Move to a Virtual Landscape: Budgets, Events, and More

Jenny Robertson, SVP Technology Solutions & Architecture, ANNUITAS
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# Move to a Virtual Landscape: Budgets, Events, and More

How to manage a budget and team to accommodate the new structures of virtual reality
- Our new virtual reality
- How we managed our budget and team to pivot our plans for the year

The process of migrating in-person events like conferences, executive meetups, and roundtables to virtual experiences
- Pre-Covid vs. Post-Covid marketing strategy

Highlights of what's next and how to stand out of the virtual crowd in 2021 and beyond

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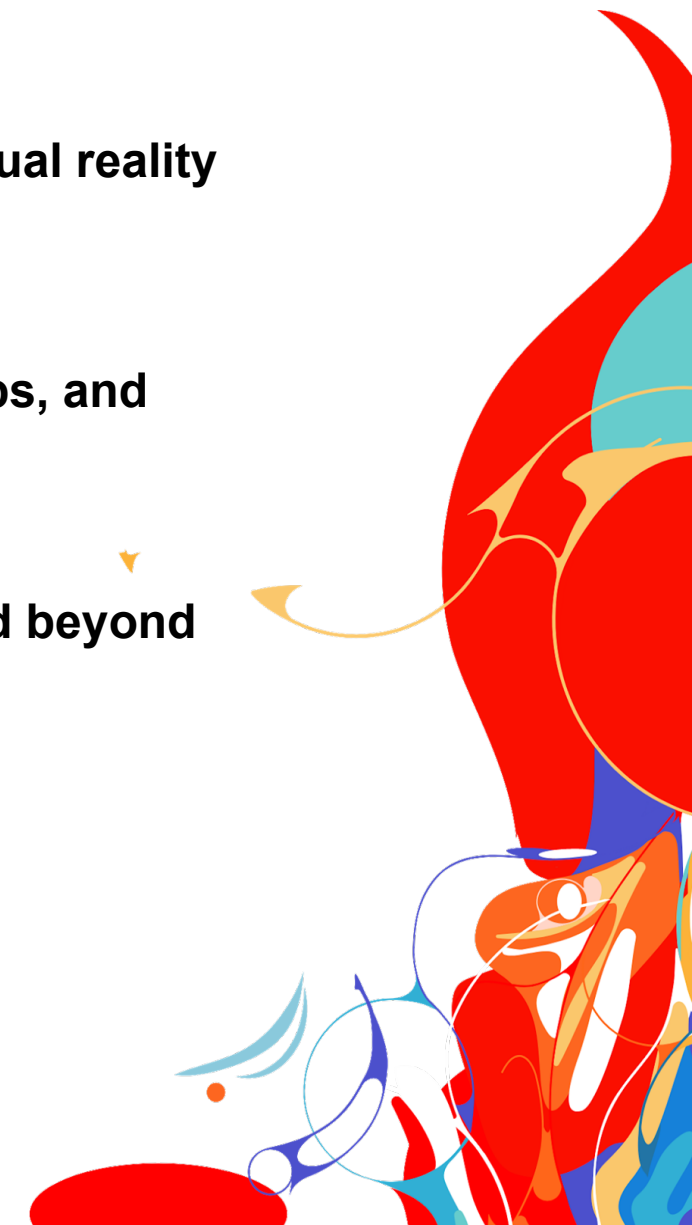
About Jenny

9 years in Marketo
7x Marketo Champion
Marketo Certified Expert Wife 2020 Fearless50
Runner Certified SFDC Administrator
Mom 17 years in technology Marketo Certified Solutions Architect
Certified SFDC Administrator
Godmother Marketo Certified Solutions Architect
Wife 2020 Fearless50 Aunt
2x Champion Alumni Ambassador Marketo Certified Solutions Architect 2x Revvie Winner
7x Marketo Champion
11 years in Marketing/Sales technology 2020 Experience Maker Award Finalist Marketo Certified Expert
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7x Marketo Champion
Wife Aunt Mom Runner Mom
2020 Fearless50
Marketo User Group Leader

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About Kalina

Kalina Mari is a **marketing maven** in **Silicon Valley**, writer and speaker. She has been **recognized** by **Adobe** as one of the **50 Fearless Marketers** in the world. She is known for identifying needs in the tech industry and bringing **creative solutions** and **experiences** to her clients for both small and large **start-up** companies. She is the **founder** of both **KMB Consulting** and **UnapologeTECH** podcast, advisor, and a **life coach** to **women in tech**.

