



# The Marketing Leader's Guide to Data Strategy

A framework to make better decisions, optimize resources and maximize marketing performance

# A Letter to Marketers

Marketing is hard.

Of course it is also fun, entertaining, challenging, mentally stimulating, and overall a fantastic profession. Why else would we willingly choose to spend a large portion of our waking hours on this profession? But it is okay to say it: Marketing is hard.

We as marketers face a multitude of choices and make numerous decisions each day. We must decide between seemingly infinite marketing and creative approaches, dozens of channels, and hundreds of languages. The good news is we have the power to make this happen by selecting from over 7,000 marketing technologies that support our choices. However, all those technology options present a double-edged sword because they generate thousands — and sometimes millions — of data points. And we need to make sense of all that data.

At the same time we are going through our daily list of decisions, we are being asked to do more, take on more, and be more than ever before. The C-suite now expects marketers to

be more accountable, drive growth, and play a bigger role in the overall company.

We as individual marketers are trying to corral all this possibility into a forty to fifty hour week (and balance it with family, friends, life!) to ultimately answer the business's request to drive more growth.

**Simply put, marketers just want the ability to make better decisions.**

While there are infinite possibilities for how to approach marketing, we at Allocadia believe there is a singular path to help marketing organizations as a whole make better decisions. That answer is data. In fact, your business depends on it. According to research by Harvard Business Review, companies with advanced data strategies are twice as likely to grow revenue by 30%.<sup>1</sup>

Data is the currency that drives the business forward. This makes it imperative for any marketer that wants to be taken seriously by Sales, Product, the CEO, and the board to embrace a formal approach to being data driven.

**“No wonder 87% percent of marketers say their top marketing goal for the next year is using data more successfully.<sup>2</sup> We wrote this paper to show you how and provide a path forward.”**

— Sam Melnick, Vice President of Marketing Insights & Growth, Allocadia



# Introduction

Whether you are leading the charge for making better decisions based on data — or have been mandated with making that happen — you are about to embark on an important journey.

Marketing organizations spend millions of dollars a year on data — acquiring, cleaning, and merging it — and endless days finagling that data to arrive at that magical place of making better decisions.

But Houston, we have a problem: Despite all these efforts, our confidence in data is still low. 89% of marketers believe data quality drives the right B2B sales and marketing campaigns. Yet 50% said they are not confident in the quality of their company's data<sup>3</sup> and only 52% of companies use data when making marketing decisions, while the rest rely heavily on intuition and experience.<sup>4</sup>

It's no surprise: Salesforce.com reports that the average number of data sources has grown by 50% — from 10 to 15 — in just two years.<sup>5</sup> And Kleiner Perkins found marketing organizations use an average of 90 systems, most of which house or generate data.<sup>6</sup> This mish-mash of

disconnected data sources equates to an unclear path for arriving at the desired data destination.

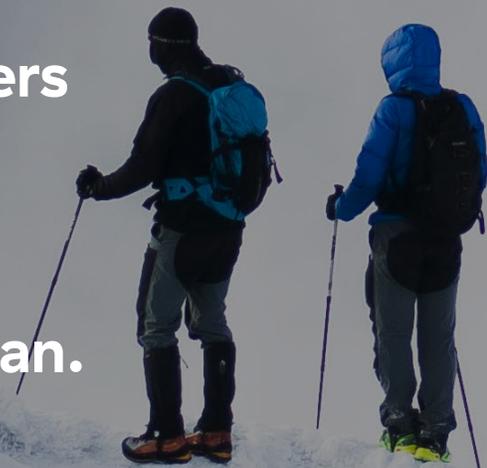
**Here is the reality: Marketers are struggling to capitalize on this valuable resource.**

How can marketers overcome this challenge? By approaching this like any other strategic initiative and treating it as a multi-step project, or a journey, with clearly defined steps that lead to an ultimate goal or outcome. Marketers need to go on a data journey.

Each marketer's data journey represents a huge investment in technology, data, human effort, and organizational focus. But far too many marketing organizations make these investments without a plan and strategy.

The ultimate goal of every data-driven marketer should be using data to make better decisions and optimize resources. Marketers should be able to answer the questions: "Where should I spend my time, focus my effort, and ultimately place my bets today, this week, this quarter? How can I realize better results from my work?"

**It's understandable that all marketers want to quickly arrive at and easily access a valuable data foundation, but it's impossible to do without a purposeful and well thought out plan.**



There’s no one-size-fits-all approach to arriving at that answer since every organization is unique, thus each data journey will be slightly different.

