12 Tips for Implementing a Marketing Resource Management Solution

Kimberly Collins

This research provides best practices for companies that are considering a marketing resource management (MRM) solution and deployment. Following these tips will enable companies to deliver successful MRM implementations that achieve or even exceed business benefits.

Key Findings

- Achieving a successful MRM implementation starts well before implementation and, in best-case scenarios, prior to solution selection.
- MRM initiatives are quite complex, and require pilots and phasing of the competencies and the functionality within the competency.
- Offering incentives and providing feedback postimplementation are critical to user adoption.

Recommendations

- Create a before, during and after implementation plan for MRM.
- Be sure your plan addresses change management, training and process automation requirements.
- Include representatives from both marketing and IT in the MRM plan.
WHAT YOU NEED TO KNOW

Avoid repeating the mistakes of past CRM implementations. Like sales force automation (SFA) and the contact center initiatives of several years ago, MRM is relatively immature and subject to many of the same pitfalls. By focusing on 12 important areas, marketing can ensure a successful and timely MRM implementation, and increase the likelihood that its MRM initiative will reach companywide status. Organizations that do not focus on user adoption, deployment planning, and process and solution requirements in their MRM initiatives risk facing the same criticisms and failures of prior CRM initiatives.

ANALYSIS

MRM brings technology to the entire marketing function, including largely unautomated areas of marketing. Every marketing employee is a potential user of an MRM system. However, a lack of knowledge of software beyond typical office productivity tools or creative tools, user skepticism and immaturity of MRM initiatives can prevent or limit a successful MRM implementation.

MRM is not simple projects. It constitutes large, complex programs whose capabilities require several years to fully exploit globally. It is not uncommon to find initiatives tactically focused on particular geographical regions, brands/products or MRM competencies. As pressures increase on budgets and for marketing accountability, more companies are considering MRM more strategically, with a global and integrated competency perspective (see “The Five Competencies of MRM ‘Re-’ Defined”).

Improved planning, vendor selection and change management strategies can ensure a greater chance for success, and increase the likelihood that your MRM initiative will reach global and integrated competency status. Here are 12 tips to ensure that your MRM initiative accomplishes its intended goals.

Preimplementation

Sell Bottom-Up: No one likes to find out about a new initiative that affects day-to-day activities by receiving an invitation to a training session. This is especially true of marketing users who are less familiar with enterprise software and may view it as a threat to their creativity. MRM must be introduced slowly—well in advance of implementation. Early education sessions must not only explain the benefits of the MRM initiative, but must also be used to document important processes and gather input on solution requirements from users. These sessions enable the identification of key marketing activities to automate, which will help users with their daily work. “Selling” MRM to users and enlisting their input makes adoption of the MRM application once it’s deployed more likely. This should happen six months to a year prior to vendor selection and implementation.

Action Item: Introduce MRM into the marketing organization before you introduce the solution. Use the sessions not just to detail the MRM initiatives, but also to gain critical solution and process requirements. Select solutions that offer benefits to users.

Document Marketing Processes: Most marketing processes are a series of ad hoc meetings, e-mails and phone calls. Therefore, many marketing organizations have not defined or documented their processes. To ensure that the right activities and processes are automated, document your marketing processes, including key participants. This must be done prior to solution selection, as it not only speeds implementation, but also enables the selection of the MRM solution that best supports your marketing processes. Organizations that take the time to do this prior to selection and implementation report greater satisfaction with their MRM solutions and faster
implementation times. Those that wait report delays of up to a year or more in implementation, and are more likely to search for an alternative vendor after the pilot.

**Action Item:** Define and document your processes before you begin the selection process. Select solutions that best fit your marketing processes.

**Cultivate a Collaborative Partnership Between Marketing and IT:** There are often conflicting views between marketing and IT about MRM solution selection. Marketing is typically focused on applications that provide robust MRM functionality through a flexible interface built for marketing users. IT prefers to leverage relationships with established vendors or core technologies to support company standards. The best MRM deployments enable marketing users to achieve business goals, while supporting IT standards. Sometimes, the discrepancy cannot be reconciled with an on-premises solution. By working together, marketing and IT may reach a compromise to outsource or leverage software-as-a-service (SaaS) MRM capabilities, rather than deploy them on-premises. Companies report the best MRM outcomes when both marketing and IT have been involved.