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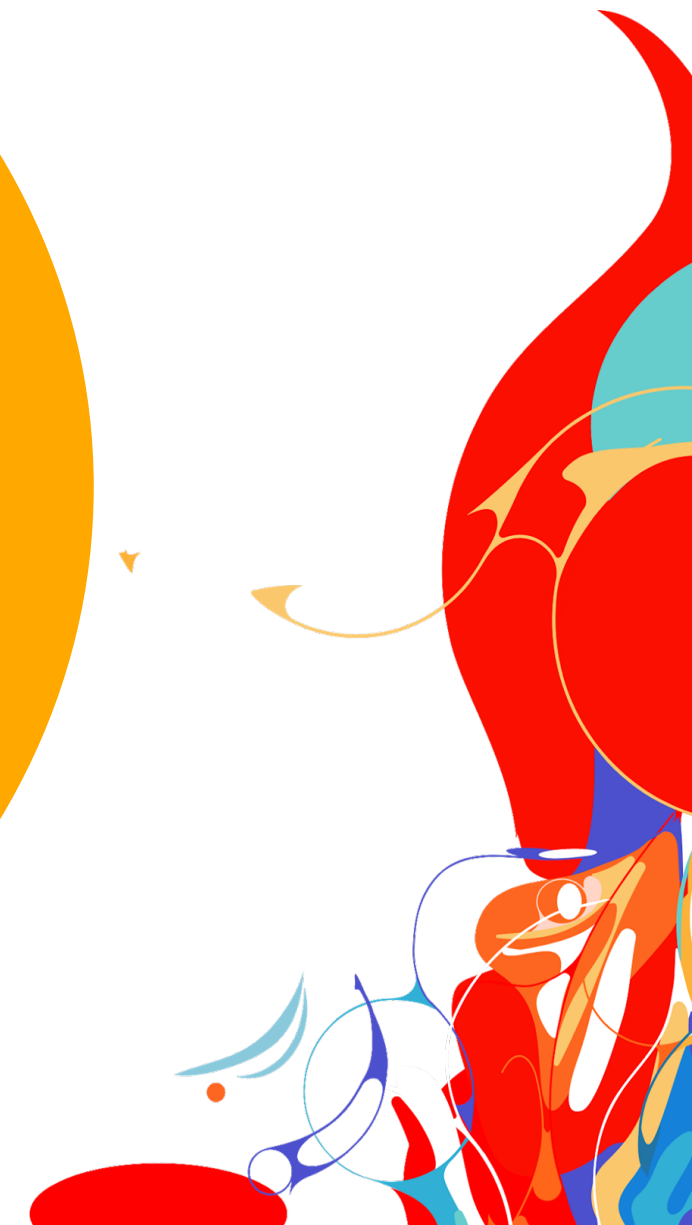
How to manage a budget and team to accommodate the new structures of virtual reality

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Our New Virtual Reality
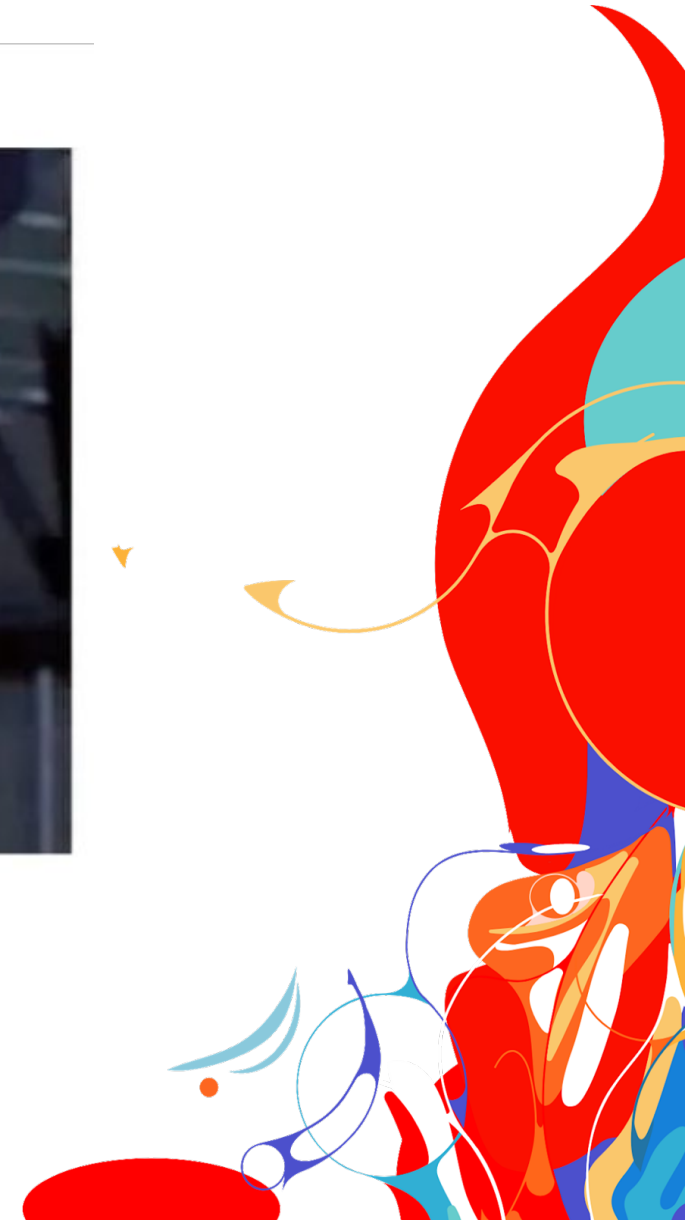
Impact is More Than Just WFH and Virtual Events

- Remote team

- Virtual team building

- Virtual meetings

- Virtual events

- Cancelled business travel

- Juggling and mixing personal with professional now more than ever

- Staying focused and avoiding distraction is harder now than ever

- Demand changes – what to do next?
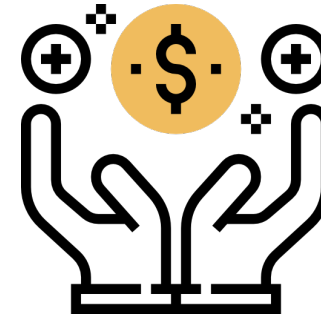
How to Manage to Accommodate the New Reality

