

# Marketing Automation Fundamentals SMART Guide



Engagement

GETTING STARTED >



# Welcome

This guide is designed to provide an overview of the fundamentals of Marketing Automation and introduces 3M's chosen partner: Oracle Eloqua. It covers:

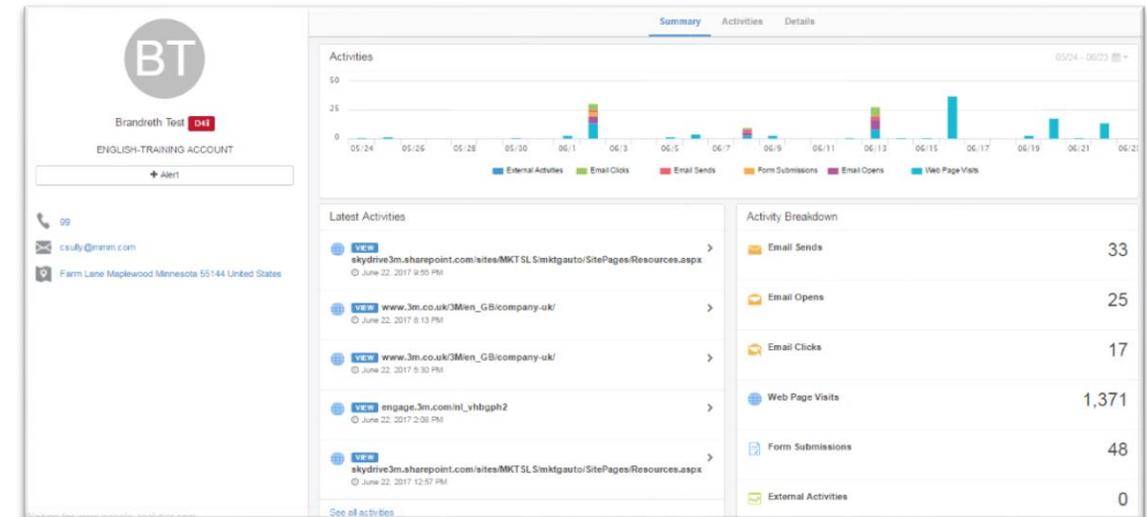
- Introducing Marketing Automation
- The benefits to marketing
- Our 5-stage approach
- Building a global database
- Preference Centre
- Segmentation
- Campaign architecture
- Introducing Eloqua
- Reporting
- The Marketing Automation journey





# What is Marketing Automation?

- Marketing Automation (MA) allows us to collate data around customer profiles and behaviours from across multiple marketing channels into a single global marketing database
- Using this depth of insight, it is possible to assess where an individual is on their personal customer journey with 3M
- We can then deliver the right communication to the right person at exactly the right time
- 3M customer journeys can be activated, driving greater relevancy and better outcomes





# How Marketing Automation works

1

A Preference Centre allows contacts to choose the type of communications they receive

2

Email campaigns can be multi-touch, personalised, highly-targeted and triggered automatically

3

Integrations allow us to acquire contacts submitting social media forms, such as Facebook, directly into the marketing database

4

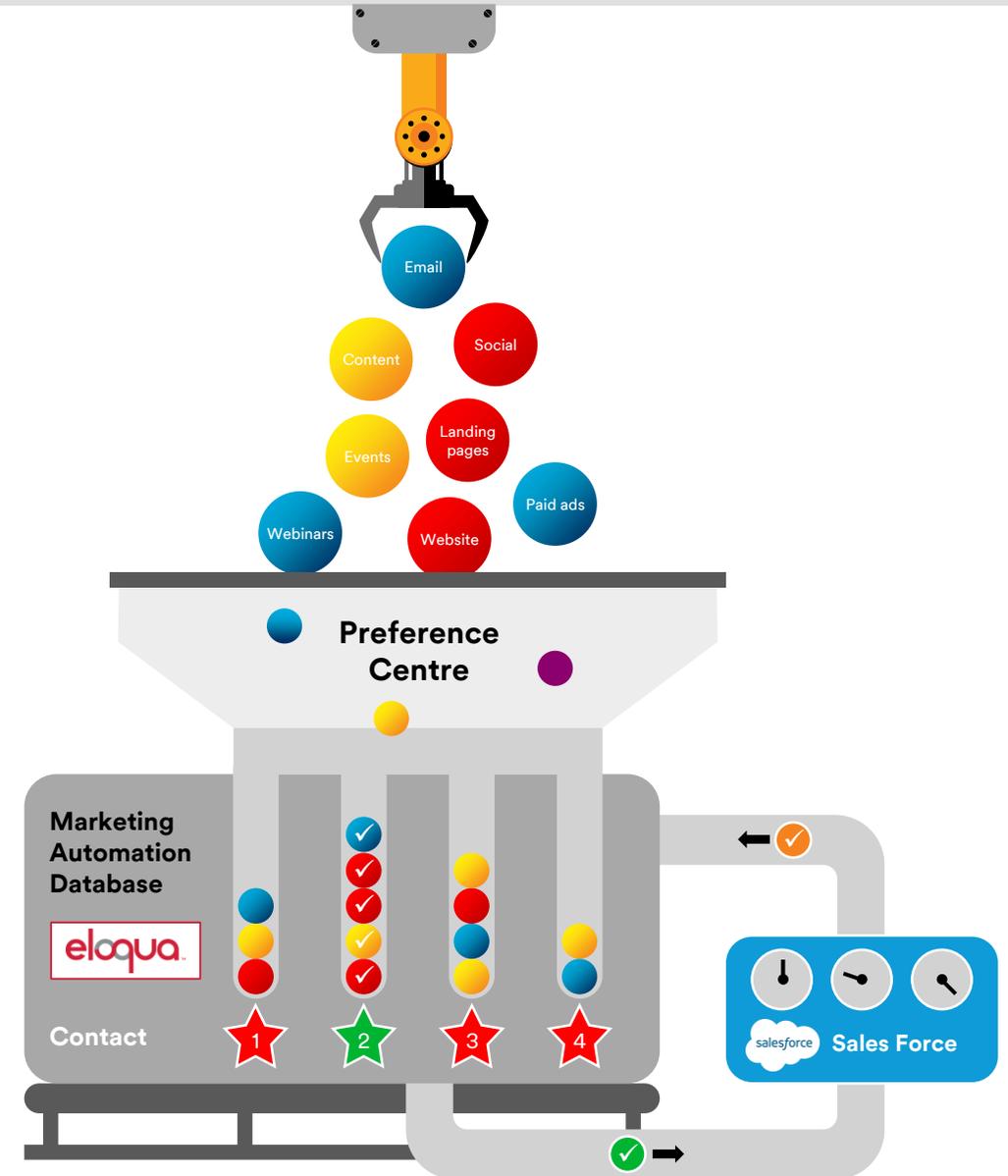
Tracking code and Eloqua data capture forms on all 3M web properties pull in known and anonymous contacts, with a view of web interaction

5

Salesforce CRM integration enables an automated flow of leads to sales with a new level of insight, while customer updates feed back to Eloqua

6

PowerBI reporting delivers an interactive real-time view of campaign success and Eloqua database health





# The benefits to Marketing

## Marketing Automation enables marketers to ...

Obtain a single reporting view across sales and marketing, and tie revenue to campaigns, through automated PowerBI reports and Salesforce campaign dashboards

