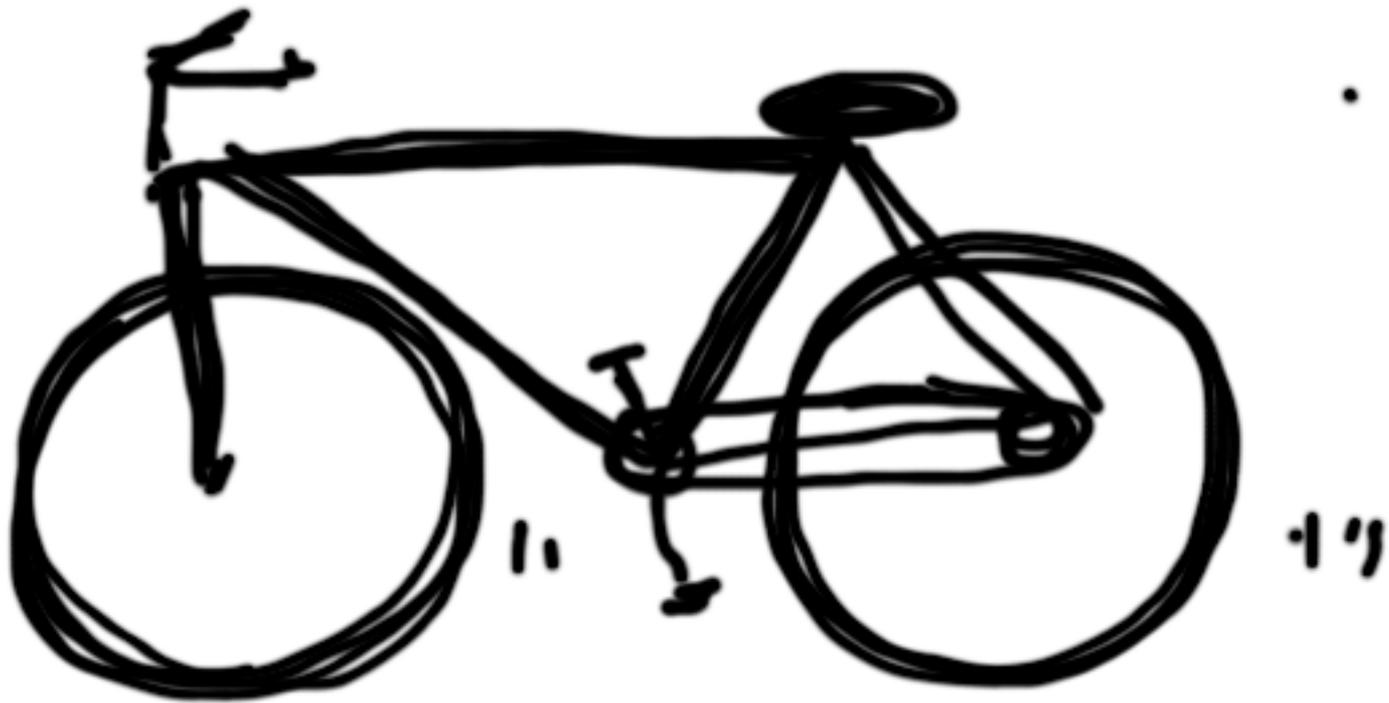


# WHAT MARKETING SHOULD KNOW ABOUT IT

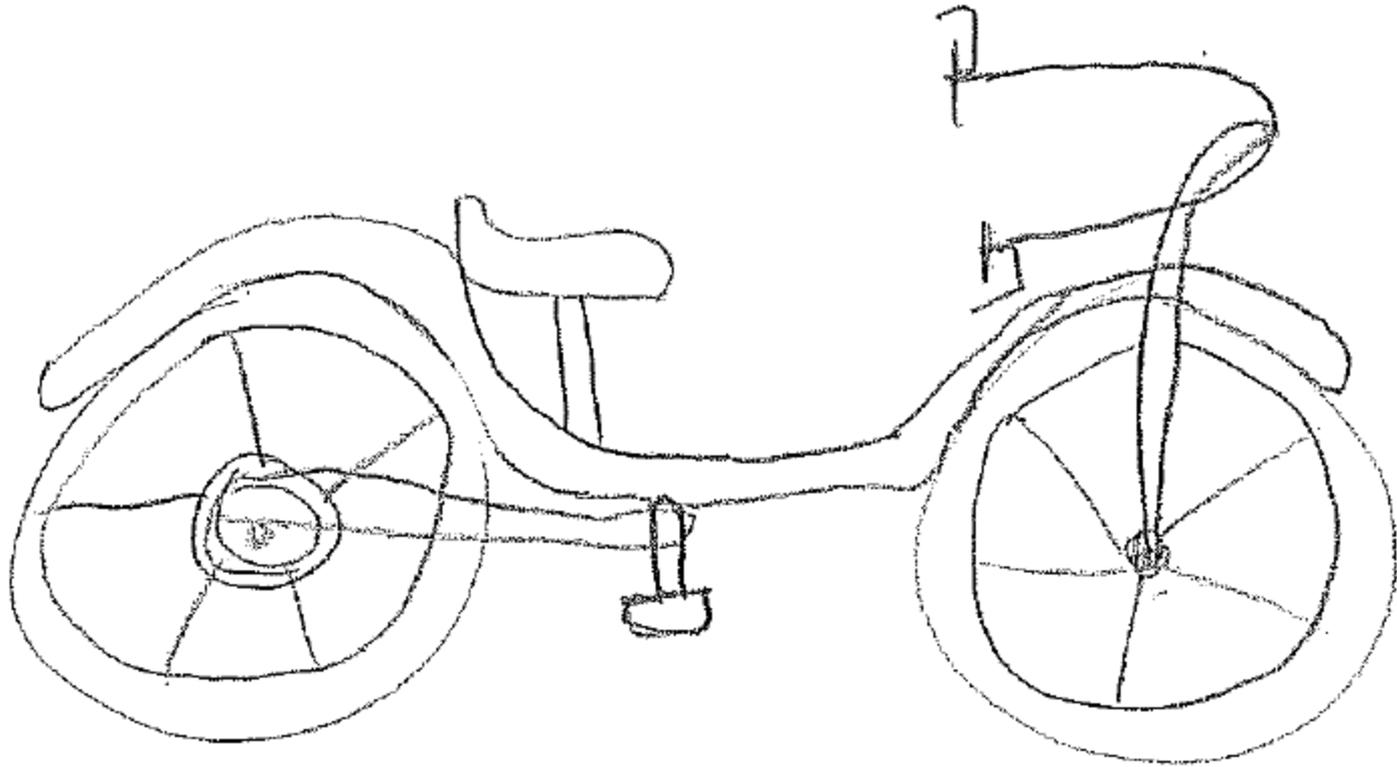
SIPA 2010 Marketing Conference

*Quarrels never could last long  
If on one side only lay the wrong*

“Could you build this for me, please?”



“Or this?”



# Three Major Themes

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- Marketing and IT professionals have very different perspectives
- Marketers need to become more tech savvy
- Marketers need to learn how to work with IT

# Part 1 – Different Cultures

Marketing – “I don’t know. Let’s test it.”

IT – “I need a requirements document.”

# When your only tool is a hammer ...

- IT's main tool is the computer.
- The IT mindset is to:
  - ▣ Automate,
  - ▣ Use databases and templates,
  - ▣ Eliminate exceptions,
  - ▣ Build once and use many time
- “IT inherently has a technology-centric worldview.” – *Scott Brinker*

“Marketing looks at digital solutions as answers to specific programs or campaigns and not as **systems that will exist and be used again.**”

From *Driving Revenue Through Customer Relevance* by the CMO Council.

# Stability vs. Learning

- IT wants processes that are dependable and repeatable.
- For marketing, doing the same thing twice means that nothing was learned the first time.
- IT needs a way to predict and manage change.
- Marketing needs a way to try new things and implement what's been learned.

“More than a few marketers and IT executives ... have described their differences as a classic case of right brain vs. left brain thinking.”

From *Driving Revenue Through Customer Relevance* by the CMO Council.

# IT has Different Business Priorities

- “Traditionally, the IT department has been an empire unto itself, with ... a decidedly internal focus.”
