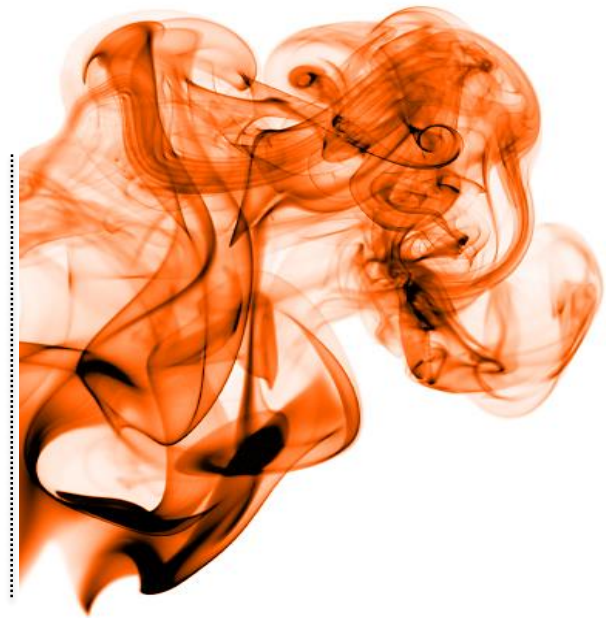


EAST COAST **CATALYST**



An Anatomy of a Digital Audit

Workshop



Gilbane Conference 2015

Content and the Digital Experience

Manage. Measure. Mobilize. Monetize.

Prepared by Tim Bourgeois

December 1, 2015

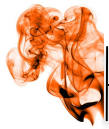


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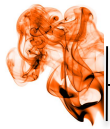
CASE STUDY

SUMMARY & TAKEAWAYS

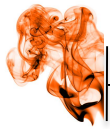
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INTRODUCTION

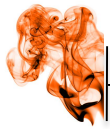


Workshop Overview

Marketing management has never been so exciting -- or daunting. The proliferation of digital tactics and lightweight technology has cleared the path for us to take genuine ownership of our operations, and be less reliant on other areas of the organization to do our jobs. While this new reality is empowering, it also comes with challenges. Indeed, today's senior marketing manager is not only tasked with traditional responsibilities such as brand shepherding and lead generation, but also line items such as data analysis, technology portfolio optimization, and vendor relations.

The session will explain a comprehensive 30-point methodology for conducting an assessment, with specific focus on the following four areas of the marketing operation:

- **Advertising & Promotion:** digital media (search, display / banners, classified, mobile, digital video, lead generation, sponsorships), organic search marketing, content marketing, social media, email marketing
- **Websites:** copy, images, video / animation, landing pages, microsites, search, live chat, blogs
- **Technology:** marketing automation, content management, analytics, and data management
- **Vendors:** even mid-sized digital marketing operations often have 10+ vendors involved in maintenance and optimization

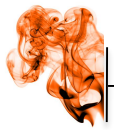


Workshop Goals

- **Leave the session with 2-3 practical techniques for cost-cutting or ROI improvement**
- **Develop an understanding of the entire digital ecosystem and how an audit could be pursued at your own organization**

Most digital audits are focused on the following areas of emphasis:

- ❖ **Cost-savings:** “Our spending on digital advertising, staff, and technology has doubled in the past three years, and we need to find ways to get spending under control.”
- ❖ **Performance improvement:** “Our digital strategy is critical to the long-term health of the business and we need to make sure our digital investments are optimized.”
- ❖ **Competitive benchmarking:** “We know we’re at a competitive disadvantage due to our digital strategy and we need to understand the precise pain points and how to respond.”



About Me: East Coast Catalyst & ChiefDigitalOfficer.net

**INVENTING YOUR FUTURE:** Accelerating Success Through Technology
MAY 20, 2015
Register

INDUSTRY NEWS, EVENTS, ANALYSIS & JOBS.
SIGN UP FOR OUR NEWSLETTER

**Chief Digital Officer**
For the next generation of digital leaders

STRATEGY TACTICS TALENT EVENTS 5 QUESTIONS WITH... JOBS

Digital disruption threatens to change IT to its core

A great deal of lip service has been paid this year to digital transformation and its impact on the CIO role, but no less critical is the topic of digital disruption.

Read more



What Makes a Great Chief Digital Officer?

Here are 6 key qualities I saw that characterize top-notch CDO's.

Read more


Chief Digital Officer - N

Our newsletter is delivered every two weeks and contains stories for our audience of professionals who have responsibilities in marketing, technology, and innovation.

Email

"The Chief Digital Officer Roundtable series delivers a point-of-view to meet the unique and evolving CDO role. I congratulate them on a great event in Boston and was happy to participate."


**Brent Turner,**
Chief Digital Officer, MIT

HOME ABOUT US SERVICES OUR WORK BLOG CONTACT

East Coast Catalyst is a Digital Task Force

We plan, build and manage digital marketing strategies that drive new business and competitive advantage for our clients.


DIGITAL STRATEGY



Strategic counsel from experienced digital professionals, delivering objective and independent insights, based on clients' unique needs.

- Digital transformation & strategic roadmaps
- Digital audits & marketing mix assessments
- Competitive benchmarking
- Vendor evaluation & selection

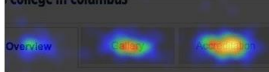
USER EXPERIENCE & DESIGN



Designing for the digital medium has always been a challenge. Then smartphone and tablet device sales overtook desktop computers.

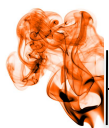
- Ideation & prototyping
- Online branding & identity
- User experience planning
- Digital interface, asset and ad design

DIGITAL MARKETING OPTIMIZATION



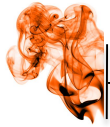
When 'set it and forget it' is no longer an option. Maximize digital marketing performance and return-on-investment.

- End-to-end digital program management
- Monthly reporting, assessment & tuning
- Conversion Optimization
- Interim CMO / CDO



