

Understanding Marketing Maturity

How Microsoft Dynamics Marketers
Can Ride the Wave to Revenue Success



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Introduction

Digital transformation has been a hot topic in recent years. And yet, for all the talk about it, the focus has been misplaced. “Transformation” implies that the evolution to digital is optional for businesses. What we should be talking about is a digital imperative. To compete, succeed and thrive, the move to digital for businesses is not a choice; it is essential. And, due to the pandemic, the timeline for making the move to digital everything has been greatly accelerated.

This drastic shift has had a tremendous impact on how marketers do their jobs and connect with customers. It has also increased the need to prove results and the return on marketing investments. However, while the pressure is on to adapt and achieve in this new all-digital world virtually overnight, the reality is that different organizations start in different places. Some are just embarking on their digital marketing journey while others already have a fully optimized digital customer experience.

For Microsoft Dynamics marketers, that’s where a marketing maturity framework comes in. By understanding why marketing maturity matters today, where you fall in the range of marketing maturity levels and how to level up, you can ride the wave to revenue success.

What is Marketing Maturity and Why Does it Matter Today?

What is marketing maturity? In its simplest definition, it is the move from a seller-centric to a buyer-centric approach to marketing. Those lower on the spectrum of maturity tend to be more project focused while those at the higher end of the maturity spectrum are drivers of strategic growth. These increasing levels of maturity correspond with increasing levels of digital marketing sophistication and expertise.

Let's illustrate this concept by looking at a process that has been traditionally thought of as unpleasant and frustrating for customers but can now be stress-free and even enjoyable – buying a new car. As you can see in the graphic below, as the car buying experience moves from traditional marketing methods to digital ones, it becomes more controlled by the buyer and more personalized to them. Businesses that are more mature in their marketing give customers more of what they want, and in turn, they get more of what they want too.



Marketing maturity frameworks look at the processes, tactics, technology, data and outcomes of an organization to understand where they fall within that spectrum. It is through this understanding that marketers can identify gaps between where they are and where they want to be and seize on opportunities for improvement that will lead to greater marketing and, ultimately, revenue success.

For marketers today, the ability to grow in their marketing maturity is more critical than ever. With digital transformation evolving into the digital imperative, marketers face a sink-or-swim situation. Those that choose to ignore the importance of digital to their businesses and customers simply cannot contend with more digitally mature competitors. And this isn't a challenge that is poised to disappear.

Since the onset of the pandemic, we have seen digital trends go from a snail's pace to lightspeed – packing years of change into mere months. A multitude of surveys about post-pandemic life indicate that consumers are not planning to part with their newfound purchasing habits. As an example, two different Gartner studies provide a glimpse into the digital future:

- When it comes to shifting behavior from in-person to online, 43 percent of consumers say, “I plan on keeping the current way of doing things online even after the pandemic subsides.”
- By 2025, 80 percent of B2B sales interactions between suppliers and buyers will occur in digital channels.

For B2B and B2C marketers alike, this means that the push to offer a seamless digital customer is essential. And for many, that requires marketing maturity growth. Organizations can realize this growth by committing to understanding where they are currently within a marketing maturity framework and forming and aligning to a plan for how they will achieve higher levels.

What Marketing Maturity Isn't

To truly understand marketing maturity, it's as important to understand what it isn't as what it is. There are many misperceptions about marketing maturity and who can achieve the highest level of it. Marketing maturity is:

