# Campaign Process Builder

by Cat Champoux

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# About the Author

Cat Champoux is VP Customer Satisfaction at  Jeto and has been running workshops to help siloed enterprise teams align processes for years. Now she has captured her methodology in a framework you can download free of charge!

Cat is a seasoned leader with a passion for complex projects, integrations and challenges. She has significant expertise in IT-related fields, is a Marketo Certified Expert and holds a PMP certification

Over her 16 years of experience, Cat has led Expedia's Support Team, playing a key role in signing one of the biggest deals in the organization's history in 2007 with a major hotel chain. Cat also managed a team of 20 project managers during her time at Vortex Solutions, supervising all customer web designs. In the span of her career, Cat has completed over 100 different integrations, ranging from websites to systems connections to sales & marketing alignment workshops.

Leveraging her natural knack for befriending strangers and in-depth knowledge of enterprise challenges, Cat deftly manages relationships with Fortune 500 clients. She prides herself on delivering relevant recommendations and timely results.

# The Real Reason People Don't Follow Process Documentation

After you've painstakingly created process documentation, it's pretty disappointing when you realize no one's reading it.

Worse, your colleagues might start to give up on the idea of improving processes. People might start talking about just hiring more people to compensate for inefficiencies.

But being a marketing operations expert, you know that unless you can iron out your campaign process, there's no way your organization will be able to scale.

So what's a conscientious Marketo admin to do?

Here's what I've learned from working with enterprise teams for the past 7 years: **people don't follow process because they don't feel like it will make their work easier or their outcomes better.**

In other words, if you want people to follow your process documentation, you need to make it about them.

And that's a problem that finds its root way before you even start documenting. You have to make process about stakeholders from day one.

Here's where most people go wrong:

- They don't take the time to understand what each team involved in campaign creation contributes. As a result, stakeholders are not sufficiently empowered to exercise their expertise.

- They don't investigate beyond the way things are currently done in order to understand *why*. So you end up bulldozing necessary parts or "improving things that should be left alone.

- They jump to overhaul the system rather than improving in increments. People have no time to adjust progressively and see the value of change.

Now, let's look at what you can do to solve these challenges!

# How to Create a Campaign Process People *Will* Follow

To create a campaign process that people will follow, you need to first acknowledge the fact that people are not inherently or intentionally uncooperative.

Instead, they are under their own pressures and restrictions, but would welcome something that could truly enable them to have better outcomes on the job.

Now depending on how much of an issue collaboration is at your organization, it can be hard to accept this is true.

But trust me, I've run many workshops over the years for sales/marketing alignment. And I know that often the inability to cooperate boils down to a few key points of misalignment.

Like knowing the right acupressure points to push, you need to know which questions will reveal the core underlying issues.

While the outcomes of alignment workshops can differ greatly, the sequence of events is always the same. And that's what I've captured in the Campaign Process Builder.

First, I sit down all the teams involved *separately*, and ask them the exact same set of questions. Things like, "How do you define an MQL?", "When is a lead ready to be passed from sales to marketing?"

Afterwards, I put their answers side-by-side, and that's usually enough to kickstart some really interesting realizations about very obvious and low-hanging improvements.

The following three exercises are designed to enable you to do the same, but on your own! Scroll on to:

1. Document the current process from each stakeholder's perspective.
2. Compare perspectives & spot issues
3. Prioritize High-Impact Process Improvements

**EXERCISE 1**

# Document Your Current Process (from each stakeholder's perspective)

## The objective of Exercise 1 is to document your current campaign process from the perspective of all teams involved.

Ask each team involved in the campaign creation process (including your own) to fill out the Exercise #1 worksheet (pp 7-13).

It's very important that this be done separately and without consulting each other. This enables everyone to truly document what campaign creation looks like from their perspective.

Make sure to carefully read the tips for success and share them with all participating stakeholders. They are key to getting the most out of this exercise!

## Tips for Success

- Answer honestly! The goal is to uncover your current process, warts and all. So be honest and don't be shy about documenting all the things that aren't working and why. That's the only way you'll come out of this exercise with a thorough understanding of everything that's going on.
- Pretend you're describing what you do to a new hire. Don't assume that the reader has your expertise or background in how everything works. Add as much detail as you can.
- It's OK to not have an explanation for everything. Often, you know that something is an issue, but you're not sure why. In that case, try to document what you can observe about the situation in as much detail as possible.

For example you might only know that it takes a really long time to hear back from another team, not why. In that case, you should focus on describing the impact that has on your work.

- Don't skip questions, even when a task falls under another team. Instead, try your best to describe how you believe that team is currently doing it. This can lead to interesting realizations down the line of where there were misalignments.

- Keep your answers about what is happening rather than what you *wish* would happen instead. Don't try to justify or fix anything. Instead, stay in the present and document what *is*.