About Me: Client Experience

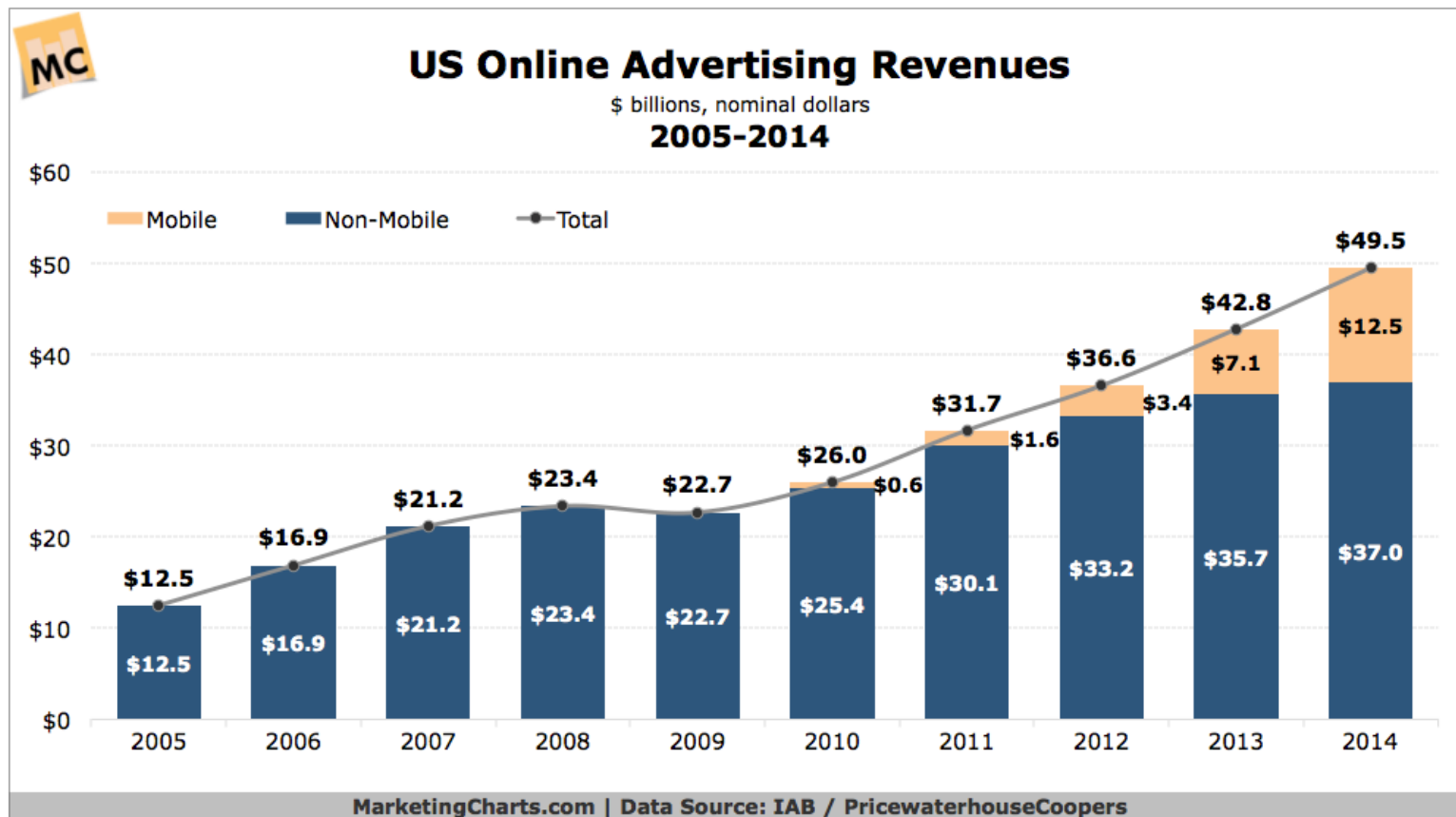


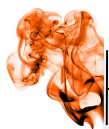


THE DIGITAL LANDSCAPE



U.S. Internet Advertising Revenues, 2005-2014

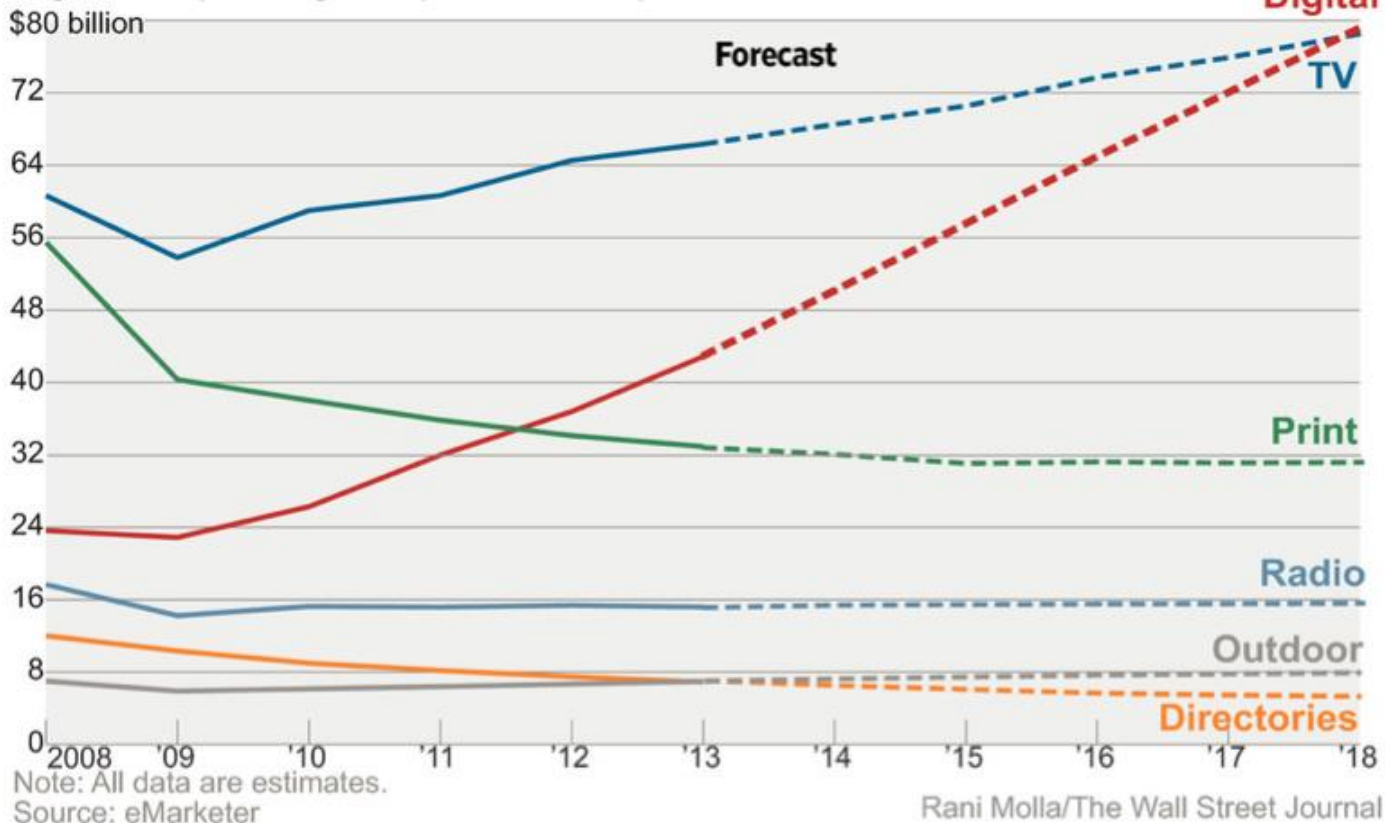


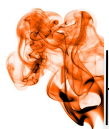


U.S. Media Spending

U.S. Total Media Ad Spending, 2008-2018

Digital ad spending is expected to surpass TV in 2018.

