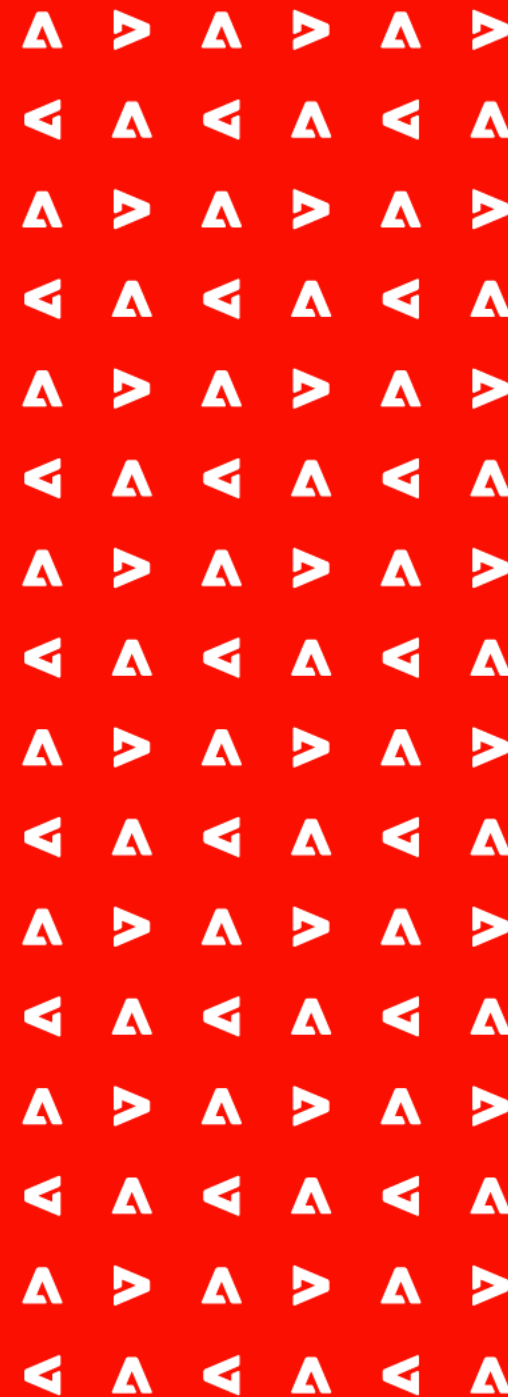




# What a Year: 2020 Lessons from Marketo Engage Champions

Jenny Robertson, Enrico De Leon, Christina Zuniga

December 3, 2020



**Jenny Robertson**  
**SVP, Technology Solutions & Architecture**  
**ANNUITAS**





# Three Take-Aways from 2020

1. Digital Transformation is more important now than ever
  - Why and Best Practice
2. Marketing Automation has an important place in Digital Transformation
3. Ways to Navigate Job and Career Mayhem