Managing Budget and Team at ANNUITAS

Shifted
headcount
focus

Team
Support

Spot bonuses
matched with
charitable donations

How to Manage to Accommodate the New Reality

Managing Budget and Team at ANNUITAS

Shifted focus away from new logos to existing clients

New virtual reality has made digital transformation that much more important
- Revving our own demand engine
- Revamped and scaled our sales processes
- Previous clients have come back because they realize digital transformation is more important now than ever
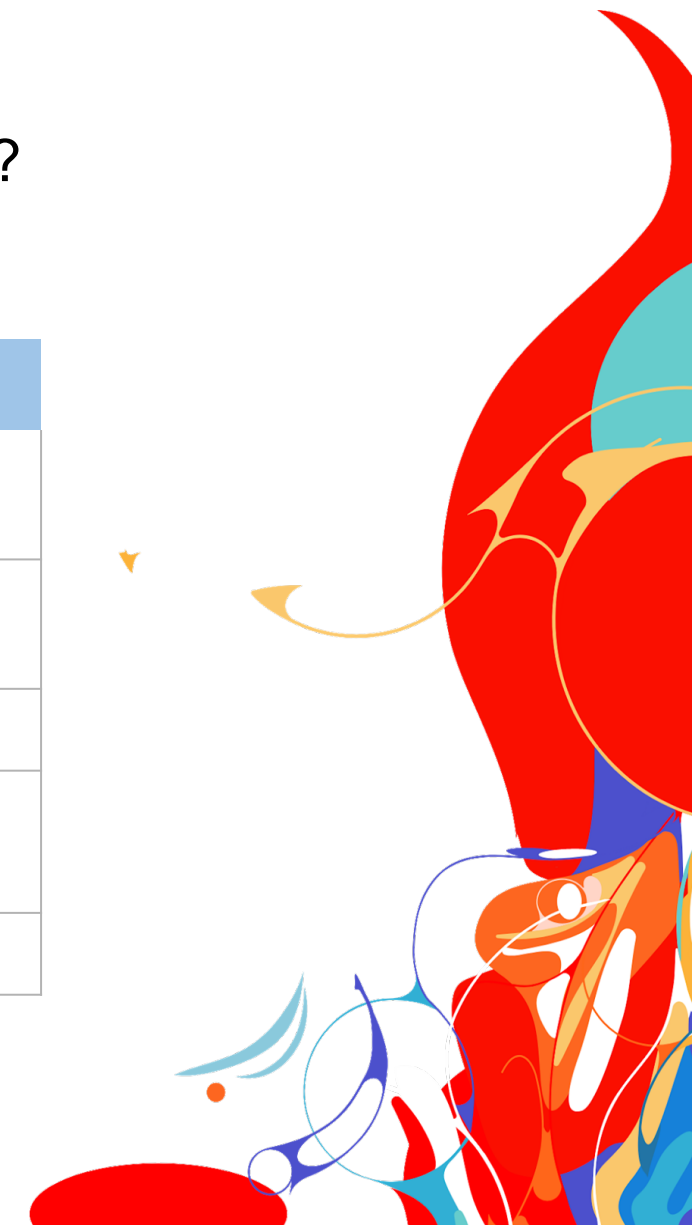
How did we make these decisions?
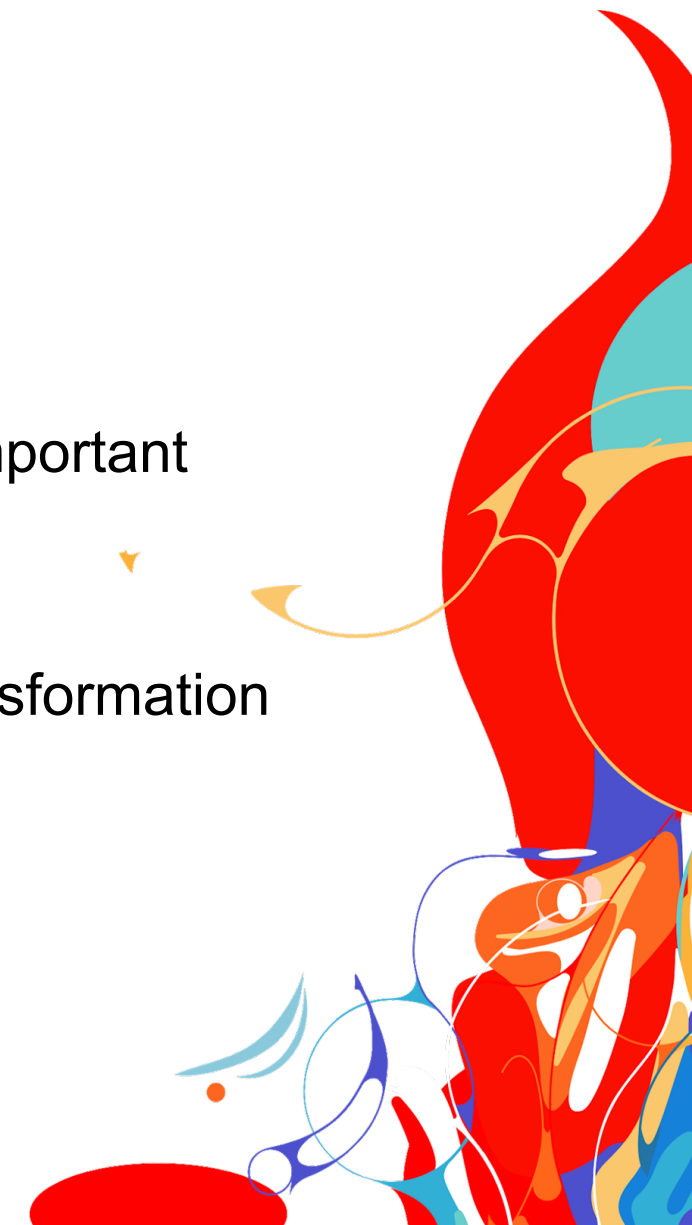
Data Strategy & Lead Management Foundation

Data Strategy

How do you know what to change in your budget and justify changes?