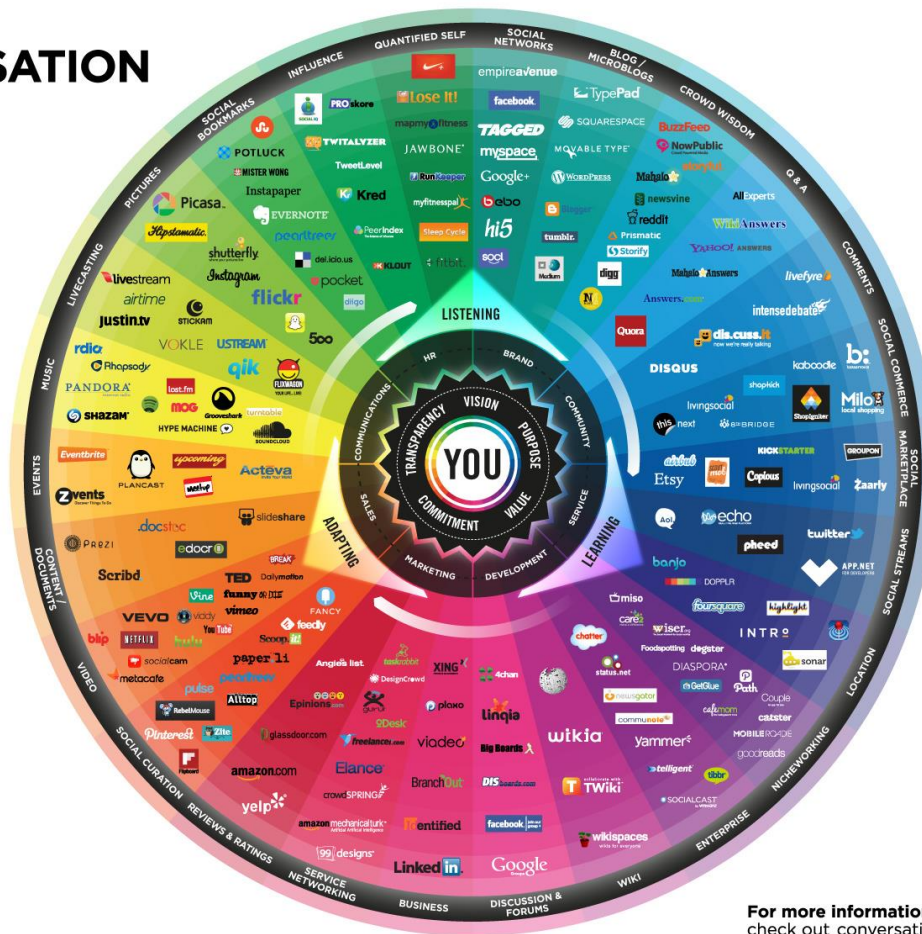


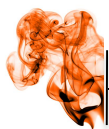


The Social Media Landscape

THE CONVERSATION PRISM

Brought to you by
Brian Solis & JESS3



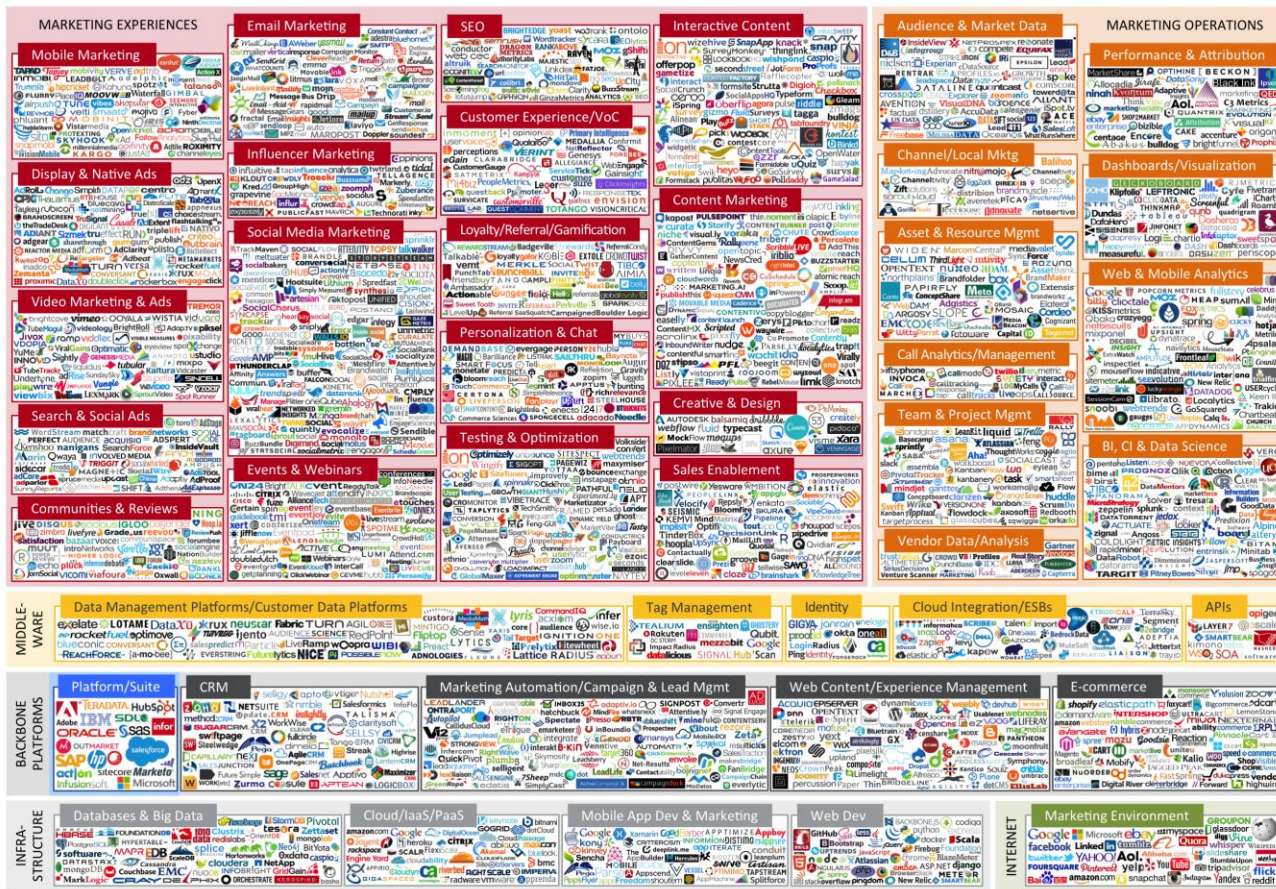


The Marketing Technology Landscape

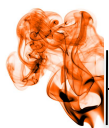


chiefmartec.com Marketing Technology Landscape

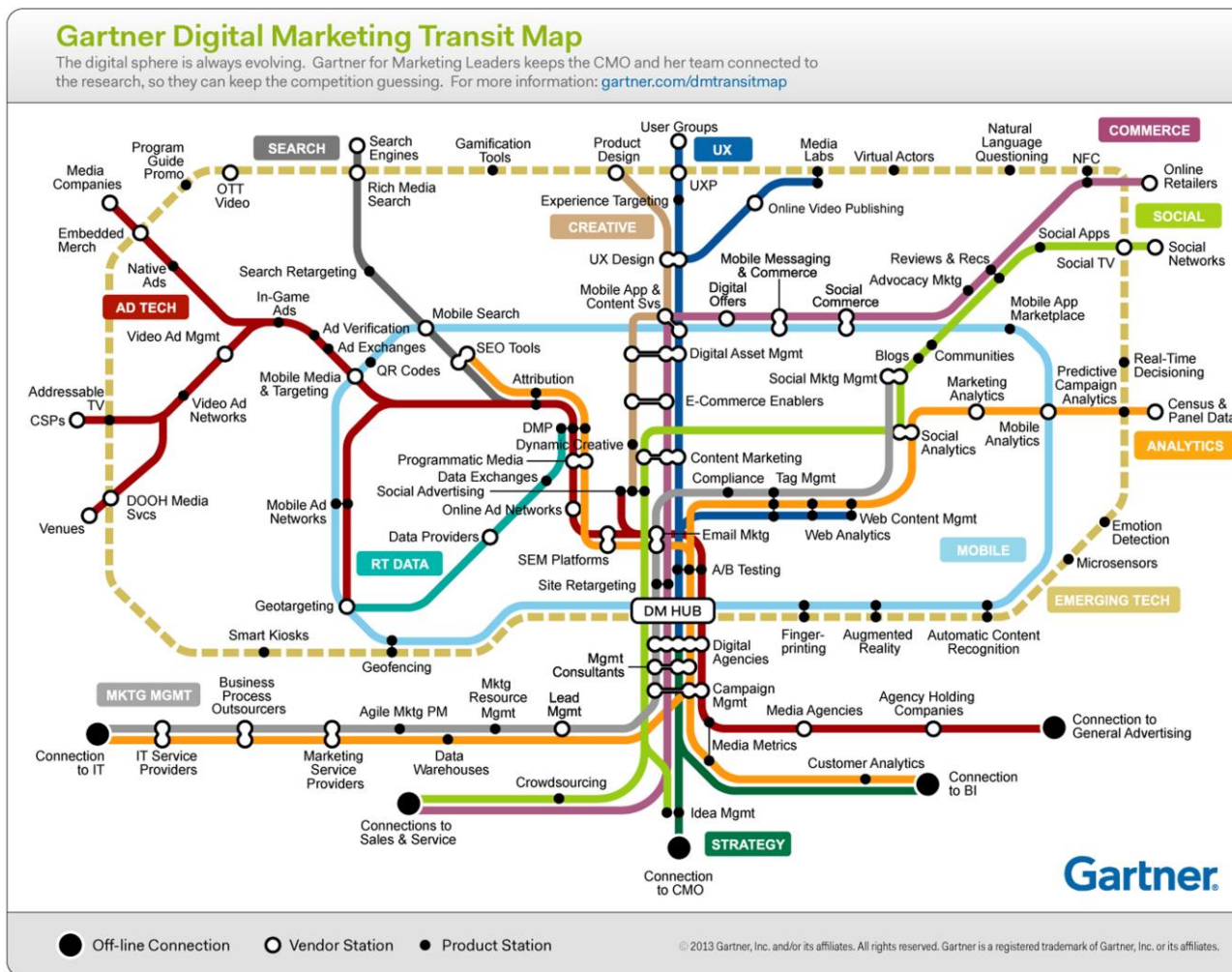
January 2015

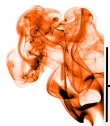


