

State of Marketing Automation 2020

10 questions to test your digital readiness



Dr Dave Chaffey, Co-founder Smart Insights
CommuniGator GatorCon 2020
5th February

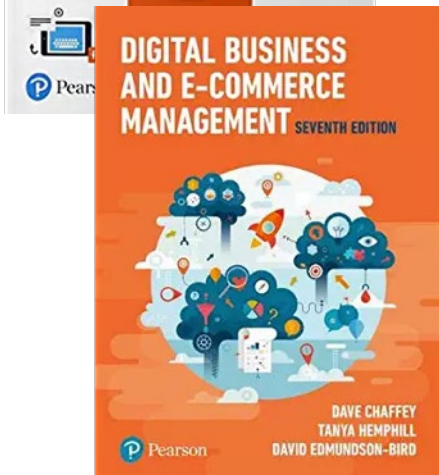
About Dave Chaffey and Smart Insights



Digital Marketing consultant, trainer and author since 1997. Creator of the RACE planning model. Co-host of the [What's New in Marketing](#) podcast.

Co-founder and content director of [SmartInsights.com](#) - a marketing advice community with > ½ million uniques/month.

Premium members in over 120 countries use our **planning guides, templates and online courses** to Plan, Manage and Optimize their digital marketing.



Stacy's car-buying journey included over 900 digital touchpoints* in a 3-month period



Occurred
on Mobile



139 Google Searches



14 YouTube Videos



89 Images



69 Dealer Interactions



186 Manufacturer Interactions

Explored
14 Brands



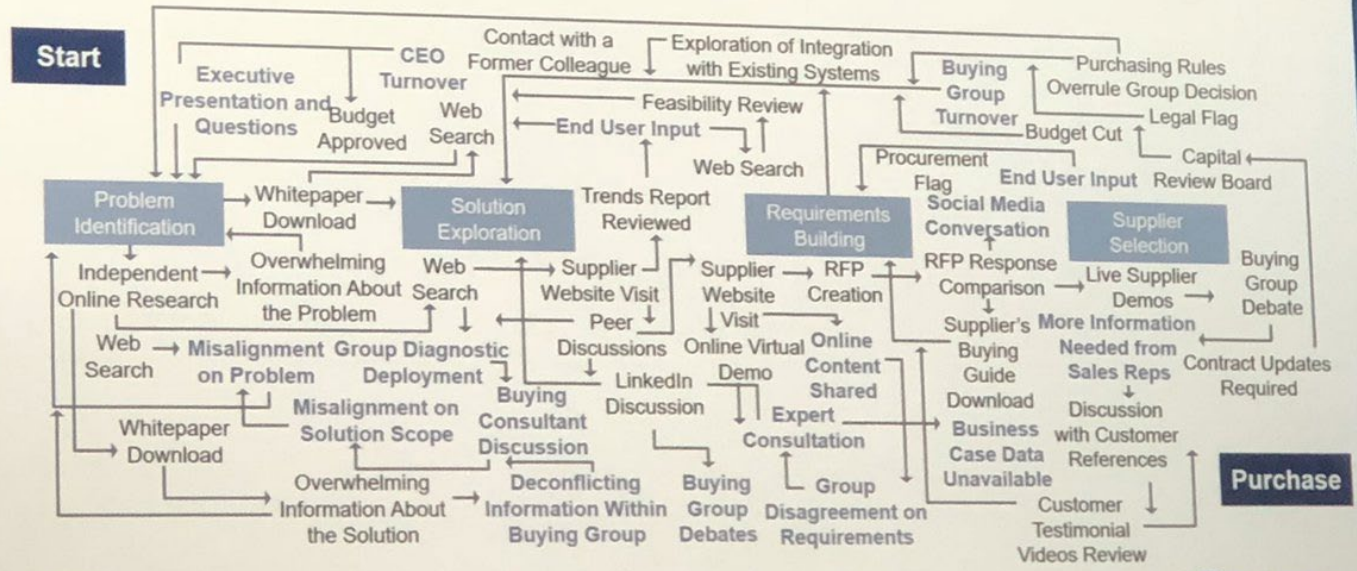
Considered
6 Brands

Decided Between
2 Brands

*Touchpoints = searches, website visits, video views, clicks

A Long, Hard Slog

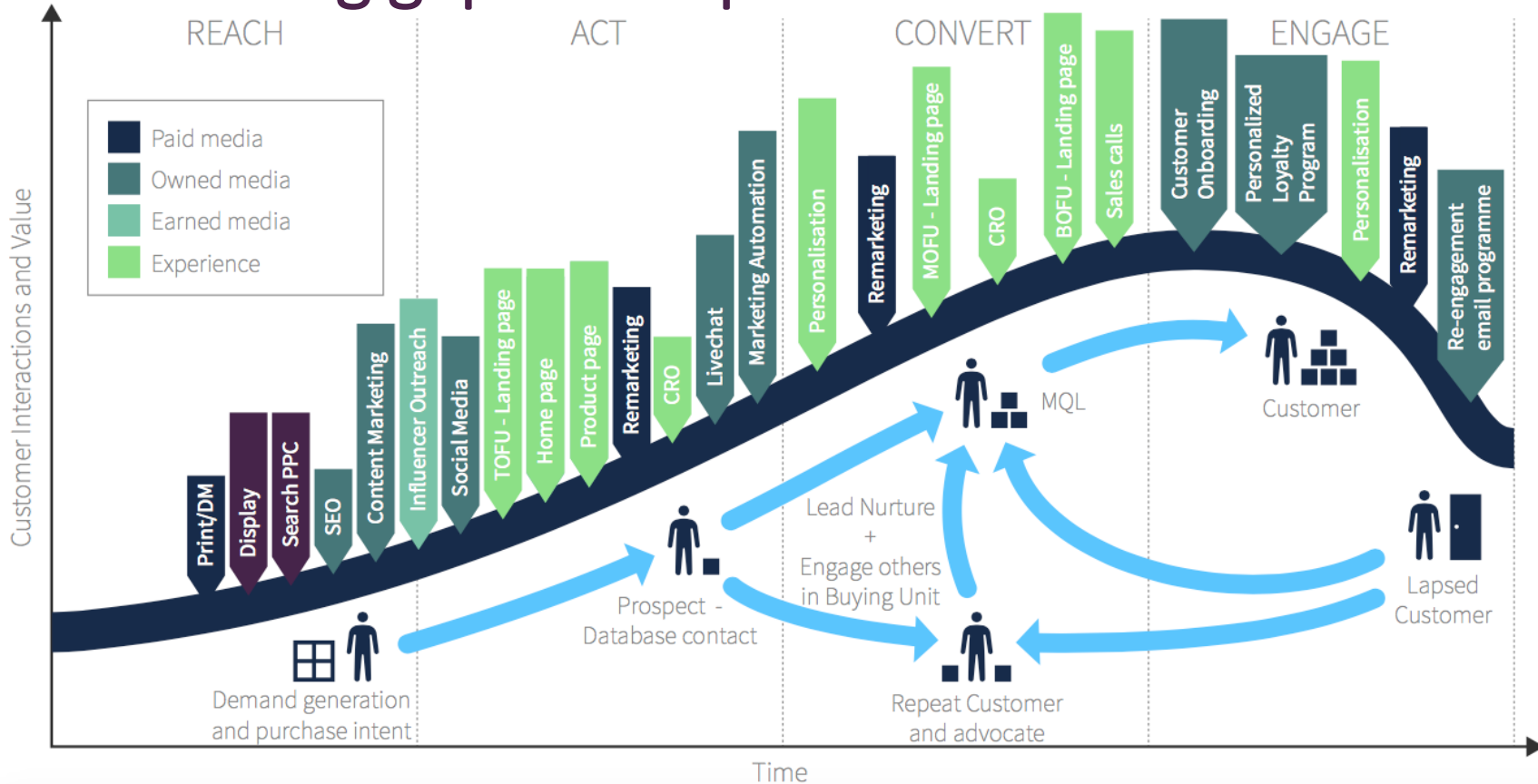
Illustrative B2B Buying Journey



Source: Gartner

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Customer lifecycle omnichannel touchpoint review – filling gaps and optimisation needed!



Source: [Customer lifecycle guide](#)

Key digital marketing investment decisions?