Create a single view of customer digital behaviour

Identify where a customer is on their journey with 3M

Deliver truly qualified leads to Sales in a timely manner, accompanied by supportive customer insight

Deliver relevant, personalised content to progress customers through their identified journey

Focus on content creation, by eliminating the demands of design and reducing administrative tasks

Automate and share marketing campaigns globally, minimising local re-invention

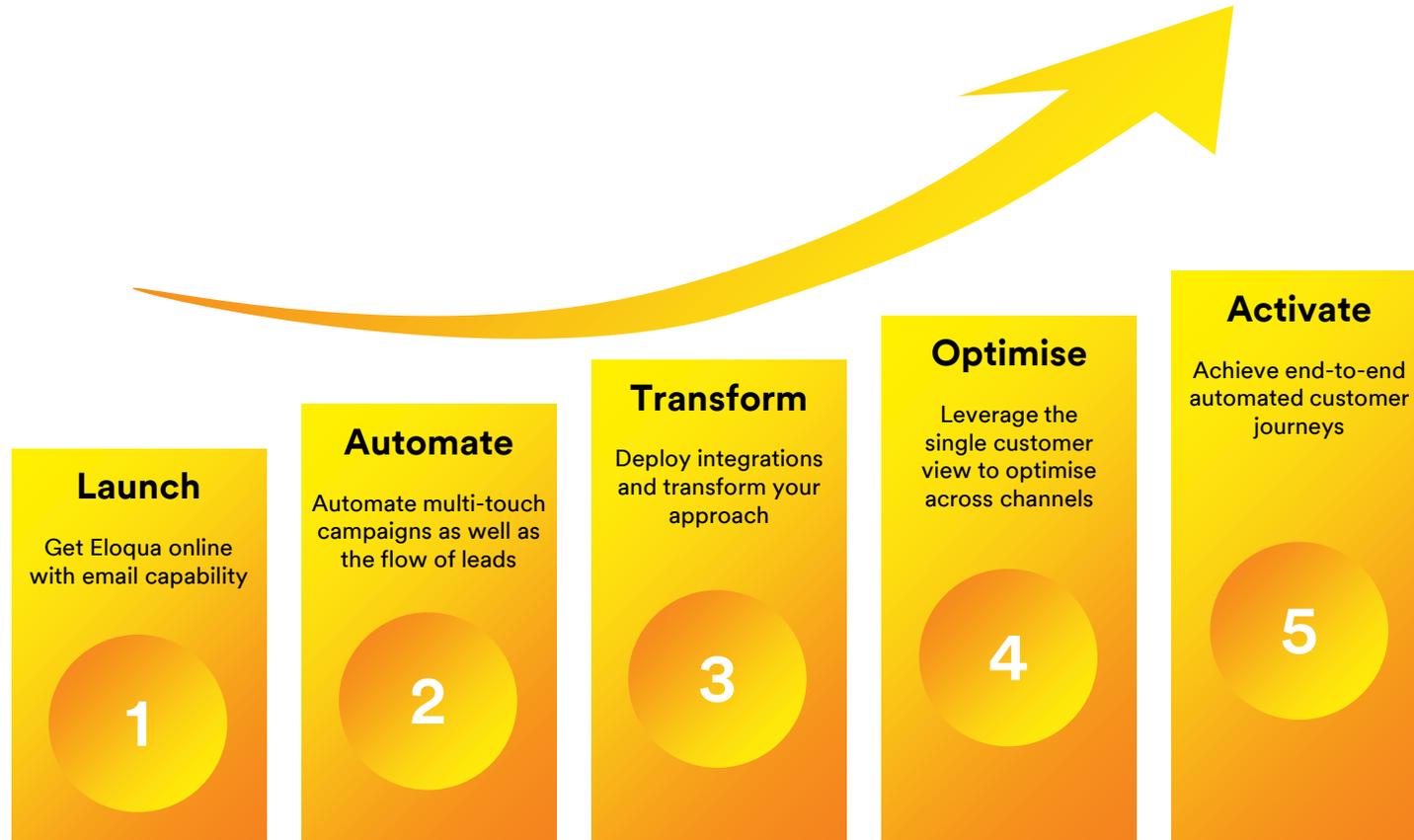
Marketing Automation enables great marketing, but it still needs great marketers

Only through successful marketer adoption can we secure the optimum business return and achieve these compelling benefits





# Our 5-stage approach to deployment



- Achieving transformation through Marketing Automation is not an overnight initiative
- That's why we have a structured approach with clear stages
- Through these defined stages, we have been deploying in a manageable way, while maintaining focus on the end goal of optimising the customer experience and achieving full customer journey activation
- This guide provides an overview of the fundamentals of the Launch stage of 3M's Marketing Automation deployment. The Automate stage is, however now in progress. Please refer to the [Campaign Architecture SmartGuide](#) to learn how to achieve multi-touch automated campaigns, and the [Lead Management Overview](#) for a guide on how to achieve an automated lead flow



# Building a global marketing database

The Preference Centre allowed contacts to choose the type of communications they received

All contact data was captured, stored and managed in a single global marketing database

The MA platform identified a unique individual by their email address

All forms for capturing data for sales and marketing purposes were migrated to MA forms

All new email marketing data was loaded to the system upon collection

Marketing data in the platform was governed according to the latest data privacy guidelines and legislation

Email campaigns sent from 3M only used Marketing Automation contact data

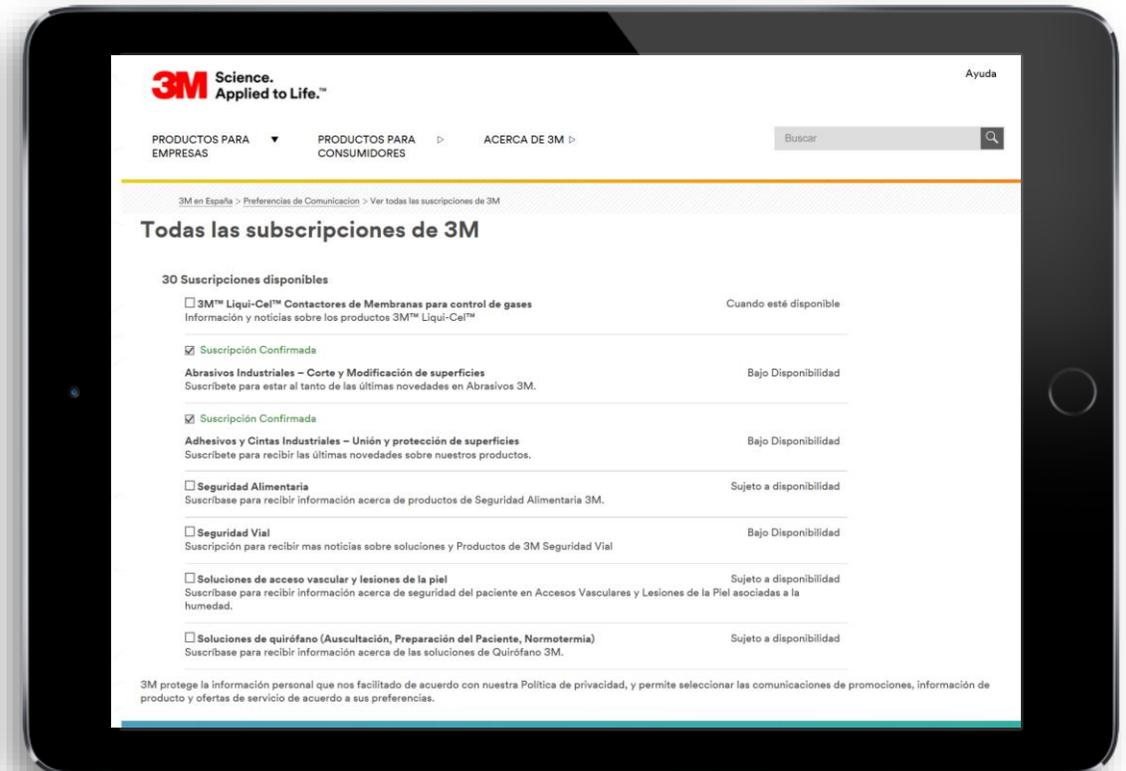
**Through collating all data directly to the MA contact database, we enabled new levels of segmentation, driving email marketing performance and revenue return**