by Scott Brinker @chiefmartec <http://chiefmartec.com>

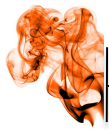


The Gartner Digital Marketing Transit Map

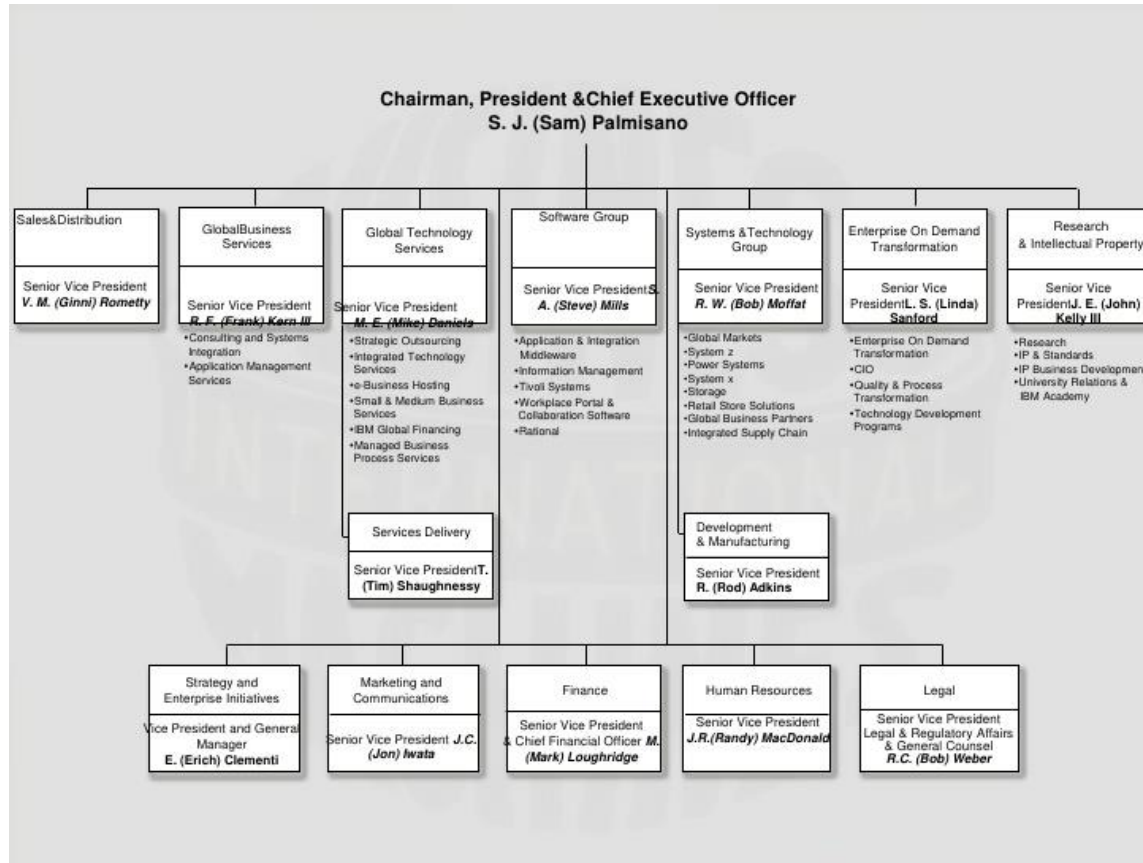




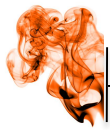
THE CHALLENGE



Traditional Corporate Org Structure



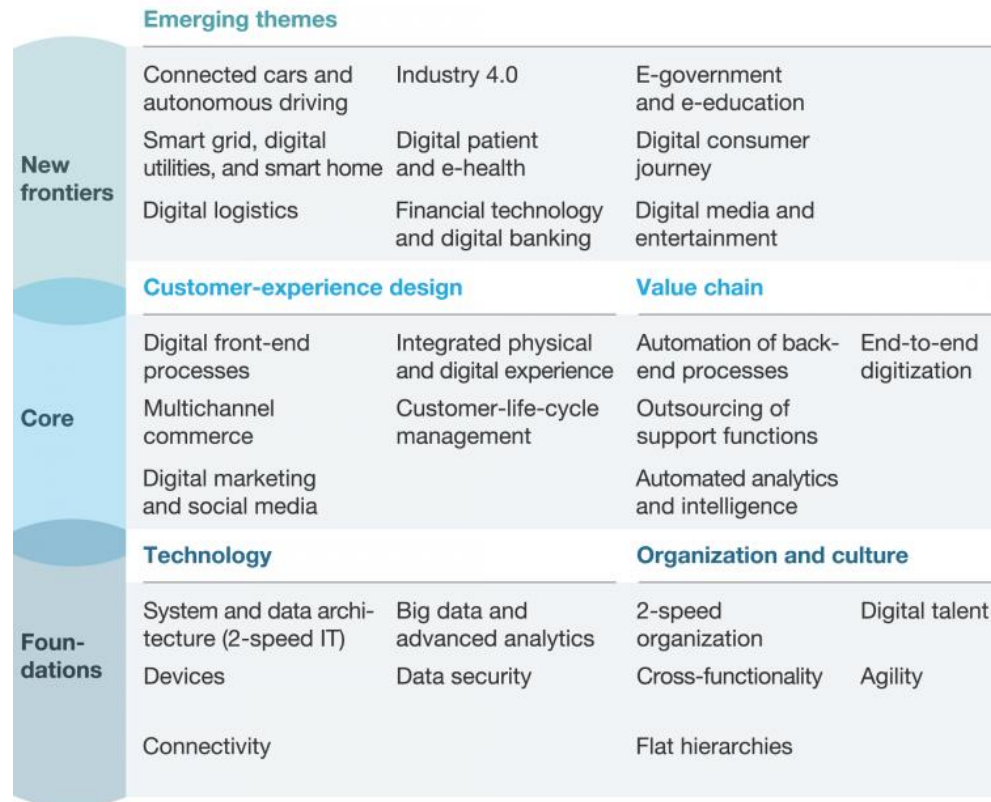
The traditional, function-based structure of corporations doesn't accommodate successful digital business, which cuts across multiple functional areas.