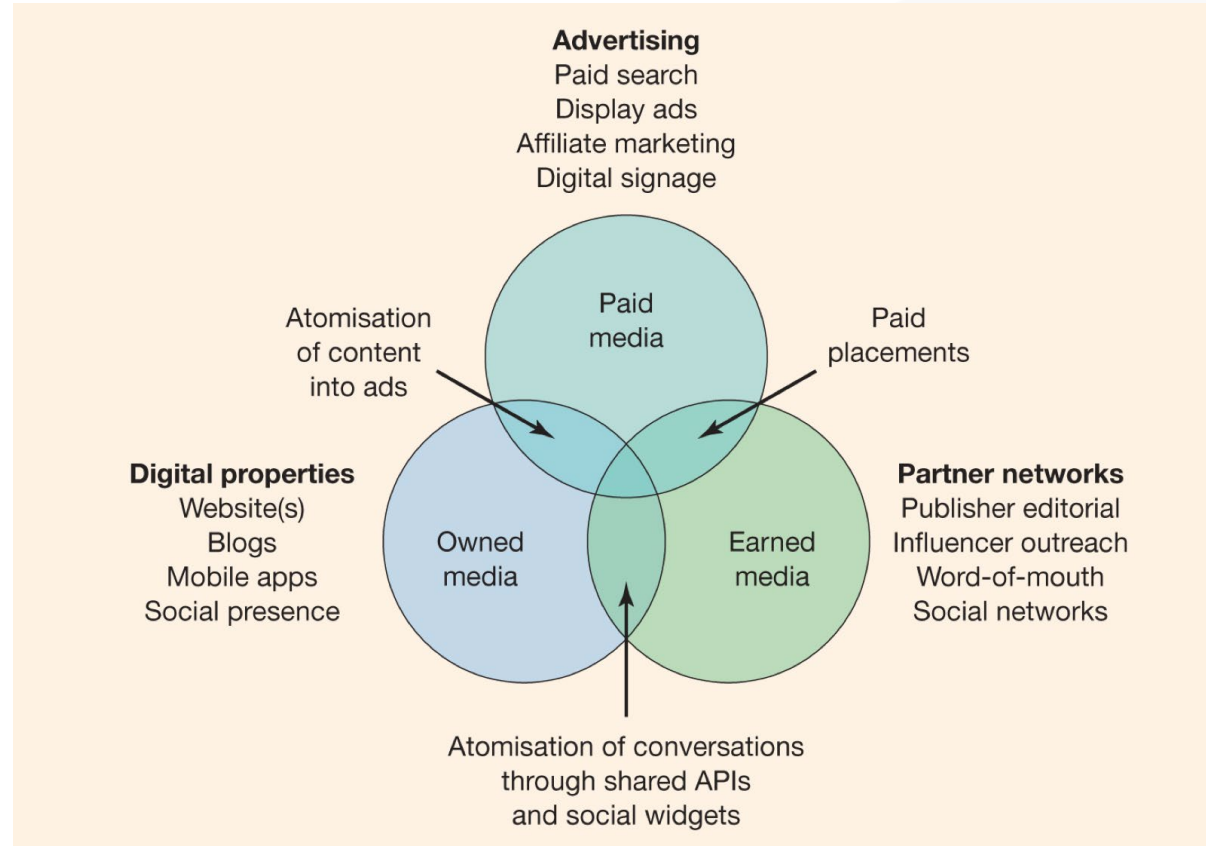
Governance

Media

Experience

Messaging

Content



About you. Q. Which marketing investment will most INCREASE your commercial returns in 2020?

- 1. Digital governance
- 2. Digital media
- 3. Digital experiences
- 4. Digital messaging
- 5. Digital content



Governance

Q. Do you have the right capabilities and competencies in place?

Q. Is your digital marketing strategy effective?

Q1. Do we have the digital maturity to compete?

AIMING FOR DIGITAL MARKETING EXCELLENCE

Take your digital marketing to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are exploiting their digital marketing and then plan how to take it to the next level.



Digital Capability	ONE. Initial	TWO. Managed	THREE. Defined	FOUR. Quantified	FIVE. Optimised
A. Strategic Approach	No strategy	Outline plan with prioritised marketing activities	Defined vision and strategy for Digital Transformation	Business-aligned strategy and roadmap	Agile strategic approach
B. Performance Improvement Process	No KPIs	Volume-based KPIs No dashboards	Quality-based KPIs 'Last click' attribution Business dashboards	Value-based KPIs Weighted attribution Ad hoc tests / CRO	Lifetime-value KPIs Structured experiment programme
C. Management Buy-in	Limited	Verbal support, but inadequate resourcing	Sponsorship and increased investment for Digital Transformation	Active championing and appropriate investment	Digital is an integral part of strategy development
D. Resourcing and Structure	No specific digital skills	Core skills centralised or agencies	Centralised hub and spoke Dedicated resources	Decentralisation and reskilling	Balanced blend of marketing skills
E. Data, Martech and Infrastructure	No or limited customer database	Separate marketing technology, limited data integration	Partial integrated Martech stack and data quality controls	Integrated systems and 360° view data sources in Martech stack	Latest innovations, e.g. AI and Machine Learning can be integrated
F. Integrated Customer Communications	Not integrated	Core push activities synchronised	Integrated inbound approach. Last-click evaluation.	Integrated, Personalised, Paid-Owned-Earned media attribution	Media optimised for ROI and to maximise CLV
G. Integrated Customer Experience	Static brochureware website	Desktop and mobile support, not personalized. Landing pages in place.	Partially personalized desktop and mobile experience	Integrated, Personalized web, mobile, email and social media	Full contextual personalized experiences and recommendations
	"Laggard"	"Developing capability"	"Competent average capability"	"Above-sector average capability"	"Market leading capability"

📌 **Free Membership**

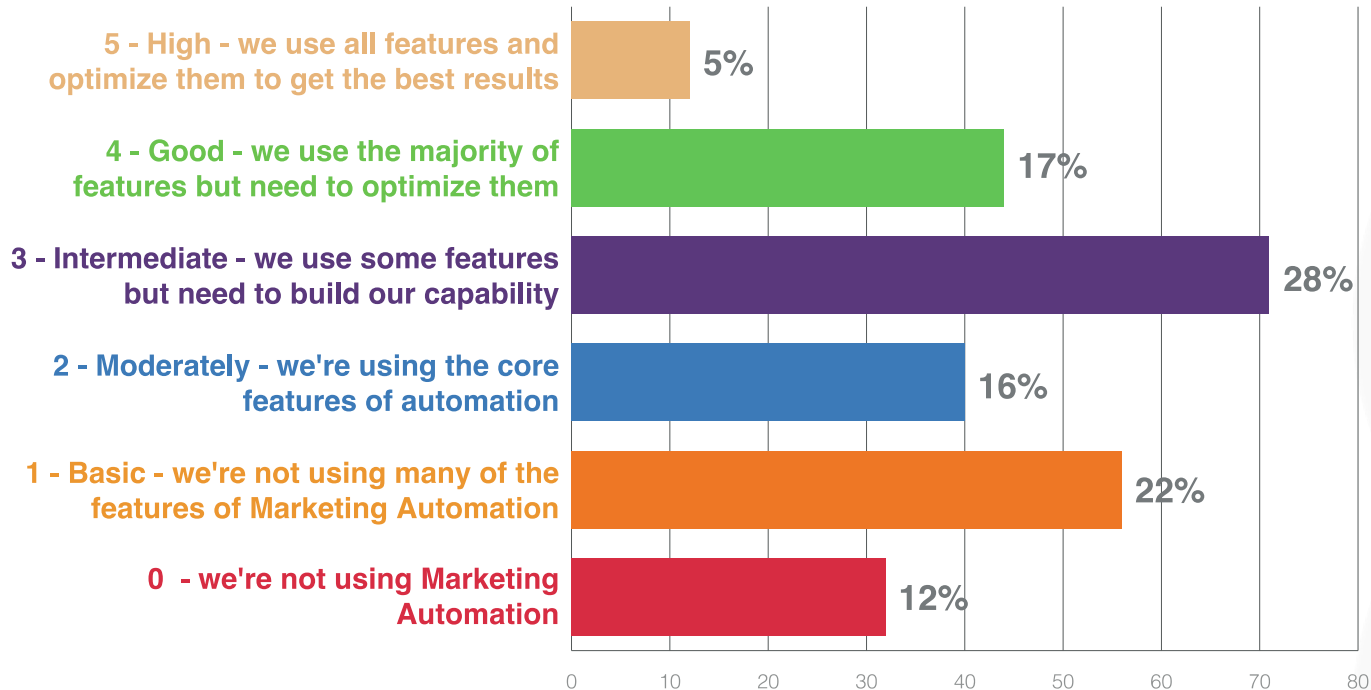
Free digital marketing benchmarking templates

Part of the Digital marketing strategy and planning Toolkit

[Download for digital marketing benchmarking templates](#)

Automation Maturity

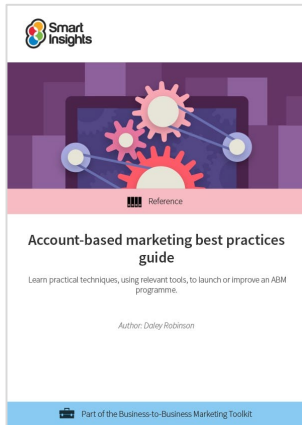
How do you rate the overall effectiveness of Marketing Automation in your business?



Number of Respondents: 255



Q2. Do you have an integrated inbound (ABM) plan?