# What is a Preference Centre?

- The 3M Marketing Automation Preference Centre allows individuals to add to/edit their preferences in terms of the types of content we send them
- By allowing our audience to select what types of communications they receive, we can be more personalised and relevant, reduce the rate of unsubscribes by offering an alternative, and improve our brand reputation

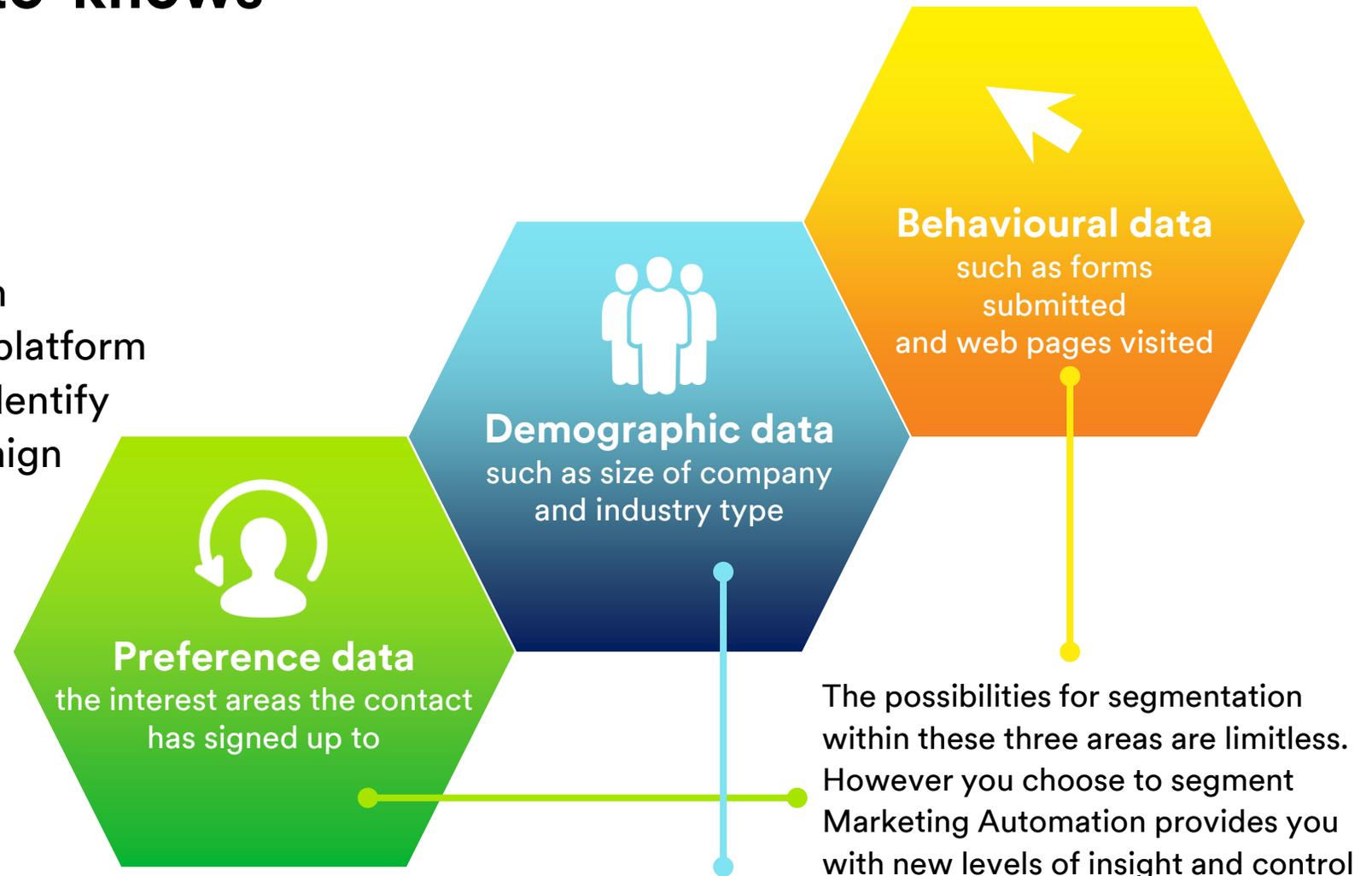




# Segmentation need-to-knows

Using the rich global database, we can segment in three ways

Data will be filtered and campaign segments created within the MA platform using a wide range of criteria to identify the best set of data for any campaign





# Essential need-to-know facts



**MA preferences are called email groups**



**When segmenting contacts for a campaign, email groups are the top level of the hierarchy from which we build a segment**



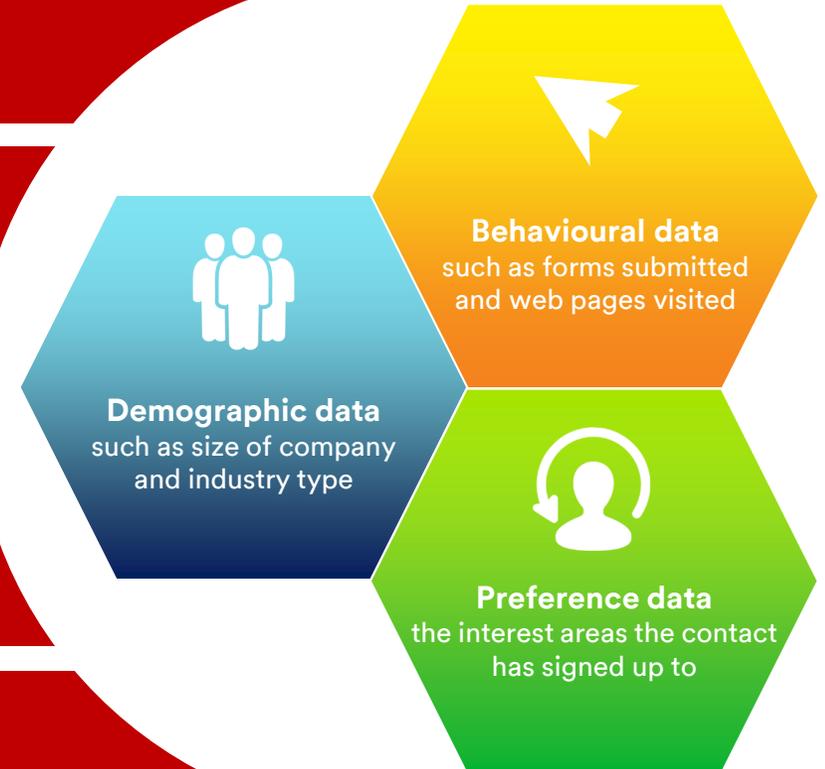
**Within the email group or preference, we can then use a wide range of demographic and behavioural criteria to identify the best set of campaign data**



