at him. In the background, another man and woman are walking away from the camera, also in business attire. The hallway has large glass windows and structural columns.

OPTIMIZING B2B MARKETING AUTOMATION

Strategies, Tactics and
Tips From the Field

 **ClickDimensions**

Research Conducted in Partnership with Ascend2

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Methodology

Ascend2 benchmarks the performance of marketing strategies, tactics and the technologies that drive them with a standardized online questionnaire and a proprietary 3-Minute Survey format.

This survey was fielded to a panel of marketing influencers and marketing research subscribers.

Introduction

Marketing automation is everywhere today, as more organizations of all sizes adopt this technology and make it more of an essential part of modern marketing. Marketing automation is “very important” to the overall performance of marketing, according to 94 percent of the best-in-class marketers participating in a recent Ascend2 survey.

But for B2B marketers specifically, how do you optimize marketing automation to continually increase business-to-business marketing performance?

To help answer this question, ClickDimensions, in partnership with Ascend2, fielded the Optimizing Marketing Automation Survey.

This report, titled *Optimizing B2B Marketing Automation*, represents the opinions of the 95 business-to-business marketers responding to the survey.

This research has been produced for your use. Put it to work in your own marketing strategy, use it to influence others within your organization or share the stats on social media. All we ask is that you share this research credited as published.

Enjoy!

Number of Employees

More than 500	37%
50 to 500	38%
Fewer than 50	25%

Role in the Company

Owner / Partner / CXO	44%
VP / Director / Manager	42%
Non-Mgmt Professional	14%



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**New research insights from
@ClickDimensions and
@Ascend2research:
Optimizing #B2B
#MarketingAutomation.
Get your free copy:
<https://ctt.ec/F6ec0+>**

Top Strategic Priorities

To successfully optimize marketing automation, you need a sound plan. And for 61% of B2B marketers, creating a successful strategy is a top priority for optimizing marketing automation.

What are the TOP PRIORITIES for optimizing marketing automation?



*Optimizing Marketing Automation Survey
Conducted by Ascend2 and ClickDimensions
Published June 2018*



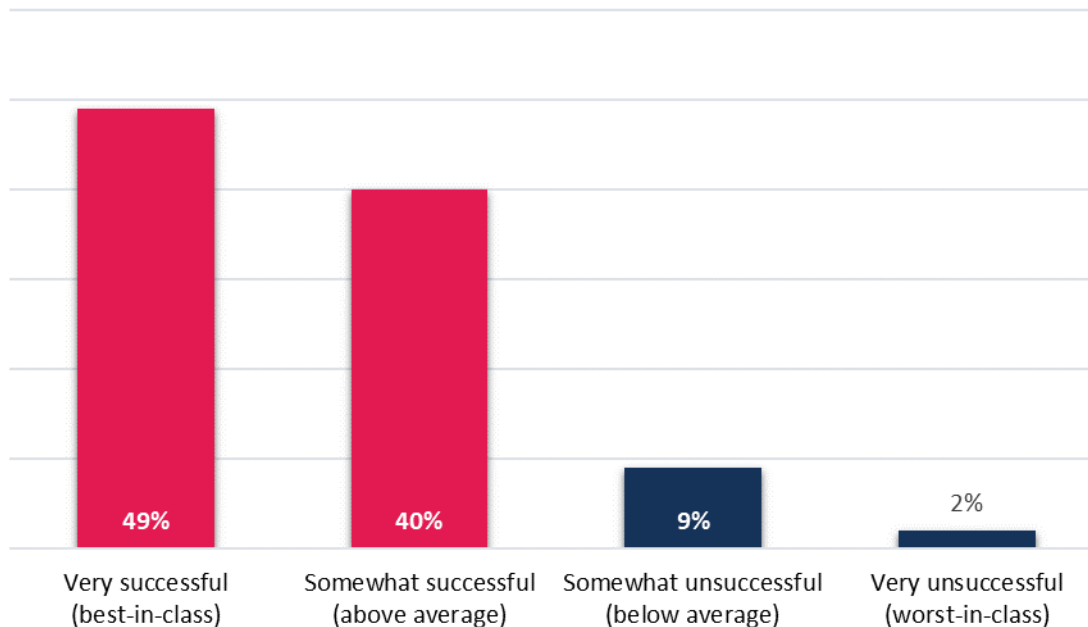
TWEET THIS

For 61% of #B2B marketers, creating a successful strategy is a top priority for optimizing #MarketingAutomation.
<https://ctt.ec/b77ay+>

Rating Optimization Success

89% of B2B marketers in total say a marketing automation optimization strategy is successful to some extent at achieving top priorities, with more than half of those (49%) describing the success as best-in-class when compared to competitors.