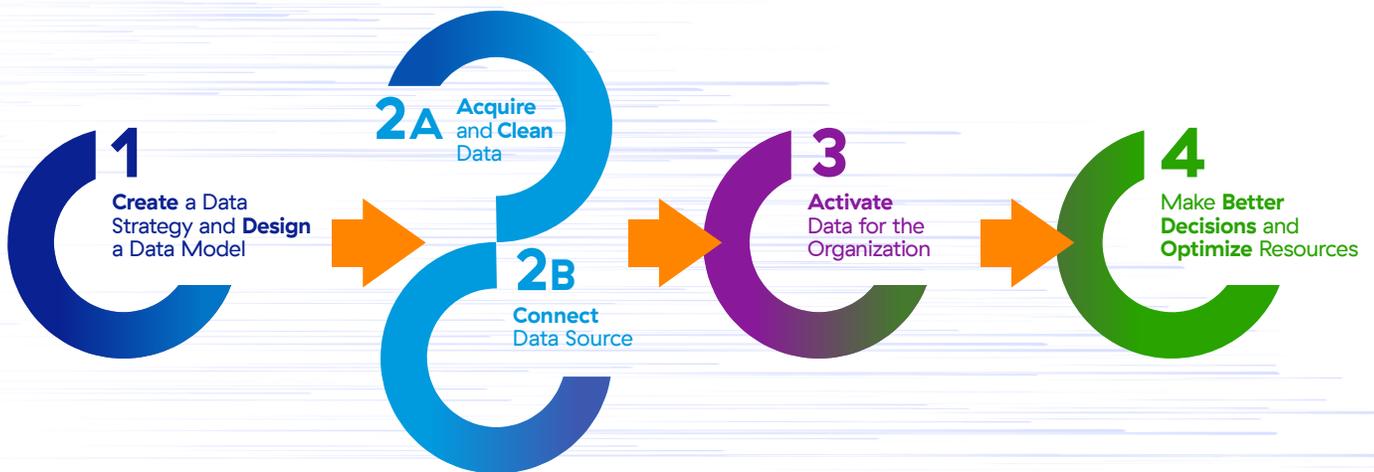
In this paper, we reveal an approach and framework capturing the core activities that enable marketers to use their data to achieve better outcomes. We developed this framework based on our interviews with almost a dozen senior-level marketing operations leaders who have led similar projects combined with our experience working with customers on their own data journeys.

We present the framework as a series of steps (see below), but you won’t necessarily apply them in order. In fact, a data journey isn’t a linear

process; instead, these activities often occur simultaneously, particularly steps two through four.

What matters most is starting with a defined and agreed-upon data strategy and data model — step one in our framework. This will inform the choices you make and the actions you’ll take in steps two and three. If done effectively, by step four, you will have orchestrated, activated, and delivered the data your company needs to make better decisions. You’ll improve, you’ll iterate, and you’ll learn (like every marketer already on this journey), but you will be on the path to higher quality data, more confidence, and better decisions.

## The Marketer’s Data Journey Framework



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**I can't say enough about the importance of a strategy. In the absence of strategy, activity fills the void and it's hard to measure the effectiveness of an activity. If you start with a strategy aligned with a business objective or outcome, you can identify the tactics to achieve that and the measurement for determining whether or not you were successful.**

— Scott Sheppard, Vice President, Marketing Operations, WeWork

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# 1 Create a Data Strategy and Design a Data Model

Every journey starts with a first step. Sometimes it's easy to take that first step, while other times you need to carefully think before moving forward. Through the interviews we conducted, it became obvious that when it comes to a data journey, this first step must be creating a data strategy and designing a foundational data model. Fail to handle this step well, and you will never arrive at your ultimate destination. That's why the best marketers spend an enormous amount of their time, energy and political capital here.

Technology and frameworks enable the entire data journey process, but ultimate success is about putting in the work upfront and approaching your journey from a strategic viewpoint.

Let's use the simple analogy of baking a cake for a party. You must first know how many people you will be serving and what type of cake they would enjoy, find a recipe, gather the ingredients, and set the proper oven temperature. Without this important preparation, you'll never produce an edible, and delicious cake for everyone.

Because this first step in the data journey is essential to success, we cover it in great detail, broken down into two key sub-steps: 1) Creating a strategy and 2) Designing a data model.

**“We spent a lot of time on our data strategy and data modeling. Unless our data is structured and connected in the right way, we can't arrive at the level of insight we need to take an action against the data.”**

— Lori West, VP Marketing Operations & Technology, Genpact



## How to create a data strategy

To create a strategy, you must first answer questions and gather information from a multitude of stakeholders. Start by aligning your data goals with your organization's strategic objectives. Your marketing leadership team and executive counterparts should be able to share the top organizational priorities. It is important to be grounded in the corporate strategy — not just the marketing or sales plan.