	BUYER'S JOURNEY			CUSTOMER'S JOURNEY			
	Demand Generation	Pipeline Velocity					
Customer Journey	Prospect	Opportunity	Customer	Adoption	Upsell/Cross-Sell	Land & Expand	"Always On" Air Cover
Goal	Leads to Qualified Accounts	MQL to Opportunity	Opportunity to Customers	Customers to Advocates	Winning New Business	Winning More Business	Keeping Top of Mind
Strategies	Events/Webinars Campaigns Inbound Outbound	MQL to SQL SQL to Opportunity Lost/Dead to Opportunity	New Opportunity to Evaluation Evaluation to Negotiation/Review Negotiation/Review to Closed-Won	Workshops/ Training Webinars/Events Customer Reviews	New Product/features Upgrades Outbound	New departments Personalized Messaging Outbound	Partners Analysts Influencers Investors
Recommended Content	Blog Post eBook Infographic Whitepaper	Video Testimonial Case Studies Webinar	Video Testimonial Case Study "How To" Resources ROI Competitive Analysis	Implementation Guide Tutorials "How To" Resources	Product Webinar Case Study ROI	Case Study ROI Video Testimonial	Quarterly Reports Thought Leadership Newsletter
Stakeholders	Marketing, CMO, Demand Generation	Marketing, Sales, Sales Development	Marketing, Sales, Sales Development, CMO, CSO	Marketing, Customer Success	Marketing, Customer Success, Sales	Marketing, Customer Success, Sales	CEO, CMO, CSO
ABM Success Measure	<ul style="list-style-type: none"> ↑ MQLs ↑ Contact Activities ↑ Audience ↑ Executive Awareness ↑ Number of Appts. 	Increase In: <ul style="list-style-type: none"> ↑ Opportunities ↑ Accounts Engaged ↑ Marketing Sourced Pipeline ↑ Pipeline Velocity 	Increase In: <ul style="list-style-type: none"> ↑ Closed-Won Accounts ↑ Opportunities Engaged ↑ Sales Velocity ↑ Deal size ↑ New logos 	Increase In: <ul style="list-style-type: none"> ↑ ↑ ↓ 	Increase In:	Increase In:	Increase In:

Source: [Terminus](#)



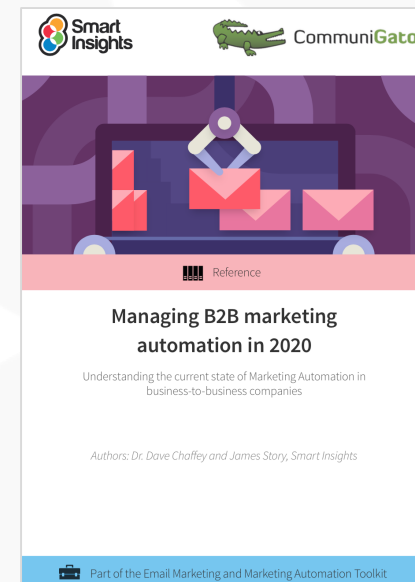
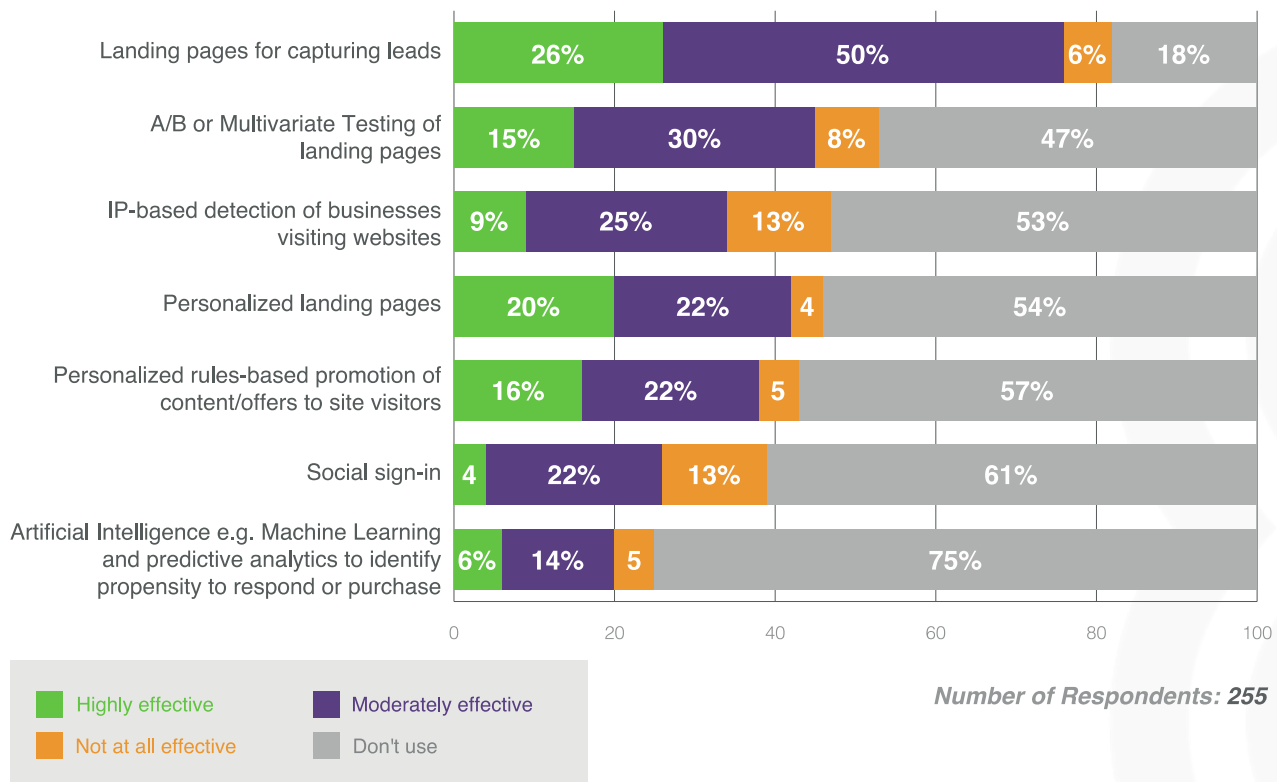


Experience

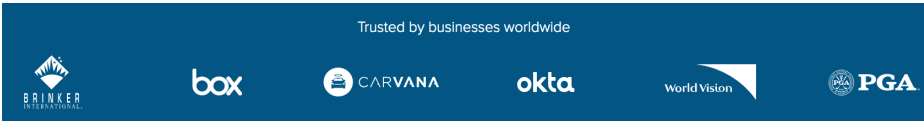
Q. Are your website / mobile apps effective?

Q3. Do you have the agile, data-driven marketing mindset?

Please rate the effectiveness of these web-based Marketing Automation techniques



Example design patterns to test - Customer list / testimonials



What our customers have to say

"As we grow and scale our business, RingCentral offers a solution that allows us to run our enterprise communications on a single platform while **delivering a very high standard of reliability, security, and quality.**"

Paul Chapman
CIO, Box

"RingCentral is way ahead in terms of **innovation**. It has plenty of functionality. It brings big-company systems to smaller companies."

Sean Lam
CEO, Walker Crisp

"From receptionists to the executives, **everyone is delighted with our new system**. Migrating communications to RingCentral was the best move we have made."

Marika Clemow
Director of Operations, ATG

[See more case studies](#)

"We now spend less time on issues such as software changes and can direct more energy on protecting our members' data and company information."

Sharon Black
Sr. Manager of Information Security,
BlueCross BlueShield of Tennessee

TRUSTED BY MORE THAN 1 MILLION BUSINESS USERS WORLDWIDE

[EXPLORE CASE STUDIES →](#)



The best brands connect with Genesys.

For delivering the best customer experience, 65 of the world's top 100 brands choose Genesys. See how these brands are connecting with customers to build relationships and loyalty.

PayPal

Learn how the Genesys Customer Experience platform was a game-changer for PayPal.

[Read the story](#)

Quicken

Learn how Quicken deployed a cloud contact center solution in two months.

[Read the story](#)

vodafone

Learn how Vodafone improved contact center ranking and NPS with Genesys.

[Read the story](#)

Local Government & OMBUDSMAN

Local Government Ombudsman

"In terms of financial and operational benefits, significant cost savings, productivity and efficiency gains feature highly."

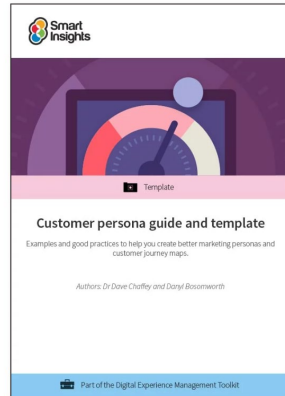
Adrian Beaumont, LGO IT Manager

[Read case study](#)

Q4. Do you have a deep understanding of your personas?

Details need for an effective persona:

- A. Characteristics
- B. Motivations and Buyer behaviour
- C. Customer journey content mapping



Persona	Name	Robert	
	Type	Primary persona	
	Decision role	Main decision maker in startup	
Demographics	Age	35 y.o.	
	Gender	Male	
	Buying unit	Reports to COO, CFO and CEO	
Decision making	Style	Product evaluation style	
		5 month timescale to deployment	

Personal and home	Lives in Boulder, CO Keen snowboarder and ultra-runner in summer Married for 5 years
Work	CTO responsible for service availability Online Diet service / startup Serving consumers 12 people in development, design and infrastructure

Goals and motivations	<ul style="list-style-type: none"> • Demand spikes are jeopardising the growth of the business • Wants to focus on core competencies - developing customer proposition • Looking to reduce costs and internal admin time
Barriers and Challenges	<ul style="list-style-type: none"> • New year spikes are literally keeping Robert awake at night • Needs 10+ web servers, multiple database servers and load balancer • Want to support 10 million uniques maximum per day • Only 5 months to deploy before Christmas spike • Not sure about using a third party or direct to AWS, Azure
Our key messages	<ul style="list-style-type: none"> • Speed to market • Flexibility to grow with you • Your dedicated support team

Buying scenario	<p>Robert is seeking a managed cloud (Infrastructure as a Service, IaaS) to scale virtual server space, processors, bandwidth and load balancers Has to make business case to 3 more senior colleagues</p> <p>Since launch 2 years ago the company has seen rapid growth with a 50X revenue growth in the previous year involving 300K average daily site visits with spikes up to one million daily uniques requiring IaaS</p> <p>Previously had a part time system admin responsible for up-time</p>
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Preferred media	Work: CIO.com, Quora, Stackexchange for queries Home: Medium blogs, Boarding and Ultra magazines
Social media use	Work: Twitter (for keeping informed); LinkedIn (for career) Home: Facebook and Instagram (daily)
Devices	Macbook Pro Latest iPhone