How SUCCESSFUL is a marketing automation optimization strategy at achieving the top priorities?



*Optimizing Marketing Automation Survey
Conducted by Ascend2 and ClickDimensions
Published June 2018*



TWEET THIS

89% of #B2B marketers say a #MarketingAutomation optimization strategy is successful at achieving top priorities, per @ClickDimensions and @Ascend2research. <https://ctt.ec/lMt4g+>

Most Challenging Barriers

Creating a successful strategy to optimize marketing automation is not only a top priority, it is also a challenging barrier to marketing automation success for 42% of B2B marketers.



*Optimizing Marketing Automation Survey
Conducted by Ascend2 and ClickDimensions
Published June 2018*



TWEET THIS

**Creating a successful strategy to optimize #MarketingAutomation is a barrier to success for 42% of #B2B marketers, followed by 41% who say integrating all #marketing systems is their biggest challenge.
<https://ctt.ec/2BoTW+>**

Priorities Versus Barriers

Analyzing the importance of top priorities in comparison to the most challenging barriers to success provides a valuable perspective for developing a balanced and successful strategy for optimizing marketing automation.

Comparing strategic priorities and success barriers.



*Optimizing Marketing Automation Survey
Conducted by Ascend2 and ClickDimensions
Published June 2018*



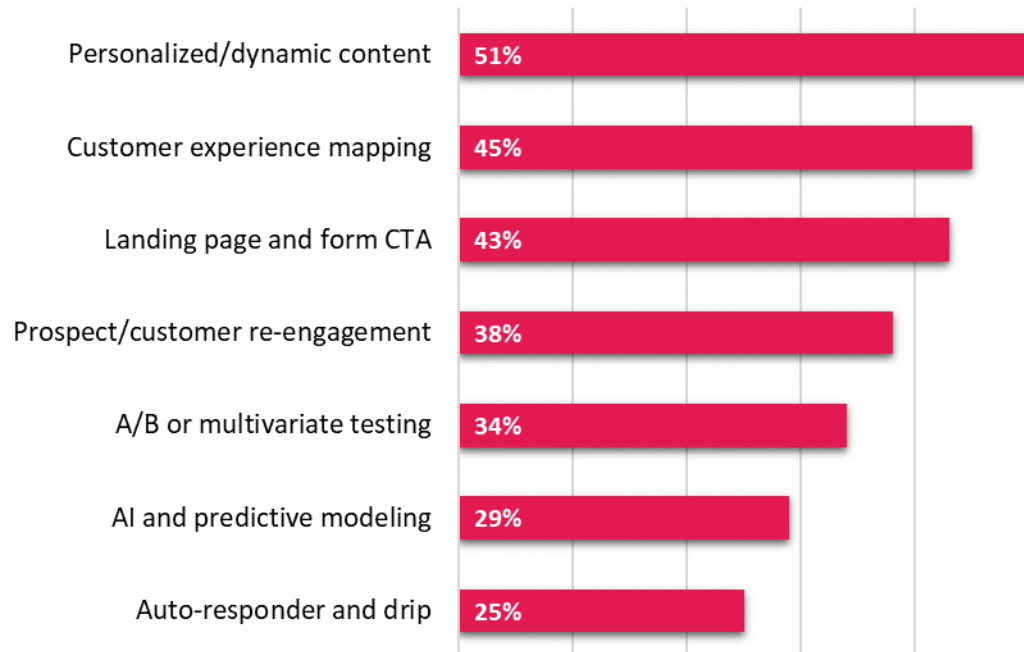
TWEET THIS

**Creating a successful #MarketingAutomation optimization strategy is a top priority for 61% of #B2B marketers and a barrier to success for 42% of those surveyed by @ClickDimensions and @Ascend2research.
<https://ctt.ec/RHeYK+>**

Effective Optimization Tactics

Utilizing personalized/dynamic content is considered a most effective tactic by a slight majority (51%) of B2B marketers. Also effective is customer experience mapping and landing page and form CTA for 45% and 43% respectively.