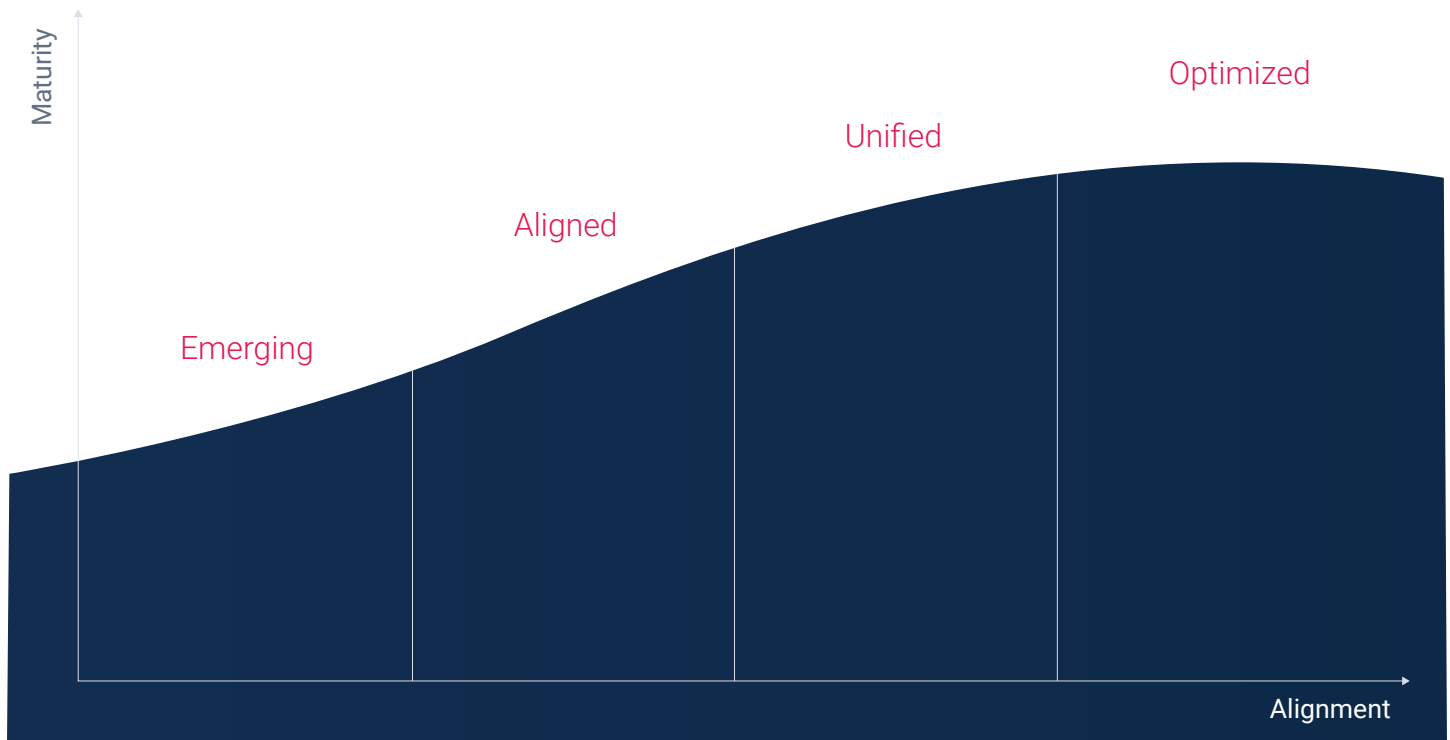
- **NOT** based on a company's revenue
- **NOT** based on the employee count of the company
- **NOT** based on B2B or B2C or B2B2C
- **NOT** based on age of the company
- **NOT** based on how many emails they send

