

Marketing Automation Glossary of Terms



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GLOSSARY OF TERMS

AUTOMATION CONCEPTS

Campaigns/Reporting Management—A process within marketing to develop, deploy, manage and measure programs that target individuals or groups. The scope of efforts includes segmenting data, offer development and campaign execution. These efforts constitute campaigns and result in funnel, pipeline, retention or reputation benefits. The ongoing performance and results of campaign elements are monitored and analyzed against objectives.

Content Management—The secure storage, retrieval and use of on-line marketing content that includes video, audio, text, animations, photos and other web-based content. These assets often are used in campaign or community efforts. They may be static, interactive, or dynamic, and can include both physical media and electronic content.

Customer Service Automation—The use of technology and services to enable service organization-led processes and activities. These activities are useful primarily in the consideration, purchase, and use phases of the customer life cycle. The technology and services focus on delivery and retention activity and are intended to convert customers into advocates. Customer service automation is broken out into products and services that touch on any of five areas—Trial, Acquisition, Implementation, Usage, and Optimization.

Data Management—The storage, organization, retrieval and analysis of information gathered and managed by automation technology and services. This data can be stored in automation-specific repositories or central repositories that cover additional organizational requirements.

Deliver and Fulfill—The use of content, personalized contact information, offers, and incentives in response to a query, request, activity participation, or dialogue. An automated process must complete delivery and track access and use of the information.

Execute and Engage—The performance of outbound activities that leverage a variety of media, including print and online, through direct and indirect sources. These activities make contact or create an impression on an individual, buying team or organization. These activities lead the target audience member from initial awareness to becoming engaged with a measurable degree of interest.

Interaction Management—A combination of processes, contact capabilities, deliveries, real-time responses, tailored dialogues, reports and analyses to facilitate, conduct, complete and score a specific activity or series of activities. Those activities enable direct interaction between a vendor/partner and prospect, buyer, or customer. Management must include the ability to attach a score to specific content types, activity participation, events, demographic or psychographic attributes. Scoring must enable routing, aging analysis, and point expiration.

Lead Management—The effort to generate new business activity stemming from outbound marketing and responses from individuals, buying teams, and organizations. Responders are engaged, qualified, and validated. At that point, a specific opportunity is identified, targeted and pursued. Management can involve prioritization, segmentation, validation, follow-up, nurturing, and pursuit.

List Management—The use of tools and analytics specific to the prioritization, segmentation, organization of lists or audience types in different stages of pursuit, engagement and retention. This includes segmentation and customization of approach. The content and context of the customized approaches are based on the demographic, psychographic, behaviographic and learning attributes of one or more target audiences.

Manage/Report—Overall, ongoing administration of the funnel to coordinate, consolidate and tune various activities, resources, and elements during the awareness and engagement phases.

Marketing Automation—The use of technology and services to enable marketing-led processes and activities, primarily in the awareness, interest and advocacy phases of the customer life cycle. The technology and services focus on funnel activity to convert prospects into buyers. Marketing automation is broken out into products and services that touch on any of five stages: plan/budget, prioritize/target, execute/engage, deliver/fulfill, and manage/report.

Marketing automation technology and services fall into one of seven areas: resource management, data management, content management, interaction management, list management, lead management, campaigns/reporting management.

Plan and Budget—The coordination of activities to evaluate campaign alternatives in terms of scope, reach, investment requirements, and resources. A holistic view enables comparison of alternatives using shared definitions, cost structures, weighting, and other evaluation criteria for effective discussion, review, and approval.

Prioritize and Target—The management of campaign activities to narrow larger audience into a target audience through culling past participants, segmenting industry data, determining the status of lead nurturing efforts, historically analyzing past campaign effectiveness, or acquiring new lists from partners and third parties. The key value is in the effective visualization and analysis of alternatives, including cost estimates and response rates. Automation tools and solutions offer estimates of investment returns in terms of short-term results, as well as longer-term impact in response rates, and qualified leads. Campaigns managed to prioritize and target cannot be considered in isolation. Each must be linked to other geographies, industries, solution sets, account status, sales resources, past performance data, and strategic value.

Resource Management—The organization, planning, distribution, and use of people or other constrained resources for marketing or sales activities. Resource management activities can be direct, indirect, part of a process, or one-time, in-need and use.

