

Project Portfolio (Use Cases)

Business Pillar:

Marketing roadmap development and feature prioritization.

Goal:

Identify critical marketing projects to prioritize in the following fiscal years for the client; pitch to the executive leadership team for buy-in/approval and work directly with senior management to implement.

Crawl, Walk, Run

Recommended High-Level Strategy Roadmap for [Client]'s MarTech Evolution

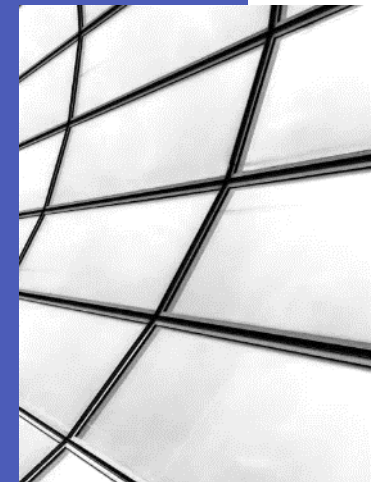
	Crawl Audit & Prioritize	Walk Kickoff & Implement	Run Utilize & Optimize
Timeline	Q4 2022	Q1-Q3 2023	Q3 2023+
Goals	<ul style="list-style-type: none"> Discovery & Planning Design & Align Stakeholders 	<ul style="list-style-type: none"> Migration & Implementation Onboarding & Training 	<ul style="list-style-type: none"> Measuring and Understanding Refining and Optimizing
Purpose	<ul style="list-style-type: none"> Establishing priorities and strategic approach for [Client] MarTech implementation Setting up fundamental capabilities in the requisite tools (e.g. Pardot) 	<ul style="list-style-type: none"> Initiate pilot campaign in new systems (e.g. NERC campaign) Migration of existing programs (audit first to identify keepers vs. programs to sunset) Develop new marketing/omnichannel initiatives tied to 2023 business goals (and aligned with existing automation tools) Continued consolidation /centralization of marketing/sales platforms, and increased analytics 	<ul style="list-style-type: none"> Measure current [Client] campaign performances Evolve/optimize marketing campaigns and MarTech strategies based on analytics and desired outcomes Scale and increase automation efficiencies

[Client] MarTech Priority List (Ranked)

Recommended priorities for [Client]'s MarTech Evolution:*

1. Form Strategy (migration from CRM > Pardot)
2. Evolution from Mailchimp 1-offs > Dynamic, always-on customer journeys in Pardot
3. Pardot Usability/Increased Utilization to minimize costs (incl. support model and onboarding training)
4. Enhanced Insights: Analytics/Attribution/Funnel tracking + Reporting (B2BMA) – Consolidating GA + Pardot + SFDC
5. Marketing > Sales Interlock: Lead Qualification Development and Implementation
6. MarTech Strategy: Customer Journey Development, Automation Maps, Omnichannel Planning (+Social posting/validating your capabilities/licenses in Pardot), and Campaign Development
7. Marketing Technology Platform Architecture Consolidation & Logical Design

**Recommended tasks are developed in conjunction with [Client]'s marketing stakeholders, in addition to findings from ABC's initial systems audit and industry best practices.*



Priorities x Categories of Work

How do [Client]'s recommended MarTech priorities fall into the established categories of work?

Centralized Platform Ecosystem	C360 via Enhanced Analytics	Always-On Customer Journeys	Foundational Platform Capabilities
Marketing Technology Architecture Design & Alignment	Expanded dashboards for enhanced insights for [Client]'s leadership	MarTech strategy: customer journey developments	Form migration to Pardot for consolidation/increased efficiencies
Mailchimp email migration to Pardot campaigns		Lead Scoring/Lead Qualification for Increased Marketing > Sales interlock	Pardot usability/Increased utilization

ABC Project Milestones (high-level)

Required milestones to track
towards project completion.

**End-of-Contract*

1



[Client]/ABC: Align on Priorities (decisions on contract terms)

2



ABC: Assess timeline/level of effort for each priority

3



[Client]/ABC: Alignment on rest of scope (incl. level of support and outputs - e.g. omnichannel activation roadmap, campaign timelines)

4



By EOC:* Implementation activities by ABC, with regular touchpoints/stakeholder sign-off by [Client].

4



EOC: Final readout & recommendations from ABC on [Client]'s Next Steps (post-engagement)