Once you've identified those ultimate outcomes, go a level deeper and gather input from everyone who will be using your data to make better decisions in the name of helping the organization achieve those goals. Ask your CMO, field marketing leaders and department leads what questions they want and need to answer in order to achieve their own objectives. But don't stop there; sales and finance are important stakeholders that will use marketing data at some point.

**“A fundamental problem in the world of big data is feeling the need to bring every single data point possible into a system. You actually need to work backwards from the outcome, looking at the end state that you want. Then you design a data strategy that works to drive those decisions.”**

— Teresa Joy, Vice President of Marketing Technology & Operations, Autodesk

Approach this as the discovery or preparation stage of your journey. While you need to stay receptive to the needs of different stakeholders, it's your responsibility to expertly guide them down the path versus just reacting to each and every need.

As a marketer, you're uniquely positioned to excel in this role because you have the mindset to move fast and work with impressive amounts of data. Moreover, as the project lead, you are considering the journey from the strategic perspective of the entire organization, while each stakeholder will be thinking of their individual, siloed needs.

Back to the cake analogy: As the master chef, you want to please your partygoers, but you also know what is and isn't possible with the ingredients on hand and time allotted to prepare the dish.

Best practice is to encourage stakeholders across the organization to join you on the path. You do that by prioritizing the needs of the business while educating stakeholders on the limitations of your data. This includes discussing with them:

- What can we do today with our data?
- What would we like to do with our data?
  - What insights do we need?
  - How are you going to use the data?
  - What are we trying to achieve?
  - Who needs access to the data and in what format?
- How long will it take us to enable the team?



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**Marketers have to start asking the hard questions of how can we further optimize with what we have and how can we acquire more data to help the organization answer questions.**

— Paul Green, Director of Marketing Technology, Extreme Networks

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Once through this exercise, the project team should step back, assess the organization's needs, propose an overarching data strategy, and provide a glimpse into the potential outcome of this journey. (See the end of each section for who should be involved in each step of the journey.) Ultimately, you want to provide a view into how this project will enable your organization to make better decisions. The ideal output is a mockup of what the dashboards and data will look like and what questions they will help key stakeholders and their teams answer.

The validation phase of your data strategy work is critical. It provides the opportunity to gather feedback on your proposed path forward. Without buy-in from the start, you are almost guaranteed to never reach your final destination on this data journey. Solicit reactions from your stakeholders, and understand what decisions they could and would make with this data in hand. Approach this as an iterative process knowing the goal is to lay the groundwork for ultimate data success.

### Build your data model

After you've created — and secured buy-in for — a data strategy that aligns with your organizational outcomes, use it to inform your data taxonomy and hierarchy, aka your data model. A model sets you up to successfully deliver your data strategy and plan. It does so by ensuring the data you gather and create throughout your data journey produces the insights you need.

Remember: The more complex your business, the more complex your data, which is why a clear taxonomy and data hierarchy are essential. Think of this as the equivalent of nailing down the recipe that will produce the best cake possible.

With that in mind, collaborate with your experts in marketing operations and marketing analytics on the following steps:

#### 1. Clearly define data definitions/taxonomy.

The way you design and structure your data sets and systems is the first step to ensuring data accuracy — which is essential to making better decisions.

Agreement here is essential to a viable taxonomy, and that requires conversations with relevant stakeholders from marketing and sales. Don't assume everyone's definitions will align — each person brings their historical perspective and experience to the table. For example, what the marketing group tags as an inquiry in its marketing automation platform might be called a response in Salesforce.

Map your end-to-end sales process and each touchpoint in the prospect journey: What is an inquiry, an SQL, an opportunity, etc.? What is your precise definition for each of these? Similarly, on the investment side, you must define what an "event" is and how it should be tagged or differentiated across the organization. Another example is determining the difference between a campaign, program, and tactic (or whatever terms you are using).

Rather than starting from scratch, work from existing taxonomies defined by experts like IDC and SiriusDecisions, to name two. Using third-party definitions can eliminate time-consuming arguments and assure that everyone is aligned around an industry standard.

Do not rush this part of the process. Your marketing team will need to follow specific rules of engagement and enter data and campaigns correctly to stay aligned with this taxonomy, so it's vital to be in complete agreement on this before moving on to the next step.