What are the most EFFECTIVE TACTICS used to optimize marketing automation?



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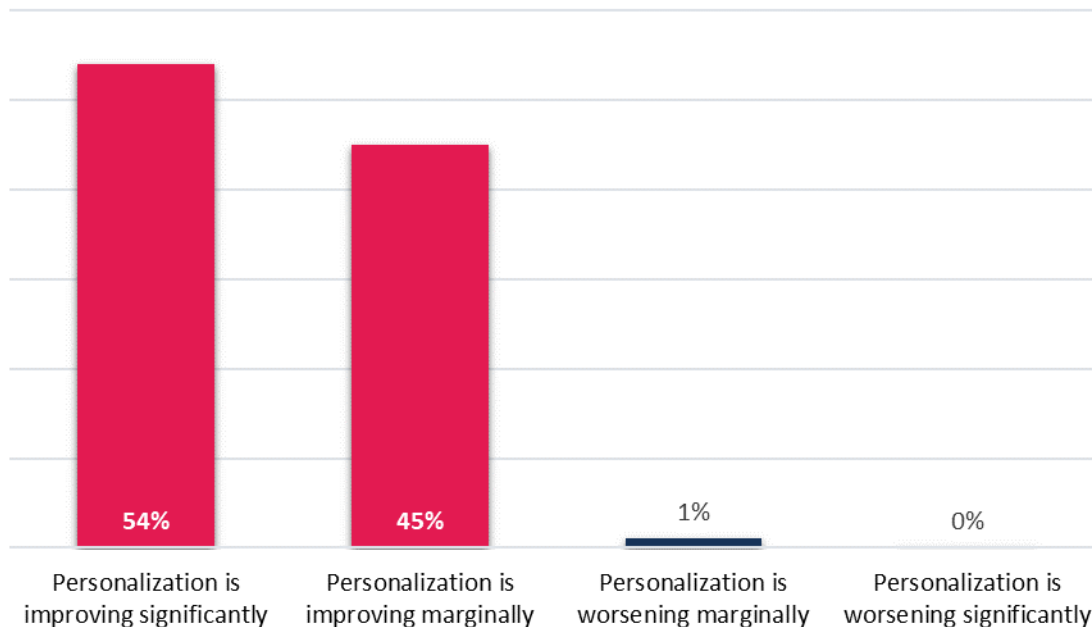
TWEET THIS

Utilizing personalized/dynamic content is considered the most effective #MarketingAutomation tactic for 51% of #B2B marketers: <https://ctt.ec/SwDUL+>

How Personalization Is Changing

Content personalization that is driven by marketing automation is changing for the better for nearly all (99%) B2B marketers, with more than half of those (54%) describing the improvement as significant.

To what extent is CONTENT PERSONALIZATION via marketing automation changing?



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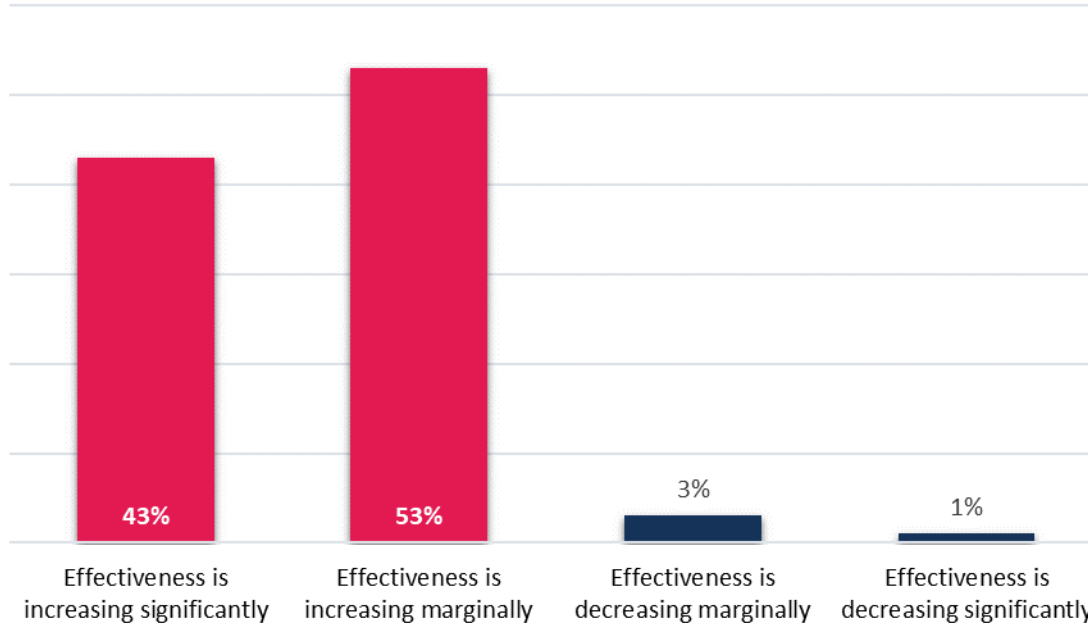
TWEET THIS!