Customer journey map			
	Stage 1: Awareness (Discover)	Stage 2: Evaluation (Compare)	Stage 3: Decision (select)
Media touchpoints	Google Quora CIO.com	Clouds360.com G2Crowd.com Itadvisory.com	G2Crowd.com Brand searches
Key questions	Cost savings for business case Time to implement? Potential risks	Independent service quality assessments? Implementation project tasks Cost breakdown	What happens when there is downtime? How do I escalate? How is agreement purchased?
Searches	IaaS Benefits and risks Cloud-based servers Virtual servers and load balancers	Top IaaS providers Managed cloud providers Support quality IaaS	IaaS reviews Azure vs Amazon Web Service Pricing Azure vs AWS
Key content (Types and formats)	Proof points - speed to market Benefits of managed cloud (top-level video and whitepaper) Process of migration	Gartner magic quadrant Service levels Implementation case studies/success stories Why 'company name'	Detailed service level agreement How it works - dedicated support contact Details of team certifications for AWS Options when major problem/deadline?
Interactive tools	Cost savings calculator	Webinar on how to choose a cloud service	Video case study of onboarding

Where is your content marketing strongest and weakest? Different personas?

	REACH	ACT	CONVERT	ENGAGE
<i>Content type and aim</i>	TOFU Awareness Engagement	MOFU Evaluation Engagement	BOFU Purchase Engagement	ROFU Retention/Advocacy Engagement
<i>B2B Examples</i>	<ul style="list-style-type: none"> • Hero lead-gen for cut-through • Infographics • 10X content • Webinars - education 	<ul style="list-style-type: none"> • Case studies • Datasheets • Independent reviews • Webinars - demos 	<ul style="list-style-type: none"> • ROI calculators • Business case download 	<ul style="list-style-type: none"> • Career development • Enewsletter
<i>Distribution</i>	<ul style="list-style-type: none"> • SEO • Social • Pop-ups and Inline content 	<ul style="list-style-type: none"> • Email welcome • Email nurture • Enewsletter personal • Web personalisation • Livechat 	<ul style="list-style-type: none"> • Emails from Sales (Automated) • Webinars 	<ul style="list-style-type: none"> • Enewsletter • Web personalisation

'Hyperpersonalisation' AI-based merchandising strategy



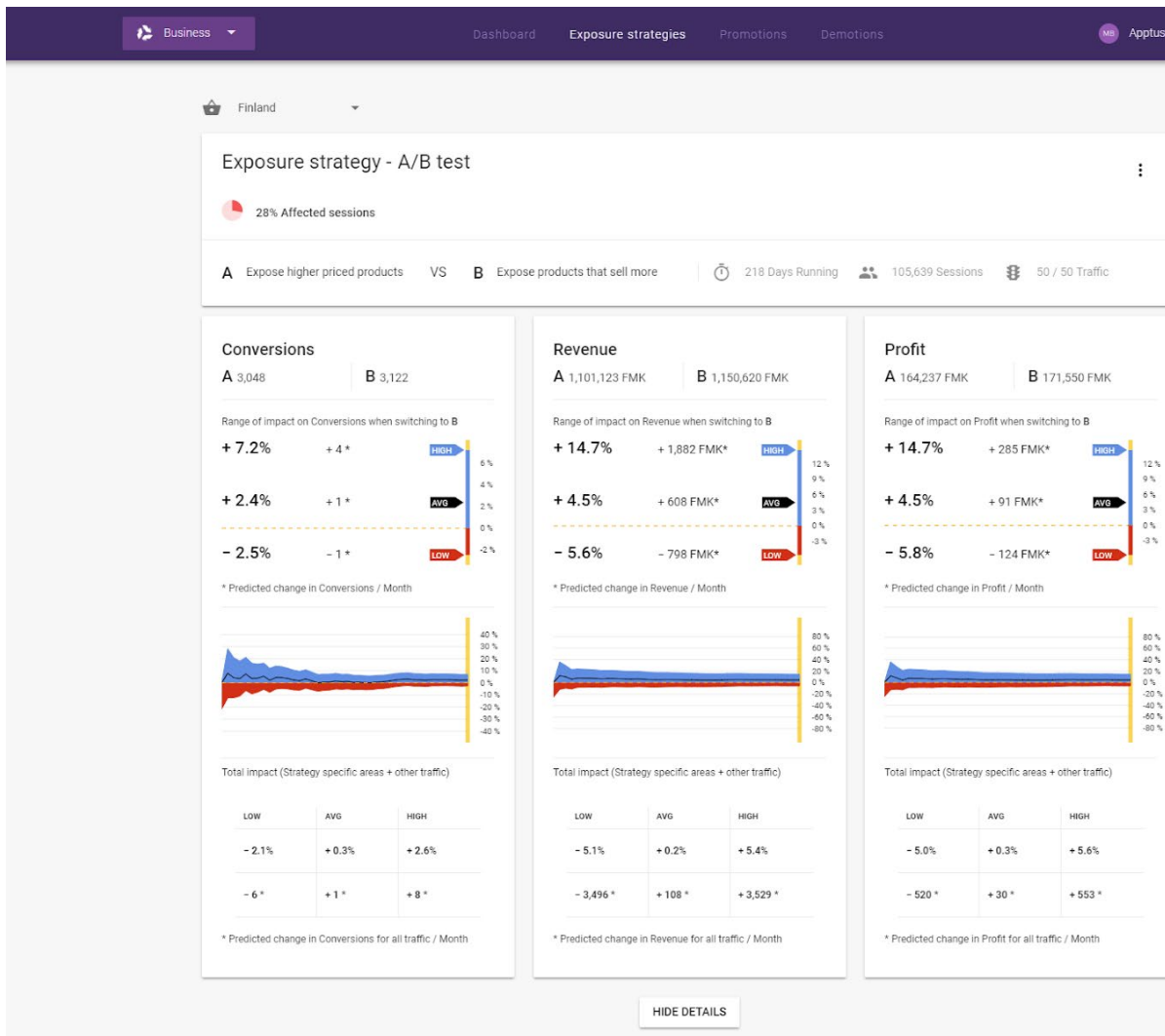
Making the case for AI in online merchandising

Why AI must cross the chasm from digital marketing to trading teams.

Authors: Dr Dave Chaffey (Smart Insights)
Andrew Fowler (Apptus)

Part of the E-commerce/Retail Toolkit

Source: [Apptus](#)





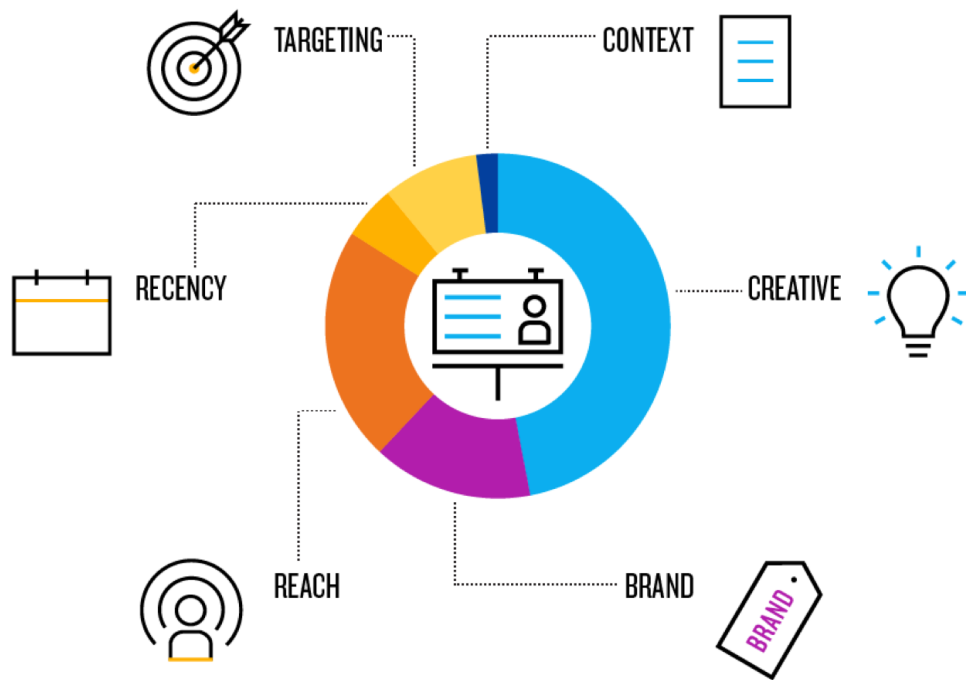
Media

Q. Is your investment in paid, owned and earned media effective?

What's most important to get right?