- Trust the process. Rather than wondering about why or how your answers might be interpreted and used, focus on the task at hand.

- Refrain from influencing other team's answers. Each team must provide independent answers that aren't influenced by other stakeholder's perspectives. Your answers will probably not match the answers of other teams – that's the point. This exercise will give you a much better perspective of how other teams perceive their role. It will also encourage you to think about what other team's roles are relative to your own.

# **Exercise 1**. Document Your Current Process

**Which team is filling this worksheet out?**

**Please list all other teams involved in campaign creation:**

**Planning/Initiation**

Who/what team requests campaigns?

Who/what other teams are involved in the planning phase and what role do they play?

What resources/data are needed to successfully plan the campaign?

In what order are new requests routed (i.e. how are they prioritized in relation to other items in the backlog)?

Who/what team is responsible for determining campaign goals and success metrics?

Who/what team is responsible for putting together the campaign concept (from ideas to creative content to cost and reporting)?

Do you have SLAs (timeframe for completion) in place for campaign creation between requesters and other teams? If so, what is/are the SLAs?

What needs to be established before the campaign moves from planning into production & execution?

How are campaign details transmitted to the relevant stakeholders (channel, format)?

How long does the planning stage usually take in reality (regardless of SLA)?

What are typical blockers at the planning stage?

**Content Production (development of copy & visuals)**

Which team(s) are involved? What is each team in charge of?

What resources/data are needed to create content successfully?

Do you start from scratch or follow a template?

What are the steps/phases of content production?

What criteria needs to be met for content creation to be considered “complete”?

What channel/format is used to transmit finalized content to those in charge of technical execution?

How often and why do changes need to be made to content after it’s been transmitted for technical execution? What generally is the cause for these changes?

How long does content creation actually take (regardless of SLA)?

What are typical blockers at this stage?

**Technical Execution (eg: building emails, landing pages, programs, smart lists)**

Which team(s) are involved? What are they in charge of?

What resources/data are needed for successful technical execution?

Do you start from scratch or follow a template?

What are the steps/phases of technical execution?

What criteria need to be met for technical execution to be complete (ready for QA)?

How long does technical execution actually take (regardless of SLA)?

What are typical blockers during technical execution?

### Quality Assurance (QA)

Which team is in charge of QA?

What is the QA process/checklist?

What are the common types of issues found during QA that can send a campaign back to the execution phase?

Is QA done properly and consistently? Or is it often rushed due to time constraints?

How long does QA generally take?

What are typical roadblocks during QA?

**Approval**

Which team gives the final approval before a campaign is sent?

What channel/format is used to notify approvers & reviewers to provide feedback?

What channels/formats do approvers use to communicate feedback?

Are there any recurring issues that repeatedly cause approval delays? List them.

How long does approval generally take?

What are typical roadblocks during approval?

**EXERCISE 2**

# Compare Perspectives & Spot Issues

## The purpose of Exercise 2 is to compare different perspectives of your current process to spot issues of inefficiency, misalignment, bottlenecks, and more.

Gather together the completed worksheets from Exercise 1 and start merging the complementary visions of the current process in the worksheets provided. Fill in what each team currently has as a role, deliverables, etc. for each campaign phase.

Where answers contradict each other, you can make a note of it in the row labelled "issues."

In addition, go through the list of **Issues to Look For** on p. 17 to help spot other misalignments.

## Tips for Success

- Ideally, all teams involved do this exercise together. That way, each team can explain any potentially unclear or incomplete answers. Plus, that way, everyone can feel a sense of ownership over the findings. That being said, if that's not possible, it is still worthwhile to do this exercise only as a marketing operations team.

- Brace yourself for surprising answers. Depending on how well-defined your current process is, you may be surprised by some of the answers other teams have provided. The goal of this exercise is to surface those underlying misunderstandings as a starting point to improve, not to point fingers. So if you learn something new -- it's a sign this is working!

- Keep an open mind. We are all more accustomed to thinking in the mode required by our position. There may be complications and considerations that your colleagues have to deal with that you either underestimated or were unaware of. This is a unique opportunity to get a better understanding of the expertise they bring to campaign creation!

- When documenting issues, don't get too hung up on figuring out every small misunderstanding or inefficiency. Instead, focus on clear cut issues that have a large payoff when resolved. For instance, realizing that the definition of done is varying between teams or forgotten critical tasks is a big payoff. But getting fixated on an issue that arises very rarely is not very worthwhile.

## Issues to Look For

Here is a list of typical issues of misalignment you can refer to.

- **Redundancies:** Steps completed by multiple teams that can be removed or reassigned without affecting the end product.

- **Bottlenecks:** Points in the process where requests outstrip capacity at any given time, leading to loss of momentum.

- **Over-processing:** Are there attempts to over-refine content or technical program execution beyond what is necessary?