# Jenny Robertson

## Senior Vice President, Technology Solutions & Architecture

### ANNUITAS

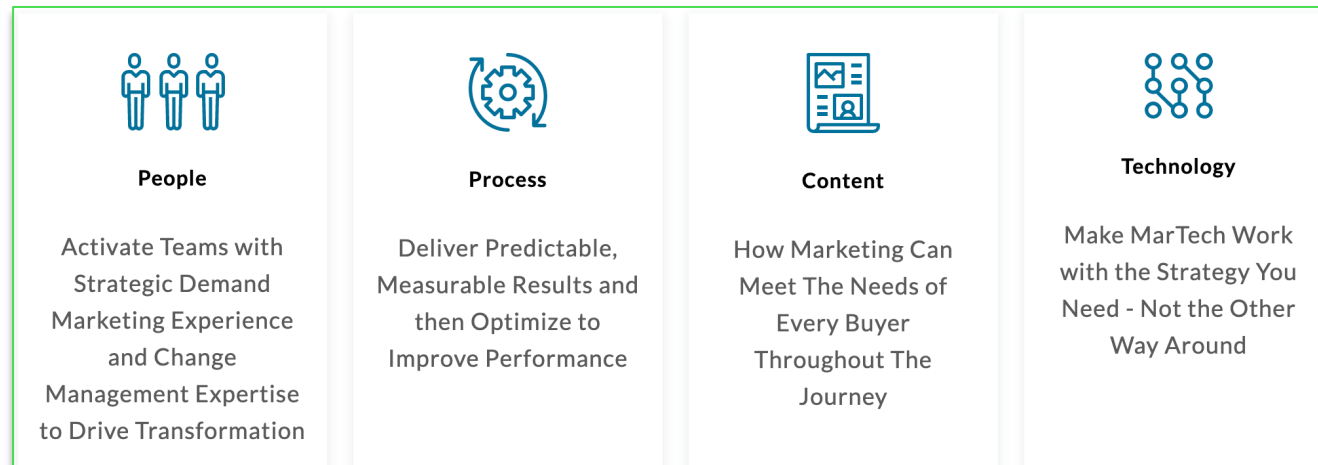


# 2020: Strategic Marketing – Digital Transformation is Important

- Digital Transformation is more important now than ever
  - 2020 has transformed everyone into a digital world
  - People are virtual more than ever before – both inside and outside of work
  - Some are overloaded and overwhelmed with this new virtual world – which means when you get your shot, it better count!

# 2020: Strategic Marketing – Digital Transformation is Important

- Digital Transformation Best Practice: Strategic Demand Marketing State guides it
  - Strategic Demand Marketing orchestrates customer engagement and provides lift to pipelines in a sustainable, perpetual way by aligning people, process, content, technology and data around the buyer
  - A strong strategy backed with a lead management foundation keeps data and systems aligned is key to digital demand transformation



