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TOP 5 ISSUES WE FIND IN DIGITAL TRANSFORMATION AUDITS

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This white paper examines the 5 most common issues we find during transformation audits. Of course, not all of them will apply to you, but we advise to keep them in mind when you review the efficiency of your own marketing stack. You may be able to cut costs and even improve the performance of your marketing efforts.
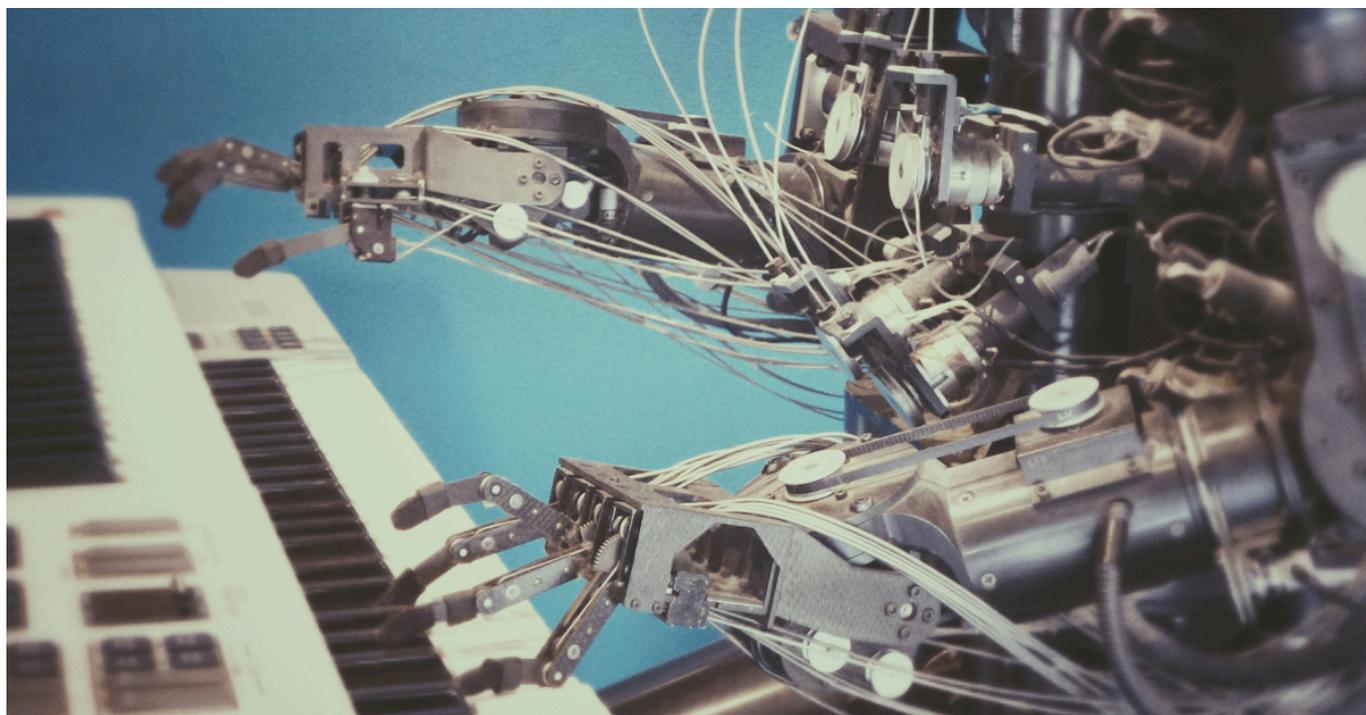

[*Image credit*]

ISSUE #1

LIMITED USE OF AUTOMATION

While most organisations employ some automation, most still have a lot more busywork than they need. Marketing messaging is often helped by funnel sequencing of email templates (or display ads). Similarly, remarketing lists can be set up to activate a certain time-frame after conversion. Even the process of reviewing and providing feedback on marketing collateral often ends up in a lot of back and forth rather than something automated. By improving the automation for campaigns, more time can be spent on analysis and strategy.

For most orgs, the right level of automation is "somewhat more than you're doing now"
*[Image credit]*

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ISSUE #2

LIMITED DATA CONNECTIVITY

There are lots of connections that can be made but the most common ones we see missing are:

- Website forms not connecting to CRMs (in a way that also lets you link to analytics activity).
- Ad platforms not being sufficiently connected to website activity (conversion tracking and value capture).
- For more advanced orgs, the CRM/EDM platform not connecting back to the website when a repeat customer revisits (which reduces the opportunity to personalise).
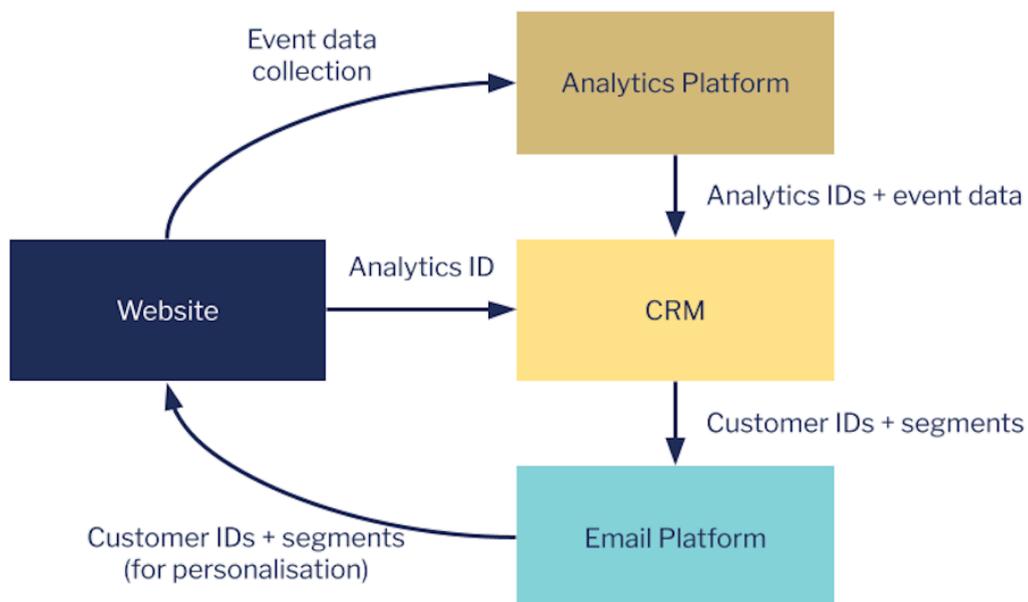

An example two-way flow that would link your website, CRM and analytics reports

ISSUE #3

LIMITED VISIBILITY FOR DECISION MAKERS

A lot of the time, the data is there but in silos, meaning decision makers might not even be aware that the data exists (or have to commission laborious ad-hoc reports to pull it together). With tools like Looker Studio, PowerBI and BigQuery, having a mini data warehouse is no longer the domain of enterprise orgs and doesn't have to cost a fortune. Even a small org running entirely on free tools can use Google Sheets to group marketing and financial data.
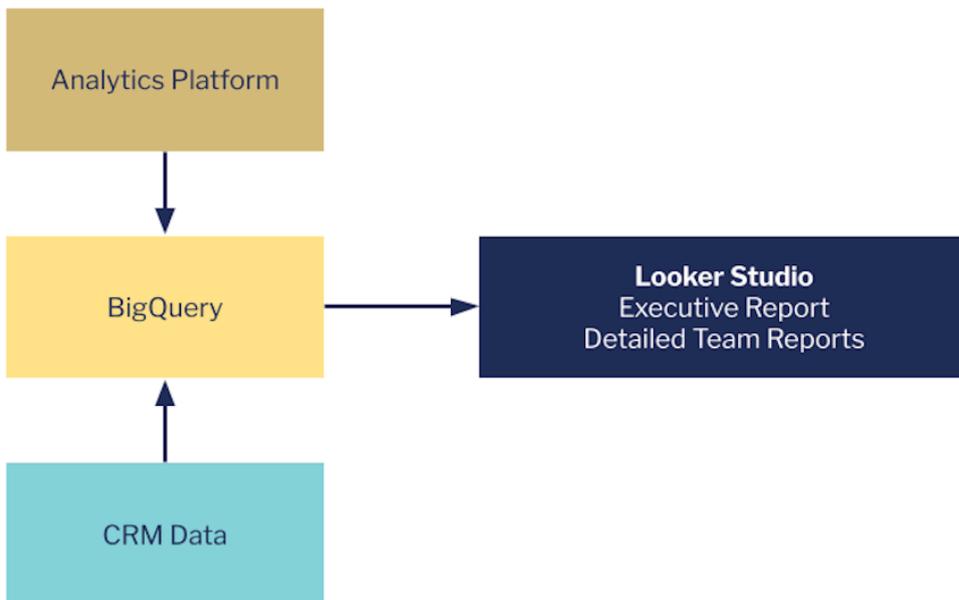
An example of data unification for easy reporting for non-tech users, many other flows exist

ISSUE #4

LACK OF DATA AND RESOURCE GOVERNANCE

Without centralised documentation and governance, it's common for tools to become bloated, which might mean:

- Too many tracking codes that slow down the website
- Different teams using different tools for similar purposes, reducing mutual intelligibility
- Unnecessary recurring paid subscriptions for tools

Your stack is like a garden, without frequent pruning it will get overgrown fast!
[Image credit]

ISSUE #5

WRONG RESOURCE ALLOCATION

It's important to weigh the effort vs impact of your different team projects and continually refine them. Without optimisation programs (which would include your team projects, website, marketing campaigns), it's easy to get into a holding pattern of creating more and more stuff (eg. campaign builds) without significant impact. The same goes for time spent on content creation/management of channels which have low activity.

Without weighing the cost & benefit your team may do a lot of great work to little effect
[Image credit]

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