- KPIs that show marketing's contribution

| KPI	Description
Elasticity	Likelihood that a person who touches a specific channel will reach a certain stage
Velocity	How long it takes for a channel to move someone forward in the funnel Engaged to QL velocity & Engaged to Closed Won velocity
ROI	Various levels (Program, Tactic, etc.)
Conversion & Quality	Conversion rates, quality of QLs, quality of Opportunities
Lift	Opportunity source vs. influence

Data Strategy & Lead Management Foundation

Data Strategy

How do you know what to change in your budget and justify changes?

- Data capture in place to support reporting of those KPIs

Data Point	Description
Channel Name	Engagement channel marketing touchpoint occurs on
Content Name	Content piece consumed as a part of the touchpoint
Campaign Name	Touchpoint's specific ad, event, or campaign
Source	Service or partner that provided touchpoint
Keywords	Any keywords that led to the touchpoint
Previous Page	Page that led to touchpoint (whether it be direct or referral)
Device	Device interaction is consumed on
Interaction Date/Time	Date/time interaction took place

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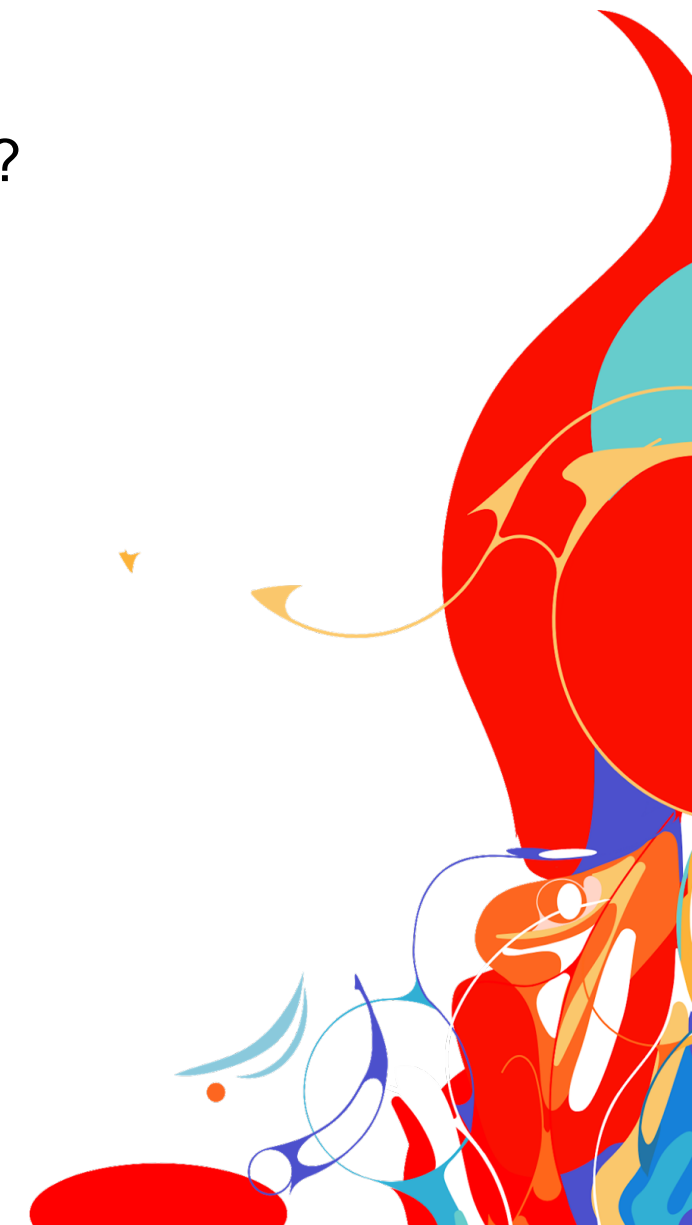
Data Strategy & Lead Management Foundation

Lead Management Foundation

The Lead Management Foundation supports a data structure that shows Marketing's effectiveness

Revenue Stage and Lead Qualification
Lead Scoring, demographic, and behavior factors to qualify leads

Marketing technology foundation to support data capture of KPIs
Marketo and CMS work together to populate programs, custom fields, custom activities, and capture each rich interaction

Reporting to bring data together in meaningful, accurate way
Tableau takes data from SFDC, CMS, and Marketo to show us exactly how we're doing

Putting Insights Into Action

Webinars and Virtual Events

- An engagement channel pivot from live events to webinars will be a net positive ROI, if used strategically in the funnel.

- Certain personas and industries are likely to respond better to webinars than others, making segmentation key to success.

- As different personas respond to different digital event formats, virtual events can connect professionals within the same role, have open conversations about buyer pain point, and present additional opportunities for buyers.

