



Managing Change and Maximising User Adoption: 10 Steps for a Successful MarTech Implementation

Introducing Marketing Technology (MarTech) to streamline and automate processes can deliver competitive advantage and increase ROI. But it can present a challenge to marketers.

Teams are increasingly expected to manage the implementation and administration of tech systems. Not to mention making sure users adopt and adapt to new ways of working.

There are an estimated 7,000 MarTech products available at the time of writing and that number is growing. Increased choice, lower costs and access to open source options mean that MarTech is now accessible to most businesses.

But if everyone has access to the same tools, where does the competitive advantage come from?

It comes from:

- ✓ Selecting the right tech for your business
- ✓ Using it to deliver strategy, not drive it
- ✓ Improving processes
- ✓ Engaging and empowering users.

Bright have 21 years of experience helping businesses implement innovative marketing technology and we love seeing our customers reap the benefits we offer.

This guide is to help you understand the processes you need to follow to prepare for MarTech in your business. It will tell you how to implement change effectively, maximise user adoption and deliver the desired ROI from your MarTech investment.

Step 1

Know your options:
what technology is
available to marketers?



Knowing the key areas where MarTech can support your business is the first step to finding a solution that's right for you.

Here is a very brief overview of the types of technology available. We could go into more detail but that's a whole other Ebook.



Digital Asset Management (DAM)

This is the central resource where you keep your creative assets, like photos, video, logos, podcasts, graphic design. It provides staff with easy access to everything they need to create consistent, on-brand content to promote your business. Bright's flagship product; Asset Bank is an example of DAM software.



Analytics

Analytics tools help you understand and measure the impact of your marketing efforts. Data can drive improvements to how to deliver services and information to customers, giving your business a competitive advantage.



Lead Management

These tools support the process of moving leads through the buyer's journey. These systems help businesses capture leads, qualify them and follow them up effectively.



Marketing Automation

These systems perform predetermined actions when certain goals are met – for example, sending out an email to remind a customer that they didn't complete an online purchase.



Customer Relationship Management (CRM)

CRM systems help marketers keep track of interactions with customers. All contact can be tracked to build a picture of your clients. Then the database can be segmented to deliver more effective communication.



Content Management Systems (CMS)

These are used to manage web pages and publish content that attracts, engages and converts customers online, for example, blogs, Ebooks and landing pages. Tools for managing and scheduling social media could fall into this category too.

What is the MarTech Stack?

You will often hear marketers talk about the MarTech Stack. That just means the specific combination of marketing technology that a particular business uses. There is no one-size-fits-all with MarTech.

Different processes, products, customers and market needs all require different solutions. The trick is finding the right stack for you: to streamline your systems, improve your customer experience, and launch your marketing to the next level.



Step 2

Know what mistakes
to avoid



What stops successful change management?

At Bright, we understand the importance of getting things right first time. We're here to help you avoid common pitfalls and make sure your MarTech project goes without a hitch.

Planned and executed correctly, MarTech can deliver fantastic benefits to your organisation. But poor planning and unrealistic expectations can cause projects to come undone. This can lead to reputational damage for the team in charge and be a costly mistake for your business.

Here is our four leading causes of headaches for people implementing a new piece of software.

Don't worry, we've got the solutions too.

1. Being over-optimistic

Some software companies sell their software as the cure for all ills. It is in their interest to make you believe that as soon as you implement their IT system, business will boom and problems will disappear.

But this simply isn't true. MarTech is a powerful tool but it's not a magic wand. Don't base your buying decision on hope and faith. Taking time to conduct research and basing your decision on firm facts will pay off later.

2. Being over-cautious

It is natural for organisations to be cautious about change. But there comes a point when not changing becomes an even bigger risk to business. Failing to maximise on opportunities to automate and innovate can leave businesses at a competitive disadvantage.

But influencing change is especially challenging when it comes to tech.

- ⊕ Companies struggle to keep up with the pace of change in IT
- ⊕ Fear of investing in the 'wrong' solution can deter management from making a decision. IT teams can be protective of their existing software ecosystem.

Once you've decided on the system you want to implement, you will need to build a strong business case, before approaching senior management and IT for support. When you have buy-in, keep the project moving so that you reach ROI as quickly as possible.

3. User resistance

User resistance and low user adoption can become a serious problem for your software. If your strategy relies on the uptake and use of a new system, but 50% of users aren't onboard, you'll struggle to achieve your goals. So it is very important to make your new system as user-friendly as possible and onboarding as pain-free as you can.

It can be frustrating when you implement a new IT system and people don't love it as much as you. But have patience. Your colleagues are busy people and probably already have multiple systems they need to work with. Accept that resistance will be a challenge you have to overcome and start planning for this early.