- **Terminology Misalignment:** Is one team using the expression "banner image" to mean one thing, while another team is referring to something else? This type of simple misunderstanding is quite common and can lead to many unexpected issues. Good news is, it's easy to fix!

- **Timeline Misalignment:** Does one team believe technical execution will take only one day while others believe it will take four?

- **Criteria Misalignment:** Are there different definitions about when a project is ready to move from one phase to the next?

- **Orphan Tasks:** Are there necessary parts of campaign creation that everyone thinks someone else will be handling?

- **Pointless Manual Work:** Is something being done manually when it should be automated? (eg: using tokens in programs)

- **Inadequate Information or Resources:** Is anyone lacking access to critical data about customers or past campaigns in order to do their role wisely?

# **Exercise 2**. Compare Perspectives & Spot Issues

## Planning/Initiation Phase

| Teams | Role | Deliverables | Resources/Data Needed | Definition of Done Criteria |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| Issues | | | | |

## Content Production Phase

| Teams | Role | Deliverables | Resources/Data Needed | Definition of Done Criteria |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |

| Issues | | | | |
|---|---|---|---|---|
| | | | | |

## Technical Execution Phase

| Teams | Role | Deliverables | Resources/Data Needed | Definition of Done Criteria |
| --- | --- | --- | --- | --- |
| | | | | |
| | | | | |
| | | | | |
| Issues | | | | |

## QA Phase

| Teams | Role | Deliverables | Resources/Data Needed | Definition of Done Criteria |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |

Issues

## Approval Phase

| Teams | Role | Deliverables | Resources/Data Needed | Definition of Done Criteria |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| Issues | | | | |

**EXERCISE 3**

# Determine High-Impact Process Changes

## The purpose of Exercise 3 is to translate the issues spotted in Exercise 2 into actionable process changes.

In the first column of the worksheet, summarize the major process issues that were found in Exercise 2.  In the second column determine an actionable process change that will solve the issue.

## Tips for Success

- It can be overwhelming to think about overhauling your whole process. Instead, focus on actionable improvements (i.e. nothing is blocking you from making the change). Marketing changes all the time, so it's best to think about improving your process incrementally.
- If possible, do it in a meeting with other teams that are involved in the process. If that's not possible, at least consult them about the final outcome and make sure you get their buy-in to follow the updated process.
- Always keep in mind the unique contributions each team makes in campaign creation due to their expertise and function. Make sure they are empowered to exercise their role both through access to adequate flexibility, information, and resources.

# **Exercise 3**. Determine High-Impact Process Changes

## **Planning/Initiation Phase**

| Issues Discovered | Actionable Process Change |
| --- | --- |
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| | |

## Content Production Phase

| Issues Discovered | Actionable Process Change |
| --- | --- |
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## Technical Execution Phase

| Issues Discovered | Actionable Process Change |
|---|---|
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## QA Phase

| Issues Discovered | Actionable Process Change |
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## Approval Phase

| Issues Discovered | Actionable Process Change |
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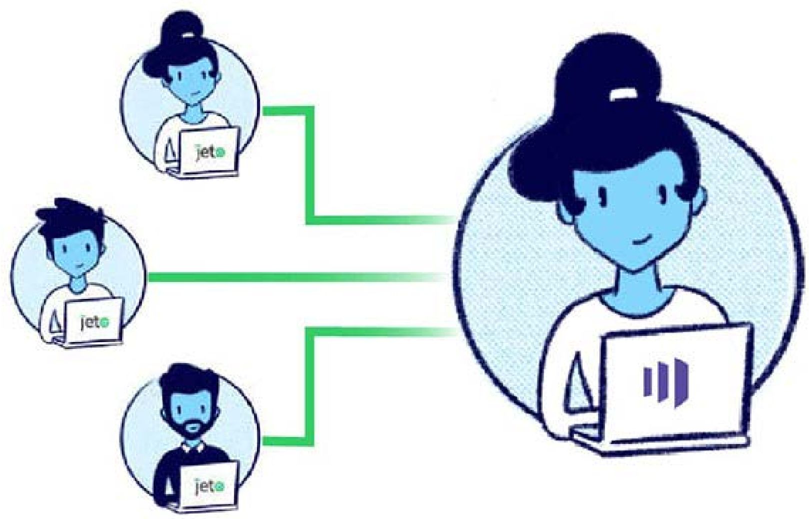
# Simplify & automate Marketo campaign operations

View Video Demo



## AUTOMATE EXECUTION

Instantly route campaign requests into fully-executed Marketo campaigns.

## EMPOWER MARKETERS

Empower users who are not Marketo experts with our visual editor.

## CONTROL ACCESS & PERMISSIONS

Manage access to different forms and functionalities at user and group-levels.

## MANAGE COLLABORATION & APPROVALS

Assign approver roles, and leave comments and tag users directly on-asset.