

OVERVIEW

This playbook should be used by marketers looking to continuously improve the quantitative performance of their digital experiences. Ongoing optimization and improvement results in a better buyer experience, driving lasting uplifts in marketing's contribution to business success.

OUTCOMES OF THIS PLAY



Increased conversion rates

Measure, test and adapt key touchpoints to lift performance.



Faster buying cycles

Convert and qualify potential buyers faster to accelerate revenue.



Increased contribution to marketing pipeline

Convert a larger share of prospects to active opportunities to lift your contribution to the bottom line.

PROCESS

1. Review marketing goals and targets, identifying leading metrics

With every digital interaction being measurable, there is a risk of feeling dazzled or deluged by the opportunities for optimization. By starting with your key marketing goals and targets, you can narrow down on the areas that will drive improvements that matter.

It's also important to bear in mind any leading metrics that drive those the business cares about. For example, senior leadership may be most interested in MQLs and opportunities. Leading goals you might then use could include lifting the average engagement score (if this feeds into your lead scoring) or improving the share of MQLs that become SALs.

2. Audit your current performance of current touchpoints

With your key goals, targets and leading metrics identified, you should now assess your baseline performance across touchpoints, channels and integrated campaigns. Taking a broader view will allow you to think of performance in the context of the entire buyer's journey, rather than a narrow focus on single points of interaction.

For your touchpoints, use industry benchmarks (such as [ON24's Webinar Benchmarks Report](#)) to identify areas that are performing suboptimally. Landing page conversions, total registrations, percentage attendance and engagement scores can all be assessed.

Industry benchmarks can also be used at the channel level. Examples might include cost per acquisition for net new contacts across paid media, opens and clickthrough rates for email, or conversion rates for content downloads on your website.

With your integrated campaigns, assess which ones are contributing most to pipeline. You may find significant differences between them, or that the performance of particular campaigns has declined over time. Also, look at any post-engagement performance, as you may find a gap between initial and subsequent engagement.

With all of these, make sure to factor in volume and value in your assessment. A high conversion rate for a particular touchpoint will not drive much performance if the volume or value of the prospective buyers here is low.

3. Set priority optimization goals for improving performance

Having the whole picture for the performance of your marketing efforts allows you to identify which areas to focus on in order to drive performance towards your key goals.

To start with, look to choose discrete areas to set goals against rather than broad aims. This will allow you to test the feasibility of improvements before promising more than you can deliver. Furthermore, look to choose areas that will have a long term impact—an uplift in performance on an evergreen asset or nurture program will deliver ongoing benefits, whereas a change to a one-off campaign will not.

Once small scale success is demonstrated, you will then be in a better position to propose wider goals and request support and resources for continuous optimization.

4. Implement changes and tests

With your optimization goals in place, the next step is to roll out changes and tests to increase performance.

Keep in mind the quality of the buyer experience as you implement any changes. On the surface, a whole page pop-up might perform well, but the damage in perception might not be worth it.

Make sure you inform any key stakeholders with sufficient notice so they can implement any changes. This may include booking in design time for new creative, making sure changes to your website are in the next sprint or delivery cycle for your agency or tech team, or asking your direct reports in marketing to balance their commitments so they can deliver when needed.

5. Monitor, measure and improve

Even if your changes are in line with commonly-accepted best practices, such as reducing the number of fields on a landing page, monitoring and measuring is necessary both to avoid making changes that are negative and to provide you with data that informs future optimization efforts.

If you are running any tests, allow for sufficient time to generate statistical confidence in any changes. B2B businesses typically have fewer prospective buyers and lower volumes than consumer-facing organizations, so account for this fact in your planning.

Look to connect any improvements to your key marketing goals. For example, if your landing page conversion rate is up, investigate the impact on the total number of qualified leads. This may

provide data to model the impact of wider scale improvements, which can build the case for increased resources.

Finally, to deliver ongoing improvements, schedule optimization reviews in advance or add it to the agenda of existing meetings where you reflect on marketing performance. Otherwise, it can be all too easy for optimization to fall off the agenda, resulting in an opportunity cost that may be difficult to recoup.

DATA

Inputs

Any key metrics for marketing performance as a whole e.g. MQLs, number of opportunities, marketing-generated pipeline value.

Baseline figures for leading metrics (e.g. acquisition, conversion, engagement scores) at a touchpoint, channel and campaign level.

Outputs

Actual improvements to key marketing goals e.g. increase in MQLs or opportunities.

Forecasted improvements to key marketing goals, based on initial tests and wider implementation.

Improvements from baseline figures for optimized touchpoints, channels and campaigns.

NEXT STEPS

Optimization and improvement efforts should be an ongoing and regular activity in order to generate long-term performance uplifts, but with a heavy workload for marketers it is often overlooked. Furthermore, as buyer behaviors and expectations are always changing, failing to make optimization a regular activity increases the risk that marketing's performance will decline. It may also reduce marketing's ability to respond to sudden changes. By contrast, small and consistent optimization will deliver compound improvements over time.

Marketers should also consider how the technology available to them can help sales teams improve their performance and convert a larger share of marketing-generated leads to revenue. For more information, read the next playbook in this series.