PERCENT SALES CONTRIBUTION BY ADVERTISING ELEMENT

n

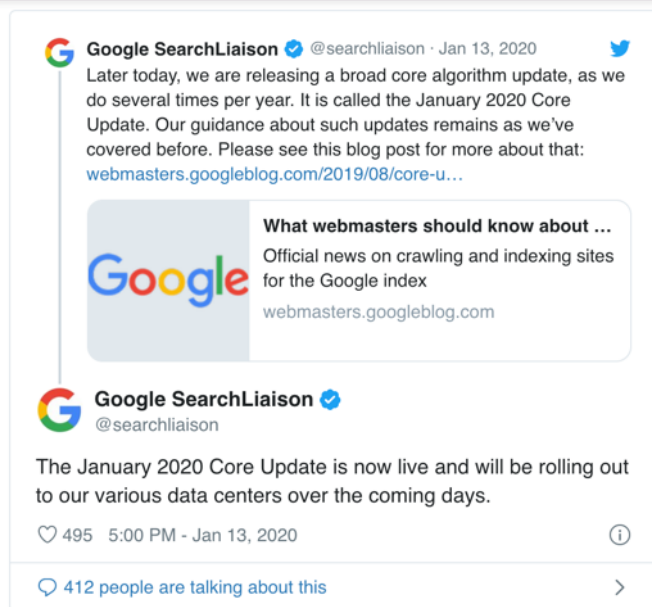


What's missing?

Source: [Nielsen](#)

Q5. Are you harnessing always-on media?

Dr Dave Chaffey : Digital Insights



Google SearchLiaison @searchliaison · Jan 13, 2020

Later today, we are releasing a broad core algorithm update, as we do several times per year. It is called the January 2020 Core Update. Our guidance about such updates remains as we've covered before. Please see this blog post for more about that: webmasters.googleblog.com/2019/08/core-u...

What webmasters should know about ...
Official news on crawling and indexing sites for the Google index
webmasters.googleblog.com

Google SearchLiaison @searchliaison

The January 2020 Core Update is now live and will be rolling out to our various data centers over the coming days.

495 5:00 PM - Jan 13, 2020

412 people are talking about this

If you're wondering what these are, and you're active in SEO, this post [explaining Google's core updates](#) is a must-read.

The article explains simple questions how you can use to test your content like this, that are part of their E-A-T which stands for Expertise, Authority and Trust guidelines. They give these *content and quality questions* as examples:

- Does the content provide original information, reporting, research or analysis?
- Does the content provide a substantial, complete or comprehensive description of the topic?
- Does the content provide insightful analysis or interesting information that is beyond obvious?
- If the content draws on other sources, does it avoid simply copying or rewriting those sources and instead provide substantial additional value and originality?
- Does the headline and/or page title provide a descriptive, helpful summary of the content?

A glossary example like this would fail these tests, but that's OK since I'm not trying to rank for this term – just explain the term!

The post gives more examples and also suggests people working on SEO become familiar with their [search quality rater guidelines](#) including E-A-T. They explain that raters are people who give us insights on if our algorithms seem to be providing good results, a way to help confirm our changes are working well.

Using Historical Optimization



7 Digital Marketing Strategies and How to Plan Your Own ...

<https://blog.hubspot.com/marketing/digital-strategy-guide>

16 Oct 2019 - What is digital marketing strategy? Your digital marketing strategy is the series of actions that help you achieve your company goals through carefully selected online marketing channels. These channels include paid, earned, and owned media, and can all support a common campaign around a particular line of business.

Digital marketing strategy: How to structure a plan? | Smart ...

<https://www.smartinsights.com/digital-marketing-strategy>

A digital marketing strategy is essential to take advantage of the growing opportunities from digital marketing. Create your plan with our resources.

10 reasons you need a digital ... Digital marketing strategy guide

10 reasons you need a digital marketing strategy in 2020 ...

<https://www.smartinsights.com/digital-strategy-development/10-reasons...>

9 Jan 2020 - These are the essential ingredients of a digital marketing strategy, and they will help you plan manage and optimize your digital marketing.

What Are the Most Effective Digital Marketing Strategies ...

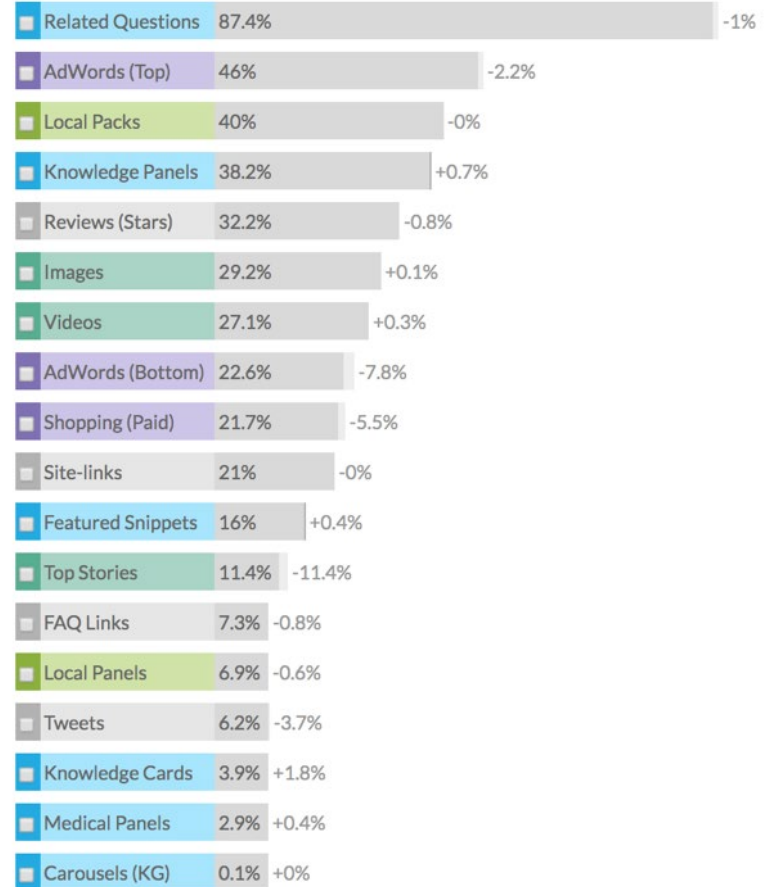
<https://digitalmarketinginstitute.com/en-gb/blog/what-are-the-most-ef...>

Marketers looking for the ultimate digital marketing strategy need to have a clear understanding of their business, product, and demographics before choosing a ...

5 Steps to a Powerful Digital Marketing Strategy | Trends ...

<https://digitalmarketinginstitute.com/blog/5-steps-powerful-digital-mar...>

According to a 'Managing Digital Marketing' study by Smart Insights, 46% of brands don't have a defined digital marketing strategy, while 16% do have a ...



[HubSpot - the blogging tactic no one is talking about](#)

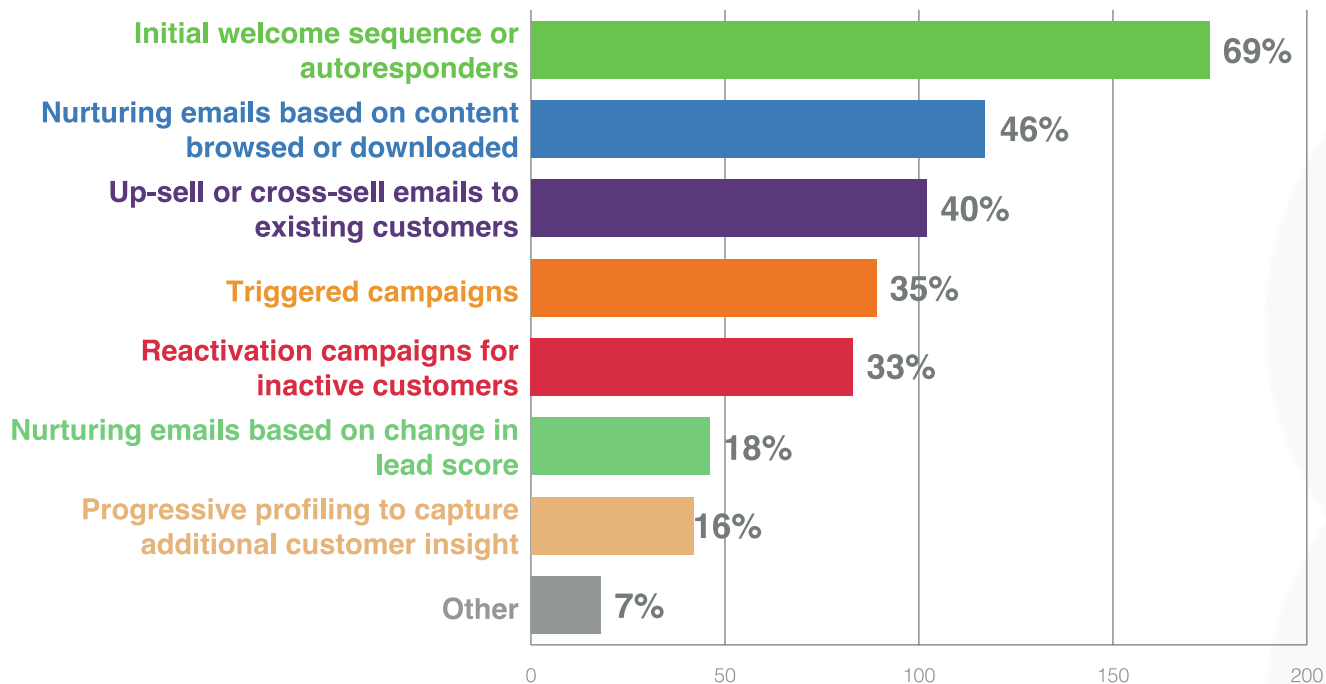


Messaging

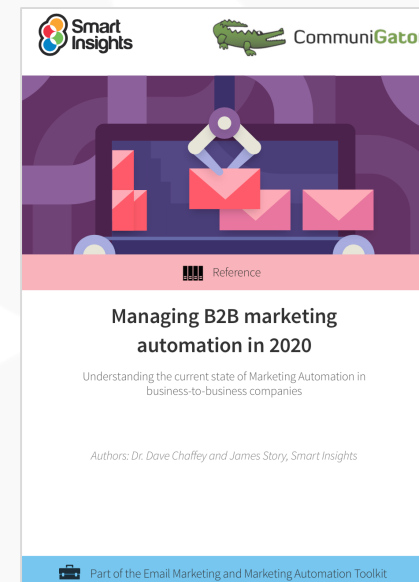
Q. Is your use of lifecycle messaging effective?

