

lead change + build a marketing powerhouse



barbara moreno

Allied Universal® / Vice President,
Marketing



brittany trafis

Fathom / Executive Vice President,
Digital Marketing

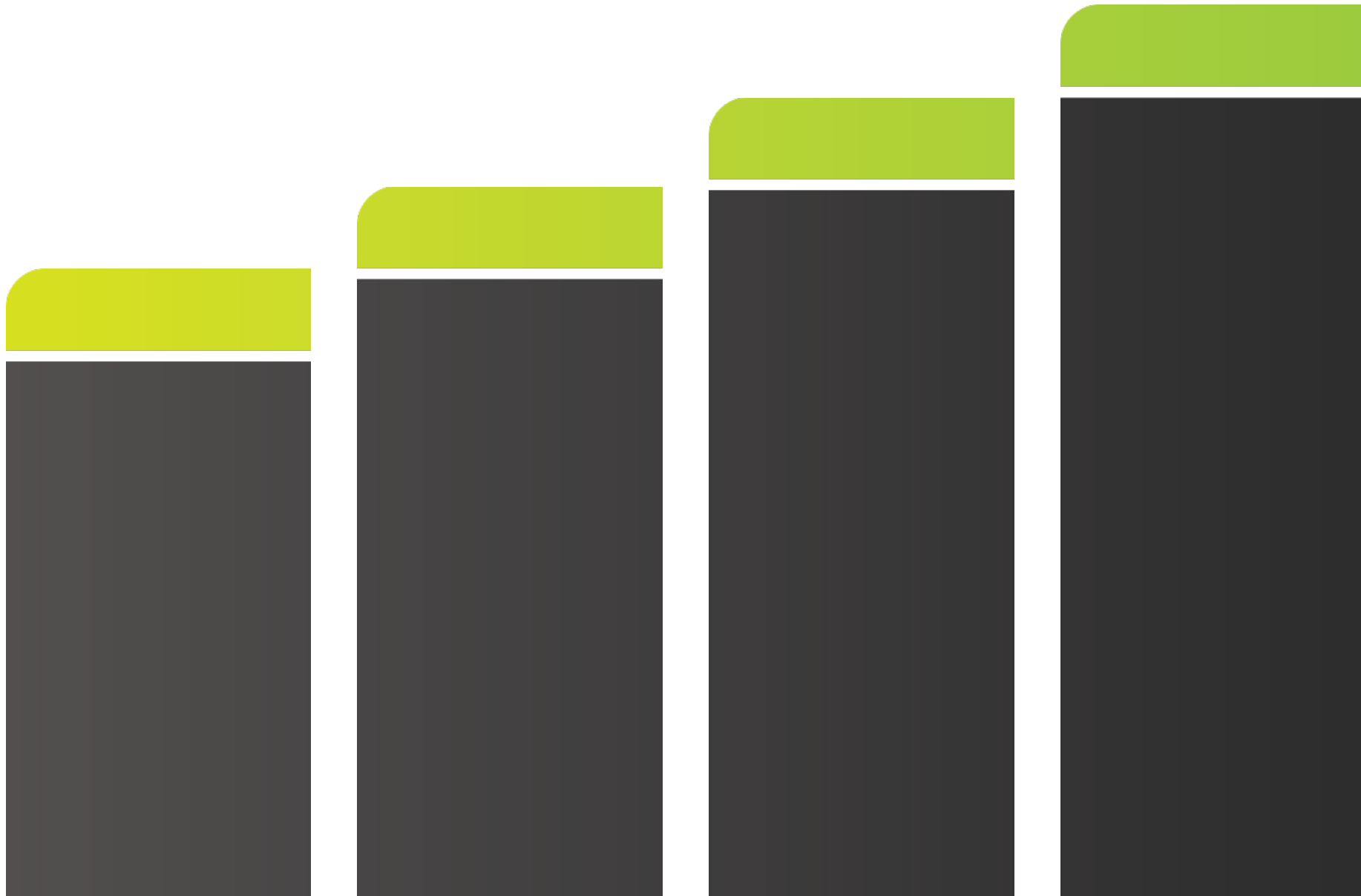


the challenge

Marketers have limited budgets and big expectations to show value. This is especially true during times of economic uncertainty.