**“You assume you already have a taxonomy and that everyone is aligned around it, but everybody has their own perspective so you cross-talk. That's why taxonomy is a ‘go-slow-to-go-fast’ step.”**

— Sean Hiss, Chief of Staff to the CMO, VP Marketing, Hitachi Vantara



You will need to socialize and educate everyone who will use the data so they understand the taxonomy and how to use it properly. This is an ongoing exercise since you must continually remind people of the proper definitions and processes, even as those change with the introduction of different data sets and new data sources. (Note: Much of this work is done in step 3 as well.)

With that in mind, this is the time to determine how you will capture and implement the data model. You do this by identifying core systems that house data — such as your CRM, marketing automation, and Marketing Performance Management (MPM) systems and then assure the data model (i.e., taxonomy and hierarchy) flows and is consistent across each system.

**2. Identify and validate your core data sources.** You may have dozens of data sources, but you need to decide which contain the truly essential data and where that foundational data will live. Some may argue you need a customer data platform (CDP) or other centralized system, like a data lake, to house all core data. Whether or not you take that approach, you must still identify the core origin data sources. With that prioritized list in hand, determine which data matters most within each of those systems and the state of that data.

You should then inventory auxiliary systems and data sources (such as your social media channels) and execution

systems and sources (for example, your programmatic advertising platform).

**3. Determine how you will connect this data to drive the right decisions.** Now you need to identify hypothetical data integrations and connections. From a tactical standpoint, this means uniting the core data with a unique identifier, consistent fields, and valuable metadata. This is when you decide which data fields and pivots are required across all systems and map out workflows between systems.

Unless the auxiliary and execution systems and sources you listed above fit your defined data model — and match your defined data structure, fields, and quality threshold — you don't want to connect them to your core systems. Otherwise, you introduce the possibility for poor quality data to taint your data model. Keeping these peripheral data sources separate from your core systems is your way of erecting gates to keep out bad data.

**4. Validate the model.** Once you understand how your entire data ecosystem will look from a connected point of view, you validate that the data model helps produce the insights you've identified. In other words, you verify if your data model flows through your systems as intended, and whether it supports your taxonomy and data strategy. At this point you are ready to move to step 2 where you acquire and clean data and connect data, which is the true pressure test for your model.

Just 43% of those B2B marketers polled indicated that their companies' data sources and insights are well integrated, understood, consistent, validated, and shared across the organization.<sup>7</sup>

**“You need to continue to socialize and educate the organization on your taxonomy and ensure people understand it and are using it correctly.”**

— Emil Adigyoalov, Head of Global Marketing Excellence, Signify

## Who should be involved and what are their responsibilities?

- Marketing strategy and/or marketing planning and/or senior marketing ops leads in creating a data strategy.
- Marketing ops and data analytics partner to create the data model.
- CMO, executive counterparts, field marketing and sales leaders provide strategy input.

## Dos and Don'ts

- Work backward from the outcomes. Start from the decisions you want and need to make and then design a data strategy that works to drive those decisions.
- Don't create a data strategy in a vacuum. Solicit input from your CFO, CMO, field marketing leaders and sales leads.
- Don't approach discovery as an open-ended exercise. Jump-start conversations with key stakeholders by laying out your expert ideas and considerations for a data strategy.
- Carefully define your taxonomy. Get agreement from stakeholders on each key definition. If your taxonomy is not consistent and accurate, your insights won't be trustworthy.
- Use outside sources to define your data model. Industry experts like IDC and SiriusDecisions have already developed broadly applicable taxonomies.
- Pinpoint your data model. Define which core or foundational systems are a must to create your data model.
- Look for a "Goldilocks" zone. You want your data model to include enough metadata and fields so you get the right clean and accurate measurements, but not so many that you introduce significant work for those inputting the data.
- Socialize your data strategy and data model. It's important for all key stakeholders to buy into and adhere to the strategy and model. But this is not a set-it-and-forget-it exercise, so educate them initially and continuously on how to apply it.



# 2 Acquire, Clean, and Connect Data

The next steps are interconnected: Acquiring, cleaning, and connecting the data. Back to the cake analogy: You gathered your essential ingredients in the first step; now it's time to follow the directions you wrote out, mix the ingredients, and put them in the oven in order to bake your cake. At this phase, you collect data and build rules to orchestrate how data moves through systems and how it will be visualized.