Paid Search

- While other organizations are reducing paid search budgets, lay claim to keywords they have protected with larger advertising budgets. Use this channel to fill top-of-funnel and increase share-of-voice.
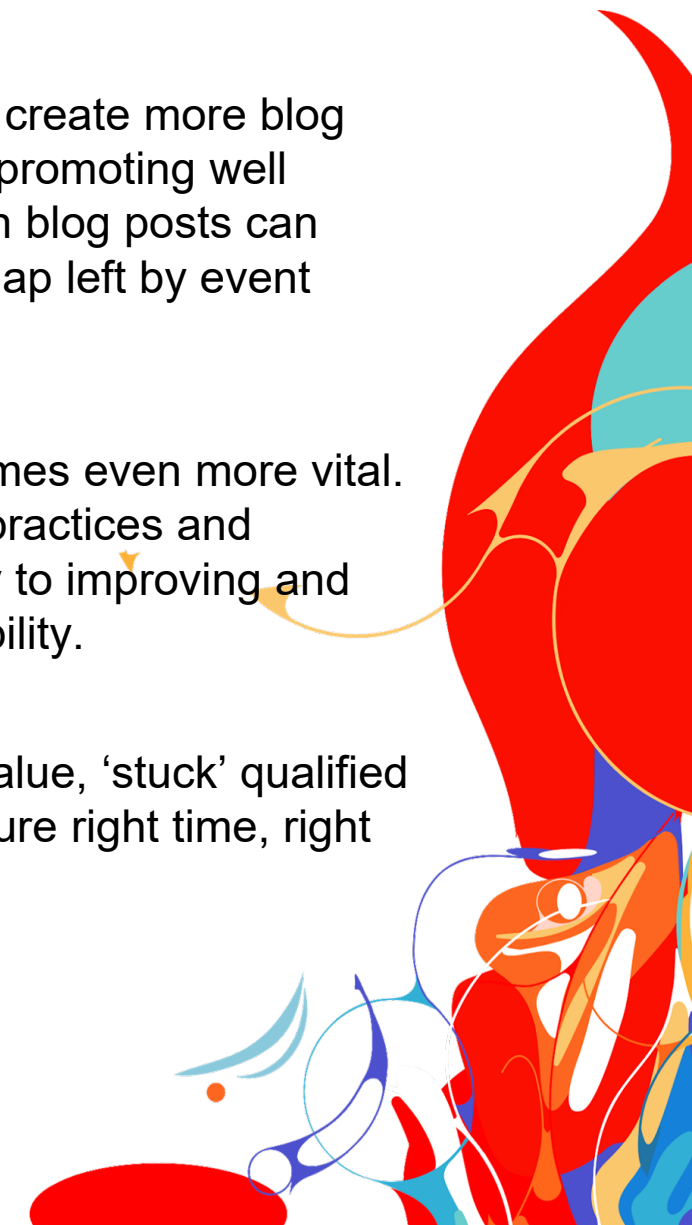
Blogs

- Reallocating resources to create more blog content, along with cross-promoting well performing gated offers on blog posts can help fill the top-of-funnel gap left by event cancellations.

Email Deliverability

- Getting to the inbox becomes even more vital. List hygiene, good email practices and domain protection are key to improving and maintaining high deliverability.

Re-Engaging Mid-Funnel

- Re-engage recent, high value, 'stuck' qualified leads to attempt to recapture right time, right place.