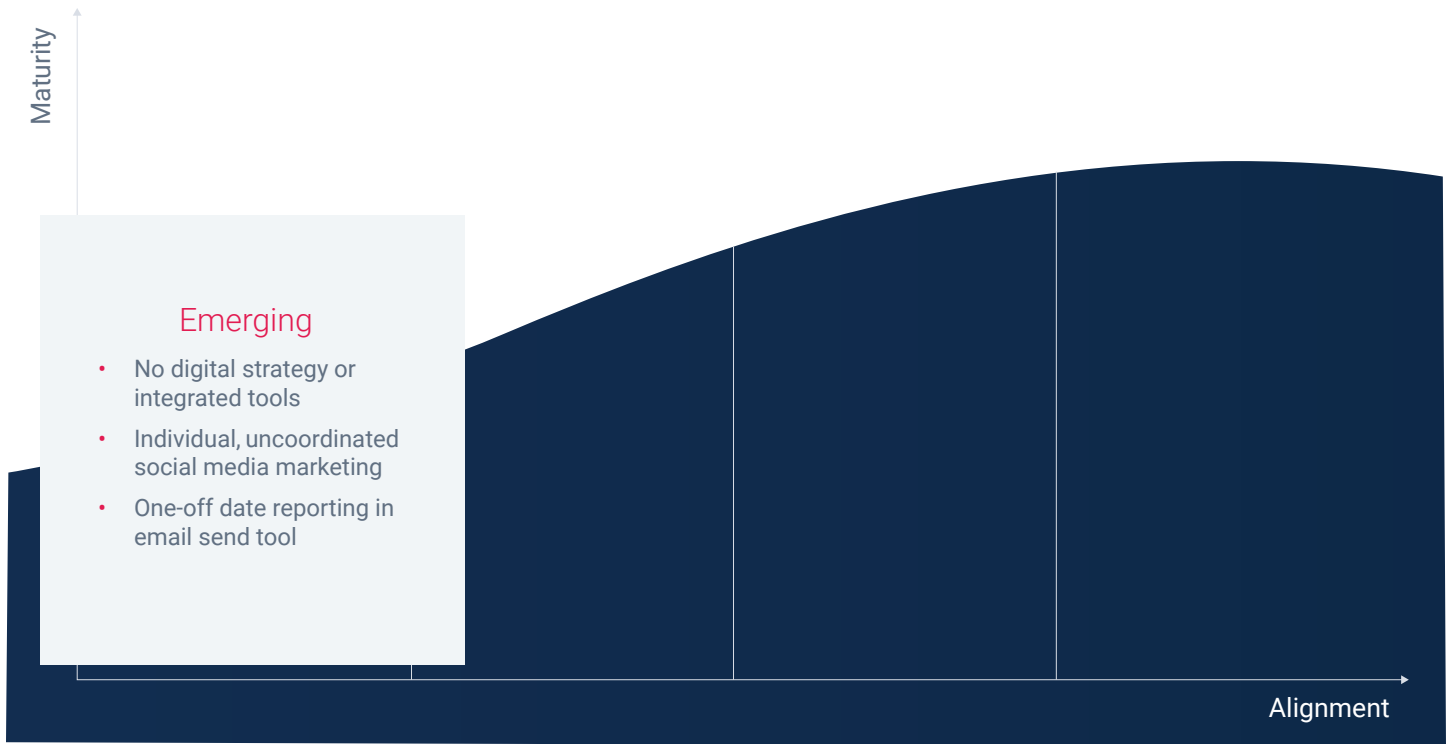
Since marketing maturity doesn't depend on any of these factors, reaching the highest levels of it is achievable for all organizations.

Understanding the Levels of Marketing Maturity

Evolving your marketing plans and processes for organizational success in the all-digital landscape requires a reimagining of the very purpose and mission of marketing both internally and externally. However, before that work begins, it is important to understand the entirety of the marketing maturity journey. By understanding where you are within this framework, where you want to be and even where you have been, you can better gauge your progress towards hitting the crest of marketing maturity.

There are four stages within the marketing maturity journey: emerging, aligned, unified and optimized. Within each of these phases, you will find varying degrees of sophistication when it comes to marketing strategy and tactics, as well as adoption of Microsoft Dynamics and marketing technologies. Let's take a closer look on the following pages.