Q6. Are you automating to the max?

Which of these automated email marketing techniques do you use?



Number of Respondents: 255



Template to plan nurture emails

Automated email code	Trigger event	Source	Trigger interval and rule	Message focus and template style	Primary marketing aims	Secondary marketing aims	From	Subject line	Pre-header (1)	Headline (2)	Block 1: Hero area lead copy, visual, and CTA (3-6)
Welcome-0d	Online brochure download	Landing page	+0d	Welcome. Build brand favourability and familiarity Standard Welcome - Postcard + longer content	1. Engage with deals offer to encourage purchase 2. Generate a callback	1. Explain brand values 2. Convince about company proposition 3. Offer help	Company name	Enjoying your XX brochure?	Check our latest deals	Let us help you choose the right course	Do you need any help? Acknowledge brochure download (including multiple brochures).
Welcome-2d	Online brochure download	Landing page	+2d	Try our service taster Standard Welcome	Generate additional lead event	Generate callback, "Ask the Expert" to capture phone number or book online.	Company name	Have you tried our <next lead type>?	Are you suitable?	Learn more about the <brand> Experience	Need to find out more? Try the <lead type>. Acknowledge brochure request.
Welcome+7d	Online brochure download	Landing page	+7d if no response to E1	Time-limited discount/bonus Shorter postcard welcome	1. Buy before lose attention 2. Encourage social sharing	Generate callback, "Ask the Expert" to capture phone number or book online.	Individual name	Receive a 5% discount PLUS free service deal	Act now to get the best deal	Act now to save	Discount code in Johnston Box

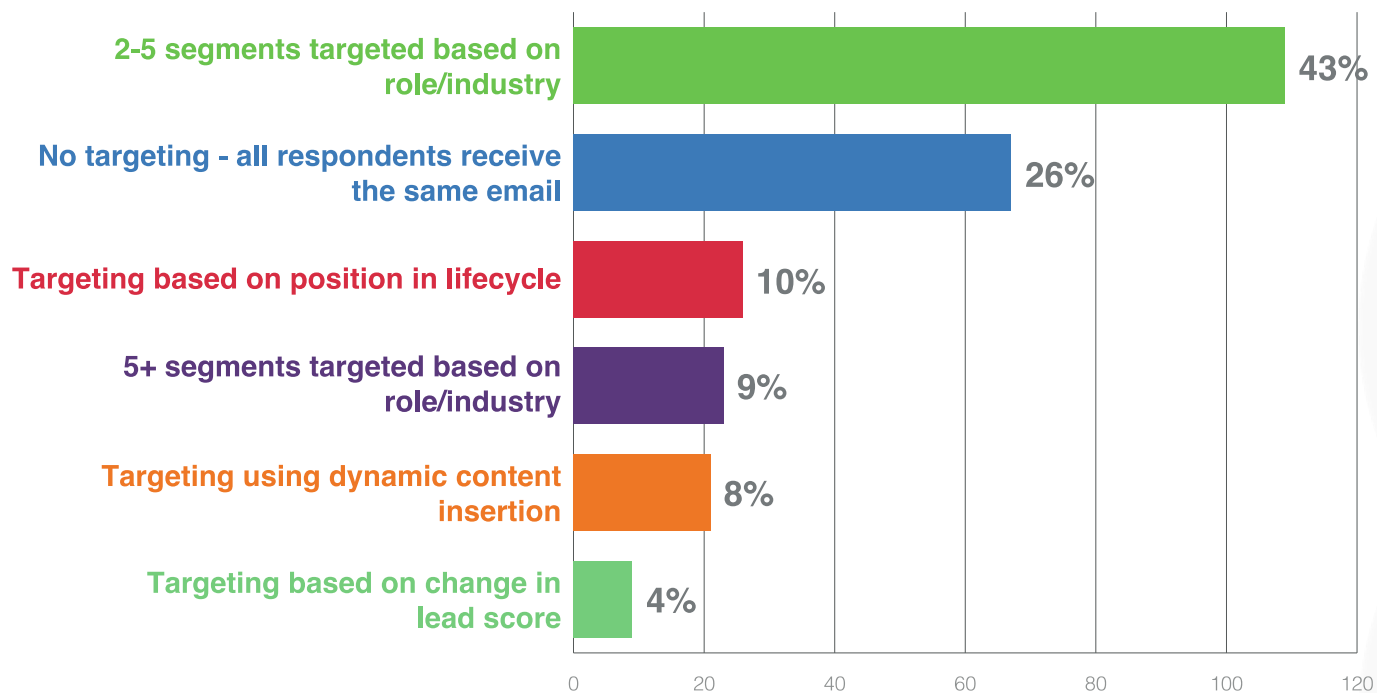


Email sequence contact strategy template

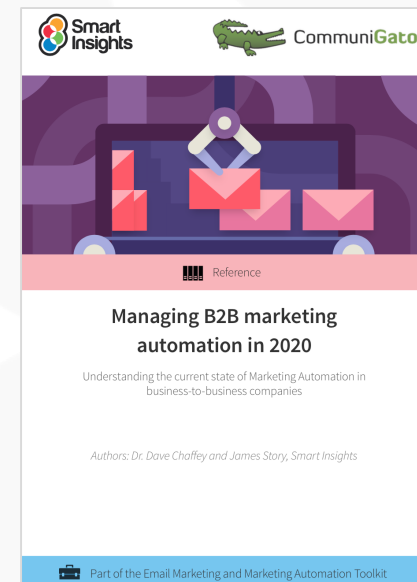
Part of the Email Marketing and Marketing Automation Toolkit

Q7. Are you targeting to the max?

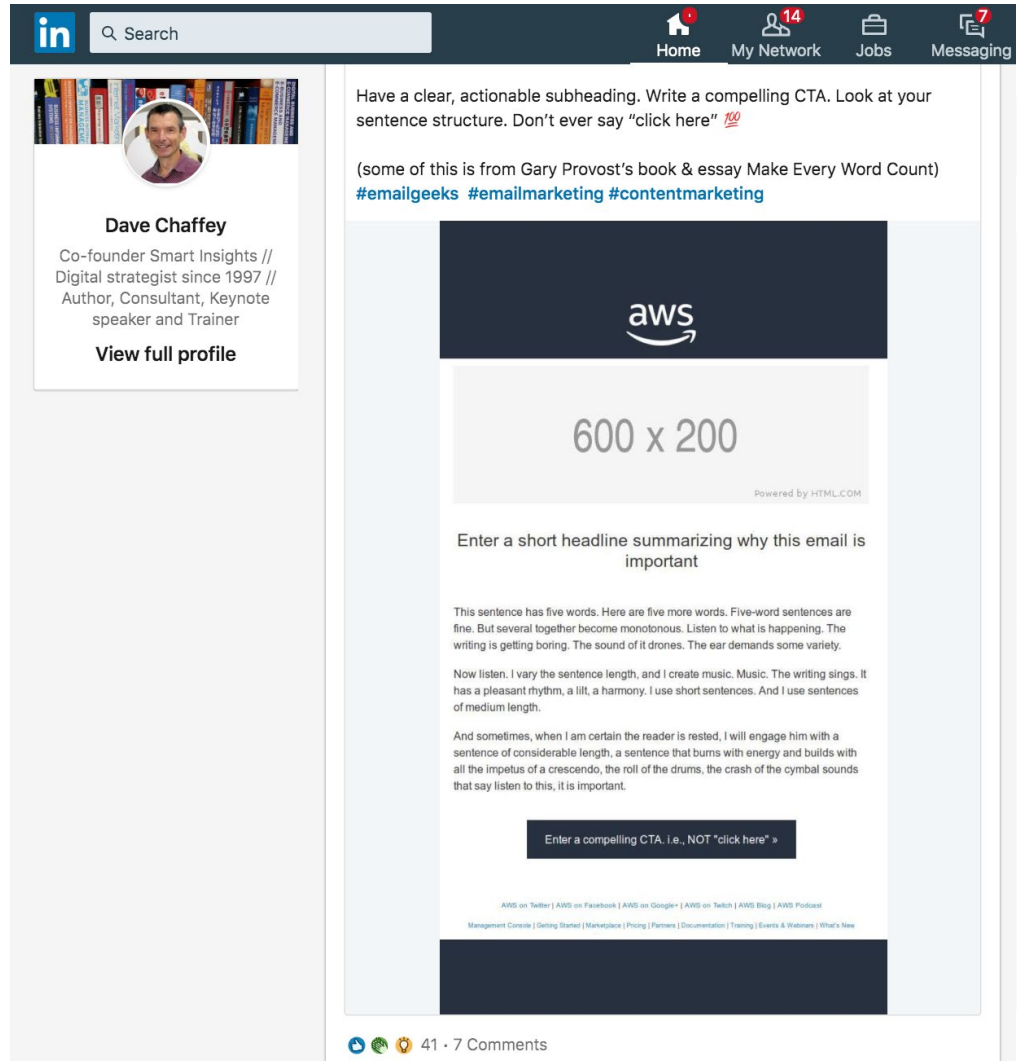
Rate the level of email targeting you use