**3M keeps the groups as broad as possible to allow for greater flexibility around which data can be used for a campaign**



**Data belongs to 3M, not Marketing, and only becomes available to you if contacts have signed up to email groups you use to create a campaign segment**



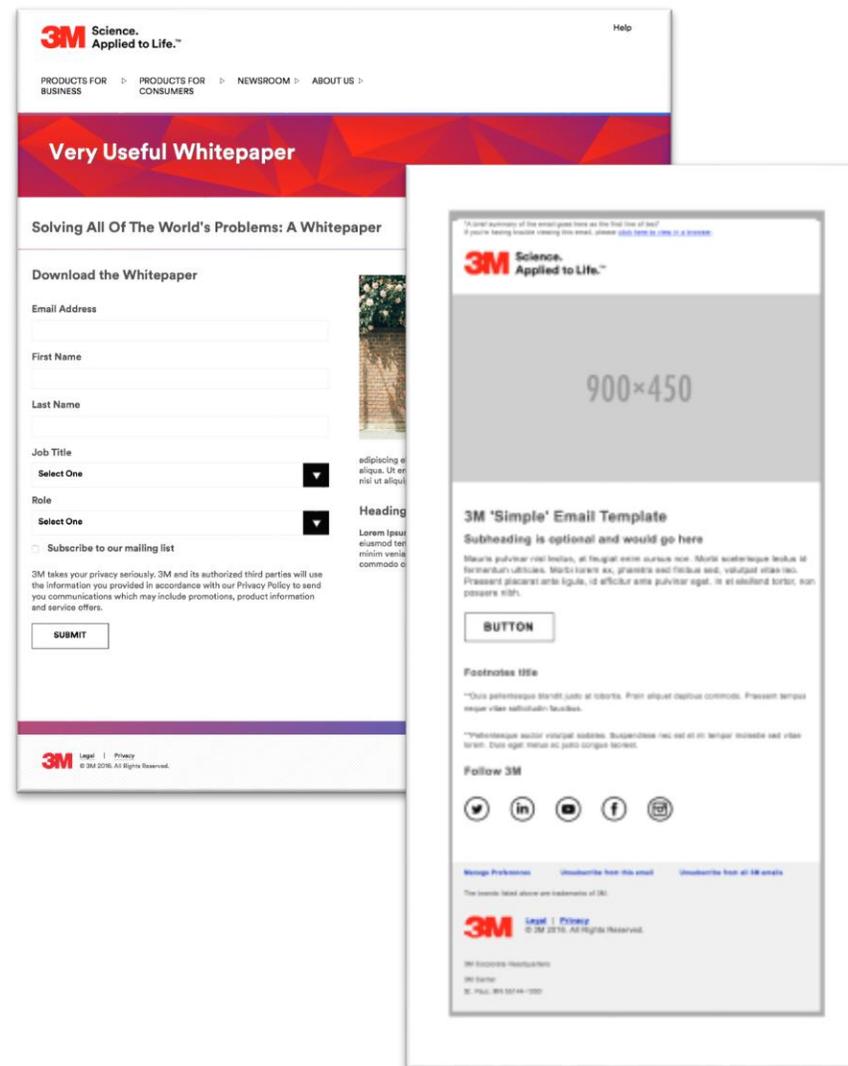


# Eloqua allows us to build assets directly in the platform

Templates can be supplied to agencies and copywriters, enabling them to write content directly into a format that is ready for build

All layouts are device-responsive and based on the Fuze design patterns, creating a consistent visual image of 3M across marketing channels

Now you can focus on the production of compelling content, without worrying about the design and layout





# Essential template need-to-knows



Any combination of templates can be used in a multi-touch campaign



All images are hosted in Celum



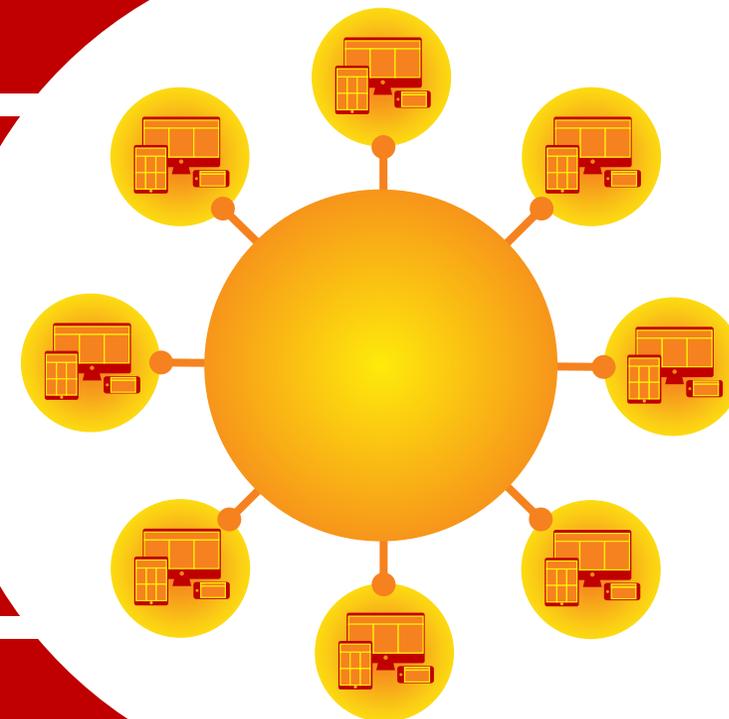
All new contact data and profile data should be collated in MA form templates, and contacts should be given the option to legally opt in to receiving marketing communications from 3M in all such forms



There are over 20 design templates available, all based on global best practices



Promotional landing pages scheduled to be live for less than 12 months and which do not need to be highly searchable and accessible on the Fuze navigation can now be hosted in Eloqua templates



Review the wide range of available email, landing pages and form templates available [here](#)





# Advantages personalisation and dynamic content

- Lets you **personalise** messages with relevant prospect information
- Supports 3M's focus on **building customer relationships**
- Gives our communications the edge over those of competitors
- Enables you to adapt content across the entire **customer journey** or life cycle
- Lets you personalise entire blocks of content and imagery
- Increases newsletter **relevancy** among recipients that are genuinely interested
- Saves customers' time and effort with pre-populated forms



Template uses the Simple layout.



