COURTNEY KEARNEY



Unify Your Workflow

Smarter Marketing Through Process Mapping

THURSDAY, JANUARY 29 | 4:15 PM – 5:15 PM

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SUPPORTING CHAPTERS

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Track 4: Impact Innovation

Unified Innovation through the latest technology and insights

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Unify Your Workflow

Smarter Marketing Through Process Mapping

CKearney Consulting

Captivated by CRM & Driven by Data

What is process mapping?



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Putting a Process on Paper
Visualization / Documentation

Why take the time for process mapping?



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A process you can’t see is a process you can’t fix!

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Components of Process Mapping

- **What** happens – step by step
- **When** does it happen
- **Who** does what
- **Where** data is created, edited & used
- **Why** it needs to happen this way

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Benefits of Process Mapping

- Clarity
- Efficiency
- Quality
- Hygiene
- Onboarding
- Consistency
- Automations

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Good data isn't extra work.
It's what makes the work work!

Inefficient Processes



Data Chaos



Bad Decision-Making



Mapped Processes



Data Integrity



Advantageous Decision-Making



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Advantageous Decision-Making

- Data-Driven
- Storytelling
- Lifestyle
- Integrity
- Visibility
- Proactive
- Culture

If it lives in someone's head, it does not exist.



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Culture of Data-Stewardship

- Purpose
- Buy-In
- Ownership
- Accountability
- Training

Make stewardship part of everyone's role, not just an extra task.



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Data Roles

- Editors
- Auditors
- Analysts
- Consumers
- Leaders
- Data Officer

The goal of a data-driven leader is to turn data into insight, and insight into competitive advantage.

~ *Carly Fiorina*



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Process Mapping Steps

- Define the Goal/Why
- Identify the Steps
- Add the People/Roles
- Document Data Points
- Review for Inefficiencies
- Multi-Department
- Integration Review
- Automate Assessment

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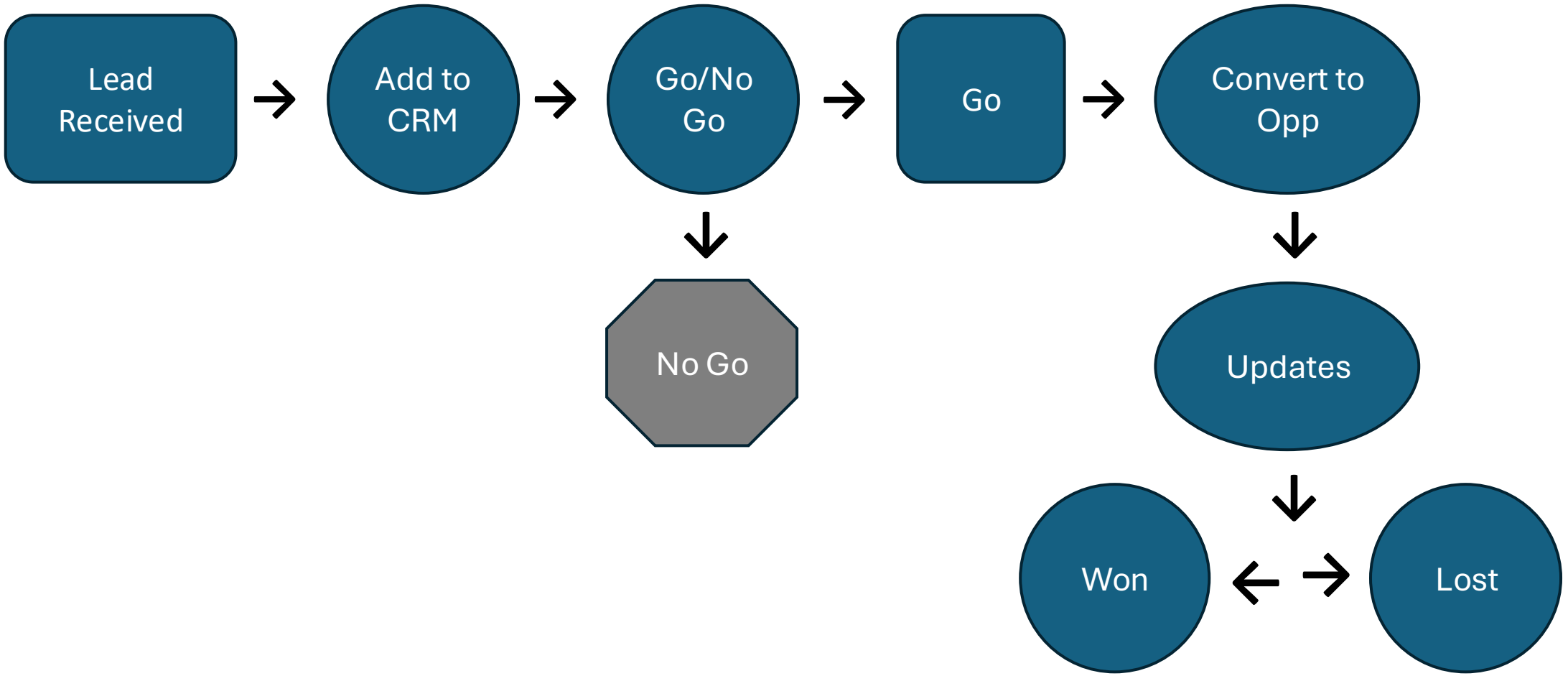
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Process Mapping Example