**Action Item:** Involve marketing and IT in vendor selection. Balance business versus IT requirements to achieve the best compromise. Keep deployment options open.

**Select Power Users or Champions:** User adoption varies in marketing organizations. Once users leave the classroom, the use of the application must be reinforced on a daily basis, or it will wane. One key to successful change management is identifying power users or MRM "champions" to promote the solution and support other users. Marketing users are typically social in nature, so have power users on-site, rather than virtual, if possible. Select champions by role and product or brand area. They have proved invaluable in areas where user adoption is problematic.

**Action Item:** Identify power users during educational or training sessions by role, location and brand or product area based on interest and enthusiasm.

**Consider Outsourcing Prior to Bringing In-House:** Another low-cost entry point to MRM is having the vendor or third party host your MRM solution. Having the pilot hosted lowers costs and provides greater flexibility to switch vendors. SaaS is the lowest-cost option. Outsourcing beyond the pilot, as you phase in other objectives, enables you to build competencies across a number of components in various regions. Once you have built competencies, decide whether to continue outsourcing MRM, bring it in-house or develop a hybrid model where certain MRM capabilities, such as marketing fulfillment, are outsourced and others, such as planning and budgeting, are maintained on-premises. One caution is that long-term hosting and SaaS can become more expensive than hosting after three to five years.

**Action Item:** Consider outsourcing the pilot or initial phases of the MRM deployment. Look for vendors that offer different deployment models (directly or via third parties) and flexibility for migration across models. Evaluate the long-term costs of the different deployment models.

**During Implementation**

**Establish Role-Based Training:** Marketing users, particularly the more creative types, are not interested in software and do not like taking time away from their day-to-day activities. Sitting through long training sessions is not practical for them. Training must be targeted to roles. Only show users the content, capabilities and tools that are relevant to their daily or occasional use. Process-oriented training that highlights users’ roles in the marketing process is better than traditional, functionality-focused software training. Training has been a major contributor to the lack of user adoption in other CRM initiatives, such as SFA.
Action Item: Avoid mass training sessions that detail functionality in the entire application. Focus on developing role-based training around typical day-to-day marketing processes for users. Only provide users with the capabilities needed to support their roles.

Phase in MRM Components: MRM encapsulates a broad range of capabilities:

- Planning and financial management
- Creative production management
- Asset, content and knowledge management
- Marketing fulfillment
- Reporting, analytics and optimization

It is impractical to deploy a complete set of MRM capabilities at the same time. You must build MRM competencies over time to achieve long-term strategic value and ensure the success of each capability. Phasing depends upon trade-offs among benefits, costs and risks (see "Cut Waste, Not Marketing Programs, Using MRM").

Action Item: Create a road map for phasing MRM. Ensure that each phase maps to a long-term MRM vision. Select vendors based on a complete road map or vision.

Keep It Simple, and Expand Capabilities Slowly: Early CRM initiatives (such as SFA and contact centers) focused on selecting vendors with the greatest and richest functionality. Most users, however, were only leveraging about 20% of the functionality within the deployed applications. This low usage was one of the commonly cited failing points of CRM initiatives by executives who stated that they overpaid for capabilities they weren't using. Many organizations selecting MRM solutions prefer feature-rich applications. Because marketing users are skeptical of MRM, providing too much functionality too quickly will work against user adoption. By starting with only 20% of the features of an application, you prevent users from being overwhelmed. Phasing in additional capabilities enables the organization to grow user adoption incrementally so that full application benefits can be achieved. Organizations that follow this approach report users “begging for more capabilities” sooner. It is better to leave users wanting more than to overwhelm them.

Action Item: Start with a few capabilities to help users with key day-to-day marketing activities. Phase in additional capabilities over time, based on three- to six-month cycles.