Sales Automation—The use of technology and services to enable sales-led processes and activities, primarily in the consideration, purchase, and use phases of the customer life cycle. The technology and services focus on pipeline activity to convert buyers to customers. Sales automation is broken out into products and services that touch on any of five areas: Initial Contact, Dialogue, Proposal, Negotiation and Engagement. Sales automation technology and services fall into one of three categories—contact management, communication management and resource management. Each has elements that cover coverage, timing, expertise and delivery.

AUTOMATION PORTFOLIO FRAMEWORK TERMS

The terms in this section may be helpful in how an organization begins to segment its automation investments.

Area—The combined realm of automation offerings that address the need to manage, clarify and execute processes that exist between a vendor and customers.

Stage—Segmentation of automation coverage based on the stage of automation campaign impact, including: Plan/Budget, Prioritize/Target, Execute/Engage, Deliver/Fulfill and Manage/Report.

Category—The distinct automation focus of an offering in or across categories of marketing, sales and customer service.

Capability—Specific product functionality or a capability that make up threads. Fibers describe the desired focus from a task perspective and segment them into specific elements.

Parts—The aspects of a capability that deliver automation functions or complete tasks.

Phase—A view of the customer life cycle that from the perspective of a particular automation focus area, namely: funnel, pipeline, or delivery.

Process Metrics—Those measures that focus on an end-to-end process or steps within a process. Metrics around process usually highlight time, accuracy, quality, efficiency and effectiveness.

Steps—The sequence of activities triggered by an offering.

Focus Area—The marketing areas of interest and management by marketing. Those focus areas may cut across one or more Stages and can include Campaigns/Reporting, Content, Interaction, Data, Lists, Leads and Resources.

Value Metrics—Those measures that equate automation efforts with business results, as ultimately tied to the areas of revenue, retention, and reputation. Often, value metrics reside within one of those areas and include accuracy, understanding, timing, timeliness, visibility, completeness, consistency, and decision making.

GENERAL AUTOMATION TERMS

Aging—A view of responses and leads as they move through the funnel and into the pipeline. Aging includes duration, status, and the ability to compare periods of time and view trends.

Alert—Proactive notification of status or required actions based on a response or alert reaching a specified threshold.

Analyst/Influencer Management—Specific capabilities to deliver content, track, access, and facilitate ongoing marketing activities that are specific to industry and financial analysts, as well as other key influencers through the automated delivery of tailored content.

Analytics—Analysis of all types of data as it relates to funnel and pipeline management. The key is the improved understanding and clear areas of action.

Archiving—The movement of response, leads, content, and other managed information from an active, ongoing use status to one that is off-line, for reference and later use.

Attendance Tracking—The ongoing capture, segmentation and reporting of online registration, access and participation at telephone and online webcasts, podcasts, seminars or other events.

Banding—The organization of audience members, respondents, and leads into segments based on pre-determined criterion. Often used for review, analysis, and action.

Blog Management—Ongoing monitoring, review, response, and organization of activities related to private and public on-line journal creation and use.

Budget Preparation—Creation of campaign-oriented estimates of costs in response and lead generation activities, including internal and external elements.

Cadence—The pattern of contact made during lead generation or nurturing. Cadence is distinct from timing in that it focuses on the density, intensity and combination of activities delivered to target audiences.

Campaign Justification—Ability to match investment requirements with expected results across multiple measurement metrics, including awareness, engagement, downloads, interest levels, response levels, lead generation, shortlist inclusion, references, retention, and ultimately potential revenue impact.

Campaign Templates—Methods to schedule marketing campaign elements, including timing, content type, interval determination and delivery method. Templates can include rule definitions, auto response capabilities, results monitoring, multiple steps and layers, and personalization.

Cleansing—Transforming data from its raw state to specific formats that provide consistency. Data cleansing is also referred to as scrubbing and focuses on removal of incorrect data, formatting issues, out-of-date information, and redundancy.

Click-through Monitoring—The tracking of referral activity from one website to another. This is accomplished by linking web pages and results in increased traffic for the target site and a payment to the referring site.

Coding—Segmentation of incoming responses or leads according to pre-determined criterion.