- **Define the Goal –** Lead to Opportunity
- **Define the Why –** Tracking for Resource Management
- **Identify the Steps**

  Lead received → Lead added to CRM → Go/No Go →
  If it's a Go, it's Converted to an Opportunity →
  Weekly Status Updates → It's Won or Lost

Lead to Opportunity



Add the People

- **Lead received** → Anyone in the company
- **Lead added to CRM** → If CRM user, enter it.
  If not, send to the designated email
- **Go/No Go** → BD Leader completes form in CRM
  If it's a Go, it's Converted to an Opportunity → BD Leader
- **Weekly Status Updates** → BD Leader
- **Won/Lost** → BD Leader

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Add Roles

Lead added to CRM →

- Entered by Data Editors
- Reviewed quarterly by Data Auditors
- Trends studied bi-annually by Data Analysts
- Discussed bi-annually by Data Consumers
- Overseen by Data Officer

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Add Roles

- **Go/No Go** → Form reviewed quarterly by Data Leaders and overseen by Data Officer
- **Weekly Status Updates** → Reviewed quarterly by Data Auditors and trends studied bi-annually by Data Analysts
- **Won/Lost** → Updated by Editors, reviewed monthly by Auditors, trends studied quarterly by Analysts, discussed quarterly by Consumers and overseen by Data Officer

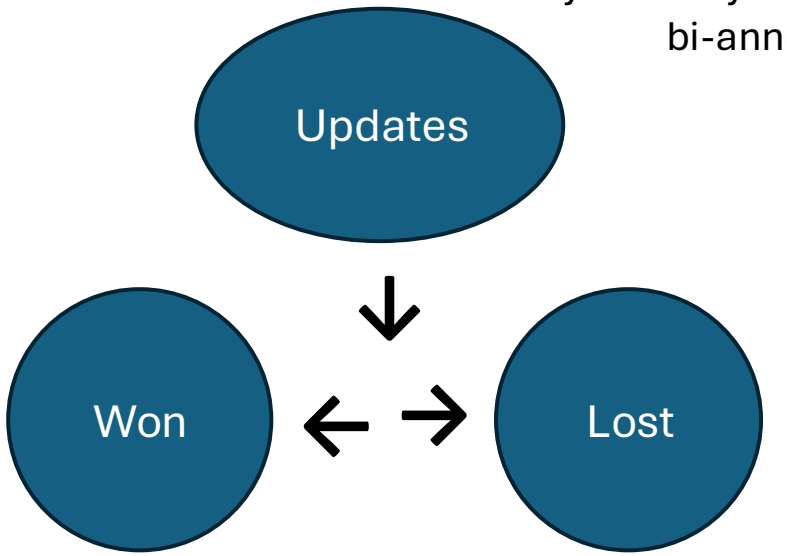
Add Roles



Editors enter
Auditors review quarterly
Analysts study trends bi-annually
Consumers review bi-annually
Data Officer oversight

Leaders review Go/No Go form quarterly
Data Officer oversight & accountability

Auditors review quarterly
Analysts study trends bi-annually



Editors update
Auditors reviewed monthly
Analysts study quarterly
Consumers review quarterly
Data Officer oversight

