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30 MINUTE MARKETER

How to Use Pilot Projects to Gain Executive Support

9 tactics for getting your bosses on board

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How to Use Pilot Projects to Gain Executive Support: 9 tactics for getting your bosses on board

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TACTICS YOU CAN LEARN OVER LUNCH

Welcome to *30-Minute Marketer* – a resource from MarketingSherpa that features bite-sized tips for busy marketers. In this edition, we focus on how to use pilot projects to get your marketing ideas off the ground, overcome roadblocks, and win management approval.

It's not easy to launch a new campaign. Budgets are tighter than ever before, and you may be competing with other teams for a limited pool of resources. Also, you may face internal resistance or skepticism if you are proposing a new campaign that lacks proven results.

One solution is to start small, by doing a trial run in the form of a pilot program. A pilot helps you demonstrate the potential value of your new project, with a small investment, in a way that lets you quickly show results.

In this report, we'll show you:

- How pilot programs can test unfamiliar tactics
- How to focus on goals that are relevant to management
- The importance of carefully wording your pitch to executives
- Tips for presenting a convincing argument

We know you're in a hurry, so let's get started!

Bobbi Dempsey
Editor, *30-Minute Marketer*

About *30-Minute Marketer*

MarketingSherpa's *30-Minute Marketer* is designed with you, the busy marketer, in mind. We provide quick, simple tips that you can put into action right away.

For each *30-Minute Marketer*, we scour the vast MECLABS library of marketing research, from MarketingSherpa case studies and benchmark reports, to MarketingExperiments optimization tests and analysis. We highlight tips to help improve your marketing performance right now … or, at least, by the time you're done with lunch.

Tactic #1: Pick goals executives care about

In your new project, you need to target goals that will be relevant to upper management (hint: they want higher profits).

In the MarketingSherpa article, "Investing in Marketing Automation: The Benefits of Pilot Testing," Lawrence Mitchell, Marketing Director, Reed Business Information, discussed how his team used a pilot program to gauge whether or not a marketing automation package was worth the investment.

The team needed a better way to nurture, qualify and manage leads, and thought an automation program could help. Launching a pilot would test the value of the software, and prove its worth to executives without risking a large upfront investment.

Mitchell's team focused on using the program to improve ROI in two ways:

1. Re-engaging and converting "dead" leads
2. Sending fewer—yet better qualified—leads to Sales

The team conducted a series of small campaigns using the software. For example, one campaign worked to improve lead qualification, improving the quality of leads sent to salespeople, and cutting the number sent from 4,000 to 3,000.

After the pilot campaigns, the key divisions – Marketing, Sales, IT, and Finance – were on board with making the investment. Additionally, these trials helped the team gain insight on how to use these tools, and how to design future campaigns and strategy.

Tactic #2: Outline the resources you need beforehand

Before embarking on a pilot program, you must consider the resources you will need, for both a trial run and (if successful) a long-term program. Executives will have questions about the upfront investment, so be prepared to present this information. You must also be realistic; if your resources and budget are already stretched to the limit, you will need to make a very convincing case, or be prepared to work within a limited budget until you demonstrate results.

The MarketingSherpa article, "Landing Page Optimization: How to start optimization testing and get executive support," outlines three key resources you will need for a pilot program. Although this particular example involved optimization testing, these basic resources are universal in scope.

Money
The exact amount of money required will vary considerably, depending on your situation. Some marketers can leverage free tools and internal resources to launch a program. Others will have to pay for development or consultants.

Time
These programs can be time-consuming for all parties involved. Be sure to consider all the tasks involved and

account for a learning curve. A common pitfall is to underestimate just how long tasks will take, especially if you have never executed them previously.

Expertise
You may be able to do the basics using free tools, but certain tasks require an expert. For example, when it comes to SEO, you will likely need qualified experts to identify the best keywords, advise you as to how to make pages more SEO-friendly, and analyze results.

Be prepared to improve your own level of expertise by reading industry research, handbooks and benchmark reports, and attending conferences and workshops. Of course, you can also hire a consultant to guide your program and fill gaps, if you have the resources.

Tactic #3: Demonstrate the value of unfamiliar strategies

Pilot programs can be especially helpful when it comes to tactics that are of low priority to colleagues who don't realize their potential value. You, however, know the importance of these tactics, and that they can provide tremendous benefits when properly implemented.

You won't have much time to convince skeptical members within your organization, so you need a "quick win." A short-term pilot program is a great way to quickly demonstrate results. You'll also be able to test the waters, since these new tactics will be unfamiliar to your company, and might produce unexpected outcomes.

In the MarketingSherpa article, "Mind Type Segmenting Lifts Email Donations 42.5%: Six Steps to Find Subscribers' Underlying Motivations," the American Heart Association wanted to uncover subscribers' motivations in hopes of using that information to increase responses to a call-to-action.