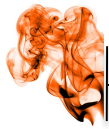
Digital's Impact is Far-Reaching

Leaders must understand where digital is having the greatest impact.

Digital affects core businesses, opens new frontiers, and requires foundational change.



McKinsey&Company



Why The Need for a Digital Audit & Roadmap?

Executing successfully on digital strategies has never been more challenging. While the rapid proliferation of digital technologies and techniques over the past decade has fueled the growth of an exciting new industry, and which has enabled general managers and marketers to free themselves from the grips of the IT department, it has also created a disruptive environment that is challenging to manage.

"In our experience, companies may be leaving as much as 20% to 30% of potential [digital advertising] returns on the table."

McKinsey&Company

"Software is eating the world." (Marc Andreessen)

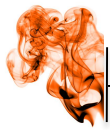


"The CMO will spend more on IT than the CIO by 2017."

Gartner®

New research from BCG shows that today's marketing organizations "do not have the skills to operate in a digital world, and that the gaps and shortfalls are bigger than they assume."

BCG
THE BOSTON CONSULTING GROUP



Other Reasons for Audits & Roadmaps

“Should I be using Outbrain?”

- *CMO at \$100M manufacturing company*

“Do you think \$9,000/month is enough for my paid search program?”

- *CMO at \$50M marketing company*

“Is Hubspot good?”

- *Numerous*

“I just hired a senior in college to make some noise for me on social media in between classes.”

- *Consulting firm CEO*

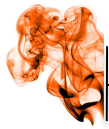
“My nephew is graduating from college this spring and I’m thinking of hiring him to run my website.”

- *Successful energy entrepreneur*

“What about the other 97% of my website visitors – why aren’t we getting their business too?”

- *\$500M company CEO in response to hearing his company’s website performs at a 3% conversion rate*

Lots of confusion among senior executives about how to deploy digital strategy, and what is considered successful or unsuccessful.



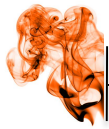
Financial Incentives

<u>Company Revenues</u>	<u>Digital Spend*</u>	<u>Savings/Gains**</u>
\$10,000,000	\$187,500	\$37,500
\$25,000,000	\$468,750	\$93,750
\$50,000,000	\$937,500	\$187,500
\$100,000,000	\$1,875,000	\$375,000
\$250,000,000	\$4,687,500	\$937,500
\$500,000,000	\$9,375,000	\$1,875,000
\$1,000,000,000	\$18,750,000	\$3,750,000
\$5,000,000,000	\$93,750,000	\$18,750,000
\$10,000,000,000	\$187,500,000	\$37,500,000

** Digital spend estimated at 25% of marketing budget; marketing budget assumed to be 7.5% of revenues*

*** Assumes 20% savings or performance gain as a result of audit & roadmap*

A typical company with \$100M in sales can expect \$375,000 in savings or performance gains following a digital audit.



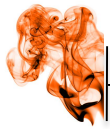
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\$500,000,000	\$9,375,000	\$1,875,000
\$1,000,000,000	\$18,750,000	\$3,750,000
\$5,000,000,000	\$93,750,000	\$18,750,000
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* Digital spend estimated at 25% of marketing budget; marketing budget assumed to be 7.5% of revenues

** Assumes 20% savings or performance gain as a result of audit & roadmap

The most likely candidates for a digital audit are companies with \$50M - \$1B in annual sales. Small companies aren't spending enough on digital yet to justify an audit, and very large companies are either too complex or impenetrable due to their existing agency relationships.



Making the Case for an Audit

Your CEO Is Going to Start Asking Questions

Combined factors of increased profile + budget

Playing Catch-Up is a Bad Spot

If the audit is requested by a CEO or CFO, that puts marketing in a vulnerable position

Objectivity is in Short Supply

If your vendor's tool is a hammer, every problem looks like a nail

If You're Not Confused, You're Not Paying Attention

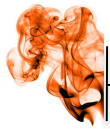
The growth of digital advertising and the digital tools and technologies marketplace has resulted in sprawling, Frankenstein-like digital operations with various inefficiencies

(Practically) Every Other Group is Doing It

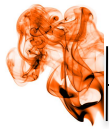
Many other corporate groups conduct audits regularly: finance, IT, risk, energy, HR, etc.

Your CFO Will Love You For It

It's the CFO's job to keep an eye on spending, and while many digital audits result in budget increase recommendations, it can also serve as a compelling tool to influence CFO thinking about digital investments



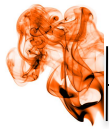
THE AUDIT



Digital Audit Approach (Framework)

The East Coast Catalyst digital strategy framework is a tested methodology that ensures every aspect of an operation is assessed and incorporated into the planning process.

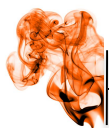
EAST COAST CATALYST		THE DIGITAL STRATEGY AUDIT & ROADMAP FRAMEWORK			
CATEGORY	AREA OF FOCUS	DESCRIPTION / INVENTORY	ASSESSMENT	OPTIONS	RECOMMENDATIONS
Strategy	Alignment with Corporate Sales, Marketing & Operational Objectives				
Strategy	Competitive Benchmarking: Digital Footprint & Reach				
Strategy	Competitive Benchmarking: Competitor Ad Spending & Budgets				
Infrastructure	Hosting: Setup & Configuration				
Infrastructure	Hosting: Performance & Scalability				
Applications	Content Management System (CMS)				
Applications	Baseline Functionality (Forms, Personalization)				
Applications	Database / Data Warehouse				
Applications	Ecommerce				
Applications	CRM / Marketing Technology & Automation				
Applications	Custom Applications / Intranet / Extranet				
Applications	Community				
Applications	Mobile Apps / Mobility				
Creative/Design	User Experience				
Creative/Design	Branding / Identity				
Creative/Design	Website Assets (Imagery, Content, Widgets)				
Creative/Design	Rich Media / Video				
Promotion	Social Media				
Promotion	Search Engine Optimization / Organic Search				
Promotion	Pay-Per-Click (PPC) Search Marketing / Paid Search				
Promotion	Email Marketing				
Promotion	Content Marketing				
Promotion	Mobile Marketing				
Promotion	Display Advertising				
Promotion	Online PR				
Analytics	Tool(s) Setup & Configuration				
Analytics	Conversion / Goal Tracking				
Analytics	Reporting: Business Process				
Talent / Skills	Staff Capability Assessment				
Vendors	Vendor Mix, Contracts & Performance Assessment				



Digital Audit Approach (Framework) *(continued)*

ECC's digital marketing strategy discovery activities may include the investigation into any one or all of the following components of a digital operation.