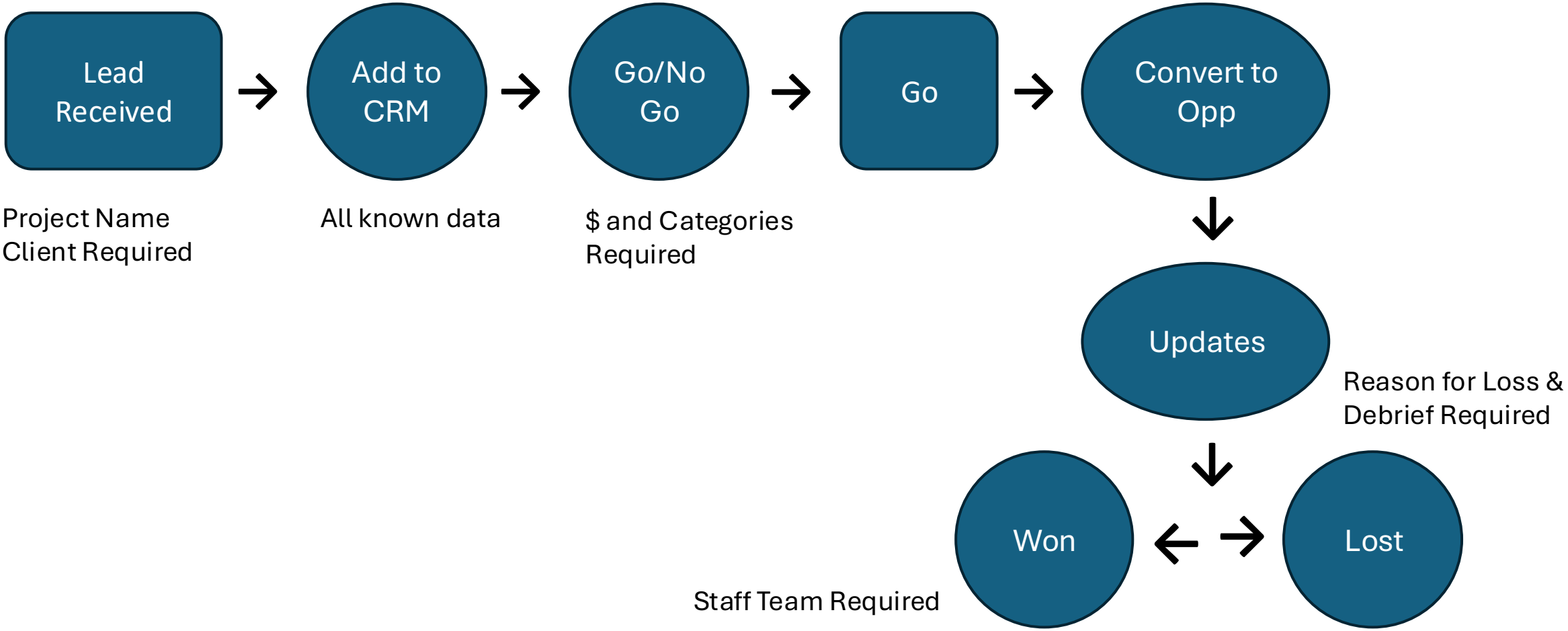
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Document Data Points

- **Lead received** → Project Name & Client Required
- **Lead added to CRM** → All known data entered
- **Go/No Go** → $ and all categories/tags required
- **Weekly Status Updates** → BD updates prior to mtg
- **Won/Lost** → BD updates. All fields required to finalize
  - If won, staff team is required.
  - If lost, reason and debrief are required.

Document Data Points



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Review for Inefficiencies

- **Lead received → Add to CRM →** Not every lead is added
- **Go/No Go →** $ isn’t always correct because it’s a required field
- **Won/Lost →** Opportunities aren’t always updated with the final status

Multi-Department

- **Lead received →** Lack of education outside marketing/BD
- **Added to CRM →** Need more CRM users
- **Go/No Go → If it's a Go, it's Converted to an Opp →** Operations needs to know ASAP for workload
- **Won →** What if a project number in ERP can't be created until the opportunity record is finalized?