**Tip:**  
Personalised emails get a much higher engagement rate than generic content – think about simple changes you could make, like swapping images based on industry or persona

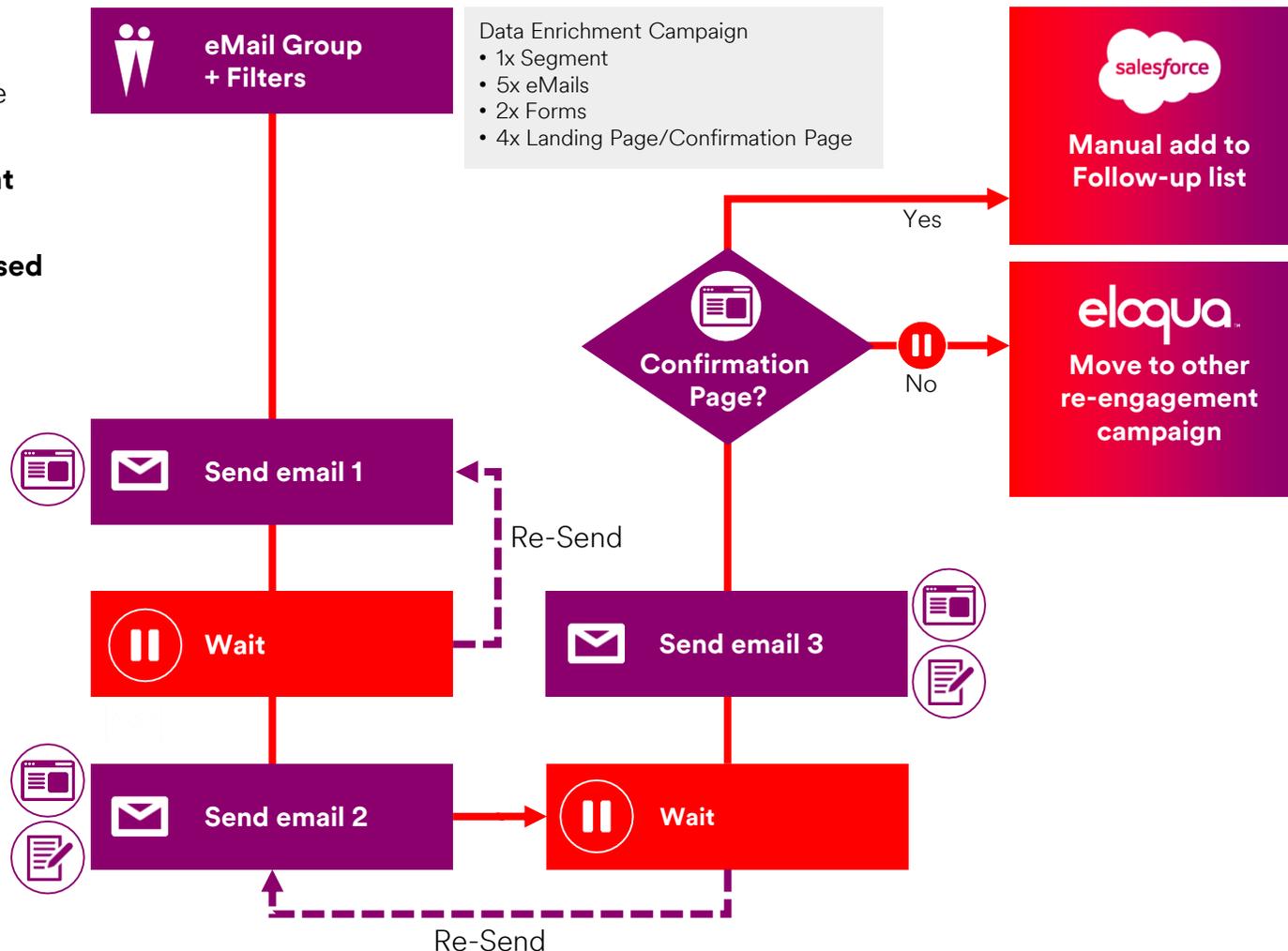
- Useful Links:**
- Campaign Architecture [Playbook Menu](#)
  - eMail, LPs, Form [Template Chooser](#)

**Want to get most of your Campaigns?**  
Start with [Contact Data Enrichment campaigns](#) today – this is key for personalised and dynamic content



# Advantages multi-step campaign

- Utilises the wealth of **data** available to 3M, beyond simple segments
- Engages with prospects at the **right time for them**
- Enables messages to be **personalised** with relevant prospect information
- Reduces spam by only sending **relevant content**
- **Builds relationships**
- **Differentiates** 3M's communications from those of our competitors
- Can follow the entire **customer journey** or life cycle



Data Enrichment Campaign

- 1x Segment
- 5x eMails
- 2x Forms
- 4x Landing Page/Confirmation Page

**Tip:**  
An MA Developer can be consulted at this stage where functionality is used for the first time to ensure full optimisation of the plan

**Useful Links:**

- Campaign Architecture [Playbook Menu](#)
- eMail, LPs, Form [Template Chooser](#)
- [Campaign Checklist](#)

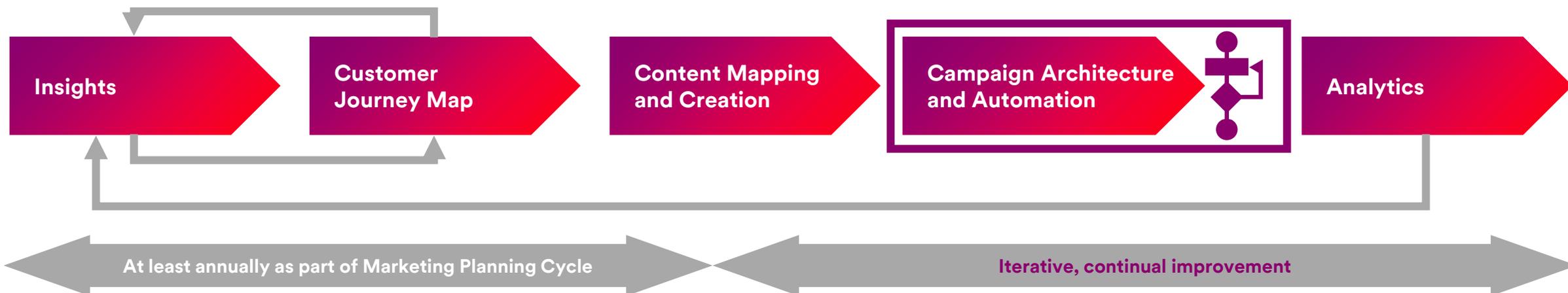
**Want to get the most out of your Campaigns?**  
Contact your local CA/WE Business Digital Leader to kick off ideation for your multi-step campaign



# Why Campaign Architecture?

Leverage the latest Marketing Automation Technologies, Content Strategies and behavioural techniques to help architect **integrated customer experience** that deliver the right message, at the right time, in the right way

In an increasingly complex marketing world, Campaign Architecture empowers 3M marketers to meet the challenge of **delivering automated results-focused**, customer-centric **campaigns**





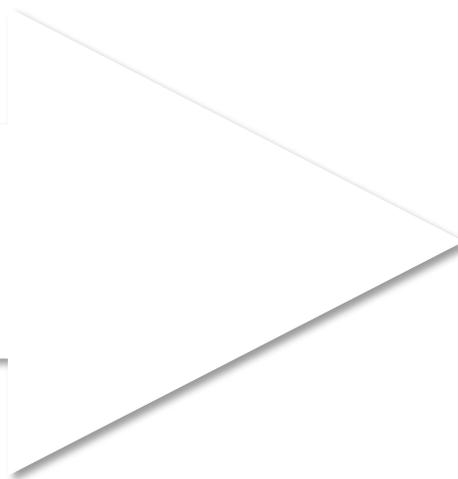
# The Challenge

How do we move...