Through careful database and audience research, the team was able to sort subscribers by their primary motivations – called "mind-type" personas – and then segmented the list accordingly. The team then wanted to deliver an email nurturing campaign with messages designed specifically for those segments.

To test this new nurturing series, the team selected a small, random portion of its database to receive emails targeted by mind-type. Donation rates were 42.5% higher from subscribers in the mind-type segments.

Based on these promising results, the team felt confident about investing further time and effort to apply these segments across the entire database.

EXAMPLE: AMERICAN HEART ASSOCIATION EMAIL - PILOT PROGRAM SURVEY

Tactic #4: Present a well-crafted argument

It's important to "do your homework" before you pitch executives. You want to outline your idea and set very clear expectations. Here are a few tips from the MarketingSherpa article, "Landing Page Optimization: How to start optimization testing and get executive support."

Bring case studies
Search online for case studies. Vendors, agencies and consultants often publish case studies invaluable proof points, and there is a wealth of them in the MarketingSherpa and MarketingExperiments archives. Using them allows you to illustrate how other companies have run similar programs and – perhaps more importantly – the benefits they realized.

Set clear expectations
Depending on what you are testing, you may not see immediate results, or you may achieve results that do not show an obvious improvement. With SEO, for example, lifts often take time to appear in search engine rankings and traffic. This is why you must not guarantee immediate success, as testing is ultimately a learning process. Both good tests and bad tests teach you about the audience, and help you design better future campaigns.

With this in mind, be sure to clearly explain the time it will take to set up your program (potentially several months) and also the time it will take to achieve real results (potentially several more months). Not only do you need the resources to make this possible, you need patience from your superiors.

Talk within the context of another project
In the article, Adam Justis, Senior Manager, Product Marketing, Adobe Systems, also suggested presenting your pilot within the context of a larger project. For example, you may want to try conversion testing while also planning a major website redesign.

"You can test different aspects of this redesign to identify what is really going to resonate with customers as opposed to putting all your eggs in one basket and hoping that what you are presenting to customers is better than what you already had," he says.

Speak the right language
You not only need to be persuasive, but you must carefully choose your vocabulary. When dealing with executives and finance departments, be sure to speak their language. Avoid using marketing buzzwords or technical jargon. Executives are unlikely to be interested in technical details or obscure metrics. Likewise, they don't want to know minute details about how you will build or implement this program.

Instead, focus on what they care about: profits. Talk about revenue and costs. Executives want to know how this program will impact their bottom line, not every detail on how you're going to build it.

Tactic #5: Put together a "persuasion paper"

In the MarketingSherpa article, "Website Optimization: Testing program leads to 638% increase in new accounts," Lauren Guinn, Director Online Marketing, Active Network, says when seeking executive approval for a testing program, one approach is to create a document that "sells the test" and provides information, such as:

- The problem to be solved, or opportunity to be capitalized upon
- The hypothesized solution to this problem or opportunity
- The plan of execution, with details including traffic and time estimates

This document also helps you refine the testing plan to account for risk, limitations, and the moving parts your pilot project may entail. Like Guinn found, often the best way to get approval for a pilot program is to outline these elements, and present the potential for a testing plan to the C-suite.

Tactic #6: Increase your odds of getting quick results

To ensure you can show results before colleagues grow impatient, focus on strategies that are likely to pay off quickly. Otherwise, you may need to deal with a discouraged staff, which will present more challenges.

In the MarketingSherpa blog post, "Lead Generation: Four critical success factors to designing a pilot," Dave Green, Director of Best Practices, MECLABS, suggests these steps:

Step #1. **Start where the economics are most forgiving**
Begin with segments that will provide ample room to experiment and course-correct. Then test and iterate your way to the margins of your market. With lead generation, for example, you would want to start in markets that let you combine a high potential average order size with a high probability of purchase, giving you the most room for mistakes and course correction.

Step #2. Keep it simple
Once you determine where the low-hanging fruit lies, determine how to narrow the scope of your plan so it remains manageable. Start by clarifying an objective and using that objective to simplify the pilot. Tackle tasks in stages, and look for ways to narrow your focus. For example, with lead generation this means focusing on sending fewer leads to salespeople, a particular type of software, a specific market segment, or another narrow area.

Step #3. Make the pilot long enough for course corrections
Develop a conservative timeline that shows key milestones at particular stages. If possible, make the pilot last for an entire fiscal year with the understanding that you'll come back to management sooner if possible with a plan for scaling the initiative.

Step #4. Base the measurement of the pilot on what you can control
You can only control certain parts of the process. Once you delegate responsibilities to other staffers, you can't control what they do with the elements you've put in place. While you should find out how you can help colleagues get the best results, it's best to frame promises to executive shareholders in terms of the processes you will own.