Collaborative Access Rights—Management of tribes or groups of individuals that defines permission to access documents and programs, and conduct activities as part of a group process or effort.

Collateral Development—Creation of content for use in marketing and sales activities.

Community Management—The organization, segmentation, facilitation, engagement, and monitoring of groups of individuals who share interests, needs, and goals. Management of activities includes communication, coordination, and enabling collaboration.

Conditional Processing—Actions taken on data records once those records meet predefined conditions.

Configuration Modeling— The process of assigning software attribute settings prior to deployment to determine the best settings for a particular application.

Content Delivery—Introduction of information and/or materials of interest to individuals. Delivery can be through traditional or new media methods with virtual or physical attributes.

Customer Analytics—Analysis of customer values, needs, and preferences based on interests and activities.

Data Mining/Extraction—The extraction of elements data from a repository based on areas of interest or need. Often used to recognize hidden patterns or pursue subsets of data, the information is extracted, separated and prepared for use.

Data Modeling—A graphical representation of marketing information and data assets expressed in terms of audiences, offers, and relationships.

Data Warehousing—A collection of data that is gathered, organized, and stored for later extraction and analysis. Often the extracted data will then be merged or matched with other data to provide additional depth of understanding or targeted use of the data for marketing campaign purposes.

Download Tracking—The ongoing measurement of activities that involve web site users who offload content from a web site to their local client.

Electronic Catalogs—A collection of product, service or other information loaded and stored for on-line retrieval and use by respondents, prospects, buyers and customers.

Engagement Level Scoring—The use of points or other values to measure and report the level of interest, qualification, or value of a respondent, lead, or prospect. Often, scoring includes thresholds which, when reached, designate that certain actions take place.

Event Delivery—The execution of a web-based, telephone, or in-person activity that involves one or more respondents, prospects, buyers or customers.

Event Planning—The management of estimates, logistics, resource requirements, and processes around online and in-person events.

Form Auto Population—Completion of input values for online form fields based on the use of predefined profiles that map input values to field types.

Gap Analysis—A technique that identifies gaps in a marketing campaign, program, or product coverage. Typically uses resource and portfolio information in combination with customer data.

General Analytics—Analysis of business intelligence and performance management. Typically employed in efforts to build efficiency and optimize processes.

Incubation—*Also know as nurturing.* The continued focus on an existing response or lead where certain readiness criteria have not been met.

Integrated Testing Environment—A unified, integrated environment for automated testing of tools, applications, databases, and web-based processes.

Key Variable Analytics—The use of mathematical modeling to enhance visual analysis of data and allow greater understand variables that have been determined to be of high importance.

Lead Cycle Velocity—The speed at which responses travel through the lead management process. Lead cycle velocity includes factors such as the delivery of information, actions by sales, and proactive requests from prospects. It effectively indicates the speed at which opportunities move through the funnel.

Lead Reselling—The delivery of leads to non-direct entities for a fee. Resold leads may vary in qualification and age.

Missing Values Prediction—The preparation of data sets and the automated completion of missing data values for analytical purposes and in predictive models.

Notification—Automated messages, alerts, or warnings that recommend or require specific actions in response to pre-established alarms or thresholds. Notification often prompts additional contact or content delivery during campaigns.

Participant Profiling—The gathering and analysis of information on individuals. Typically performed to identify clusters of individuals with similar interests and determine future communication requirements.

Partner Portals—An online entry point and area for partners to view and retrieve information, place orders for marketing content, share intelligence, and work with other partners and the host.

Peer-to-Peer Linking—Linking individuals for tasks, data access, or projects.

Performance Reports—Reports that evaluate the achievements of campaign efforts and elements, including responses, resources use, and quality.

Permission Management—The specification of permissions authorities grant for information that they administer. Permissions are sets of constraints which, when evaluated, allow or prevent access or modification to profile data or other marketing information.

Plan versus Performance Tracking—Ongoing ability to assess and review forecasted expectations against actual campaign element results.

Predictive Analytics—The use of data to develop probabilities for future marketing activities and to forecast trends. Central to the process is locating an appropriate, measurable data variable. Once selected, that variable is compared with other variables, and finally the analysis used to predict future behavior. For example, the size of an incentive offer may be varied and analyzed to predict response rates.