4. Lack of maintenance

It's a fact: people love to create but hate to maintain. Once the initial excitement of the implementation is over, it is easy for software to slip down the priority list. But to continue to enjoy ROI, you need to commit to ongoing training, development and upkeep.

Make sure that you plan for the future at the start of your process. Understand the ongoing needs of your system and its users, so that you can secure the right resource from the outset. Otherwise, senior managers move on and may forget the benefit your new tech brings to the business.

Top tips for successful scoping:

- ✓ **Think about the problem you have.** Does this software solve it? Is it the only software that is suitable? Is it the best software to meet your needs? What else needs to change to fix this problem? Do you have the time and resources to make those changes too?
- ✓ **Check what the software actually delivers.** Take the time to really understand how the software works. How does it deliver the benefits you're being sold? It might work for others but will it work for your business? Do you have the skills required to make the most of it? Will it grow with your business and adapt to your needs?
- ✓ **Ask for references.** A reputable firm will be happy to provide referees. Ask them for referees that are similar to your type of business in terms of size, sector and needs. Ask questions about what the product actually delivers, what challenges they've faced, and how the vendor has supported them.
- ✓ **If in doubt, don't. Yet.** If you're in any doubt about your business' ability to make this software a success, stop and take stock. Don't proceed until you're certain. Going ahead on a wing and a prayer could lead to an embarrassing u-turn.

Step 3

Be clear on strategy.
How can MarTech support
marketing strategy?



Technology is a powerful tool that can transform how you implement your marketing strategy.

It's a game-changer that can revolutionise your processes and improve your productivity. Used properly, it will increase customer attraction, retention and satisfaction.

But MarTech can't solve your marketing challenges on its own. No software is a substitute for having a strategy in place. Asking and answering key questions now will lay the foundations for successful MarTech selection, implementation and execution.

We've got some pointers to get you started.

Check your direction of travel

It is important that your marketing strategy is embedded in the overarching strategy for your organisation. Take the time now to review how you contribute to the overall business objectives.

As marketers, your role is to help propel the organisation in their chosen direction of travel. Marketing technology should support and speed up this process.

Think of it as adding a motor to a rowing boat. It can get you where you want to go much faster. But you need to check the compass before you fire it up. Otherwise you end up off-course, at speed.

SWOT up on opportunities

You probably already have a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis in your marketing strategy. Now is a great time to revisit it and explore whether technology can help.

Are there opportunities in the external environment that you should be maximising on? What can technology do to mitigate weaknesses in your internal processes?

Refer back to the types of MarTech in Step 1 and imagine money is no object. What problems can you solve?

Strengths ⊕ High level of design skills across the team ✓ Empower team to create content by providing better access to photos and logos.	Weaknesses ⊗ Lack of capacity for creative work, team too busy segmenting data manually ✓ Explore CRM system that can automate this and free up staff for creative work.
Opportunities ⊕ Customers respond well to personalised video content ✓ Investigate software to scale video production.	Threats ⊗ Competitors have higher conversion rates ✓ Look at better ways to keep leads warm during the sales process.

Identify solutions to pain points

Think about the pain points from the point of view of your team and your customers. What can technology do to ease these?



Pain point 1

Staff are overwhelmed by inputting customer records manually.



Possible solution

A lead management system to automate the process.



Positive outcome

Staff are free for more creative work and to start new projects. Bigger picture, it might help retain staff who would otherwise lose heart and leave the company.



Pain point 2

Customers are confused by inconsistent marketing materials from different teams.



Possible solution

Implement a Digital Asset Management (DAM) system to provide decentralised staff with access to pre-approved images, video and audio.



Positive outcome

Everyone in the business can create on-brand brochures and online assets. Customers receive consistent, on-brand materials that give them confidence in the content.

Eradicating pain points can boost business success. Not only by meeting and exceeding customer expectations, but by retaining and utilising staff to their full potential.

Step 4

Use implementation as
an opportunity: how can
MarTech improve my
marketing processes?



Your software supplier will guide you through the technical process of implementation.

Those stages will be specific to the software you choose. However, something that you should do, regardless of the technology, is review your processes now.

Simply using technology to speed up your existing processes isn't the best way to get ROI. There's no point making poor working practices faster. Use this opportunity to evaluate what is and isn't working in your current practice. Then work out how technology can improve it.

It is important to think creatively. New software may open up entirely new opportunities and activities. You'll get the most out of this process if you start with a blank page.

Before you start...