# 2020: Strategic Marketing – Digital Transformation is Important

- Digital Transformation Best Practice: Strategic Demand Marketing State guides it
  - The right content, at the right time, in the right place so that people receive valuable information when they are ready – not when you are
  - Maintaining a consistent experience across channels and buying stages successfully guides prospects through the funnel
  - Perpetual dynamic personalization works across all technology platforms and channels to create the most personalized experience possible



# 2020: Strategic Marketing – Digital Transformation is Important

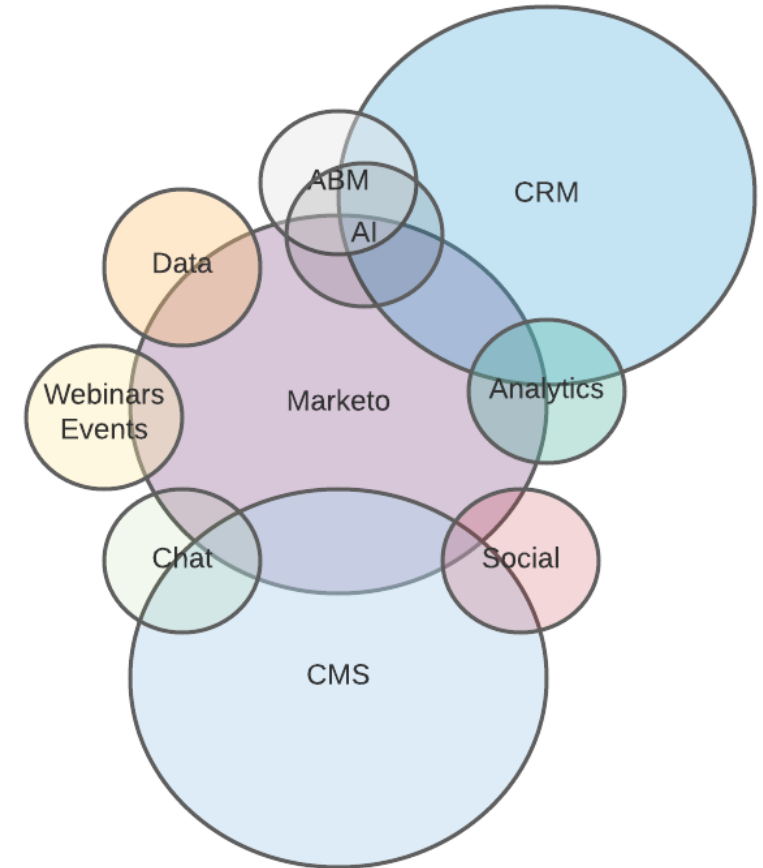
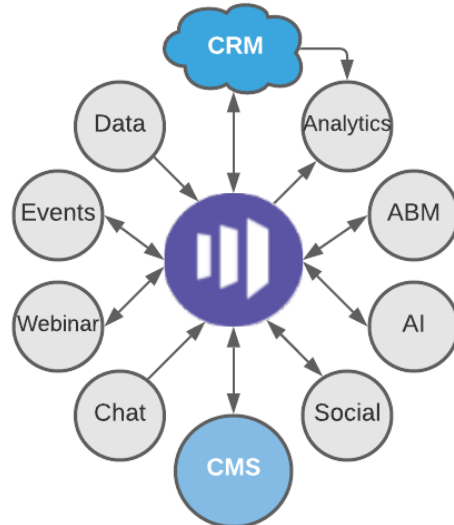
- Digital Transformation Best Practice: Yes, it's even nurture (no – not a drip campaign)!
  - Leveraging MarTech strategically means running strategic dynamic nurture programs
  - A dynamic nurture program segments, targets, and personalizes your audience based on multiple data inputs and allows multiple people to be in the exact same nurture program and yet receive different versions of the same email