Prioritization—The ranking and rating of alternative actions, based on a predetermined set of assumptions and a review of past results.

Product Structure Modeling—Decomposing a campaign portfolio into its elements to discern the impact(s) of changes to one element on other elements and analyze the effect on campaign performance. Often, the decomposition is accompanied by a weighting of elements to aid in understanding their relative importance or impact.

Prospect Banding—The segmenting and ranking of respondents into groups that can be used to trigger additional campaign actions or activities.

Real-time Customization—The use of XML, style languages, and link languages to modify a display of information based on user activity or input. Functionality offered includes text emphasis, organization, order, and location of screen elements.

Reassignment—The modification of status, profile, importance, completeness, or age that results in a change in responsibilities for response, prospect, lead or buyer follow-up, planned activities or timing.

Registration—The capture of key demographic and, in some cases, psychographic information about a respondent, member, or participant.

Resource Requirements—The estimation of physical resources, such as people and skills, expertise, proximity, location, workload and throughput to determine potential shortcomings, over-investments, and allocation requirements.

Response Coding—The use of attributes from an incoming campaign or non-campaign activity to categorize and segment opportunities into groups for additional action or reference.

Response Tracking—The ongoing review and analysis of incoming responses to campaign activities. Typically, the number, timing, rate of responses and requests generated are analyzed to verify the impact of a specific marketing effort. Often used to tune campaign elements and justify or focus future investments.

Reusable Objects—Marketing content, elements or other digital materials, code, and tools that are reapplied, based on status, alerts, measurements, thresholds and profiles.

Role-based Permission—Granting of access rights to information, tools, and participation based on individual responsibility relative to a decision making process, position of authority, or existing relationship.

Routing/Distribution—The movement of information, responsibilities, or action requests, based on a pre-determined set of criterion and decision-tree factors.

Schedule and Timing—Mapping and execution of activities based on pre-set objectives, goals, requirements, or timelines.

Scoring—The rating of opportunities based upon a point or scoring system that allocates numerical awards to respondents, prospects, buyers, or customers, based on requests, past performance, participation, downloads or authority.

Skill Mapping—The segmentation of marketing and sales skills related to campaigns, content development, and respondent interaction to determine staff assignment, allocation and use.

Status Management—A method of providing visibility for a campaign activity at a particular moment in time. Typically used to view acceptance, adoption, requests, success rates, participation factors and provide information about the state of a given activity relative to a timeline, an objective line, or other, related activities. Viewing status in this manner often is useful to determine bottleneck locations in pursuit and delivery.

Suppression—The deletion of records from the output of a merge/purge data activity. Suppression is accomplished by matching records input to the merge/purge with the records included in a suppression file. It is used to avoid including particular data in specific activities. For example, suppression might be used to exclude existing customer names from a promotion designed to attract new prospective customers.

Task Assignment—Placing responsibility for the completion of a campaign or other marketing/sales related activity to particular skills, responsibilities, or availability.

Task Creation—Introduction of a task into a marketing process in response to inputs, activities, alarms, or thresholds.

Task Definition—A document which communicates the scope, timing, and objectives of a new task to provide the assignee with an understanding of goals and requirements.

Task Tracking—Progress made in completion of a task or assignment as measured against set criterion, process steps, time requirements, and results.

Timing—The delivery of content or messages, execution, commencement, completion, or other communication on a pre-determined or event-triggered schedule.

Usage Tracking—Mapping the frequency, depth, scope, timing, and completeness of the access, opening, and use of campaign elements that are provided on both a proactive and reactive basis.

Utilization—The percentage of capacity applied at any given time, relative to the maximum available effort, throughput or output. Both direct and in-direct resources and systems, can be measured.

Web Forms—Manual and auto-fill forms provided on web pages for the input of demographic information, interests, requests, membership, or profiles.

Web Site Tracking—A review of web site activities, including access and usage, to determine patterns, interests, and visitor focus.

What If Modeling—The adjustment of basic assumptions about various metrics by a user, through a tool or input form, to create a more relevant, tailored scenario. Adjustments in What If scenarios are often reflect changes in pricing, usage, value, time savings, resource requirements, and costs. What If modeling is designed to create higher relevance through the use of more specific, personalize data that best reflects an organizations requirements or status. *Also known as What About Modeling.*

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