Remember to approach this task sensitively with colleagues. What excites you might make them anxious. And an open discussion about problems with your current processes may make some staff feel vulnerable. Reassure them that this task is about poor PROCESSES, not individual performance. Let them know that change will be handled in a structured and organised way. And remind them of the tedious tasks they'll be able to wave goodbye to once your new systems are in place.

What are you doing now?

Create a map of all of your current marketing processes. Understand:

- ✓ What happens and why
- ✓ Who's involved
- ✓ How long each process takes
- ✓ What order they need to happen in.

Ask the staff involved what they'd like to change. They're best equipped to understand the daily challenges, frustrations and unnecessary duplications. What's going wrong? What's taking too long? Refer to the types of MarTech at the start of this guide and see if any opportunities jump out at you.

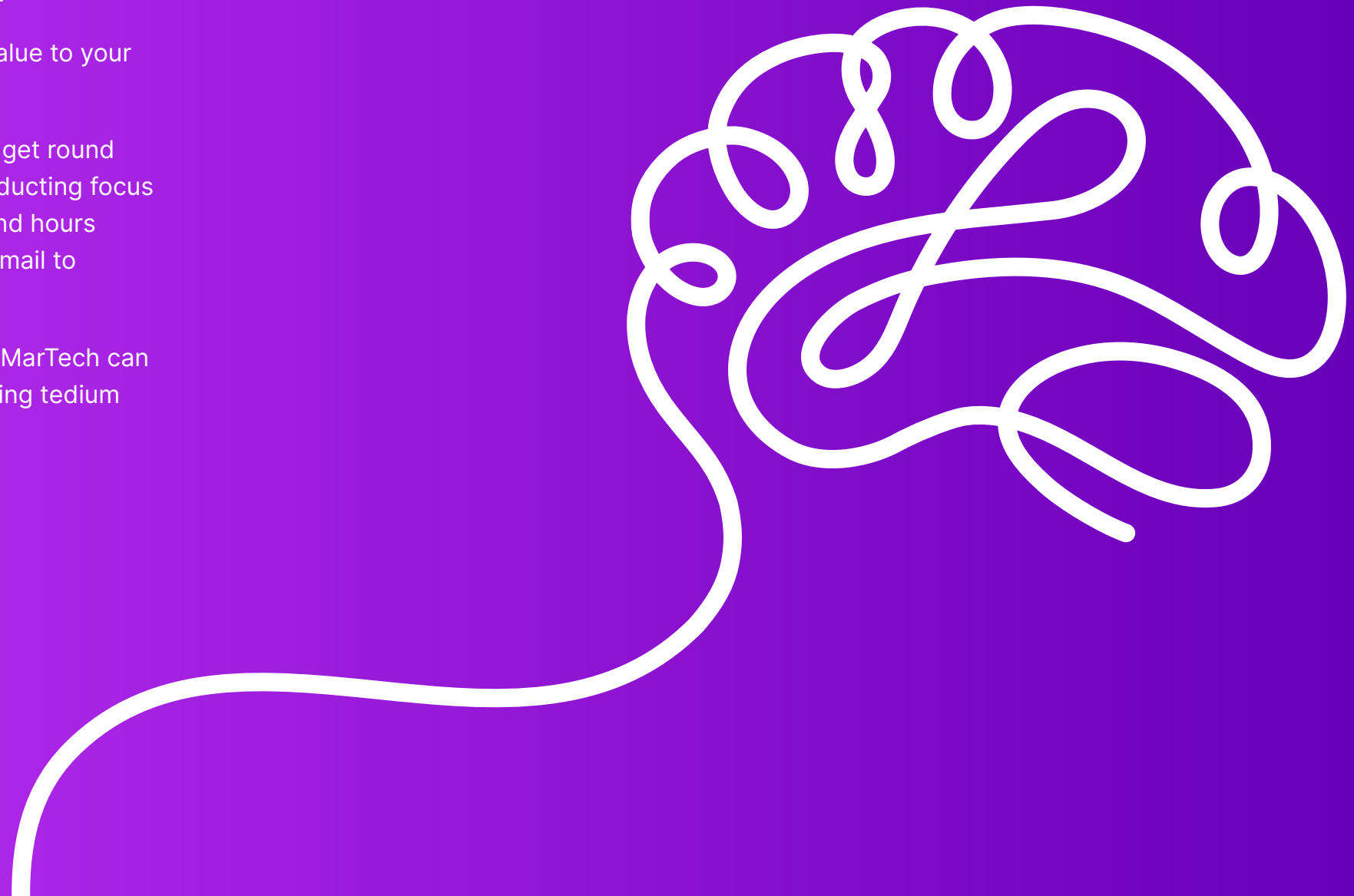
What could you be doing?