**FROM**

a campaign idea identified in a marketing plan

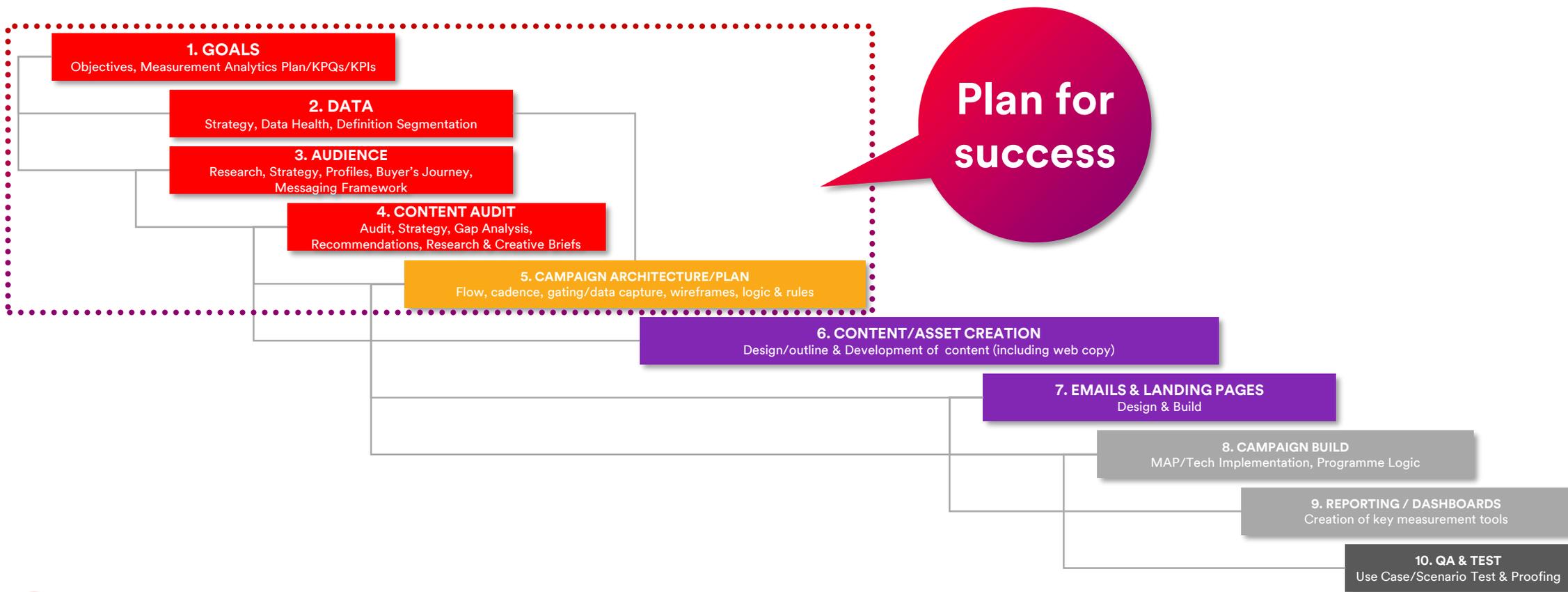


**TO**

a results-focused, successful architected campaign?



# How to approach CA





# Ask yourself what does success look like for your campaign?

“What does Campaign success look like?”

Use: [KPQs Framework](#)

**KPQ Framework – What are you asking of this campaign?**

Goals & KPI's Recommended performance questions and ways to measure, report and gauge success for your campaign

Business Group – Objective: \_\_\_\_\_ Marketing Objective: \_\_\_\_\_

What are you asking of this Campaign?

	1	2	3	4	5
<b>KPIs</b> Key Performance Questions	Are contacts registering for the event?	Are contacts engaged by Webinar theme and content?	Was attendance at the event high?	Were delegates engaged in post-event B2B content?	Missing something? Add your KPIs here.
<b>KPIs</b> Key Performance Indicators (Report/Source)	GTW Report showing number of contacts who have completed registration form	Dashboard showing QR and Click through Rates (CTR). Visits to campaign landing page	Automated report – how many attended versus registrant?		How do I set my Campaign Targets and manage Expectations?
<b>Success Benchmark</b>	3M WE Conversion Rate (online) Events % of contacts vs Inbound List External Benchmark conversion for local event High vs 20% of Inbound List	3M WE CTR: 14.22% CTR: 1.28% External: CTR Benchmark Poor: 1.00% Average: 0.20% Strong: 0.40% Best in Class: 30.00%	3M WE Conversion Rate (online) Events % of Registrant vs # of Attendee		

Step 1

Understand your Data-Health

Use: [DataHealth Dashboard](#) / [Adobe Analytics](#)



Step 2

Make investment decision based on Data to achieve Campaign success

Use: [Predictive Campaign Calculator](#)



Step 3

Analyse & Optimise

How are my ELQ Campaigns Performing by BG or Region?

Use: [eMail Activity Dashboard](#)

Start creating your campaign

Architect your Campaign

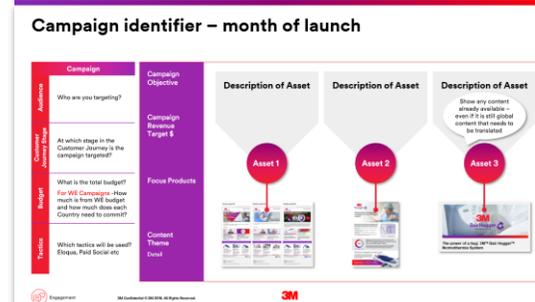
e.g. Use: [CA Playbook-Menu](#)

Play	1	2	3	4	5a/b	6	7	8
<b>Play Name</b>	Contact Acquisition Play	Data Enrichment & Profiling Play	Topic/Persona Nurture Track Play	New Product Introduction Play	a) Webinars* b) Local offline Events Play	Events Data Capture Play	Multi-Step Local Information & Alerts Play	Re-engage non-responders
<b>Core Goal</b>	Data Acquisition for new Contacts into ELQ	To better understand an audience profile using automated and tracked behaviour	To deliver deep-dive personalised messages by gender, profession or area of interest.	Deliver full customer journey messaging through multi-channel.	Known contacts Manage pre event live activities, registrations and post-event messaging	Capture unknown /new leads on site all needs for data acquisition and follow-up	To provide contextualised, timed hyper-focused activation for regional news, promotions or events within 2 to 3 locations.	To re-engage non-responsive customers - targeted email or social media (3 months)