99% of #B2B marketers say content personalization is improving via #MarketingAutomation, according to @ClickDimensions and @Ascend2research.
<https://ctt.ec/bx0e4+>

How Effectiveness Is Changing

The effectiveness of tactics used to optimize marketing automation is increasing to some extent for 96% of B2B marketers, with 43% describing the increase as significant.

To what extent is EFFECTIVENESS CHANGING for the tactics used to optimize marketing automation?



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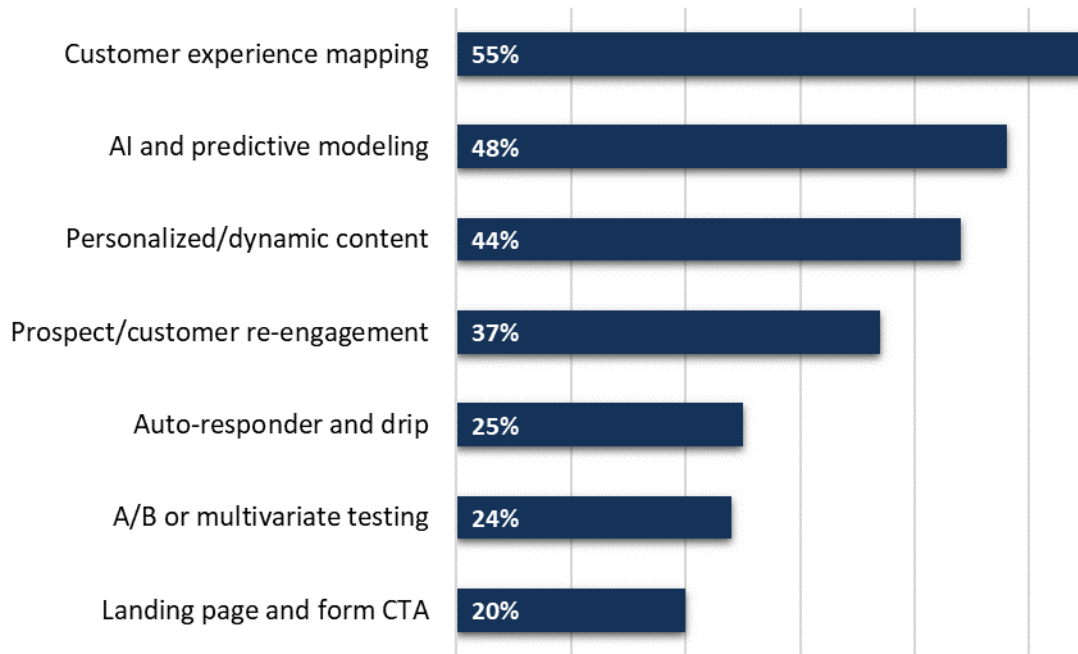
TWEET THIS

The effectiveness of tactics used to optimize #MarketingAutomation is increasing to some extent for 96% of #B2B marketers, per new research from @ClickDimensions and @Ascend2research. <https://ctt.ec/XD4Zf+>

Tactical Difficulty

Customer experience mapping is an effective, yet, one of the most difficult tactics used to optimize marketing automation for more than half (55%) of B2B marketers.