Also think about what you AREN'T doing but would like to.

What else could you do to ease staff pain points or add value to your customers' experience?

Are staff so bogged down with data entry that they don't get round to creative campaign planning? Would they rather be conducting focus groups than categorising survey responses? Do they spend hours each month rooting through files for the right images to email to creative agencies?

All of this information provides valuable insights into how MarTech can streamline your systems, liberate staff from time-consuming tedium and unleash untapped creativity.



Step 5

Determine ownership and assign roles: who needs to be involved in implementing MarTech?



As the name makes clear, marketing technology straddles two business functions: marketing and IT.

So any successful software project starts with a collaboration between these two teams. However, there are other allies you'll need onboard.

Here are our recommendations for assembling your implementation A-team. Please note this list is illustrative but not exhaustive. Ask your software vendor for further guidance, as they are likely to have a wealth of experience to draw upon.



Marketing Team role in MarTech implementation

As marketers, you are the interface between your customers and your business. You are the experts in your audiences' expectations and the processes you use to meet them. Your needs and vision are likely to be the driving force between any MarTech implementation.



IT / Business Systems Team role in MarTech implementation

Your IT team and network teams are integral to your plans. They understand the – often highly complex – combination of systems already in use in your company. They can explain any limitations that may affect your options, such as software compatibility.

They will also know more about other IT projects that may change your plans or even render them obsolete. For example, if there are plans to introduce an organisation-wide CRM next year, there is no point in rolling out a separate one for your team.

It is likely that you'll be calling on their expertise during the implementation. You may need access to storage on servers or require additional security to protect systems from outside sources. They will help with the highly technical aspects of installing any required software and hardware.

So it is important to work in partnership with them and build a shared understanding of what is desirable and possible. You may want to formalise this with a service level agreement that documents exactly what you can expect from one another. For example, response times, up-time, named contacts.



Communications Team role in MarTech implementation

Depending on the scale of your project, you may need to include your communications team.

They can help you plan and execute a communications plan to inform and enthuse your colleagues.

You need to plan communications early, so involve them from the start. It will help them to understand what you're trying to achieve and give them time to schedule their activities.



Legal Team role in MarTech implementation

Depending on the software you're implementing, there may be legislation that you need to comply with.

For example, in the UK, GDPR informs how personal data can be stored and used. This can impact what information you collect online and permissions you store in databases.

Therefore anyone implementing a CRM or DAM system would need to check with their company GDPR advisor to ensure their plans are compliant.



Leadership Team role in MarTech implementation

If your software will affect all staff, you'll want to keep senior management informed. See our next Ebook: Winning Hearts and Minds – How to Increase MarTech User Adoption (Section 7) for more information.



Read our Ebook for more: Winning Hearts and Minds – How to Increase MarTech User Adoption (Section 7) assetbank.co.uk/ebooks

Step 6

Write your roadmap
to success: how do I plan
a successful MarTech
implementation?



Now you've got your dream team in place, it's time to start planning.

Everyone knows that following a map – whether it's a paper one or a GPS – is the best way to get to your final destination. Plus you're more likely to arrive on time and without getting lost along the way. So creating a roadmap for your IT implementation is a good idea too.

Writing your roadmap for MarTech implementation

Your roadmap is chronological. It starts with the present day at the top and works sequentially down to the end of the process. You might start your roadmap with 'Research and write roadmap'.

You don't have to know all of the stages right now, but you need to commit to finding them out, updating your roadmap and referring to it regularly.

Researching your roadmap for MarTech implementation

There are lots of ways to find out what you need to include:

- ✓ You can research MarTech implementation online to understand the stages better
- ✓ When you have selected and appointed a software vendor, you can ask whether they have a template available
- ✓ You can speak to people in your network – or referees from your software supplier – for their insights into the process.



See a sample roadmap for a typical DAM implementation [here](#)

Assigning responsibility for MarTech implementation

Use the RACI method to ensure action and accountability and make sure everyone knows who is responsible for completing each task.

RACI stands for:

- ⊕ **Responsible.** The person responsible for doing the work (there may be more than one person)
- ⊕ **Accountable.** This is the person responsible for making sure the work is complete (ideally just one person)
- ⊕ **Consult.** The people who need to be consulted at each stage and have input
- ⊕ **Inform.** The people who need to be kept in the loop.

Armed with your trusty roadmap, you'll be able to monitor your progress towards agreed milestones and know exactly who is responsible for each stage.

So what now?