Number of Respondents: 255



Learn from Amazon's mistake with this email style example



The screenshot shows a LinkedIn post by Dave Chaffey. The post header includes the LinkedIn logo, a search bar, and navigation icons for Home, My Network (14), Jobs, and Messaging (7). The profile section identifies Dave Chaffey as the co-founder of Smart Insights, a digital strategist since 1997, author, consultant, keynote speaker, and trainer. The main text of the post provides advice on writing compelling CTAs and subheadings, using the example of an Amazon email. The example email content includes the AWS logo, a 600 x 200 placeholder, a headline prompt, and several paragraphs of text illustrating sentence variety. A dark button at the bottom of the example email says 'Enter a compelling CTA. I.e., NOT "click here" >'. The post footer shows 41 likes and 7 comments.

in Search Home My Network 14 Jobs Messaging 7

Have a clear, actionable subheading. Write a compelling CTA. Look at your sentence structure. Don't ever say "click here" ¹⁰⁰

(some of this is from Gary Provost's book & essay Make Every Word Count)
[#emailgeeks](#) [#emailmarketing](#) [#contentmarketing](#)

aws

600 x 200
Powered by HTML5.COM

Enter a short headline summarizing why this email is important

This sentence has five words. Here are five more words. Five-word sentences are fine. But several together become monotonous. Listen to what is happening. The writing is getting boring. The sound of it drones. The ear demands some variety.

Now listen. I vary the sentence length, and I create music. Music. The writing sings. It has a pleasant rhythm, a lilt, a harmony. I use short sentences. And I use sentences of medium length.

And sometimes, when I am certain the reader is rested, I will engage him with a sentence of considerable length, a sentence that burns with energy and builds with all the impetus of a crescendo, the roll of the drums, the crash of the cymbal sounds that say listen to this, it is important.

Enter a compelling CTA. I.e., NOT "click here" >

AWS on Twitter | AWS on Facebook | AWS on Google+ | AWS on Twitch | AWS Blog | AWS Podcast
 Management Console | Getting Started | Marketplace | Pricing | Partners | Documentation | Training | Events & Webinars | What's New

41 · 7 Comments

Q8. Are you building in conversation messaging to website journeys?

Engage **User auto messages** Visitor auto messages Manual messages Insights About Search message titles and senders...

USER AUTO MESSAGES

- All (23)
- Live (8)**
- Drafts (12)
- Paused (3)
- Scheduled
- Your messages (5)

CAMPAIGNS

- Convert - Aug 17 Offer (paused)
- Encourage - Quick Wins (live)
- Example Onboarding Campaign (draft)
- Test - Welcome Trials (draft)
- Welcome - Basic (live)
- Welcome - Individual (live)
- Welcome pt 2- Features (draft)

Live auto messages to users (8) [New auto message](#)

TITLE	FROM	SENT	OPENED
Download planning template LIVE Welcome - Basic Type is User	Dave Chaffey	22,364	94%
Business enquiry form nudge LIVE Type is User viewed-business-enquiry count has any value membership_level is not Business	Nick Strutt	921	92%
After dling planning template - view all free resources LIVE Welcome - Basic Type is User Received Download planning template Clicked Download planning template	Dave Chaffey	12,538	92%
Hi there, We have a Getting Started Guide to help you get... LIVE Welcome - Individual Type is User	Dave Chaffey	1,829	91%

Audience **Users** In campaign Welcome - Basic Received Download planning template and Clicked Download planning template

Channel **In-app message**

Message	Sent	Opened	Clicked	Goal	Reacted
Message	30,982	91%	26%	56%	2300

17% 80% 2% 1%

Note Initially appearing in full Went live 8 months ago Last sent 1 hour ago

Dave from Smart Insights
Active

Hi [First name](#),

Just a quick reminder that you will find [over 30 free marketing resources](#) in the Guides and Templates section - the blue briefcase in the menu on the left.

You can also choose the marketing activity you most need to work on by selecting a 'Toolkit'.

[See all free resources](#)

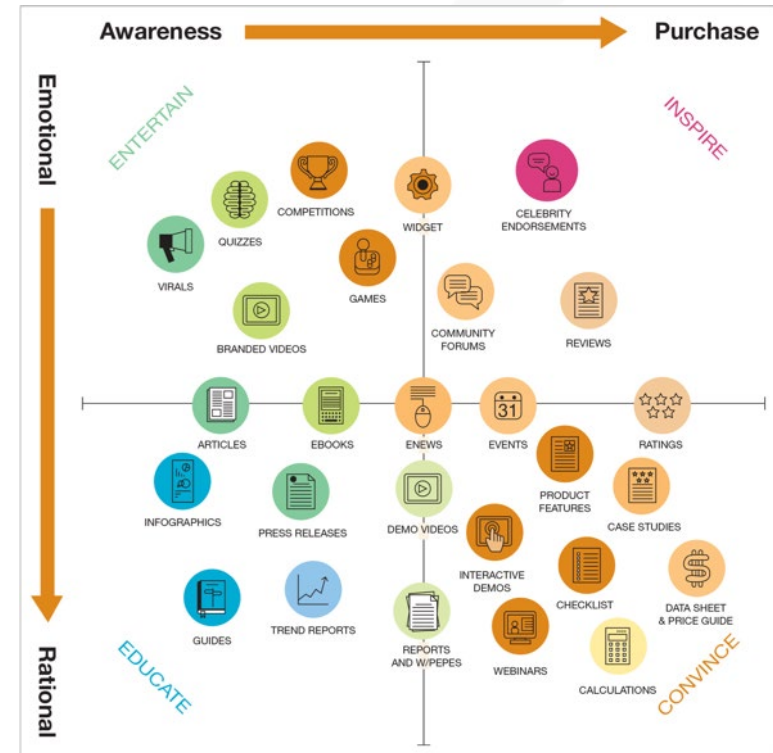
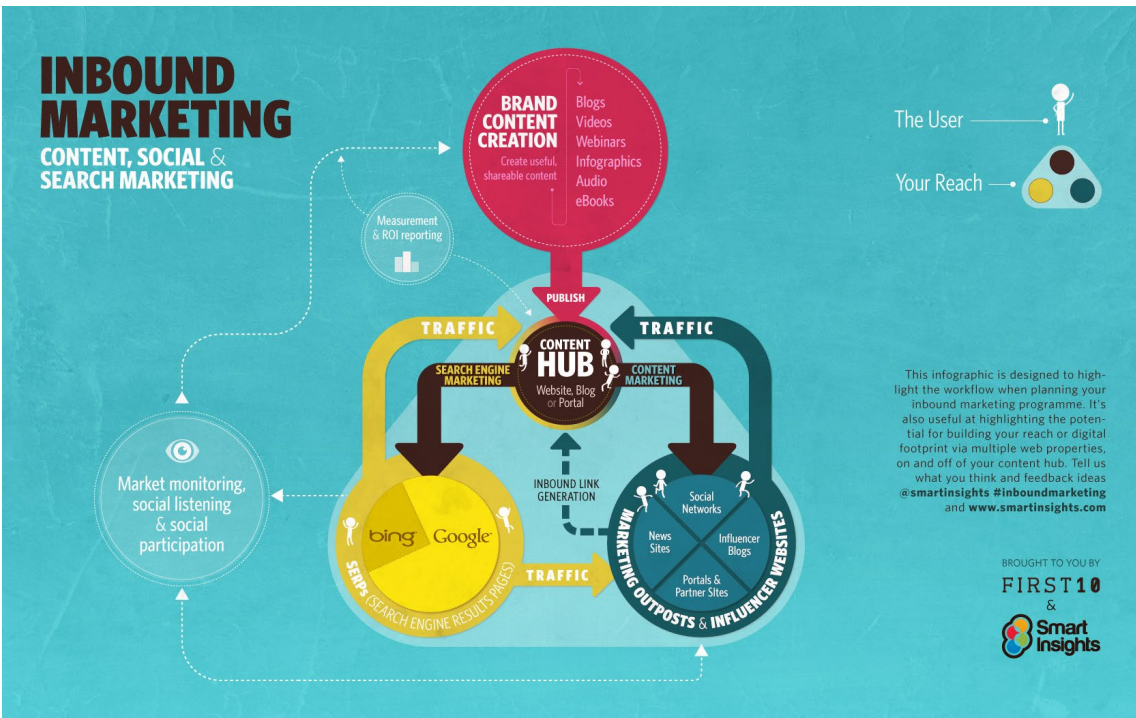
👍 👎 😊 😞



Content

Q. Are your investments in content marketing effective?

Q9. Do you have a dedicated, resourced and measured content marketing strategy



Source: [Content marketing matrix](#)

TOP PERFORMERS

This Year's B2B Content Marketing Top Performers At-A-Glance

	Most Successful	All Respondents	Least Successful
Organization's content marketing is sophisticated/mature	87%	42%	8%
Has a documented content marketing strategy	69%	41%	16%
Has a centralized content marketing group working throughout the organization	44%	25%	14%
Uses metrics to measure content performance	95%	80%	62%
Has KPIs to measure content initiatives	83%	65%	30%
Measures content marketing ROI	67%	43%	23%
Rates ability to demonstrate ROI as excellent/very good	84%	59%	25%
<i>Uses content marketing successfully to:</i>			
Build loyalty with customers	84%	63%	39%
Nurture subscribers/audiences/leads	83%	68%	51%
Generate sales/revenue	75%	53%	29%
Build a subscribed audience	68%	45%	30%



Customised interactive tools – the 4th Wave of Content Marketing



Capability Grader

[Back to Capability Graders](#) Digital Marketing Strategy and Planning Toolkit

Your business capability for Digital Marketing Strategy and Planning is 1



This assessment was last taken on Mar 8, 2018

RETAKE ASSESSMENT >



Whitepaper

Outcome-Driven Innovation® (ODI): Jobs-to-be-Done Theory in Practice

by Anthony W. Ulwick, updated January 1, 2017

Outcome-Driven Innovation® (ODI) is a strategy and innovation process created in 1991 by Strategyn’s founder Tony Ulwick. The methodology is built around Ulwick’s finding that studying the “underlying process” a customer is trying to execute, rather than focusing on the product or the customer, provides companies with a deep understanding of the customer’s needs and presents a path to make innovation more predictable. Since 1991, Strategyn, under Ulwick’s leadership as Founder and CEO, has engaged with dozens of Fortune 500 companies to evolve ODI into a proven, customer-centric and data-driven innovation process.