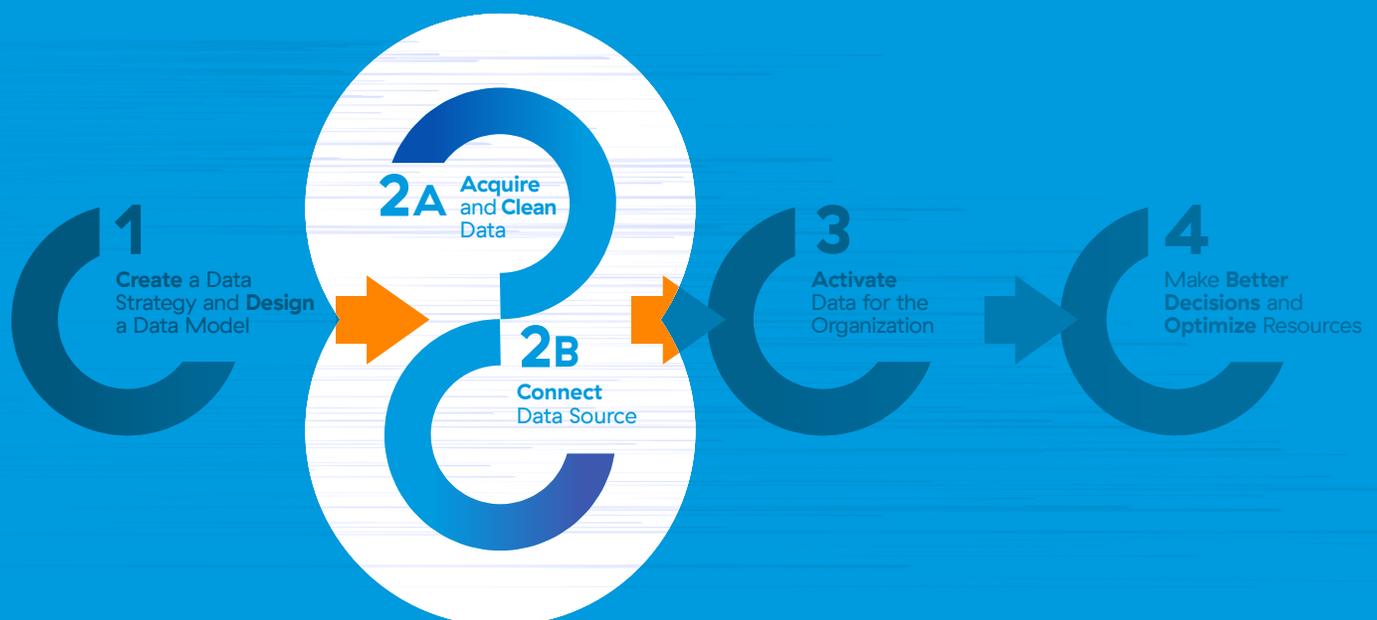
## 2a. Acquire and Clean Data

Once you've created a data model and know what questions the data should answer and what information the data should deliver, don't expect the data to appear out of thin air. After all, you wouldn't expect your cake to magically appear on the plate after you've bought the

ingredients and turned on the oven. In this part of your data journey, you need to acquire and then clean the data.

You may be building a data set from scratch. Or you might be creating a clean data set from your existing sources through a merge-and-purge process. The key in both instances is to make the data usable in its raw form, no matter what the origin source(s) or data formats.

If you are cleaning existing data, it's acceptable to eliminate data that will never meet your taxonomy and data model standards. It's also okay to accept substandard data for historical purposes. Just be sure to document these cases so you capture an accurate record of your data model.



At this stage, you need to refer back to the requirements you defined in phase one for any data being integrated into your core systems. This is to ensure the data acquired (and then cleaned) matches the taxonomy standard you defined in the data design stage. For example, say you want to connect your clean data from an internal system with an execution channel like Facebook or LinkedIn. You should first make sure the quality of the data in these channels meets the quality requirements associated with your core systems. And that means they should go through the established data cleaning process.

When it comes to creating and cleaning your data, you'll likely handle this process manually at first. But over time, you should work to automate as much as possible. Keep in mind that you'll be deciding on a trade-off between manual/automated and data accuracy:

**Manual Quality Assurance (QA)**

= Highest data accuracy but very slow

**Automated QA** = Moderately fast with decent accuracy

**No QA** = Extremely fast but lowest accuracy

**“When you’re cleansing and appending data, sometimes the automation and efficiency are more important than the highest possible level of accuracy, and sometimes the accuracy outweighs fast cleansing and appending.”**

— Ken Evans, Senior Director Marketing Operations, Fuze

You don't need to select and stick with just one of these approaches. Rather, you'll probably select one of the three depending on:

- 1. The data source.** For example, your CRM system, your marketing automation system, etc.
- 2. What the data model demands.** For instance, your model might demand a certain number of fields are filled out for each tier 1 account.
- 3. The use case.** Let's say the data source is your CRM system and you are adding 10 new contacts to a tier 1 strategic

account. The data model demands that you fill out 5 mandatory fields and have a high confidence of data accuracy for contacts associated with tier 1 accounts. You could just upload those contacts into your marketing automation system to sync automatically. However, because of the quality of data required and the low number of contacts, a manual approach would work best to assure the data is as accurate as possible.