We're not finished there. As there is a lot to take in we thought we'd create another Ebook for you which is all about user adoption for your MarTech tool. Within this Ebook you'll receive a detailed, downloadable communications plan as well as all the practical advice you'll need. We talk about how to get management buy-in, handle negative influencers, gaining insights through user testing, onboarding techniques and how to keep up momentum.



Read our Ebook for more: Winning Hearts and Minds – How to Increase MarTech User Adoption assetbank.co.uk/ebooks

Contact

Our mission is to make your workday more inspiring and productive so to discuss the impact that Digital Asset Management could have on your organisation, contact us on +44 (0)1273 923153 or at info@assetbank.co.uk

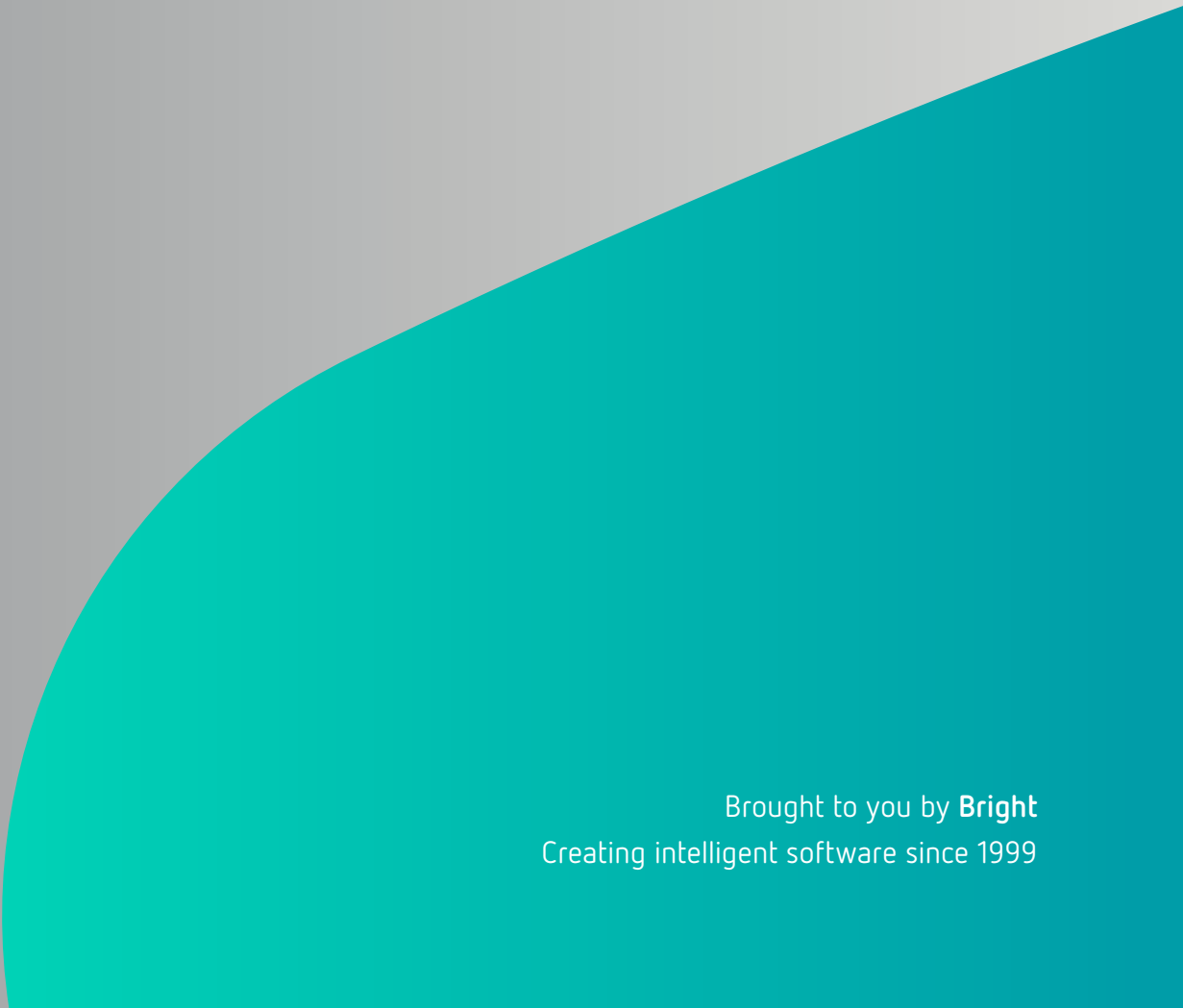
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For further information about how Bright can help to transform your digital assets strategy, visit us at assetbank.co.uk



"You have to put thought and planning into creating your own personalised system because every company is different."

Oscar Catling, INTO

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