Understanding Emerging Companies

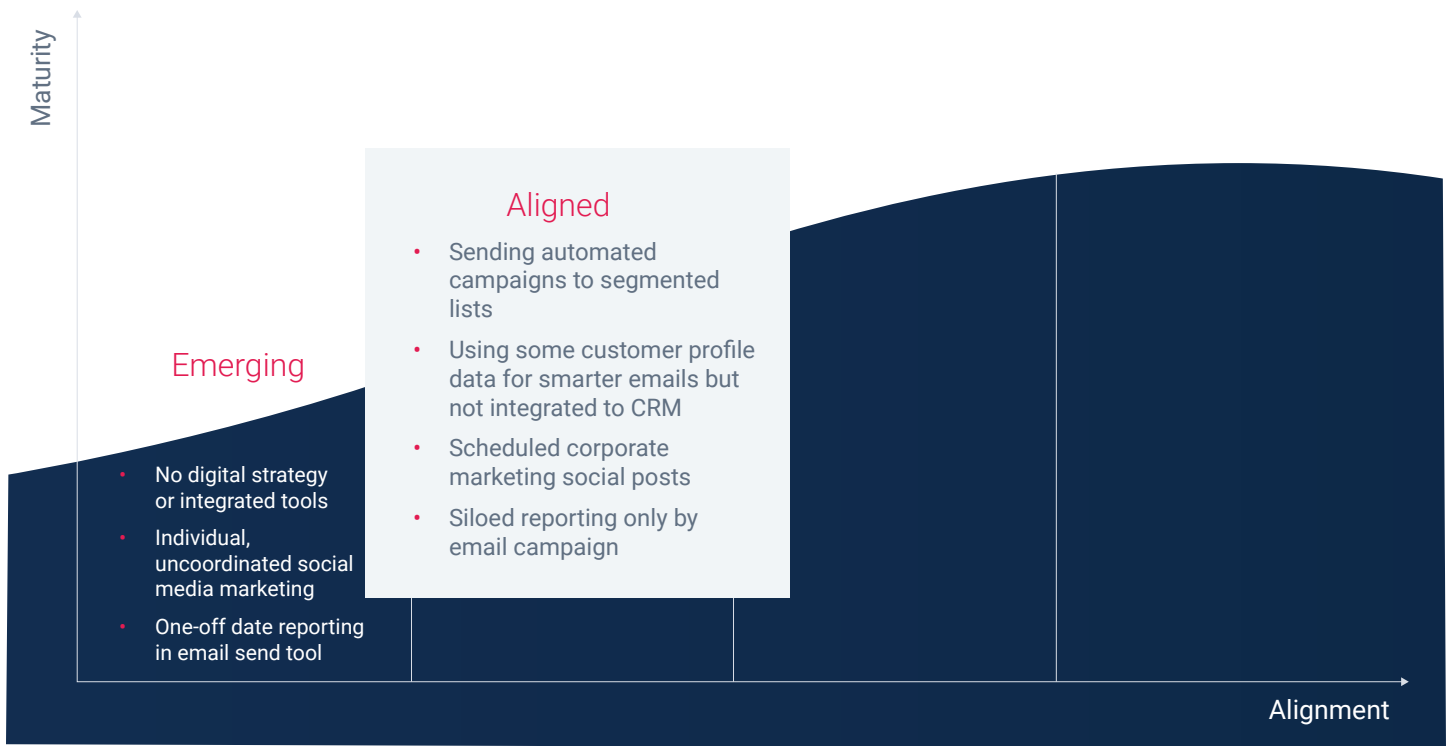
Emerging companies have traditionally sold face-to-face and utilized their website as a corporate brochure. To these companies, email marketing is often focused primarily on sending company news and order confirmations.

Emerging companies are likely to have been laggards in their adoption of Microsoft Dynamics and were driven to do so by the idea of creating a corporate database of who their sellers were talking to and tracking their activities. They often struggle with CRM adoption due to resistance from employees who don't understand the need to implement such an overarching technology. Their sellers are accustomed to controlling prospect and customer communications and may be resistant to the idea of marketing interacting with their prospects and customers.

Marketers at companies in the emerging phase of marketing maturity often don't have insight into which customers or prospects are receiving emails or what they are interested in. Their productivity suffers because they are constantly revisiting their email marketing tool to check opens and attempting to compare this to customer and lead records in CRM.

The marketing team would instead prefer to have email and prospect/customer info in one place so they can see who is interested in them, prioritize sales focus, and spend time planning forward instead of sifting through lists.

These companies have suffered the most from the pandemic and are likely challenged by what demand generation marketing means, what it means to have a digital marketing strategy and how to unify marketing into sales efforts.