Tactic #7: Do a trial run of vendors and services

Executives often fear that new initiatives will involve paying for vendors or services that won't prove to be worthwhile, resulting in wasted resources. One way to alleviate these fears is to do a pilot run specifically to test vendors before making an expensive commitment.

In the MarketingSherpa article, "Special Report: 8 Criteria for Choosing a Lead Scoring/Marketing Automation Vendor," Emily Salus, Sr. Marketing Manager, CollabNet, discusses how she used a pilot program to help choose a lead scoring/marketing automation solution.

"We received RFP responses from three vendors, and then piloted two. The pilots were offered [for] free, were easy to run, and made it easy to make a final vendor selection."

As an example, to pilot a marketing automation solution, pick a small selection of your database as a trial, pick a message you need to send to them, and see if you can set it up yourself. In a pilot or trial program, you want to be sure that you don't cause irreversible changes, but you also want to test integrations that will be part of your production requirements.

Salus did a test run using the vendor solutions, and analyzed the results, saying, "If you can do this with a small sampling, then you'll have a good idea of how the solution will work as your usage gets more complex."

Not all vendors offer pilots, and whether a pilot is free or paid varies. Some vendors offer a free trial, however, a company that wants your business should accommodate your needs.

Tactic #8: Measure the financial benefits

In the MarketingSherpa blog post, "B2B Lead Generation: 4 ways to use teleprospecting in your next pilot (and 2 ways to measure it)," Dave Green, Director of Best Practices, MECLABS, discusses a pilot related to teleprospecting. This general advice applies to any type of pilot program.

Illustrate the potential revenue and potential costs of your idea in a simple ratio. Here is an example calculating how nurturing leads through teleprospecting will impact a company's ROI:

> ROI = (cost of generating leads + cost of teleprospecting + cost of other nurturing + cost of closing sales)/revenue from qualified leads

This will give you an expense-to-revenue ratio that your CFO will appreciate. You can show how the added cost impacts overall ROI. You will want to keep it simple, but include factors that are most relevant to what you are trying to illustrate.

Another example

If a company planned to use teleprospecting to generate leads instead of nurture them, the equation would be different. A simple example:

ROI = (cost of teleprospecting + cost of other demand generation + sales cost)/revenue from the qualified leads

Again, you want to include the basic necessary elements, including any costs from integrated or related efforts.

Tactic #9: Share your success

If your pilot produces results, do not be shy about sharing its success. You want people to know results so they will want to help you expand. In the MarketingSherpa article from Tactic #5, Anna Talerico, EVP, Co-Founder, Ion Interactive, believes in doing so to increase visibility.

"The best thing you can do is tell everybody and anybody that you can who will listen. It is not just about telling your boss, but your boss, and your boss's boss, and your colleague, and your friend's boss. You need to be making sure what you are doing is really visible."

Highlight the best tests
If you have a wealth of results, pick the best few and highlight them as if they were case studies. Establishing a case for how they achieved positive results will help you make a very compelling argument that will be tough for executives to resist.

Keep it small
Your next step will be to expand your pilot program, but do it slowly. Continue running one or two tests at a time, and focus on gradual improvement. This will help you improve results without biting off more than your team can chew.

Useful Links:

How to Get the CEO to Support Your Next Marketing Plan

Investing in Marketing Automation: The Benefits of Pilot Testing

Lead Generation: How to get funding to improve your lead gen

Landing Page Optimization: How to start optimization testing and get executive support

B2B Lead Generation: 4 ways to use teleprospecting in your next pilot (and 2 ways to measure it)

About MarketingSherpa LLC

MarketingSherpa is a primary research facility, wholly-owned by MECLABS, dedicated to determining **what works in marketing** via exclusive case studies, surveys, and results data analysis. Then we publish what we learn so our community of marketers and weekly readers can improve their results and train their teams.

Praised by *The Economist*, Harvard Business School's Working Knowledge Site and Entrepreneur.com, Marketing-Sherpa is distinguished by offering **practical, results-based marketing** information researched and written by a staff of in-house reporters.

MarketingSherpa features:

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About MECLABS

MECLABS is a science lab that uses real-world research and training to **help business leaders get better use out of sales and marketing technology and resources**, including Internet marketing, website optimization, and lead management. We have been involved in direct research partnerships with companies throughout Europe and North America since 2001.

MECLABS deploys a rigorous methodology to conduct research. This research is compiled from:

- More than **10 years** of research partnership with our clients
- **1,300** experiments
- Over **1 billion** emails
- **10,000** landing pages tested
- **5 million** telephone call
- **500,000** decision maker conversations

MECLABS has consulted with companies like Cisco, Johnson & Johnson, *The New York Times*, 1-800-Flowers, and NetSuite to optimize sales and marketing processes and achieve triple-digit ROI gains.

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