

# Sample Action Plan: Marketing Data & Analytics

The Action Plan is a collaborative, living document that you'll create with your Gartner team. Each plan is customized to reflect your specific objectives.

Our analysts work with you to focus on the areas with the greatest potential impact on your business. You'll then use the Action Plan as a touchstone to measure progress against goals and course-correct if necessary.

**Put your marketing data & analytics plan into action!**

Call us at 1-866-592-5144 or email us at [gml@gartner.com](mailto:gml@gartner.com)



# Marketing Data & Analytics: Building an Analytics Team



## How your Gartner partnership will provide continuous, long-term support

| Client Objective 1  | Client Initiatives   | Action Plan and Gartner Resources   |
|---|--|---|
| Build a marketing data analytics team to use real-time data to support more informed customer interaction decisions | <ul style="list-style-type: none"><li>Understand what each business unit needs from the marketing analytics team</li><li>Define a data strategy that directly links to our business goals</li><li>Build a reporting structure that supports business goals and an integrated and unified customer database</li><li>Analyze if current team has the proper skillsets to support the organizations objectives and determine if the desired outcome is achievable through training or external resources</li><li>Build a centralized team that works across the global organization to capture and leverage fragmented data</li><li>Understand what's missing in our current dataset, teams, technology and tools for future needs data-driven marketing</li><li>Determine appropriate technology and tools required to meet goals</li><li>Continue to refine and improve they analytic team's real-time marketing decision support</li></ul> | <ul style="list-style-type: none"><li>Use the <b>Marketing Maturity Assessment</b> to give your marketing analytics team a quick self-assessment and use the results to help you decide where to focus your next talent and technology investments so you can <b>have a greater impact</b> on the business</li><li><b>Build a business case that is analyst-backed and externally validated</b></li><li><b>Develop a marketing analytics framework that combines data from multiple sources to answer the questions that matter most</b></li><li><b>Identify</b> the necessary skill-sets required for your current and future analytics team members</li><li><b>Evaluate</b> if your data partners, tools, technology, and analytics team meet requirements for future analytics and business goals</li><li><b>Partner with analysts</b> to create an analytics strategy by identifying how to best use data to creative adaptive buying journeys that amplify customer experiences</li><li>Use <b>role descriptions</b> to help you find talent that will get you more value from your marketing data and align activities to business goals</li><li>Leverage <b>how to guides</b> to develop user-centric, unified marketing dashboards that get you the insight and value need to for more effective action</li><li>Provide <b>ongoing guidance and support</b> and share strategic insights and validation on program strategy and results</li></ul> |

# Customer Experience: Turning loyal customers into advocates






## How your Gartner partnership will provide continuous, long-term support

| Client Objective 2  | Client Initiatives  | Action Plan and Gartner Resources  |
|---|---|--|
| Turn customer data into valuable insights by collecting, tracking, analyzing, and applying data to differentiate the way we engage with customers across channels | <ul style="list-style-type: none"><li>▪ Determine which business units need to be pulled into this initiative to ensure appropriate cross-function collaboration</li><li>▪ Ensure metrics in each individual channel are comprehensive and accurate</li><li>▪ Gather data from each channel and begin making appropriate connections between channels</li><li>▪ Select a data visualization and dashboard provider and solution</li><li>▪ Develop action plans based on the data to apply to marketing channels and sales tactics</li></ul> | <ul style="list-style-type: none"><li>▪ Use our <b>data-driven marketing maturity model</b> to help you move from collecting data to being a strategic intelligence function</li><li>▪ <b>Partner with analysts</b> to guide your digital marketing team in creating a data strategy that identifies opportunities, optimizes programs, and enables responsive orchestration of efforts across channels</li><li>▪ Provide key findings and data to help you benchmark against how progressive companies distinguish themselves in their approaches to data and analytics with our <b>Survey results</b></li><li>▪ Use <b>Market Guides and Magic Quadrants</b> to evaluate and select the marketing analytics platform that suits your needs, from segmenting customers, prioritizing leads, providing relevant offers and messages, personalizing experiences to improving advertising</li><li>▪ <b>Source and evaluate</b> the right data visualization and dashboard providers who best pair with your current framework and future goals</li><li>▪ Deliver <b>step-by-step guides</b> to overcoming major challenges in implementing a data-driven marketing strategy</li><li>▪ Learn <b>best practices</b> for utilizing the data you currently have and identifying whether its time to expand your data collection practices to extract more insights</li><li>▪ <b>Support and guide</b> you through working with cross-functional teams</li><li>▪ Data and dashboard <b>reviews with our analysts</b> for data accuracy and appropriate data connections</li><li>▪ Provide <b>ongoing guidance and support</b> on strategy and customer data results</li></ul> |

# Sample engagement plan for the first 90 days



|  | 1-30   |  |   |   |  | 31-60   |   |  |   | 61-90  |    |                 |
|--|--|--|---|---|--|---|---|--|---|--|----|-----------------|
| Weeks  | 1  | 2  | 3 | 4 | 5  | 6   | 7 | 8  | 9   | 10   | 11 | 12              |
| <div>▲ Key milestones</div> <div>▲ Service interactions</div>  | ▲ Kickoff  |  |   |   |  | ▲ 30-day check-in   |   |  |   | ▲ Portfolio review   |    | ▲ 90-day review |
| <div></div> <div>Written research and tools</div> | Identify research reports to baseline team's understanding                 | Review digital and analytics plans, priorities, documents, corporate goals, and next steps |   |   |  | Review findings from Spend Survey and other relevant surveys  |   |  | Toolkit: Compare your investment with peers in marketing spend and maturity |  |    |                 |
| <div></div> <div>Subject matter experts</div>     | Prioritize next steps and gaps mapped to marketing data strategy           |  |   |   | Learn best practices from across industries around content creation and curation |   |   | Talk to analysts and perform technology landscape scan for vendors, agencies and service providers |   | Talk to an analyst expert to get actionable advice contextualized to your priorities |    |                 |
| <div></div> <div>Peers</div>                    | Engage for best-in-class sales and marketing support models and structures |  |   |   |  | After the first 90 days, we'll continue to collaborate to address your highest priorities, helping you save time, reduce risk and lead with confidence. |   |  |   |  |    |                 |