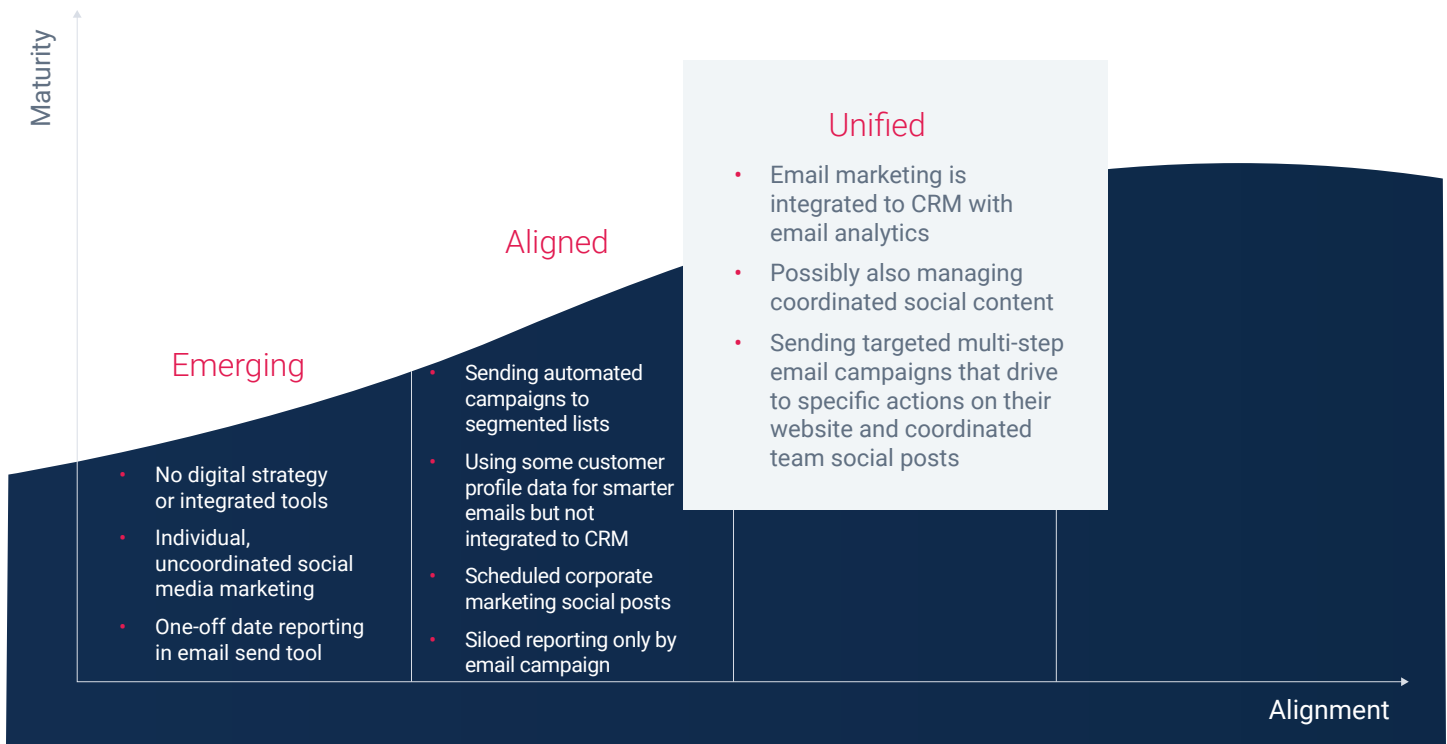
Understanding Aligned Companies

Emerging companies have traditionally sold face-to-face and utilized their website as a corporate brochure. Companies in the aligned phase of marketing maturity likely had their early-stage digital marketing efforts accelerated by the pandemic. They were probably already doing some forms of list segmentation and using some level of campaign automation but found the need for these efforts greatly increased when the pandemic hit.

Despite their adoption of some digital marketing tactics, aligned companies aren't entirely comfortable with their digital efforts. They may be trying to understand how effective their digital marketing efforts have been to date before diving into other initiatives or making additional investments. These companies may also be working to develop a marketing roadmap and determine the right mix of digital into their overall marketing strategy and budget.

Aligned companies are likely to have CRM integrated with ERP, but they often are not realizing the value of pulling information in Microsoft Dynamics into more effective marketing, targeted based on customer information. This is because they are likely using an email marketing solution, but not integrated with CRM. Marketers at these organizations are often most challenged by matching up results of email campaigns back to CRM, providing visibility to the sales team of email engagement, identifying the most effective messages for email and social, and presenting a cohesive brand across digital and traditional channels.

Marketing teams at aligned companies are often striving for a future state of their efforts where they can easily present analytics proving the value of marketing, demonstrating marketing's contribution to revenue, maintaining digital compliance, and sending personalized, relevant and timely messages to prospects and customers.