But a smaller budget doesn't have to mean smaller business impact.

maturity curve



our vision to overcome the challenge

The collective team started with **little to no KPIs** or foundational marketing strategy.

Roles and priorities for both the Allied Universal® team and agency partners were largely undefined.

Allied Universal® and Fathom came together as **one team** to establish clear roles, KPIs, and core values to build a foundation together.

This couldn't be done solely with an in-house team.

Instead, Allied Universal® and Fathom partnered together to supplement the skill sets of the internal team with **one shared vision** that allows us to measure and achieve their goals.

FOUR STEPS TO MAKE PROGRESS



four steps to make progress



1. Clear vision
2. Find partners
3. Establish goals
4. Define roadmap

set an ambitious, clear vision

step one

We created a marketing vision that stretched the internal staff and agency partners to be best in class (roles, KPIs, core values, understanding of trends, etc.). We went through constant evaluation to create a unified vision.

SET TARGETS

- Identifying KPIs and reporting on them regularly can help you determine if marketing efforts are having an impact.
- Measuring performance allows you to optimize and improve efficiency.
- Favorable outcomes get your team motivated and add value to key stakeholders.

PROVE ROI

- A few years ago, we were deploying a lot of tactics and spending money, but not creating value in terms of ROI. We were doing a little lead gen and had scattered priorities.
- Now, we have a more strategic focus prioritized around business goals, a robust lead management program, and an eye on ROI with measured and tracked activities. The internal team is excited to see how they are supporting business goals.

STAKEHOLDER MANAGEMENT TIP:

Speak their language! Be clear on what your vision is and how it aligns with business goals.



clear vision

find partners

establish goals

define roadmap

find partners for the future

step two

After setting our vision, we evaluated whether our current partners were aligned with both the vision and our core values. We removed partners who weren't a good fit.

- As marketing leaders, having strong agency partners is essential to help shape the vision of where to be in one, two, or five years down the road.
- Fathom's guidance helped Allied Universal[®] progress lightyears ahead of where they were.

- Clear communication was key, as we had to ensure the internal team and agency partners are on the same page, working together to show value in new ways besides ROI.

- What defines a partnership for the future?
 - Being aligned and honest partners, indicating where they need to lean in to support with each other's strengths
 - Constant feedback on where we are and how we are feeling on both teams
 - All aligned on the same goal and vision to avoid feeling blocked or confused on each other's roles



clear vision

find partners

establish goals

define roadmap

establish clear goals

step three

When setting benchmarks, be aware of trends and have a clear understanding of success metrics. Start small and plan for constant evaluation and optimization.

- Look to emerging trends and test into new tactics. Embrace change in pursuit of customer engagement.
- Simple things can deliver a strong response, and trying new things with the current trends can help you figure out what works.

- Fathom allowed the Allied Universal® team to see beyond the short-term with trends, benchmarks, KPIs, and an eye on what's coming next.



clear vision

find partners

establish goals

define roadmap

create a definitive road map

step four

To move from current state to best in class, we defined a marketing maturity curve with an eye toward best in class. This can be overwhelming at first, but together we created an intentional approach to achieving our goals. This helped us set our annual focus, and from here we can pivot or evolve our roadmap as we collaborate.

know current
state + goals

grow your
people

measure +
optimize

show
ROI



clear vision

find partners

establish goals

define roadmap

marketing automation maturity curve

BASELINE

- Sender driven batch and blast email campaigns
- Minimum data collection on leads (email address, name, company)
- Limited to no integration with MA platform

DEVELOPING

- Automated email campaigns across a lead's lifecycle
- Basic lead qualification rules through email and web activity
- Introduction of segment messaging
- Creation of logic to normalize and clean data
- CRM and/or CDP integration

EMERGING

- Automated personalized lead nurturing across email and SMS channels
- Utilization of lead scoring and routing model
- Source attribution on ROI
- Use of progressive profiling for additional data collection
- Integration of event, webinar, and social platforms

LEADING

- MA platform as a true marketing hub
- 1:1 messaging across channels based on demographic and behavioral data
- Marketing campaign attribution on ROI
- Use of data appending to fill gaps in lead profile
- Integration of online and offline channels and data visualization platforms



key takeaways

The teams completely transformed where Allied Universal[®] was five years ago, but it wasn't an overnight success. There were little transformations each year that brought in new learnings and insights. Multiple years of these little transformations made a huge change overall.



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