- “The majority of the IT power structure is in the support and infrastructure people, the network, database and help desk people. And then laying over these functions, you have a thin IT strategy layer ....”

From *The Empire Strikes Back: Unleashing IT as an Innovation Center*.

# Timetables

- Marketing has firm deadlines.
- IT projects are often behind schedule.
- IT and marketing should agree on a clear schedule with clear deliverables.

# Details vs. Big Picture – IT side

*The programmer is thinking ...*

- How does this integrate with other systems?
- What server resources does it use?
- How often do I have to update it?
- Does it create any security problems?

# Details vs. Big Picture - Marketing

The marketer is thinking ...

- I want this now.
- How do I measure success?
- What colors and images will work best?
- If this doesn't work, how can I change it?

# A plan to move forward

- Learn the basics of the technology
- Understand IT's motivations
- Be diplomatic
- Bring IT in early and work with them
- Where possible, model the project with commercially available software or services
- Be willing to limit your project in keeping with IT's estimation of low-hanging fruit.

## Part 2 – Learn the technology

“Marketing must ultimately lead its own marketing technology, from high-level strategy down to in-the-trenches code. It's the only way marketing will be able to succeed as a technical-driven discipline”

**Scott Brinker**

# The Marketing Technologist

- The more marketing learns about IT, the more forthcoming IT will be with ideas and solutions.
- The people who can't work with IT are often the ones who won't take the time to learn.