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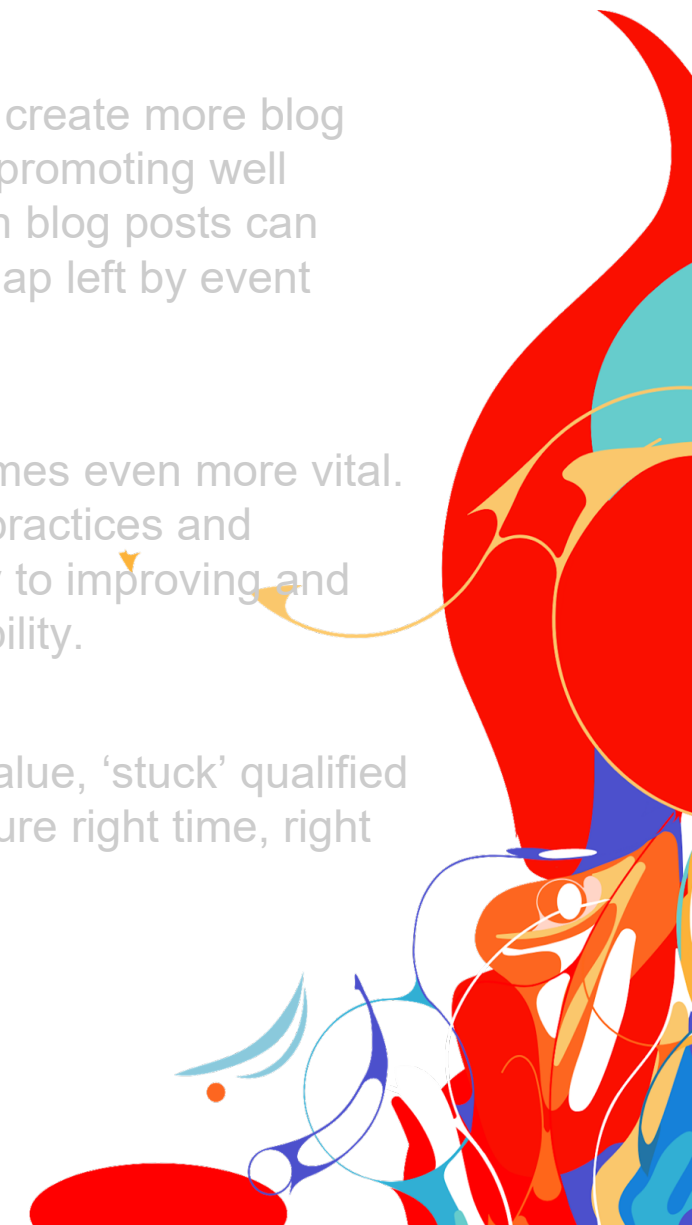
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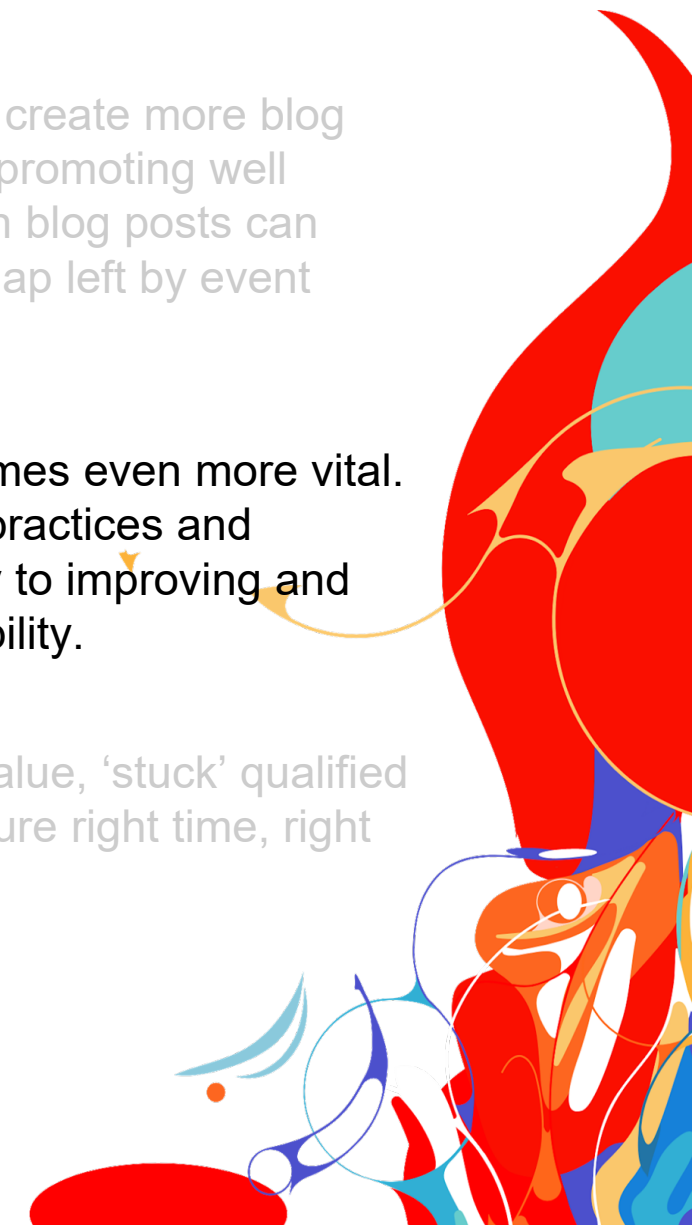
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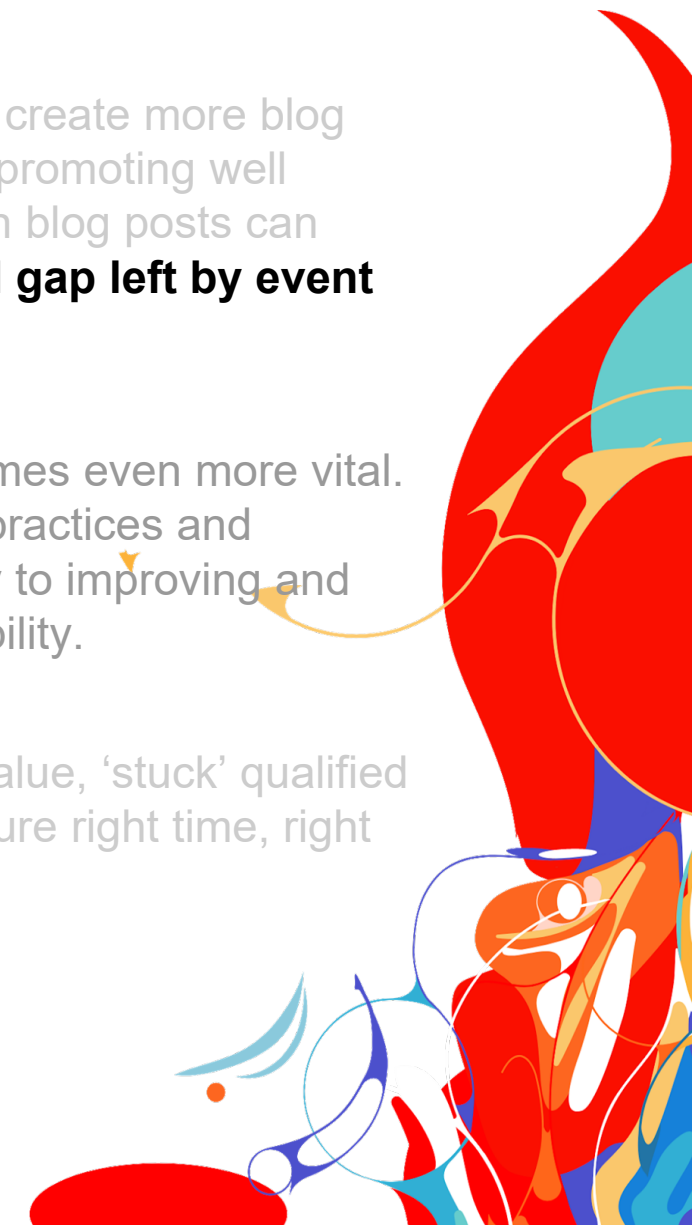
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What's Next ?