**Remember: Your data will never be 100% clean so don't wait for or expect to achieve that nirvana.**



## Who should be involved and what are their responsibilities?

- Marketing ops, sales ops, marketing analytics, BI, or data analytics to acquire and clean the data.
- Marketing ops and sales ops to enable and teach marketers why it's important to expend effort keeping data clean (enablement is a key tenet in step 3!).

## Dos and Don'ts

- Stay aligned with your data strategy and design. Determine how you will ensure data pulled into source systems matches your taxonomy.
- Choose between manual and automated QA. Go with manual when accuracy trumps speed; select automated when the reverse is true.
- Don't wait for perfection. A reliable source of truth isn't always 100% accurate, but is still valuable as long as it satisfies your definition of data you can use to make decisions.
- Don't lose track of data cleaning. New sources, new people, and new data will continually threaten your data cleanliness. While data cleaning isn't exciting, it's vital if you want to succeed with data.

## 2b. Connect Data

By now you've created a data strategy and a model and determined on paper how you will enable these — but it's still theory. The first tangible step you took was acquiring and cleaning data.

Connecting data and cleaning it go hand in hand, but the connection part is where you will call upon more technology. When you automate data cleaning and data connection, the magic happens behind the scenes.

Without technology connecting your data sources and automatically cleaning data, you will spend days manually cleaning data in a spreadsheet and using intricate vlookups trying to unite your (hopefully clean) data.

When you built your data model, you decided on the core source systems and core data you need to feed into — and connect across — your technology ecosystem. Before connecting these systems and data, you must ensure that you meet your definition of data cleanliness. For example, "Is X field filled out in the data source?" or "Are we X% confident that the data meets our quality standard?" If the data sources don't satisfy those gating factors (which you defined in phase 1), you should not connect them to your foundational systems or include them in your insights. Fortunately, technology allows you to enforce these gating factors!



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**You need an endgame for what you're trying to do with that connected data or those connected systems. Just because you can connect A and C doesn't mean you should. You might be able to connect A to B and B to C and solve the same problem.**

— Justin Sharaf, Director, Marketing Technology & Operations, LogMeIn

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Keep in mind that connecting data isn't just about using technology; it's about:

- Assigning unique identifiers within data sets so you can unite tables/data to arrive at needed insights.
- Setting up resources like CRM and peripheral systems like ad-serving technology to align with your taxonomy and data model.
- Ensuring data flows together to enable the views, insights or dashboards that business users need to make their decisions.

Back to our cake analogy: Think of this as using the best of the ingredients at your disposal — and the most fitting kitchen tools — to make your batter and bake your cake.

### Who should be involved and what are their responsibilities?

- Marketing ops and sales ops are the data model experts and ensure the data strategy is being followed.
- Marketing technology leaders own the technology and integrations.
- BI and analytics make sure it's possible to deliver the needed insights and provide input on the data model, particularly details around how the data will come together.

## Dos and Don'ts

- **Don't connect data just because you can.** You need a reason for connecting data or systems.
- **Start manually:** Test your data connections and sources manually first. While this takes time, it is much less of an investment than a failed technology purchase!
- **...But consider automating.** Once you validate that it makes sense for your business, set up a perpetual cleaning mechanism that automatically cleans your data at set intervals.



# 3 Activate Data

Now that you've mixed all your ingredients and baked your cake, you're ready to ice it and serve it up on a plate (or napkin) for your guests. How do you actually deliver the data and in what format so people can use it in the right way and act on it intelligently?

While visualization comes to mind when we think of acting on data, visualization is the means to an end.

You can activate data in a sophisticated business intelligence tool that creates beautiful visualizations or by sharing it in a simple spreadsheet or email. What really matters is the insights people glean and the actions they take as a result of that data. In other words, visualization is in service of interpreting and analyzing data.