The ODI process enables companies to discover hidden growth opportunities, create products and services that customers want to buy—and predict, with a success rate that is five times the industry average, which new products will succeed in their given market. In other words, **Strategyn’s Outcome-Driven Innovation® process helps companies avoid the frustration of hit-and-miss innovation because it makes innovation five times more predictable.**

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What is JTBD?

- Jobs-to-be done is a methodology aimed at driving growth by improving value propositions as part of new product development (NPD).
- It’s focused on supporting customers complete their tasks more effectively and efficiently in B2B and B2C markets.

1 Define the customer's "job-to-be-done"

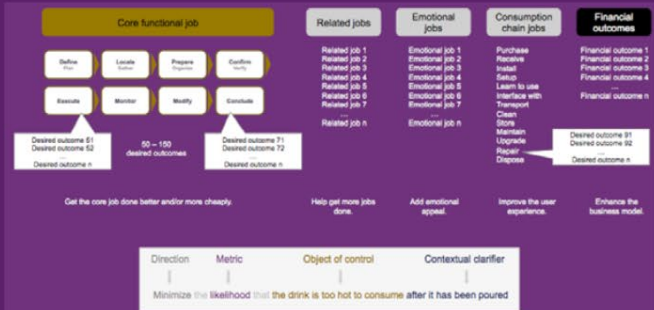


Use the **Job Map** to break down the core functional job into discreet steps, describing in detail exactly what the customer is trying to get done. The Job Map reveals a path to create the ultimate solution.

2 Uncover the customer's needs

Use the **Jobs-to-be-Done Needs Framework** to categorize, define, capture and organize all your customers' needs. The framework introduces the types of customer needs that must be considered to gain a deep understanding of the market.

Define a need in the form of a desired outcome statement: the fundamental measure of performance customers use to measure success when getting a job done. An outcome statement reveals what must be measured and controlled to ensure the job is executed with the speed, predictability, and effectiveness customers desire.



3 Quantify the degree to which each outcome is underserved

Survey a statistically valid sample of job executors. Ask them to rate the importance of each outcome and the degree to which each is satisfied, given the solution they use today.



Use the **Opportunity Algorithm** to reveal which outcomes are under- and overserved. Visualize and interpret the results on the **Opportunity Landscape**.

Outcome-Driven Innovation®

Jobs-to-be-Done Theory in Practice

4 Discover hidden segments of opportunity

- Select outcomes to serve as the bases for segmentation.
- Statistically cluster the respondents.
- Profile the segments to determine what is causing some customers to struggle more than others.
- Create statistically valid "personas" or segment descriptions.

Apply the **Outcome-Based Segmentation** methodology to reveal targets for growth: under- and overserved customer segments and their unique unmet needs.



5 Align existing products with market opportunities

In 2013, Arm & Hammer's Animal Nutrition Division used ODI to develop a new **value proposition** and align its offerings, messaging, and sales efforts around hidden segments and underserved outcomes it discovered in its core market. The Division achieved 30% year-to-year revenue growth from 2013 to 2014 without changing its product or pricing.



Use the **Jobs-to-be-Done Growth Strategy Matrix** to determine which growth strategy to employ for each product and optimize the product portfolio for growth.

6 Conceptualize new products to address unmet outcomes

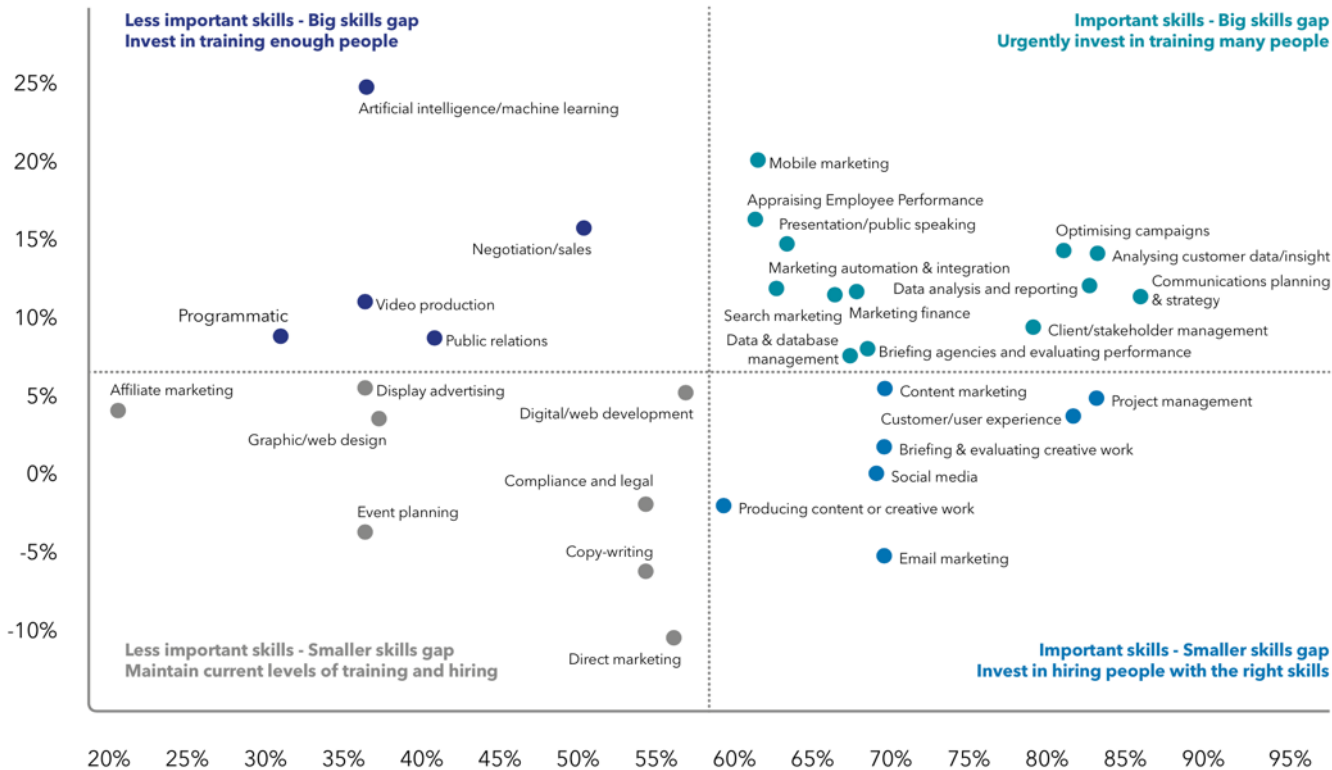
Minimize the time it takes to progress through a tortuous vessel	9.7	++
Minimize the time it takes to determine if/where any dissections have occurred	12.4	++
Minimize the time it takes to position the balloon across the lesion	14.1	+
Minimize the time it takes to open the blockage	5.2	--
Minimize the likelihood of relesions (recurrences)	16.4	++
Minimize the likelihood of damaging a vessel during the procedure	12.7	+
Minimize the time it takes to determine the location of an advancing balloon in the patient	10.5	--
Minimize the time it takes to advance the balloon to the lesion	9.3	++
Minimize the time it takes to stop patient bleeding at the entry point	9.1	--

Focus ideation efforts on specific performance metrics and evaluate ideas against the same metrics to determine which ideas will get the job done best.

Knowing what outcomes to target and evaluating ideas against them makes the innovation process **5-times more predictable**.

Q10. Do you have the relevant skills to compete?

Skills Gap %



IDM
PROFESSIONAL
SKILLS CENSUS

The 'quantum marketing' skills challenge.

Skills Importance for Career Progression (very important + "extremely important")

Let's Connect – Questions and discussion welcome!

<https://www.linkedin.com/in/davechaffey>

Featured Skills & Endorsements

- Digital Marketing · 99+**
 - Endorsed by James Gurd and 143 others who are highly skilled at this
 - Endorsed by 12 of Dave's colleagues at Smart Insights
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Dave is also good at...

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- Digital Strategy · 99+
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- Social Media Mar... · 99+
- PPC · 67
- Online Advertising · 51
- SEO · 99+
- Social Media · 99+
- E-commerce · 99+
- Conversion Opti... · 61
- CRM · 50