The process of migrating in-person events like conferences, executive meetups, and roundtables to virtual experiences

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Pre-Covid Customer Marketing and Demand Strategy

Objectives	Strategy	Key programs to drive results
#1 - How will you drive Enterprise penetration?	Continue designing customer engagement opportunities	• Customer Advisory Board • FLOW - In-Person Customer Meetups • FLOW Executive Dinners • Referral Program • User conference both virtual and in-person • EBR - Executive Business Review
#2 - How will you drive Core Verticals penetration?	Publishing key customer success stories and promoting logo usage	**Case Study Breakdown** • Customer and partner case studies and customer video testimonial
#3 - How will you drive Europe market share?	Mirror US customer advocacy programs	• FLOW FORWARD Advocacy Program • EMEA CAB / FLOW Executive Dinner • FLOW London
#4 - How will you support Net Retention / Upsell?	Design framework for customer lifecycle journey	• Design customer lifecycle campaign • Scale Customer Gift programs • Flow Forward Advocacy Community • Scale Customer Newsletter • Scale 3rd party reviews

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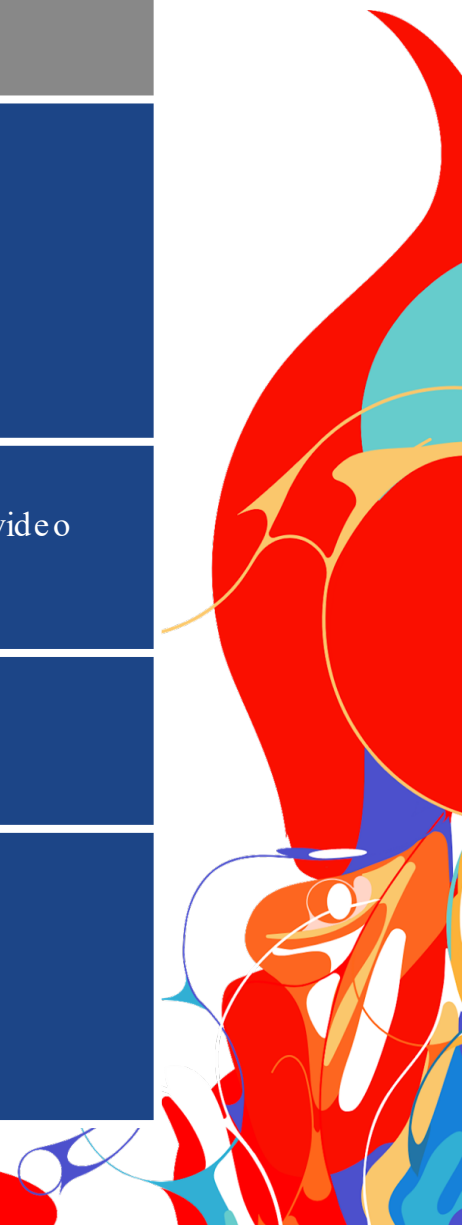
Virtual Transition: What Is Most Important ?

Virtual User Conference	Virtual Webinar Series Happy Hour Theme	Virtual Executive Round Tables
- Drive awareness - Bring customer, partners, and prospects together - Create new pipeline - Close new deals	- Bringing our community together - Sharing best practices - Providing a place for customers to collaborate - Drive awareness and increase pipeline	- Virtual Surprise & delight experience - Gathering key prospects - Bringing together exclusive CAB Members

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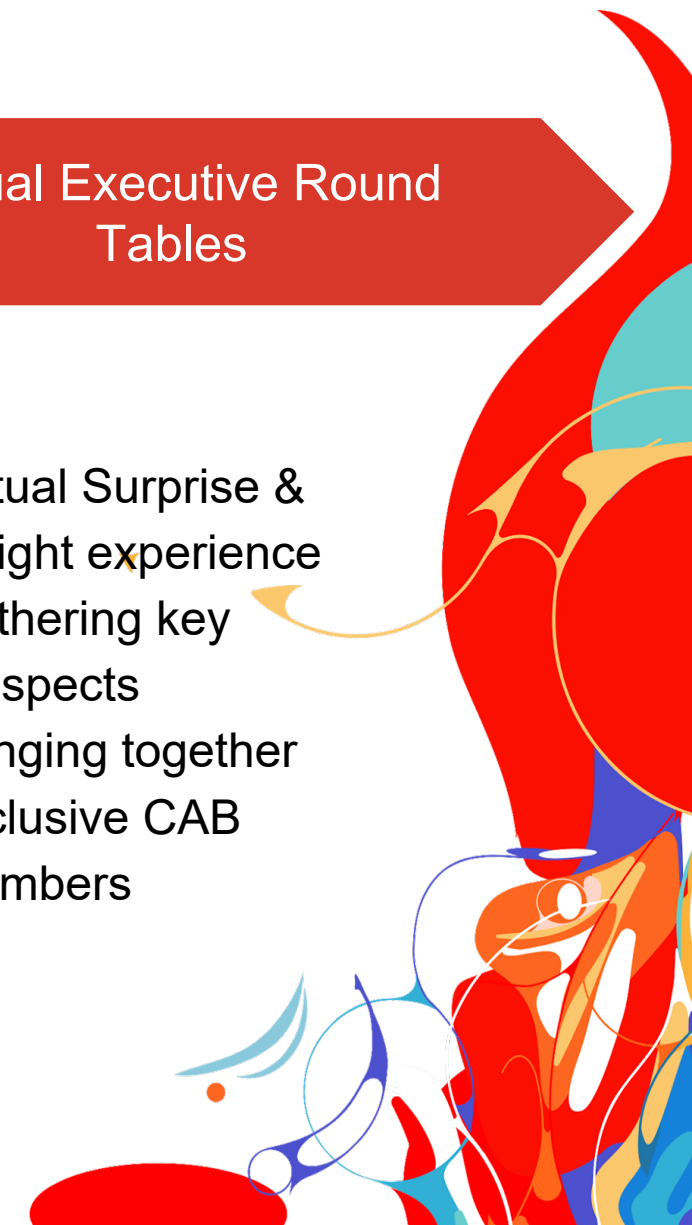
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Highlighting What's Next: 2021 and Beyond