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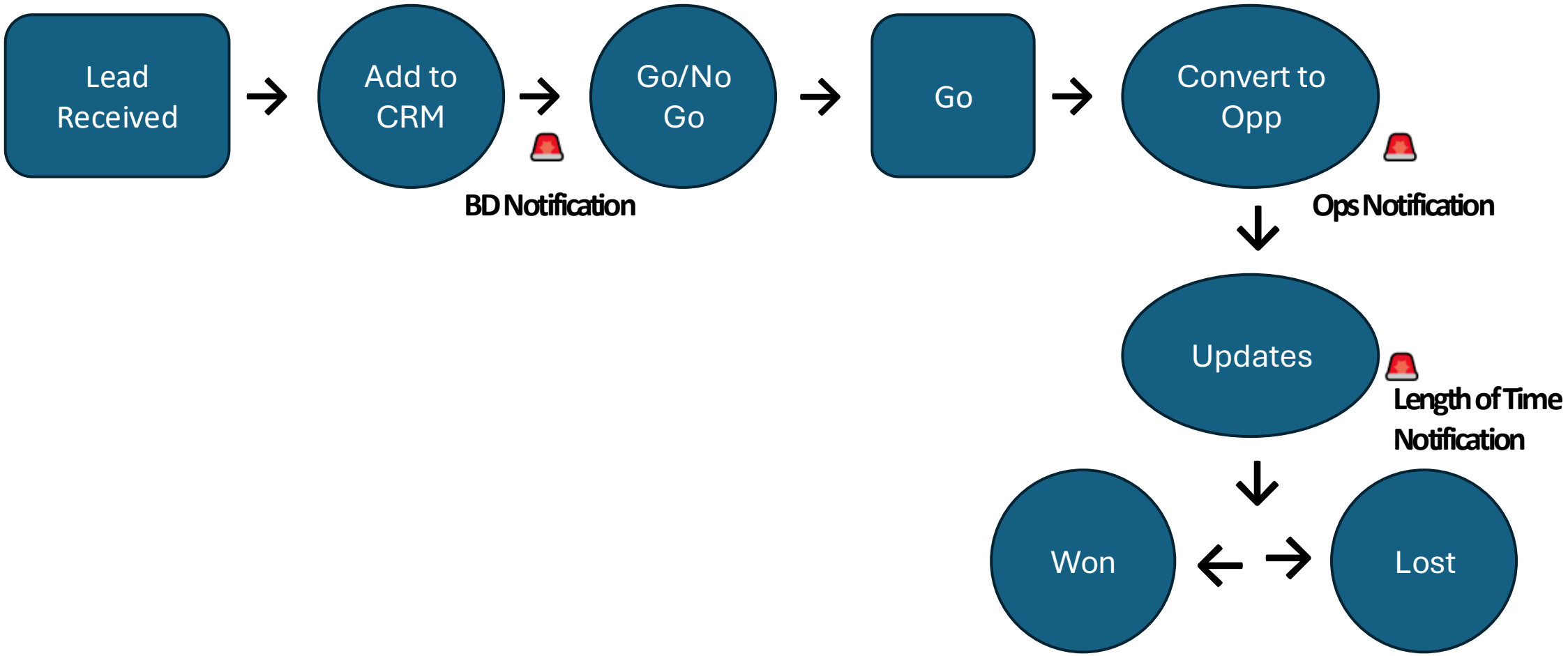
Integration Review

- **Lead received →** Could we have a form or email in Outlook for people to complete?
- **Added to CRM →** Could the data be sent to the CRM?
- **Weekly Status Updates →** BD struggles to make timely updates, could they have access via Teams or Outlook?
- **Won →** Should data push to the ERP?

Automation Assessment

- **Added to CRM** → Could BD be notified when a new lead is entered to complete the Go/No Go?
- **Converted to an Opp** → Could/Should operations be notified?
- **Weekly Status Updates** → If there's a certain update, should people be notified?
- **Won/Lost** → Alert if an opp stays in the system too long?

Document Data Points



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What process will you map?

- Contact and Company Data
- Project Data
- Personnel and Resume Process
- Email Marketing Campaigns
- Social Media Management

Questions





Thank you!





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- Access the survey through the specific session on the Guidebook app

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Stop by for our Pre-Thursday Night Social

Happy Hour!

HOSTED BY:

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Date: Thursday, January 29th **Time:** 5PM - 6PM

Location: High Praise (3rd Floor Rooftop @ InterContinental)


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