Step 5

Pitch the Plan

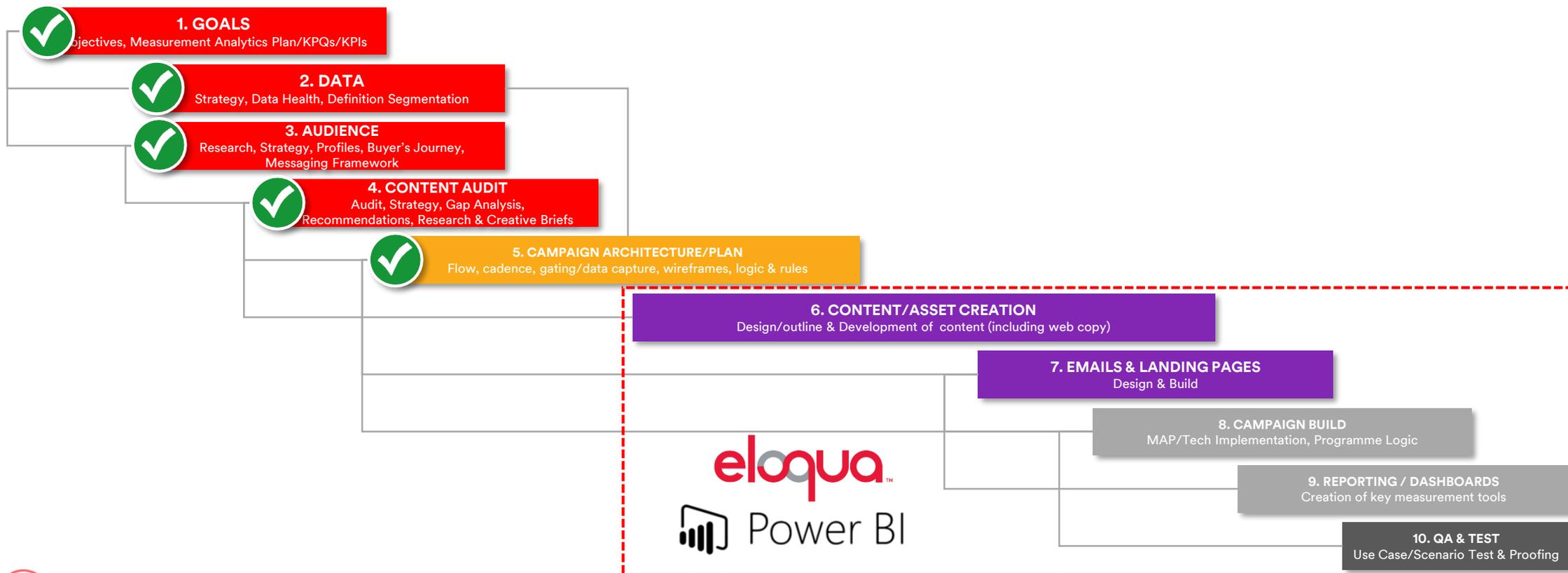
Ask for local \$ WE-approval / Get local Buy-in Use: [DRC Template](#)



Step 4



# Content Creation and Eloqua Build





# What steps are needed to start an Eloqua campaign?

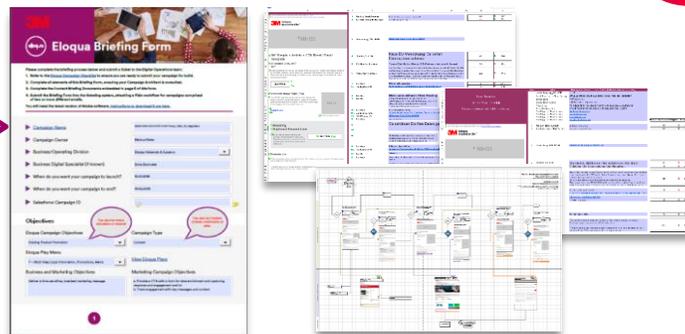
Choose the play and download the information package  
Use: [CA Playbook-Menu](#)

Step 5

Play	1	2	3	4	5a/b	6	7	8
Play Name	Contact Acquisition Play	Data Enrichment & Profiling Play	Topic/Persona Nurture Track Play	New Product Introduction Play	a) Webinar* b) Local offline Events Play	Events Data Capture Play	Multi-Step-Local Information & Alerts Play	Re-engage non-responders
Core Goal	Data Acquisition for new Contacts into Eloqua	To better understand an audience profile into automated behaviour	To deliver deep, personalised messages to contacts on relevant areas of interest.	Deliver full customer journey messaging across touchpoints	Known contacts. Manage and event, registrations and post-event messaging	Capture unknown /new leads on site at events for data acquisition and follow-up	Exploits hyper-localised information on regional news, promotions or events within 2 to 4 hours	To re-engage non-responsive customers - e.g. not opened last 3 emails in 3 months <small>(*to follow up with sales call or Phd or interview)</small>

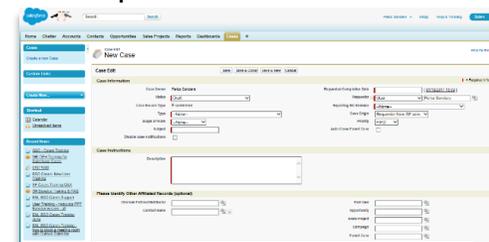
Fill in Briefing Document  
Content/Landing Page/Form Documents  
Adapt Visio Document

Step 6



Open Salesforce Cases Ticket  
Upload all Eloqua Documents

Step 7



Eloqua Operations Team

Reporting Optimisation

Step 10

Start the campaign

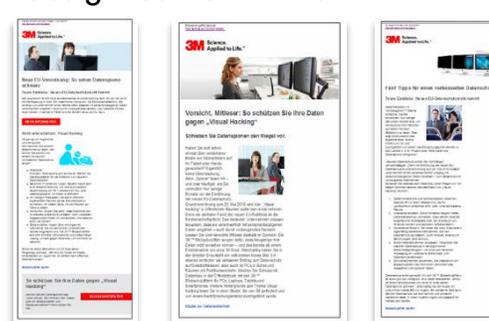
Fill in Business review checklist

Step 9

Could not submit form until all required fields completed?	Y
Form is submitted correctly?	Y
Thank You' page displayed correctly after submission?	Y
Submit triggered emails are generated correctly?	Y
Unsubscribe functionality works as expected	Y
<b>Landing Pages:</b>	
All text is correct with no spellings or grammar errors for the language?	Y
Landing page display correctly and matches requirements in campaign brief?	Y
Check all hyperlinks and buttons to ensure they are linking correctly?	Y
Hyperlinks to non Eloqua or fuzzle sites should be tracked (manage hyperlinks)?	Y
Downloads correct and open in new window (ensure both document name and language accurate)	Y
<b>Campaign Workflow &amp; Reporting</b>	
Is the workflow of the campaign (timings and orders) work as expected?	Y
<b>Testing Sign Off</b>	
Campaign Architect	Name Silvia Bickmeier

Test mails  
Check design/content/links

Step 8





# DRC support, processes & tools for successful Campaign Architecture

## Digital Support for Campaign owner:

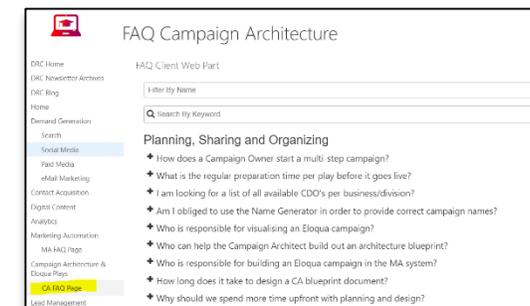
### Your first Point of Contact:

- WE: Business Digital Leader
- Local: Country Digital Leaders & BDS Teams



### CA Smart Session (Recording)

Plan for campaign success: [Smart Session Quick Start Guide \(PPT\)](#) including links to useful Tools



### FAQs – Campaign Architecture

Immediate answers to many CA questions you might have or receive from your colleagues

### They will have access to DRC SMEs:

- Digital Experience Team
- Lead Campaign Architect
- eHub Operations Team
- Marketing Automation Team



### DRC SharePoint

Direct access to useful CA Tools & Guides

Play	1	2	3	4	5a/b	6	7	8
Play Name	Contact Acquisition Play	Data Enrichment & Profiling Play	Topic/Persona Nurture Track Play	New Product Introduction Play	a) Webinar* b) Local offline Events Play	Events Data Capture Play	Multi-Step - Local Information & Alerts Play	Re-engage non-responders
Core Goal	Data Acquisition for new Contacts into Eloqua	To better understand an audience profile using segmented and tracked behaviour	To deliver deep-dive personalised messages to specific segments across all touch-points	Deliver full customer journey messaging across touch-points	Known contacts: Manage one-to-one activities, registered and post-event messages	Capture unknown/ new leads on-site at events for data acquisition and follow-up	To provide consistent, brand hyper-localised information on regional news, promotions or events in 3 seconds	To re-engage non-responsive customers - e.g. not responded to emails for any period