# 2020: Strategic Marketing – Marketo's Place in Digital Transformation

- Is your MarTech stack orchestrating buyer engagement and improving the customer experience to impact revenue? Or is it just blasting outbound emails?
  - In a strategic demand marketing state, a strategy that centers around the buyer's engagement and experience drives the technology
  - Marketo is the key to drive a connected and personalized digital experience across the buying journey



# Navigating Job and Career Mayhem as we roll into 2021

- Diverse skill sets allow you to adapt and be a stronger leader
  - Never stop learning or training
  - Don't forget transferable skills
  - Translate marketing and technology into business needs
- Be a hand-raiser
- Be a mentor, find a mentor
- Stay Positive
- Personal brand

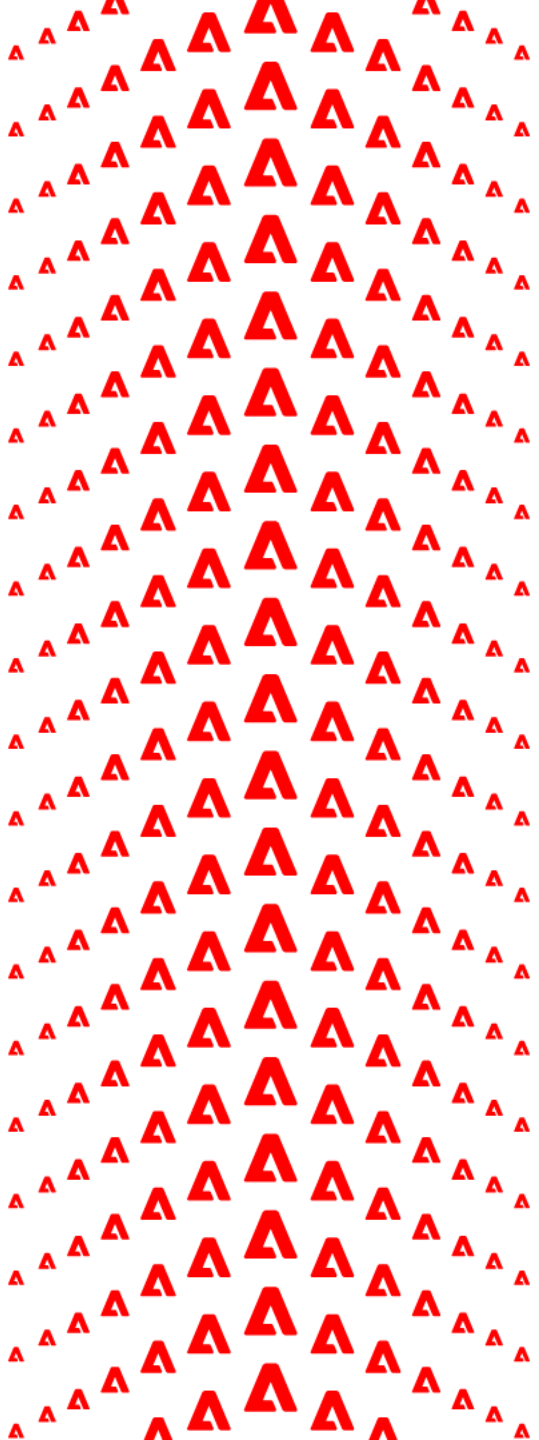




# Enrico de Leon, Jr.

Senior Associate, Digital Marketing

Altisource



# Strategic Planning and Scaled Execution for 2021

- Gather all of your data
  - Organize your efforts
- Re-calibrate your organizational goals
  - Compare your historical results from 2019 against 2020
  - Revisit KPIs and ensure they objectively measure success
- Take inventory of your systems
  - What works, what needs to be revised to accommodate for new strategies – stress test your scenarios

KPI	2019			2020		
	Goal	Actual	%	Goal	Actual	%
Leads Generated						
MQLs						
SAL						
SQL						
Funnel Velocity						
Conversion						
Campaign Metrics						
Budget						
ROI						
Top 10 Lead Sources						
				2021		
				Goal	Actual	%

# Fine-tuning Yourself

- Sharpen your skillset
  - [mugs.marketo.com](https://mugs.marketo.com)
  - [Marketing Nation](#)
- Make new friends (even if they're virtual)
  - Meetup App
  - Houseparty
- Hobbies for sanity