Understanding Unified Companies

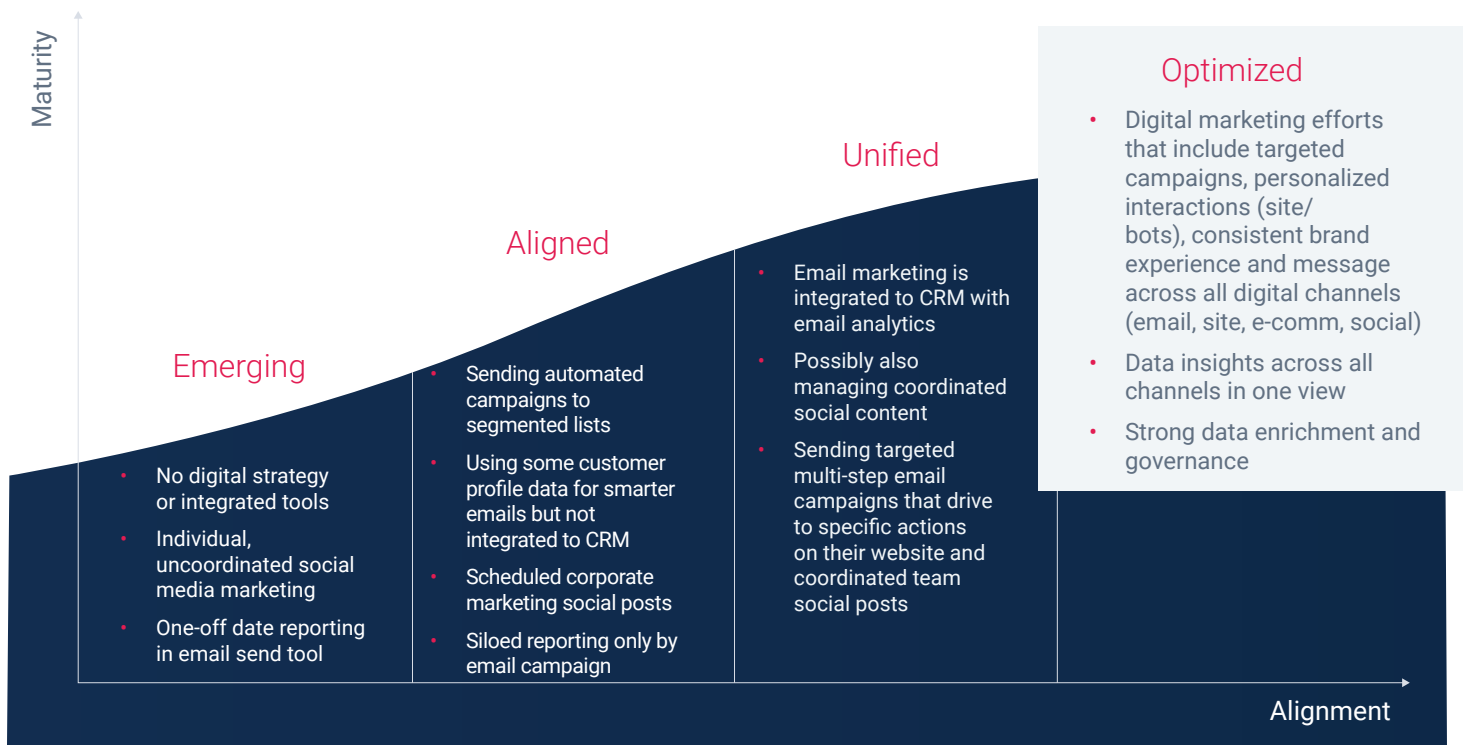
Unified companies often have some level of integration between Microsoft Dynamics and their marketing technology. They are likely thinking in terms of customer journeys, automated campaigns and measuring their marketing efforts. These organizations also are apt to tailor email marketing to various audiences to create more customized customer experiences.

Due to their adoption of digital marketing and their recognition of the importance of integrated CRM and marketing automation, unified companies were better positioned at the onset of the pandemic than their less mature counterparts. However, they may still be struggling to showcase their performance in a cohesive way due to the use of multiple marketing technologies, which may hinder their ability to prove their revenue contribution to company leadership.

To get more out of their marketing reporting, unified companies may be considering or actively making the move to a marketing cloud solution, allowing them to do more with fewer solutions and focus more on positive revenue outcomes.