## The power of data activation

According to Forrester, 82% of leaders indicated they use data to find new business opportunities compared to 47% of laggards.<sup>8</sup>



As you activate your data, keep in mind that you must:

- **Deliver intelligence to the entire organization — not just to marketing.** While the marketing organization may be the primary audience, marketing has the power to deliver meaningful data to many others so they can make better decisions. Sales is the logical next audience. But don't stop there. Customer Success, Product, and Finance can all benefit from quality marketing data and insights!
- **Create a strategy for data enablement.** Activation is one aspect of delivering data to the people who need it; another — bigger — part is data enablement. In fact, while not spending enough time developing a viable data model is the most egregious oversight marketers make, failing to invest enough in enablement is the second most common place they trip up.

Unless you enable others to use the data, all your work to date will come to nothing. It's not enough to build your data model and expect everyone to use the data wisely. You need to spend significant time enabling stakeholders by teaching them how and why to use the data and insights. It's not a one-time process.

Some advanced global organizations set up online portals, and conduct initial and ongoing training to underscore the how and why behind their data strategy (this is recommended as you progress in your data journey!)

To that end, educate key stakeholders on the following:

1. The potential impact if they make use of the data you can deliver (i.e., get their buy-in)
2. What the data taxonomy and model is, and why it matters
3. How to create the right types of data by adhering to taxonomy and data governance rules
4. Where and how to access and view the data
5. How to use the data to make better decisions (teach what the data represents, how it impacts their work, where and when they can and should use it to improve decision making, and the metrics they can track to gauge the effectiveness of their decisions over time)

**“As a leader, you want to push decision-making down as far as possible in the organization. If you can train employees to review, interpret and apply data, the better the decisions they can make.”**

— Jeremie Audran, Sr. Director Global Marketing Operations, Hitachi Vantara



## Who should be involved and what are their responsibilities?

- Marketing ops and sales ops lead enablement and sometimes own data delivery.
- Marketing leadership needs to be involved for training and determining how to deliver data to the business.
- BI/analytics team owns the data delivery mechanism — particularly the BI tool and data lake/warehouse — and participates in enablement.
- Business stakeholders across the organization should start using the data to make better decisions.

### Focus On

- **Establishing a data delivery strategy.** Determine who can define the delivery and visualization of data — e.g., should the data appear in a dashboard or is a spreadsheet or ad hoc report okay? Also determine the process for how stakeholders should review data to make business decisions.
- **Your audience's activation needs.** Executives need something extremely simple and to the point whereas practitioners and knowledge workers often prefer more detail. Some may need fancy dashboards, while others will do fine with a spreadsheet. Ideally you can serve 80% of needs with common dashboards and 20% via ad hoc methods.
- **Automating where possible.** Even if you connect and clean data, you introduce the potential for data corruption if you enable ad hoc tasks like exporting. So automate wherever possible.
- **Teaching and enabling.** It's easy to build a data model and hope people use it. The best marketing organizations teach all stakeholders across the business how to use the data to better perform their jobs.



# 4 Make Better Decisions

At this stage, you've arrived at your destination, and you and others in the organization are using data to make decisions. Those decisions result in outcomes that you then take into consideration so you can determine how to better use data going forward. Put another way, it's the equivalent of people eating your cake and telling you how delicious it is or isn't, allowing you to continually improve the recipe and the cake you serve up.

While you are ultimately steering your organization to make better decisions, simply enabling them to make data-based decisions rather than relying on gut instinct is a win. With the right data and right process, everyone can make smarter decisions — and arrive at those decisions more quickly.



This is the last step and the one that rewards you with the fruits of your labor. Too many marketing organizations want to skip to this step without doing the hard, up-front work. But just as you can't arrive at your destination without taking every step of a journey, you can't skip the stages that lead up to making better data-driven decisions. Spend 50% of your time and efforts on defining your data strategy and model, and you will reap big rewards.

Think of this as the stage where you validate all your work to date. This is when you determine:

- Is the level of data accuracy strong enough to make decisions?
  - Are marketers/sales/others using the data?
  - Do they understand how to use the data?
  - Are results improving?
  - Are marketers more confident in where they are spending their time and money?
- What tweaks should we make on steps 1–3 to improve?

Keep in mind that you should only need to make small adjustments to your data model to improve; you shouldn't tear it apart and start over. If you blow up your model, you will have wasted time and effort and lose any chance of making year-over-year comparisons of the outcomes of your data strategy and model.

### Who should be involved and what are their responsibilities?

- Business leadership and practitioners across the organization (e.g., Marketing, Sales, Product, Customer Success) should use the data.
- Marketing ops and analytics should determine if results are improving, if people are using the data, if adjustments need to be made on the overall process or if retraining is needed.