What are the most DIFFICULT TACTICS used to optimize marketing automation?



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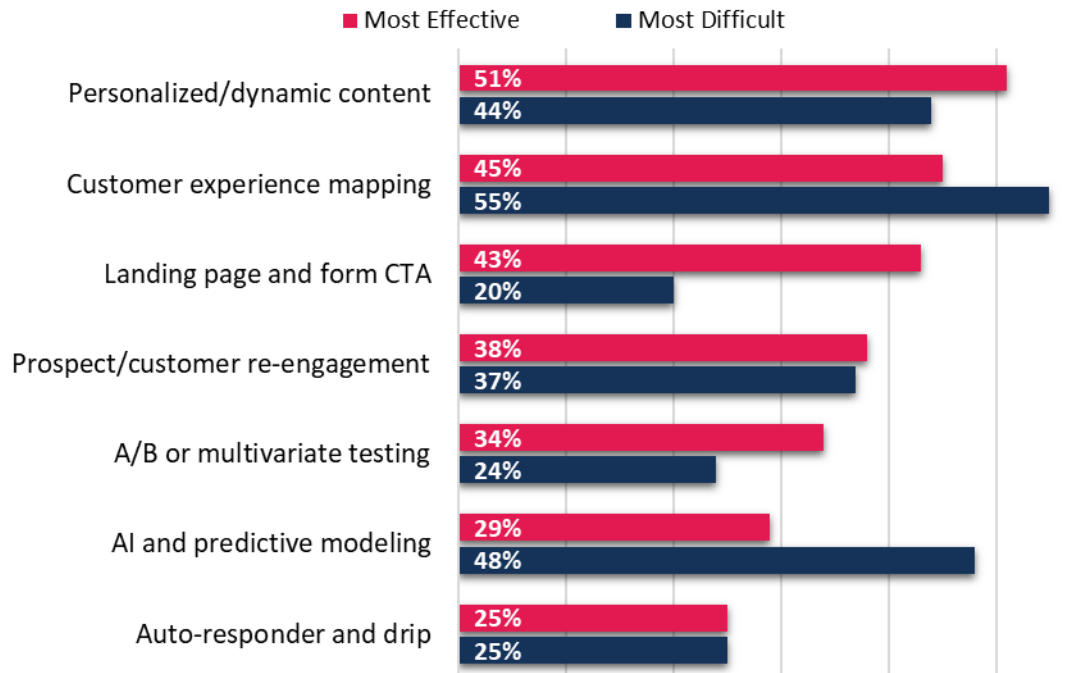
TWEET THIS

55% of #B2B marketers cite #CustomerExperience mapping as the most difficult tactic used to optimize #MarketingAutomation.
<https://ctt.ec/6Y3la+>

Effectiveness Versus Difficulty

Tactics that are much more effective than difficult to perform (e.g. landing page and form CTA) are more likely to be included in a marketing automation optimization strategy than a less effective tactic that is difficult to perform (e.g. AI and predictive modeling).

Comparing tactical effectiveness and difficulty.



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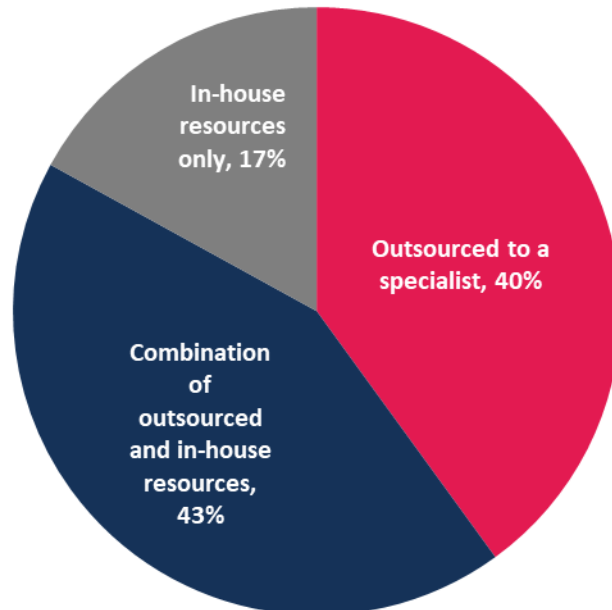
TWEET THIS!