A common pain point for marketers at unified companies is that they have no reliable way to evaluate the effectiveness of marketing in a single view that includes leads, opportunities and outcomes. They often also feel stuck on how to get to next level of marketing maturity.

Ideal outcomes for the marketers would be sending personalized email campaigns that are intelligently triggered by an action or workflow – such as lack of engagement, abandoned cart and recent purchase. They also strive for meaningful revenue analytics.



Understanding Optimized Companies

Many companies that fall within the optimized stage of marketing maturity are digital natives, founded after a time when digital marketing tactics were more commonplace. Regardless of when they were founded, however, these companies have all made significant investments in digital marketing to scale their go-to-market strategy with prospects and customers.

Optimized companies were best prepared to respond to the all-digital pivot brought about by the pandemic. This is not to say they these companies did not struggle in the face of the pandemic's economic pressures, but that did not have the added worry of starting from scratch with figuring out digital communications.

Marketers at optimized companies will feel most comfortable with independence from IT involvement when it comes to their marketing technology, though they will still embrace the importance of aligning with IT.

Having unified sales and marketing is also a hallmark of optimized companies, with both departments working in lockstep and using Microsoft Dynamics as the core technology of their operations and technology stacks.

Optimized companies are at the peak of marketing maturity, but that doesn't mean that there isn't room for improvement. After all, marketing is constantly evolving to keep pace with customer preferences. These companies often still struggle to keep pace with their analytics or to keep their marketing efforts in sync. And they are likely to face challenges with the amount of time they spend on marketing data and analytics.

Moving forward, marketing teams at optimized companies want to remain on the cutting edge of personalized communications for customers triggered by any digital action. In addition, they want to turn social engagement into sales or service opportunities inside of Microsoft Dynamics easily. Revenue analytics is also a big focus for future success.

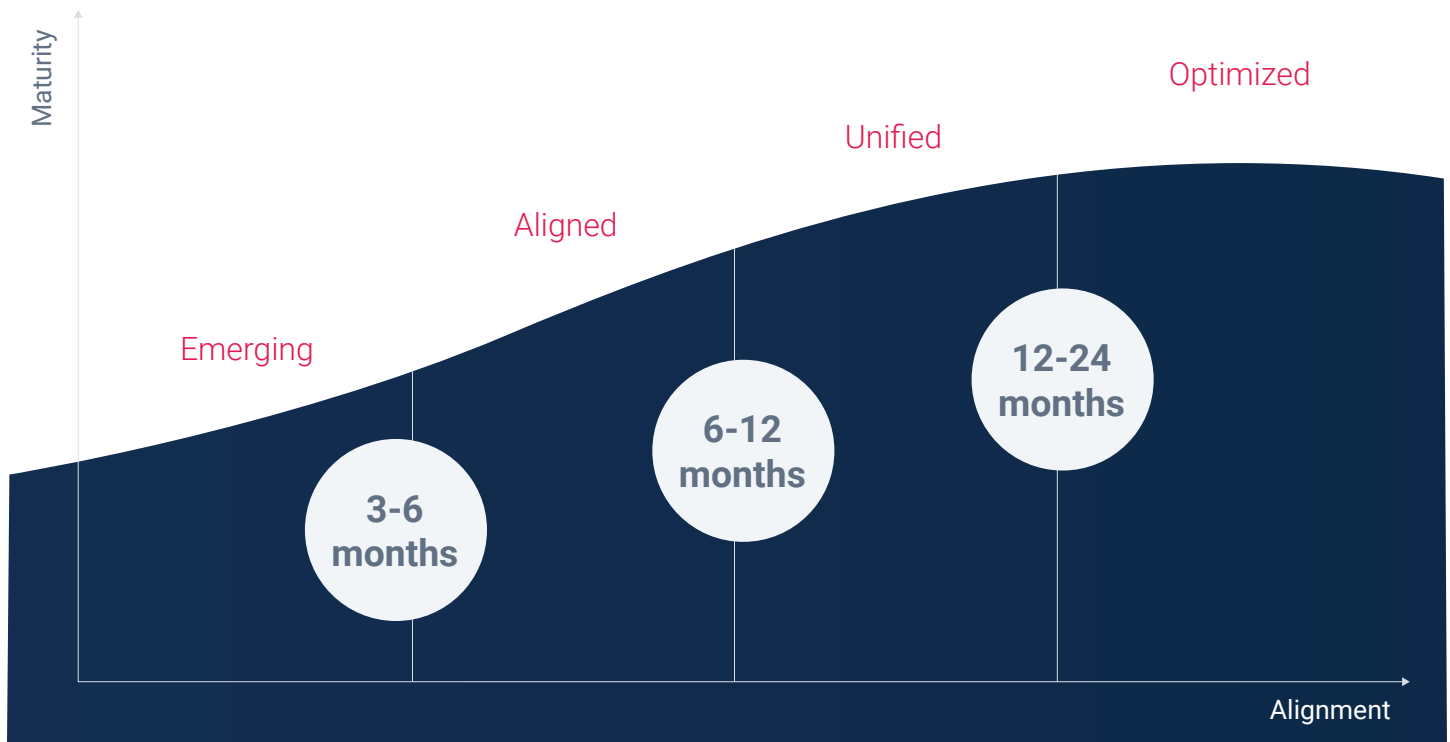
Ready to discover your organization's stage in the marketing maturity journey?