## Avoid These Mistakes

- **Skipping right to this step.** To borrow a well-worn phrase, it's as much about the journey as the destination. And to arrive at this desired destination of making better decisions, you need to pay attention to every step along the way.
- **Blowing up your data model.** Don't toss away all your hard work when you see the need to make changes; if you put in the up-front work, minor tweaks will do at this stage.
- **Expecting perfection.** Data will never be perfect and some decisions will still miss the mark. The goal is improvement, not perfection.



# Conclusion

Yes, marketing is hard, but there is a path to making better decisions. That path is data and starting on your own data journey. And while your data journey might not be a short trip, don't be daunted. Every great journey begins with a solid plan; to set yourself up for success and stay true to your course, follow the framework we've outlined here. Let's break it down:

- Step 1, your initial data strategy and data model design, should carry you through 3–5 years, with some tweaking once or twice a year.
- Steps 2 – 4 are part of an ongoing process. This is because you will continuously capture and connect data to drive decisions.
- Maintain momentum by celebrating milestones along the way, such as achieving cleaner data standards, connecting new and valuable data sources, and enabling key stakeholders to make better decisions with the insights you have produced.

Some tips to make this journey manageable:

While you will dedicate more time to the first and last stages of the framework, think of your data journey as comprising multiple work streams or mini projects that are continuously in progress. Examples of these mini projects could be CRM cleansing, connecting two key data sources, or making the data source for the “1” in ROI usable by the entire organization.

Each workstream or project is associated with its own maturity level, making a data journey the perfect initiative for embracing a crawl-walk-run approach:

- **Crawling is the equivalent of taking a manual approach.** In this phase, you are testing whether your approach will work for a given workstream and add value to your marketers and sales reps.
- **Walking is when you apply a semi-automated approach.** At this stage of maturity, you've proven the viability of the workstream and can now scale it through partial automation so more stakeholders can take advantage of the data.
- **Running represents the fully automated approach.** Once you've validated a necessary and highly valuable workstream within your data journey, it makes sense to invest in technology and integrations so you can streamline the process as much as possible. That way, the data can inform decisions across your organization.

Though we've presented best practices throughout — and you can always find more — there is no single or best data journey. Customize this guidance on how to approach being data driven to suit your organization's needs, while keeping in mind where to focus and what to avoid.

You'll learn many lessons on your data journey — just like every other marketer is doing through trial-and-error. Just keep your destination in mind and don't abandon your expedition. We won't say a data journey is as easy as baking a cake, but we do believe you'll be just as pleased with the outcome. Do the up-front work and the results will follow.



# Study Approach

This study is the result of 8+ years of Allocadia's industry experience combined with comprehensive interviews we conducted with senior-level marketing executives at B2B companies. Below is a list of sample participants and companies:

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## Autodesk

**Teresa Joy**

Vice President of Marketing  
Technology & Operations

## Genpact

**Lori West**

VP Marketing Operations  
& Technology

## LogMeIn

**Andrew Martin**

Manager, Marketing  
Operations & Analytics

## Extreme Networks

**Paul Green**

Director of Marketing  
Technology

## Hitachi Vantara

**Jeremie Audran**

Sr. Director Global  
Marketing Operations

## Signify

**Emil Adigyoalov**

Head of Global Marketing  
Excellence

## Fuze

**Ken Evans**

Senior Director Marketing  
Operations

## Hitachi Vantara

**Sean Hiss**

Chief of Staff to the CMO,  
VP Marketing

## WeWork

**Scott Sheppard**

Vice President, Marketing  
Operations

## Fuze

**Emily Ketchum**

Senior Manager, Global  
Marketing Operations

## LogMeIn

**Justin Sharaf**

Director, Marketing  
Technology & Operations

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All participants are directors or above and have a combined 200+ years of marketing experience.

1 Harvard Business Review, Research Report: Why Your Data Strategy is Your B2B Growth Strategy

2 Chief Marketer, The Modern Marketer Benchmark Survey, 2018

3 Dun & Bradstreet, The 6th Annual B2B Marketing Data Report

4 Econsultancy, Many B2B marketers are still relying on intuition more than data: survey, May 7, 2018

5 Salesforce.com, Fifth Edition State of Marketing report

6 Kleiner Perkins, Internet Trends 2018 report

7 Econsultancy, Many B2B marketers are still relying on intuition more than data: survey, May 7, 2018

8 Econsultancy, Many B2B marketers are still relying on intuition more than data: survey, May 7, 2018



A hiker in a light-colored jacket and dark pants stands on a rocky mountain peak, looking out over a vast mountain range. The hiker is using two trekking poles. The background shows a series of mountain ridges under a cloudy sky. The foreground is a rocky, grassy slope.

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