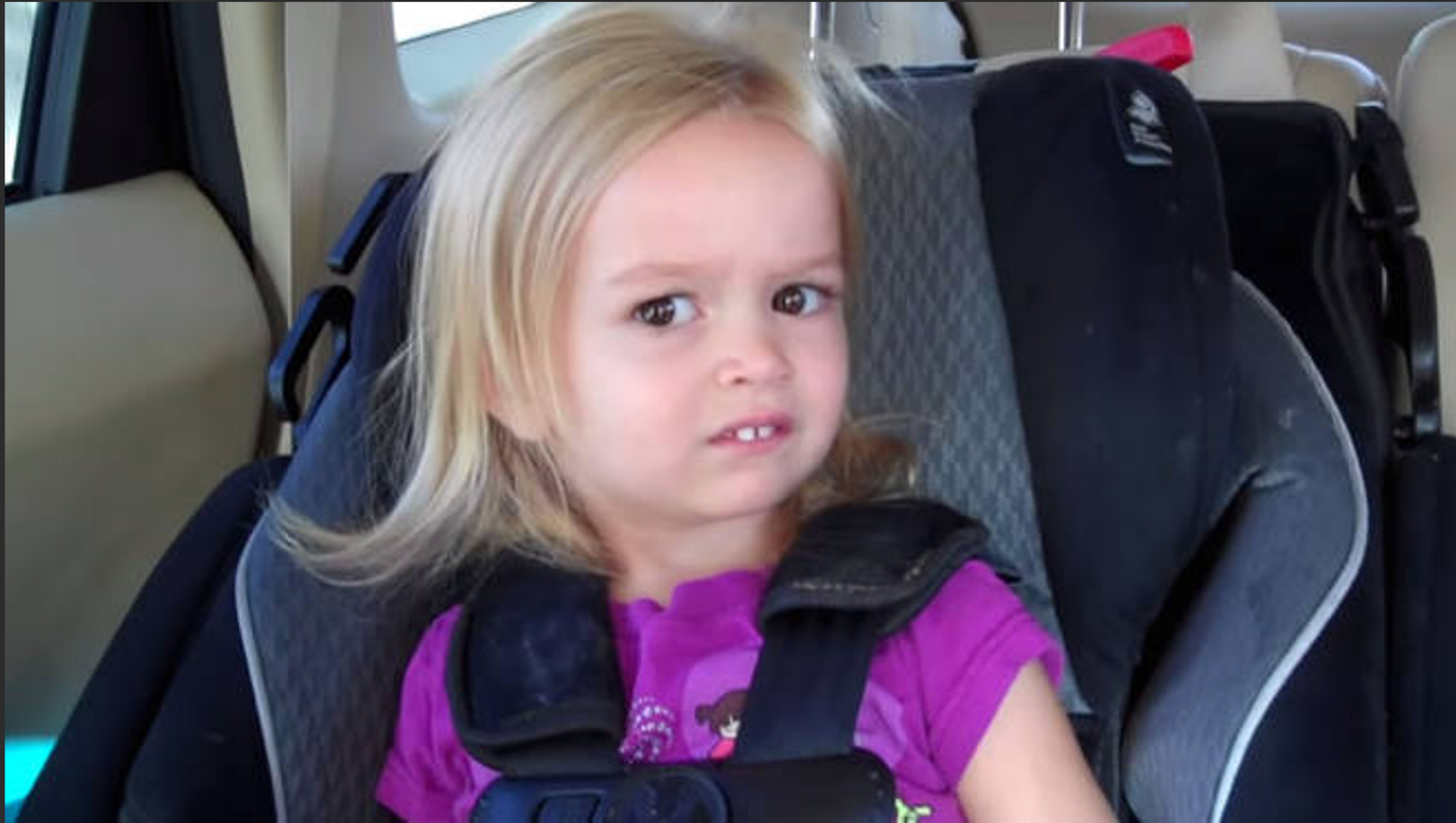


# Christina Zuniga

Senior Marketing Operations Manager,  
Databricks



**When we realized how often we touch our faces...**



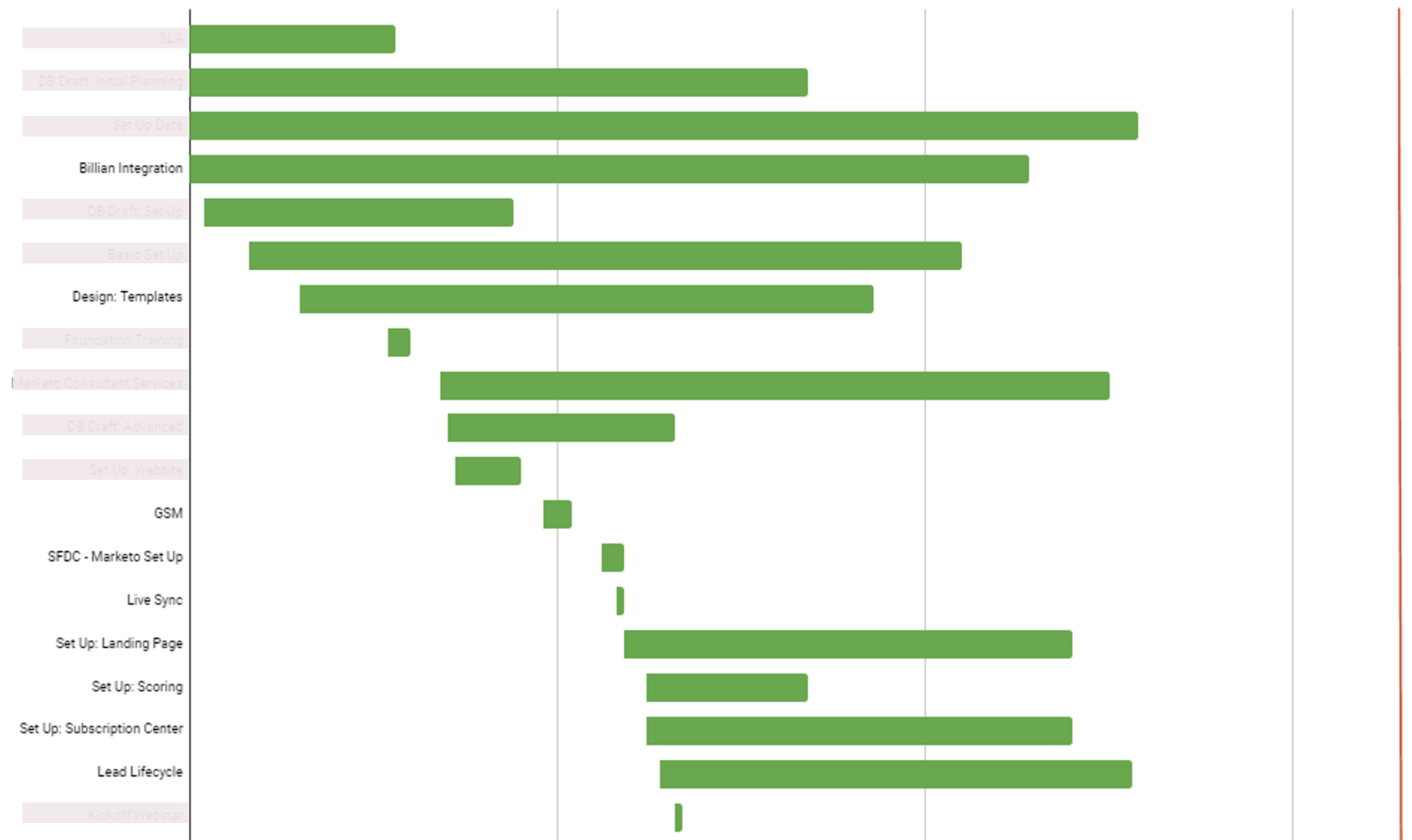
# 2020 Goals

- Reactive → Proactive
- Resolutions:
  - Where possible, plan it out
  - As you build, document
  - Execute well, not just adequately



	Q4	Q1	Q2				
	December	January	February	March	April	May	June
Phase 1							

## Marketo Implementation - Phase I



# The Roadmap: Professional

- Find the destination
- Honestly evaluate where you are today
- Build major milestones

## Key results (3)



Form strategy used live on one type of landing page (ex: webinar, field event, etc)

Owned by [Christina Zuniga](#)



Dedicated IP is live

Owned by [Christina Zuniga](#)



Blog bus is live and gathering subscribers

Owned by [Christina Zuniga](#)



# The Roadmap: Personal

Life Plan	Goal	Prepared to Sacrifice	By When	Required Actions
What Job Do You Want to Have?	Get a promotion	Time	2020	Make a case based on work / projects from 2019
	Be a mentor for another person	Time	2021	Find someone interested in becoming a Marketo Champion Request a Toastmaster formal mentee
What Career / Life Experiences Do You Want to Have?	Present in front of a group of at least 100		2021	Apply for Adobe Summit speaker Give at least 5 speeches at Toastmasters groups
	Retire before 60	Fun / Vacations	2048	Aggressive retirement plan Create a monthly budget See financial advisor FIRE podcasts