- Strategy: Alignment with corporate goals
- Strategy: Competitor benchmarking
- Infrastructure: Hosting vendor & contract evaluation
- Infrastructure: Hosting performance & scalability
- Infrastructure: Business process management methods
- Infrastructure: Database / data warehouse
- Website: Application (CMS)
- Website: Application (ECommerce)
- Website: Application (CRM / Marketing Automation)
- Website: Intranet / Extranet
- Website: Custom application(s)
- Website: User experience
- Website: Community
- Website: Multimedia assets
- Creative: Communication strategy & offline integration
- Creative: Digital asset review
- Promotion: Display advertising
- Promotion: Organic search engine optimization (SEO)
- Promotion: Pay-per-click (PPC) advertising
- Promotion: Email marketing
- Promotion: Content marketing
- Promotion: Mobile marketing
- Promotion: Online public relations (PR)
- Promotion/Community: Social media
- Analytics: Systems & setup
- Analytics: Conversion tracking
- Competitor Review: Site assets & performance assessment
- Competitor Review: Digital advertising activities & budget benchmarking
- Talent/Skills Review: Assess capabilities & composition of client team
- Vendor / Partner review: Vendor management relationships, contracts, and optimization planning

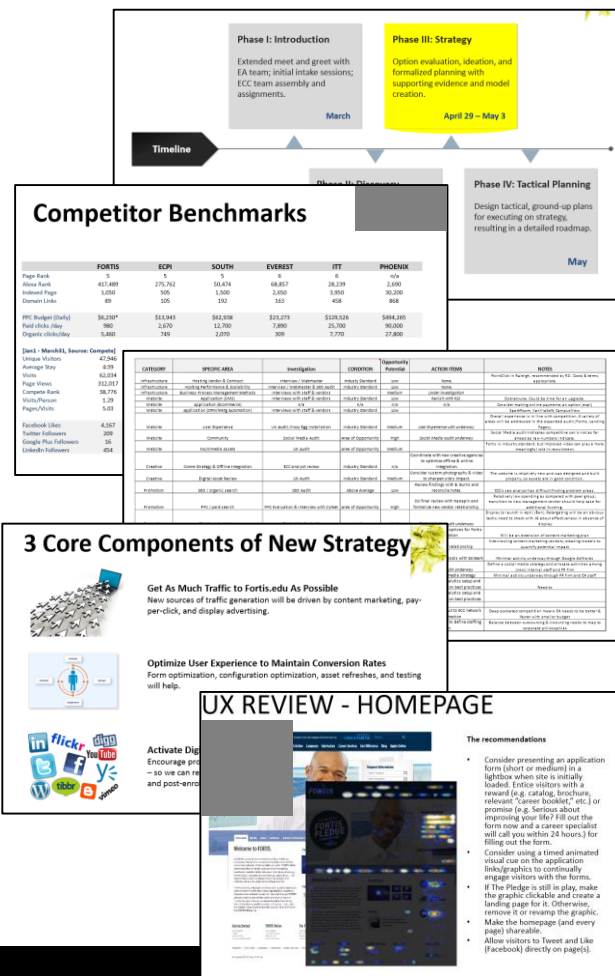


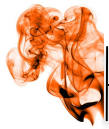
Sample Audit Deliverables

Assessment results and strategic recommendations will be delivered in two primary formats: a series of reporting documents and in-person presentations.

Prior ECC digital strategy audit and roadmap assignments have yielded reports that address the following in each major area of the project (planning, infrastructure, applications, creative, promotion, analytics, vendors and staff):

- Description / inventory
- Research findings (quotes from the field, industry experts)
- Competitive benchmarks
- Assessment (weak, industry standard, strong) + insights
- Options
- Opportunity
- Costs
- Recommendations





Area of Focus: Infrastructure & Applications

Hosting

Hosting is literally the foundation of any digital marketing operation, but often doesn't get the attention or priority it deserves.

Website Speed

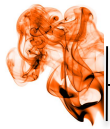
Most experts agree that sites should download in under five seconds. More recently, studies have shown that users abandon sites in great numbers after two seconds.

Marketing Technology

The marketing technology category has exploded in recent years; according to VentureBeat, the sector is growing at 50% annually.

Responsive Design / Mobile Friendly

There's no avoiding mobile. The statistics are overwhelming, in both B2C and B2B. And it's more of an infrastructure (applications) problem than a design problem.



Area of Focus: Promotion

Search Marketing

Paid search marketing (PPC) accounts for 40%+ of all digital advertising.

Mobile Marketing

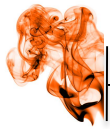
With phone and tablet internet usage officially overtaking PCs this year, a mobile strategy is a must-have in every digital marketing portfolio.

Multi-Channel Marketing

Multichannel marketing is one of the most frequently discussed topics among digital marketing executives these days. But given its relative newness, you still have time to get out ahead of the pack if you make a move in early 2015.

Email Marketing

"Newsletters are clicking because readers have grown tired of the endless stream of information on the Internet."



Area of Focus: Vendor Management

Understand the Vendor Landscape

Ad agencies, marketing services providers, marketing technology companies

Procurement Wizardry

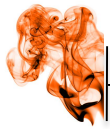
“Procurement departments and others have been busily grinding down fees for decades now”

Vendor Portfolio Management

The very largest companies can afford one-stop-shop relationships with full-service agencies, and they'll do this job for clients. The rest of us need to fend for ourselves.

Be a Good Client

When it comes to digital, skilled professionals have myriad options these days.



Tools of the Trade

The Google 'Stack'

Google Analytics, AdWords, and Console (formerly Webmaster Tools)

Competitive Benchmarking

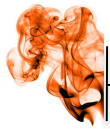
SpyFu, Compete

User Experience

Optimizely, Crazy Egg

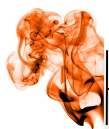
Data Collection

In-person interviews, surveys

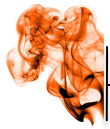


CASE STUDY

[The case study used during the workshop contains sensitive and propriety information, and therefore is not included in this document.]



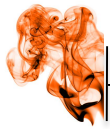
SUMMARY & KEY TAKEAWAYS



Areas of Emphasis

The “80/20” rule applies to digital audits. 80% of your material findings are going to be gleaned from 20% of the operation. These areas typically include one of the following:

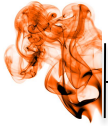
- **Paid digital advertising:** pay-per-click (ppc) search and display advertising (including mobile) combine to account for about 75% of all digital advertising, and these areas are the most fertile for auditing, if only because of their size
- **Vendor management:** mis-aligned or mis-managed vendors are the #1 sources of digital operation leakage
- **Staffing:** the largest digital agencies have been managing annual turnover rates in excess of 25% for years; corporations don’t typically experience this rate of turnover, which means that unless job descriptions are being proactively evolved each year, the “digital” job someone was hired to do 4-5 years ago is probably dramatically different today, so mis-alignment will be apparent and problematic



Keys to Success

Digital audits can be challenging to conduct successfully due to their cross-departmental variables and lack of generally agreed-upon best practice benchmarks to measure against. In our experience, successful digital audits include the following characteristics:

- **Executive sponsorship:** while this factor is true for most projects, it's especially pertinent to digital audits because many departments are necessary for fact-gathering; as such, a C-level sponsor is typically required for companies with less than \$500M in sales
- **Stakeholder meetings at each phase of the project:** most audits are complex and regular education throughout assignments is critical for gaining the buy-in necessary to implement post-audit recommendations (such as vendor re-balancing or new budget acquisition)
- **Realistic scope:** comprehensive digital audits can only be achieved with overt buy-in from the board, CEO and/or CFO, and this commitment is unusual, especially at large companies; however, focused digital audits (on specific areas of the digital value chain, such as PPC, marketing technology, staffing, etc.) can also result in significant cost-savings or performance improvements, while also serving as a path to a comprehensive audit; be realistic about what can be included in your audit and scope it in a way that affords the best chance of success
- **Avoidance of sacred cows & red herrings:** if the organization has just committed to a multi-year, enterprise-class contract with a huge software company for its marketing suite, consider that a sunk cost and figure out a way to make the most of it; at the same time, many vendor relationships can be reworked or even canceled without much difficulty – knowing the difference between these two situations can be the difference between a successful or failed audit



East Coast Catalyst

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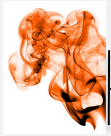
@ECoastCatalyst

@ChiefDigOfficer

Tim Bourgeois | tbourgeois@eastcoastcatalyst.com



APPENDIX: ABOUT EAST COAST CATALYST



About East Coast Catalyst

East Coast Catalyst is a digital strategy consulting firm.