Take the ClickDimensions marketing maturity assessment [here](#). Made exclusively for Microsoft Dynamics marketers, your customized assessment results will include expert recommendations for riding the marketing maturity wave to revenue success.

What it Takes to Level Up Your Marketing Maturity

Given the digital imperative, the stakes of leveling up in marketing maturity have never been higher for organizations of all kinds. And yet it is important for marketers to recognize that this is a true journey – it does not happen overnight and it does require careful mapping and planning. Here are some examples of what it looks like to graduate to a new level and the typical amount of time it takes to make the move once the right plan, processes, people and technologies are in place.

There are four stages within the marketing maturity journey: emerging, aligned, unified and optimized. Within each of these phases, you will find varying degrees of sophistication when it comes to marketing strategy and tactics, as well as adoption of Microsoft Dynamics and marketing technologies. Let's take a closer look.



Emerging to Aligned

Companies that progress from emerging to aligned in their marketing maturity grow beyond email marketing. They evolve from email blasting to creating automated nurture campaigns targeted to defined segments such as prospect versus customer or customer by product usage. It generally takes organizations three to six months to make this move.

Aligned to Unified

In making the leap from aligned to unified, companies are squarely focused on the integration between their technologies and tactics. These organizations move from siloed channels and tactics to deploying multiple marketing tactics that are unified to a campaign theme and integrated into CRM. These tactics can be measured in a unified way at various stages of marketing. Companies will likely take six to 12 months to make this move.

Unified to Optimized

Evolving to the highest phase of marketing maturity is the most time consuming, with the progression taking 12-24 months. That's because moving from unified campaign efforts to dynamically optimized interactions that are personalized and based on journey stages is a complex, though incredibly worthwhile, process. At this phase, companies enjoy outcomes that are easily measured by tactic, channel, campaign and target, and marketing is a revenue generating powerhouse.

Regardless of which phase you are moving from or to, it's important to recognize the power of partnership in this process. When selected properly, marketing technology and services vendors can be an essential part of your company's marketing maturity journey, providing guidance that can be invaluable in charting a path to progress and growth.

Conclusion

Not all marketing is created equal, and neither are the results achieved from those efforts. To keep pace with the market, competitors and customer needs, organizations must focus on their marketing maturity.

Think of marketing maturity as a wave. The goal is to be at the crest instead of the trough. That's because there is increasingly more power as the wave grows higher. It is also important to think of marketing as fluid like a wave. Marketers must go with the flow of changing customer wants, needs and preferences to achieve revenue success with their efforts.

About ClickDimensions

Founded in 2010, ClickDimensions is the leading marketing platform for Microsoft Dynamics, with more than 3,700 customers around the globe and a partner network that spans 76 countries today. As The Marketing Cloud for Microsoft Dynamics™, ClickDimensions is redefining how marketers work and attain results with the only unified marketing technology, analytics and services platform in the market – made exclusively for and natively built within Dynamics.

To learn more, visit us at clickdimensions.com or follow us on Twitter at [@ClickDimensions](https://twitter.com/ClickDimensions).