# Take the lead

- Don't count on IT to "come up with solutions." Be the "chief marketing technologist" who ...
  - understands how the system works
  - understands the business objectives of the website
  - understands the basic technical requirements, costs and time investment
  - can find creative solutions to new problems, and
  - can figure out if it's worth all the effort.

# Stuff you Need to Know ... 1

## How servers work

- request and response
- client side vs. server side
- Why templates are helpful
- What a cache does
- Why use a database
- The trade off of features and graphics for load speed and bandwidth

# Stuff you Need to Know ... 2

- HTML and style sheets
  - ▣ Why html code yields different results in different browsers, including email browsers – What you see is not always what you get.
- Database basics
  - ▣ Why you can't change the structure later on
  - ▣ Why it can be difficult to move data from one system into another.

# Stuff you Need to Know ... 3

- How cookies work
- How web-based analytics tools work
- Know what these Email terms mean
  - ▣ MX record (DNS resource record for mail server)
  - ▣ SPF (fights return-path address forgery)
  - ▣ Sender ID (validates the origin of the email)
  - ▣ Domain keys (verifies DNS of email sender)

# Part 3: Learn the Right Approach



# Be a Diplomat

- There is a large cultural gap between marketing and IT.
- Things that work in sales and marketing (e.g., “lighting fires”) might not work with programmers.
- Contact by email may be better than by phone. (Find out what works with your team.)

# Getting Past Barriers

- "Write me a requirements document" does not mean "leave me alone."
  - ▣ See if you can get IT to give you a template for a requirements document
- The helpdesk is not designed to make you go away.
- Show that you're willing to adapt and learn.

# “Good enough” vs. Perfect

- Some IT guys are perfectionists. Others are happy to slam out some code that’s “good enough.”
- Beware the IT tendency to over-engineer a solution.
- Beware of the project developer’s tendency to over-specify.
- Sometimes it’s best to do the simple thing first and learn from it.

# What Drives IT Crazy

- ❑ Half-baked ideas
- ❑ Emergency projects
- ❑ Failure to respect their process
- ❑ Doing a whole lot of work to set up for one promotion that gets one order
- ❑ Piling on non-critical requirements

# IT Wants Requirements First

- IT wants a clear requirements document up front.
- This includes mock-ups of every type of page.
- Don't change the project in the middle!
- IT wants a fixed target.

# Get IT Involved Early

- Get a sense of how hard the project might be.
- Get suggestions on ways to make it simpler.
- Break larger projects up into smaller pieces.

“Get your IT team involved right at the beginning or it's your fault if they become blockers later.”

Kate Mayfield, ***Mayfield Solutions Ltd.***

# A Possible Procedure

1. Marketing fills out a “bare bones checklist” for the project
2. IT reviews the checklist and meets with marketing for clarification.
3. Marketing provides wireframes of major pages to be built.
4. IT writes a “here’s what we think you want and how we’d do it” document.
5. Marketing buys in (or goes back to step 2).
6. Project moves forward.

# Sample Bare Bones Checklist

The checklist focuses on what marketing wants, not on how it's done.

- Elevator pitch – two sentences on what needs to be done and why.
- Scope – how many pages / visitors / sales will this project effect?
- Is it a one-off project, or part of a larger effort?
- Return – what do we hope to get out of this?
- Timeline – when does this have to be completed?
- Other Drivers – is there some Big Factor to be considered (e.g., it's the CEO's pet project)?

# DIY can be a Bad Idea

Sure you can create a blog in 5 minutes on Wordpress,  
but ...

- ❑ Will it integrate with your current database?
- ❑ Will customers be able to use their existing accounts?
- ❑ Will you be able to market to the email addresses you collect?
- ❑ Will you create a completely new workflow problem for updates?
- ❑ Are there security risks?

# But then again ...

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Playing with Wordpress for a while would be a good way to get the background you need to write a very good requirements document!

Sometimes you *should* bypass IT.

Sometimes you need an IT reality check, especially with security.

# IT's trump card

- “Security.”
- IT has to protect the company’s data.
- IT can make a legitimate claim that unless they’re able to follow best practices and proper procedures, the company can get in loads of trouble.

# Marketing's Trump Card

- IT jobs depend on your success.
- IT cannot do marketing, it can only facilitate it.
- IT wants to be more than a handyman who fixes broken things.
- Collaborating with marketing gives IT a chance to creatively contribute to company sales – and do fun stuff!

Try to see things from the IT  
perspective.

... not because IT is right.

# Questions?

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Please feel free to contact me with questions, comments, complaints or if you want to buy me a drink.

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