Located in the heart of the Boston's Innovation District, ECC is a digital consultancy that specializes in helping clients optimize digital operations. The firm's principals – Tim Bourgeois and David Polcaro – each bring more than a decade of experience in the digital industry to every client engagement.

ECC's core consulting offerings include digital strategy, digital audits, user experience planning, and digital marketing optimization. Current and active ECC clients span the spectrum of Fortune 500 organizations and start-ups alike, including: Apperian, Attivio, Cisbio, North Bridge Ventures, Resolution (an Omnicom company), and Signiant.

Prior to launching ECC, the firm's principals managed Pixel Bridge, a full-service interactive marketing and web development agency. Acquired by AMP Agency, the firm delivered a range of digital agency and consulting services to a client list that included global brands such as Black & Decker, The Boston Globe, Comcast, Harvard, ITW, Sulzer, Thomson-Reuters, and TIBCO.

For more information, please visit EastCoastCatalyst.com.



About East Coast Catalyst: What Clients Say

“East Coast Catalyst’s fresh approach to digital strategy combines analytical rigor, innovative thinking, and nuts-and-bolts best practices. The firm is a bona fide hidden gem. I’ve hired the company on more than one occasion and sing their praises at every opportunity.”

- Alan Osetek, Global President / Resolution, An Omnicom Company



“East Coast Catalyst is the rare digital firm that has demonstrated expertise in every area of the value chain: strategy, tactics, execution and optimization. I've personally been a client for more than five years – at two different companies – and I recommend them enthusiastically and without hesitation.

- Mark Lorion, CMO / Apperian



"We wanted to work with a nimble company on our digital strategy project, and East Coast Catalyst was one of the few small shops with demonstrated expertise in this area. And they didn't disappoint - the ECC team articulated problems and recommendations to our executives effectively, and its structured approach to doing the work was exactly what we needed."

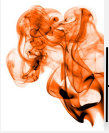
- Bob Visco, Marketing Director / Fortis College



"The principals at East Coast Catalyst combine both digital strategy savvy and front-line execution expertise in a unique and highly effective way. I consider myself one of their biggest fans."

- Brian Piccolo, Digital Strategic Services / Liberty Mutual





Consulting Capabilities

DIGITAL STRATEGY & PLANNING

- Corporate and business unit digital strategy
- Digital roadmaps and visioning statements
- Marketing mix assessment and ROI modeling
- Vendor and technology selection

DIGITAL MARKETING PLANNING

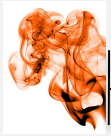
- Digital marketing audits and assessments
- Search marketing
- Content marketing
- Social media marketing
- Email marketing
- Mobile marketing
- Display advertising and rich media

CREATIVE & UX STRATEGY

- Digital identity and branding planning
- Website design and development planning
- Information architecture, wireframes, user flows, audience definition
- User testing and heuristic reviews
- Animation, video, games planning

DIGITAL MARKETING OPTIMIZATION

- Digital platform optimization
- Conversion optimization
- Digital project management
- Analytics and reporting
- Interim CMO / VP-Marketing services

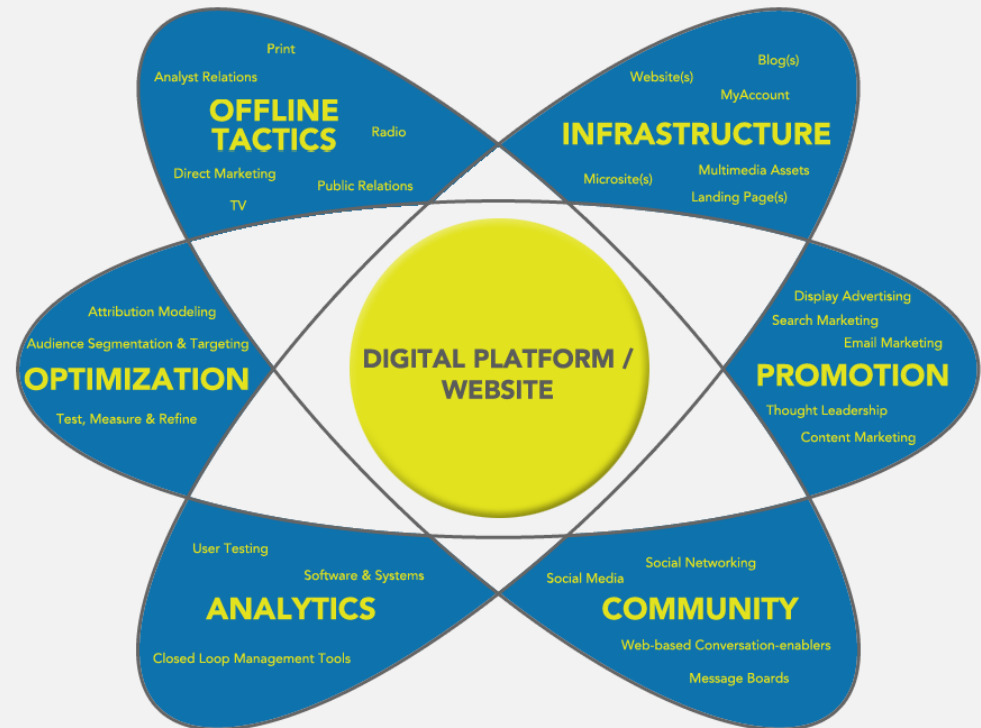


About East Coast Catalyst: Digital Strategy Approach

Comprehensive Approach to Digital Strategy

The digital landscape has evolved at a breakneck pace over the past decade, with billions of dollars invested in new technologies and solutions – resulting in the proliferation of social media outlets, infrastructure technologies, advertising exchanges, and analytics platforms. As a result, formulating digital strategies has never been more complicated – or more critical.

The East Coast Catalyst digital strategy philosophy is rooted in an integrated approach, taking into account the intersection of strategy, marketing, technology, innovation, and talent management.