When comparing #MarketingAutomation optimization tactical effectiveness and difficulty, 51% of #B2B marketers say that dynamic content is the most effective tactic, while 44% say its the most difficult. https://ctt.ec/8_351+

Resources Used

While 43% of B2B marketers believe a collaboration between outsourced and in-house resources is the best way to implement tactics for optimizing marketing automation, nearly as many (40%) outsource tactics entirely to specialized resources.

Which best describes the RESOURCES USED to implement tactics for optimizing marketing automation?



*Optimizing Marketing Automation Survey
Conducted by Ascend2 and ClickDimensions
Published June 2018*



TWEET THIS

43% of #B2B marketers rely on a combination of outsourced and in-house resources to optimize #MarketingAutomation, according to @ClickDimensions and @Ascend2research. <https://ctt.ec/4U8yx+>

How to Optimize Marketing Automation for B2B Marketing Success

Now that you have read the research, scoured the charts for insightful statistics and contemplated the mentioned marketing tactics, you're likely thinking about how to optimize marketing automation to achieve greater marketing success in your organization. Here are some of our top tips:

1. Conduct an audit.

One of the most beneficial things about a marketing automation solution is the variety of essential marketing features bundled into one piece of technology. However, as you may well know, many organizations only use some of the available features. Determine what those are within your company as well as the features available within your marketing automation platform that you aren't currently using, so you can easily see where you have room to grow.

2. Spread out.

In many organizations, marketing automation is used almost exclusively by the marketing team, but that can be extremely limiting in terms of performance and achieving business goals. As part of your optimization strategy, look at other departments and functions that can benefit from marketing automation within your company. Sales is a natural fit, with many organizations already employing marketing automation in their sales initiatives. Customer service, account management, training and human resources teams are a few other examples of organizational functions that can benefit from marketing automation while helping you to optimize usage of the technology.

3. Establish your goals.

From increasing brand awareness to driving more leads to fostering greater customer loyalty to improving marketing efficiency, marketing automation can play an important part in achieving both marketing and organizational goals. Decide what you want these goals to be and map out a general timeline, so you can set key performance indicators (KPIs) to measure your progress along the way and ensure that you achieve your desired outcomes as you optimize your marketing automation usage.

4. Experiment.

One of the most effective ways to optimize your marketing automation is by trying something new. The tactics examined in this research report as well as the audit listed above will give you some great ideas on where to start. Keep in mind that even if you're already using dynamic content or A/B testing, for example, you can easily optimize your performance by using existing tactics in new ways. Through this experimentation, you can develop tremendous insights into what works well and what doesn't with your audiences, and possibly uncover new and better ways to connect with your customers and prospects.

5. Be creative.

In this age of marketing technology stacks and big data, creativity might not be the very first thing that comes to mind when you think of marketing, particularly as it relates to marketing automation. However, marketing automation frees up time for marketers so they can be more creative. At the same time, you can optimize your marketing automation performance with creativity – connecting with the right people at the right time with creative communications that compel, delight and deliver better results.

6. Analyze.

One of the benefits of utilizing marketing automation technology is that it puts a variety of data right at your finger tips. But what good is that data if no one looks at it? To get the most out of your marketing automation technology, be sure to analyze that data both within and across campaigns. Also remember that analysis should also include a look to the future. It isn't enough to merely examine figures; to achieve bigger marketing wins, you also need ask some essential forward-looking questions like what can be improved the next campaign, what can be removed from future efforts and what new methods might work given your insights gleaned from existing data.

About The Research Partners



ClickDimensions is the leading marketing automation solution for Microsoft Dynamics 365.

With essential marketing tools like email marketing, campaign automation, web intelligence, surveys, web forms and landing pages, social marketing and more, ClickDimensions helps organizations around the globe that use Microsoft Dynamics 365 attract more leads, close more sales and more effectively engage customers.

Learn more at ClickDimensions.com



Marketing technologies, media and agencies partner with Ascend2 to supplement their marketing content, generate leads and engage prospects to drive demand through the middle of the funnel.

Learn more at Ascend2.com



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