### CA Play Menu

Order from the Play-Menu and architect your individual Play-Program





# New platform – new processes

New processes have been developed with the launch of Marketing Automation to allow us to develop increasingly engaging and effective campaigns in the most efficient manner possible



We now have a **Campaign Briefing Checklist** - this is designed for use by campaign owners to help them check whether they are ready with all information required to start the briefing process



The **Eloqua Briefing Form** guides you through what information to collate and provide when you submit your ticket for a campaign build



A **Campaign Development Process** takes campaign owners step-by-step through the approach to developing, building and launching effective campaigns with MA



Clear **Lead Times** according to the Play selected - show how long to allow for your campaign to be successfully produced



Consistent **Quality Assurance Testing Procedures** are used by all qualified developers using the platform, giving you the reassurance that your campaigns are in safe hands



The **Data Load Process** provides the knowledge of which data to load to the MA platform, how, and what your contacts will experience upon load to our database

All processes are stored here





# Campaign development need-to-knows

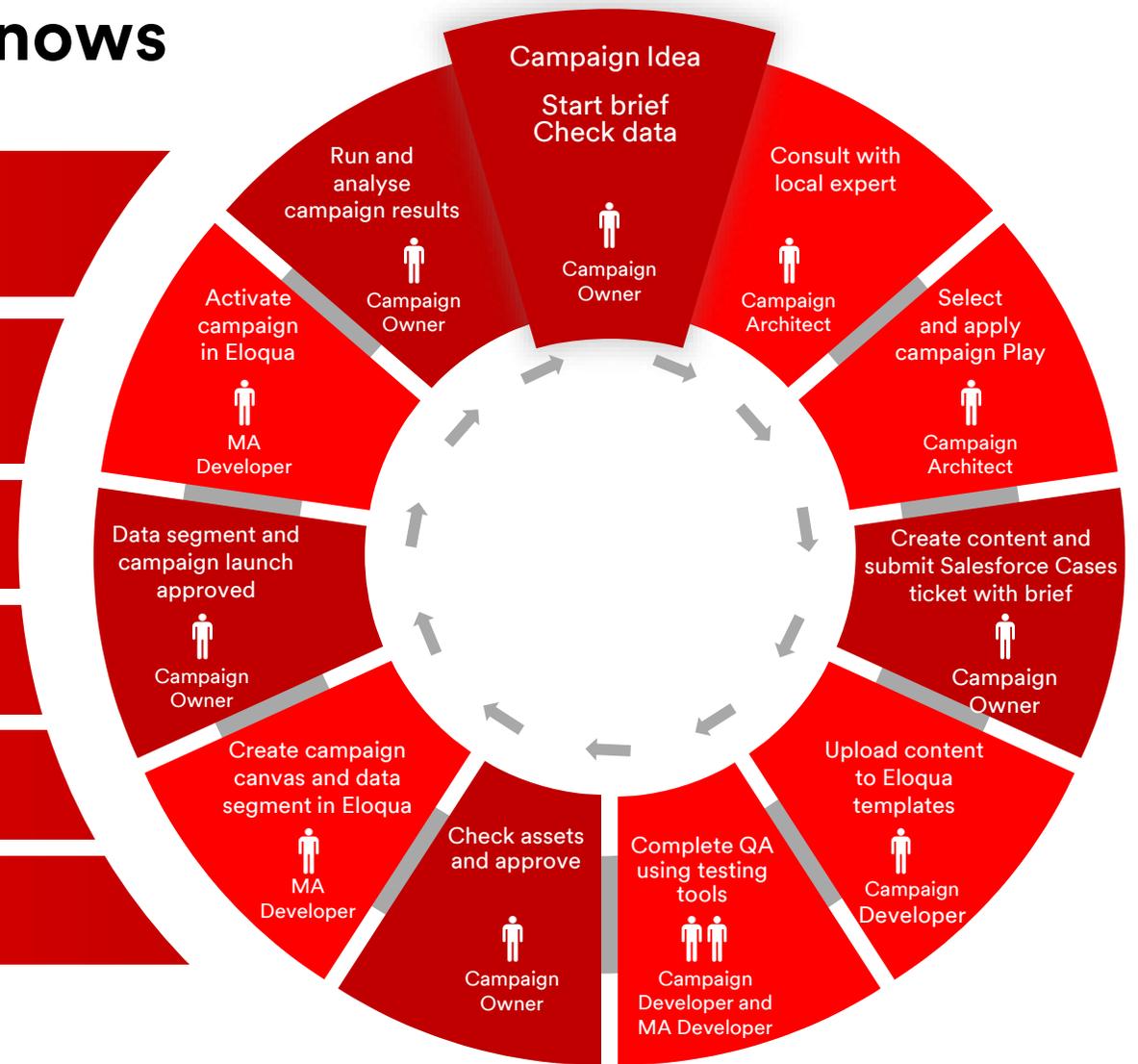


The campaign development process outlines the key actions and steps in the process of creating successful campaigns using MA



Key process elements include:

- Developing the campaign idea, objectives and measures of success
- Visualising the campaign workflow and developing compelling content
- Building and testing the campaign within the MA platform
- Activating the campaign and reviewing engagement results





# Reporting



Analysing Marketing Automation campaigns is essential to ensure we repeat campaigns with a positive result, proactively alter campaigns that were not successful, justify future marketing budget, and share learnings across businesses

PowerBI delivers a range of highly-visual campaign effectiveness dashboards that feed from a live view of Eloqua data. Providing the ability to filter the view by country, division, or even down to a specific campaign, 3M West Europe's bespoke PowerBI dashboards allow you to assess marketing success at all levels and in real-time

To obtain access to PowerBI dashboards, please contact your aligned Country Digital Lead or Business Digital Lead



# Access PowerBI to review data for the campaign

## Step 1: Review PowerBI Dashboard



Campaign Owner

- Access PowerBI to review data for the campaign
- Review snapshots comparing to similar past campaigns for the division, or the same campaign in other countries

## Step 2: Identify Actions



Campaign Owner



Campaign Architect

- Compare performance against the campaign brief
- Consult for shared insight
- Identify an action plan to apply to future campaigns

## Step 3: Implement Actions



Campaign Owner

- Implement any actions identified in step 2 for your next campaign
- Use the insight gained from campaigns as input for the marketing planning process
- Share key learnings with other marketers





# The Marketing Automation journey

Successful Marketing Automation cannot be achieved by simply turning on the platform. Marketing Automation is very clever, but it is a technology. Alone it cannot be transformative

A process of evolution and refinement is needed, which takes time. Rush this process and Marketing Automation won't fulfil its potential of transforming the business

This guide has outlined how we will achieve the Launch phase

Our current focus is progressing our journey through Automate and starting Integrate - driving campaign architecture through the Plays to new levels of sophistication, turning on lead management to flow leads automatically from Eloqua to Salesforce, and connecting external platforms to Eloqua to create an ever more connected single, intelligent marketing database





# Key contacts

If you need help setting up a successful campaign or have any questions please contact us, you can find all the relevant contacts at the link below

