

# Marketo Marketing Automation Increases Efficiency

Adobe Marketo Marketing Automation Solution Increases Opportunity, Efficiency, and Transparency for Investment Management Firm

CASE STUDY: MARKETING TECHNOLOGY



## OVERVIEW

Zirous partnered with a growing investment management firm that required a new marketing automation solution that would unify their customer data to create a competitive advantage.

This investment management firm that works with institutional and high net worth clients required a marketing automation solution to go hand in hand with their growing marketing practice area.

This case study will outline how Zirous assisted this firm by implementing Adobe Marketo in order to increase opportunity, efficiency, and transparency.

This client did not previously have a marketing automation tool which caused marketing campaigns to require additional time to create, monitor, and adapt.

With their new world-class demand generation machine, Marketo, their sales and marketing teams are now aligning on leads and are connected directly with their data in their CRM system. They are able to nail personalization at scale and optimize the sales funnel while keeping up with growth giving them a competitive advantage over their competitors.

## THE CHALLENGE

Before implementing Marketo this firm had a manual marketing process without a Marketing Automation solution. They wanted to enhance their email sending process and improve updates alongside the quality of emails for their clients. They wanted a better process of retaining contact with their clients. In addition to this, they wanted flexibility with improving inventory for email sending and organization for client communication with strong connectivity to their new CRM data.

## THE SOLUTION

To kick off the implementation Zirous had a project onboarding meeting to discuss and understand all of the firm's goals, requirements, specifications. Zirous then proceeded to work alongside the firm's marketing and business development team to achieve these goals and overcome any challenges.

The first step in achieving these goals consisted of the Marketo technical setup. This consisted of tasks between Zirous and the firm's IT and marketing teams to set up back end IT requirements to ensure optimal quality and deliverability for email sends. Next, Zirous worked to set up the CRM integration with Marketo and subsequently tested to make sure the data was coming in as expected.

In order to enhance the email sending process, Zirous worked to set up email programs inside Marketo while simultaneously running training sessions for the firm's team. This was done with the purpose of leaving the firm's marketing and business development team with the tools required to tackle new use cases after the implementation was completed. These hands on custom sessions included:

### Marketo Foundation:

Fundamental Marketo Concepts

Detailed flyover inside the tool itself

## QUICK FACTS

### Company:

- Growing investment firm
- Serves institutional and high net worth clients

### Technologies Involved:

- Marketo
- CRM
- CMS

## HIGHLIGHTS

- An investment management firm seeking to grow their marketing practice implements Adobe Marketo Marketing Automation Solution.
- Data connected with CRM system to be efficiently used in Marketo marketing programs and foster collaboration between marketing, business development, and sales teams.
- Quick, tangible improvements to marketing efficiency, transparency, and accessibility with email, landing page, and program templates.
- Direct positive client feedback



### **Marketo Operations:**

- Creating and Sending Emails
- A/B testing and Dynamic Content
- Creating and Using Programs
- Creating Marketo Forms
- Creating Marketo Landing Pages

### **Integrations and Data Best Practices:**

- Building Smart Lists
- Segmentation
- CRM Integration Best Practices
- Database Health Best Practices

### **Marketo Program Workshop:**

- Setting up an Email Program
- Setting up an Engagement Program
- Setting up an Engagement Program

### **Marketo Administration:**

- User and Role Management
- Database Management

### **Marketo Reporting:**

- Basic Reporting
- Email Insights
- Performance Insights
- Revenue Cycle Analytics

After working with the Zirous team, the firm's marketing and business development team stated:

## **THE IMPACT**

With Marketo, they were able to accomplish their goals with the ability to streamline the email sending process to be fast, efficient, and easily replicable with email and landing page templates alongside custom programs. They were able to create programs more frequently resulting in the potential for higher engagement with their contacts. This was all able to be accomplished while working seamlessly to connect data with their CRM system to keep sales and marketing up to date and on the same page. On top of this, they gained the ability to have faster output alongside triggered emails based on client activity to get information out to clients as needed. Marketo also provided the ability to increase contact retention by providing additional tangible metrics inside the tool on contact behavior. These metrics could be used to increase or decrease the quantity of content sent, A/B test for higher performing content, and better filter lists of contacts for campaigns. In addition to these Marketo metrics, the firm has had direct positive feedback regarding the marketing changes from clients. Overall, these improvements to the firm's marketing process with the implementation of the Adobe Marketo Marketing Automation Solution provided them with real, quick wins with the potential for significantly more growth in the future.