Customer Brand Awareness

Partnering with your customer advocates is key

Increase brand awareness by generating in-person and virtual events and inviting key customers

- Customer Webinar Series
- Executive Roundtable
- Virtual and In-person conference

Cross Functional Collaboration

Communicating key initiatives across the organization

Aligning the in-person and virtual strategy with customer success, executives, product management, and sales departments

- Customer Success
- Product Management
- Sales
- Executive Leadership Department

Product Awareness and Communication

Competitive product and a solid roadmap

Align key events with upcoming product releases and leveraging all channels to provide

- Virtual and In-person user groups
- Customer Advisory Board
- Product webinar

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Tips for 2021 and Beyond

Virtual Event Technologies

Virtual events are more than just presentations and conversation, and we'll see them get more innovative with different technologies to stand out.

- Whiteboarding
- Breakouts
- Roundtables
- More video
- More interactive polls, quizzes, games
- More collaboration before and after
- Visual and interactive aids will be key
- Customer buy-in and feedback

Remember to be creative!

How to Stand Out of the Virtual Crowd

1. Customer experience is key - put your customer first
   - Outline the customer experience. What will help your customers succeed?
2. Outline clear event goals and objectives
   - Lead generation, QL generation, brand awareness, etc.
3. Outline comprehensive pre-event and post-event communication plan

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Key Virtual Takeaways

| 5 key takeaways for virtual events |
|---|
| You want to ensure that the virtual venue provides a flawless user experience. Take the time to really dive into samples of past conferences that the vendor has produced. Get references and talk to them. |
| Agree on what a great experience would look like in your organization's eyes. How will you determine success — or stunning success? |
| Beyond your vision of success, you also need to outline your key goals — success metrics in other words. Your measurable success can be as simple as deciding how many people you want to see register for the event. |
| To run successful virtual events, you need to make sure that all the relevant teams in your organization are involved and excited about the project. |
| When the conference is complete don't forget to celebrate with your teammates. |

Choosing the right vendor to host the virtual events

Choosing a theme for the virtual events

Outlining your company goals to the virtual event

Aligning with cross-functional teams

Don't forget to celebrate and debrief

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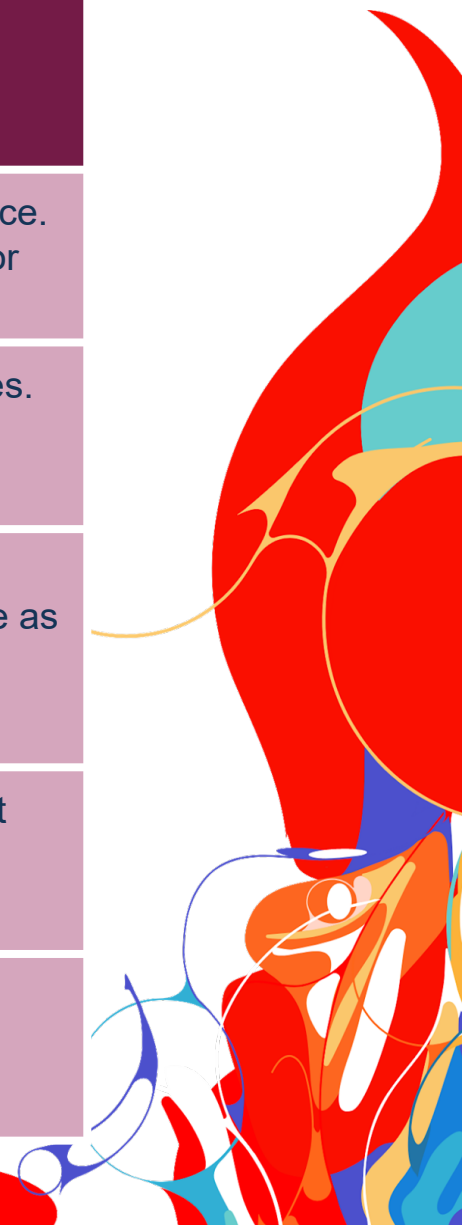
Thank you!

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Appendix

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Helpful Resources and Additional Reading

- Five steps for a successful virtual conference in the COVID-19 era

- Real World Results of Demand Marketing Strategy Shifts During the COVID-19 Crisis

- (Re)Focusing Your Demand Marketing Plan Amid the Coronavirus Outbreak

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