Start With a Pilot: A pilot is a low-cost way to begin an MRM initiative and gain valuable insight to support enterprisewide deployment. MRM is a new concept for most marketing organizations. Executives remain skeptical about the benefits, and users become wary of the effect it will have on jobs. Many organizations pilot an MRM initiative in one geographical region, or product or brand, prior to rolling out the initiative to the entire marketing organization. By starting with a pilot initiative among a small set of users, marketing can build MRM competencies and a business case for executive buy-in, and gain insight into user requirements and adoption, as well as an understanding of customization requirements. This approach also enables organizations to determine whether the vendor they have selected best fits their organization. Pilot users can also help promote the solution.

Action Item: Identify an area that is primed to adopt MRM, and establish a pilot. Set up a program office to gather user feedback, measure adoption and ascertain key benefits. Look for pitfalls to prevent before global rollout. Determine the level of customization required.
After Implementation

Celebrate Successes: To grow user adoption and increase visibility of the MRM initiative, highlight successes. Mini-celebrations provide opportunities to reinforce the solution and MRM's objectives. They provide recognition to teams and individuals who portray best practices to reinforce positive use of the application. They also provide opportunities for power users, champions and recognized contributors to interact with more-casual users.

Action Item: Use celebrations to increase the visibility of the tool. Promote healthy competition to achieve broader adoption.

Offer Incentives: Compared with an SFA tool, where sales representatives have a larger portion of variable pay, incentives can be hard to tie to the use of an MRM tool. Financial rewards, however, tend to gain attention and results. Be creative, and tie a certain percentage of bonuses to the support of marketing goals established for the MRM initiative, including use of the tool. More-frequent awards, such as quarterly bonus payments, can be particularly effective during the first year of deployment.

Action Item: Tie a percentage of bonus payments to the support of MRM goals and objectives.

Don't Approve Work or Allocate Budgets Unless They Are Sent Through the System: Although many of these tips provide positive reinforcement, force the use of the tool if all else fails. To ensure broader adoption, make the use of the solution a requirement to do work. For example, require that all projects be initiated in the system for review and approval prior to allocating budgets and resources. Not only does this drive user adoption, but it also helps marketing prevent renegade projects that do not support organizational goals.

Action Item: Prevent work-arounds. Make the use of the MRM solution mandatory.

Although these tips are common to business software deployment, they are critical to attaining executive buy-in for MRM, and to ensuring user adoption by marketing users who are less familiar with enterprise software.

Tactical Guidelines

By following these 12 tips, companies can ensure a more successful MRM implementation that achieves or even exceeds their business objectives.

Preimplementation, companies should:

- Sell bottom-up.
- Document marketing processes.
- Cultivate a collaborative partnership between marketing and IT.
- Select power users or champions.
- Consider outsourcing prior to bringing in-house.

During implementation, companies should:

- Establish role-based training.
- Phase in MRM components.
- Keep it simple, and expand capabilities slowly.
• Start with a pilot.

Postimplementation, companies should:

• Celebrate successes.
• Offer incentives.
• Don't approve work or allocate budgets unless they are sent through the system.

REGIONAL HEADQUARTERS

Corporate Headquarters
56 Top Gallant Road
Stamford, CT 06902-7700
U.S.A.
+1 203 964 0096

European Headquarters
Tamesis
The Glanty
Egham
Surrey, TW20 9AW
UNITED KINGDOM
+44 1784 431611

Asia/Pacific Headquarters
Gartner Australasia Pty. Ltd.
Level 9, 141 Walker Street
North Sydney
New South Wales 2060
AUSTRALIA
+61 2 9459 4600

Japan Headquarters
Gartner Japan Ltd.
Aobadai Hills, 6F
7-7, Aobadai, 4-chome
Meguro-ku, Tokyo 153-0042
JAPAN
+81 3 3481 3670

Latin America Headquarters
Gartner do Brazil
Av. das Nações Unidas, 12551
9º andar—World Trade Center
04578-903—São Paulo SP
BRAZIL
+55 11 3443 1509