What Do You Want to Own and/or Achieve?	Learn basic conversational Spanish		2021	Duolingo 5 days a week Practice when possible
	Become a leader in a non-profit	Time	2021	Find organization who have needs that match my skills

# 2020 Reality

- Unanticipated software purchase: in person event platform
- Adobe Summit (and all other conferences) go virtual
- Turnover



# Finding the good in the bad



- Biosphere 2 taught us that adversity encourages strength



# 2020 Reality

- Unanticipated software purchase: in person platform  
New roadmap → turning in person event platform into virtual event platform
- Adobe Summit (and all other conferences) go virtual  
[Step 1 to getting onstage](#)
- Turnover  
Lead hiring efforts  
Use case for promotion



# Lessons from 2020

- Reactive → Proactive Adaptive
  - Flexibility is key
- 2020 isn't over yet!

Life Plan	Goal	Prepared to Sacrifice	By When	Required Actions
What Job Do You Want to Have?	Get a promotion	Time	2020	Make a case based on work / projects from 2019
	Be a mentor for another person	Time	2021	Find someone interested in becoming a Marketo Champion Request a Toastmaster formal mentee
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What Do You Want to Own and/or Achieve?	Learn basic conversational Spanish		2021	Duolingo 5 days a week Practice when possible (Guadalajara, Santa Cruz)
	Become a leader in a non-profit	Time	2021	Find organization who have needs that match my skills