Source: East Coast Catalyst

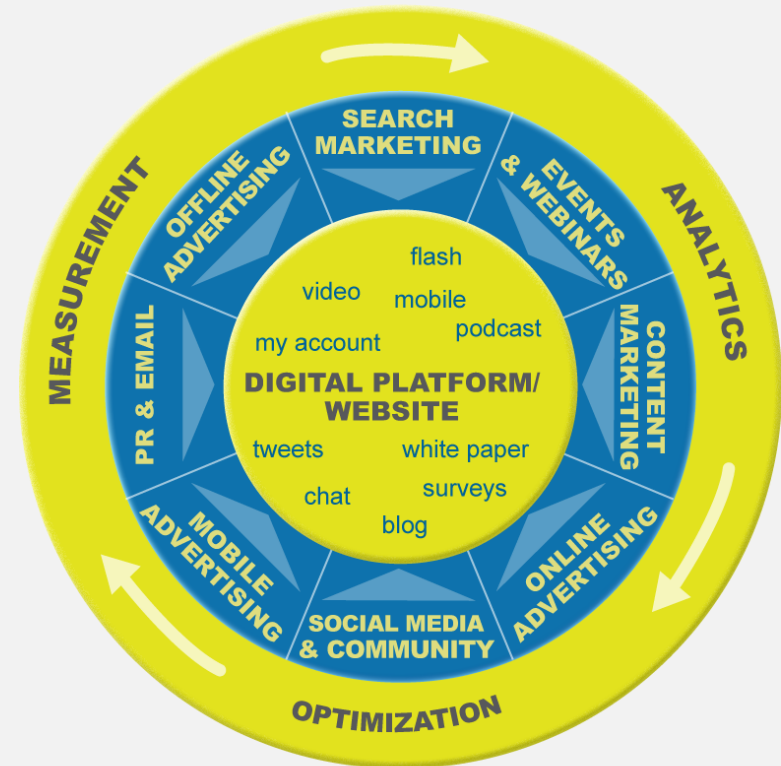


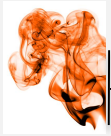
The East Coast Catalyst Approach to Digital Strategy

Philosophy

ECC's digital strategy consulting philosophy is rooted in four beliefs:

- 1) Smart digital strategy directly supports differentiation and competitive advantage
- 2) Digital ecosystems are complex and must balance user experience (platform) and promotion (marketing) to be successful
- 3) Digital operations require constant attention and investment
- 4) Digital tactics are almost always inter-dependent with offline activities





The East Coast Catalyst Difference

Experience

Senior team whose individuals each bring 10+ years practical, hands-on digital strategy and marketing optimization experience

Holistic Approach

Strategy → Platform & User Experience → Promotion → Analytics → Optimization

Tailored Methodologies & Techniques

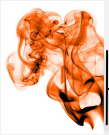
Digital Strategy Planning, Digital Marketing Audit

Network of Digital Experts

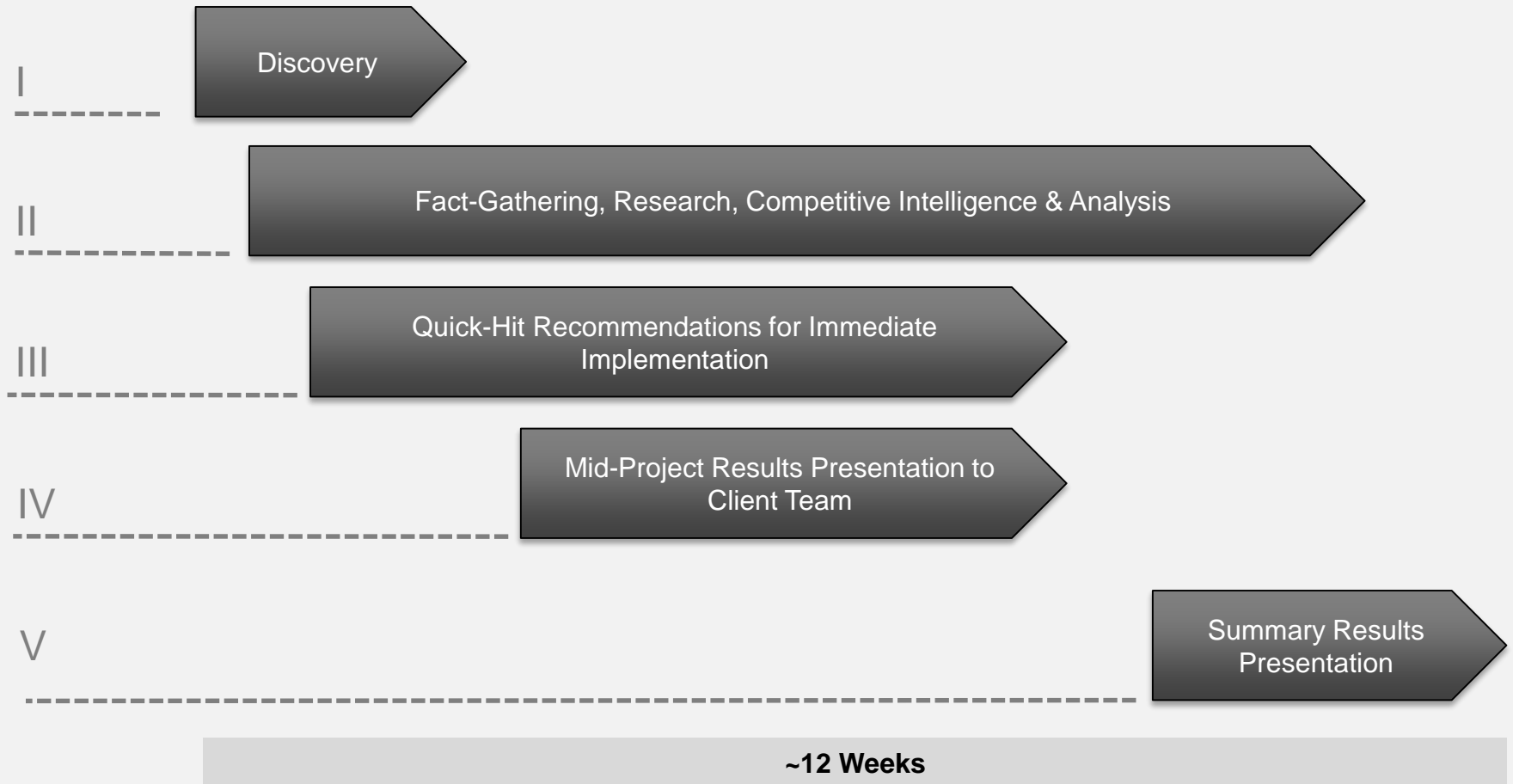
Best-in-class specialists and team assembly on-the-fly; unparalleled access via ChiefDigitalOfficer.net

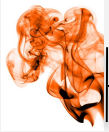
Independence & Objectivity

Technology agnostic; no contracts with solution / software vendors; no financial relationships with agencies or technology companies



The Sample Audit Timeline





Sample Audit Process

I. Discovery

Conduct interviews across the client organization. Gather information about strategies, competencies, vendors, audience, messaging, customer / partner / staff requirements, and the competitive landscape, relying on 30-point assessment framework.

II. Analysis, Research & Competitive Intelligence Gathering

Conduct research outside the organization – assess competitor digital operations, consult with domain experts, and identify best practices and map how they relate to client's infrastructure and requirements.

III. Quick-Hit Recommendations

Based on early research findings, deliver recommendations to client to implement in the short-term, which will have the ability to bolster marketing performance, save money, and/or get the organization moving in the right direction.

IV. Mid-Project Presentation

Deliver mid-project findings to the client project team leadership. This step inserts a formal deliverable into the process and keeps everyone aligned, as well as allows ECC to share initial findings and solicit feedback, and then make changes to the process as appropriate.

V. Final Recommendations & Presentation

Deliver final presentation and report to the client planning team(s) via in-person presentation(s). Document findings and fully transfer knowledge to the client marketing, sales, IT and operations groups.