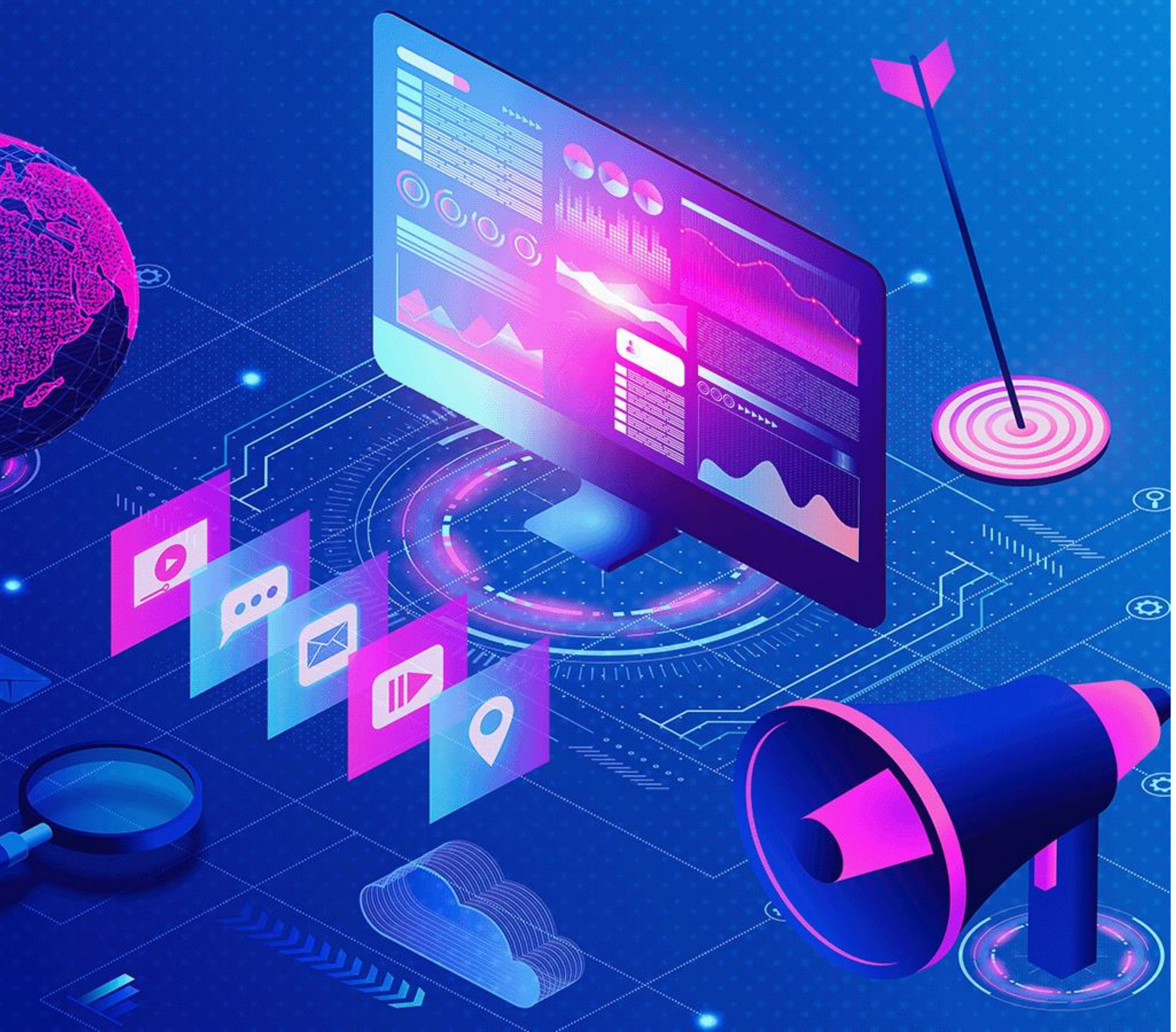

adapta
processes, people and technology

Marketing technology
A briefing for non-profits

25 April 2024

INSTITUTE OF CONSULTING
RECOGNISED PRACTICE

CFG INSPIRING FINANCIAL LEADERSHIP

Crown Commercial Service Supplier

We are a Living Wage Employer

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Keith Collins

Principal Consultant, Adapta

Sian Smith

Associate Consultant, Adapta

Keith Collins

Principal Consultant, Adapta

Sian Smith

Associate Consultant, Adapta

The programme

2.00pm Welcome and overview of the session

2.10pm Marketing technology – a briefing for non-profits

2.40pm 30 Minute: Open Q&A

3.10pm Summary and close

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processes, people and technology

Making Digital Real

- We are a **specialist** information systems consultancy
- We only work with **charities**, associations, trusts and others in the not-for-profit sector
- We are completely **supplier-independent**
- Our consultants have held **senior** positions in a broad range of different organisations
- Our advice and guidance is based on **practical experience** gained over many years

Our Mission and Purpose

Our Mission

We **empower** organisations to deliver transformational impact through more effective use of technology and ways of working

adapta

From our minds…

Our Mission

We **empower** organisations to deliver transformational impact through more effective use of technology and ways of working

Our Purpose

From **our minds to your minds** – our team of experienced, independent consultants work with you to transfer their knowledge, share their expertise, and **develop your organisational capability**

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…to your minds

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Marketing Technology

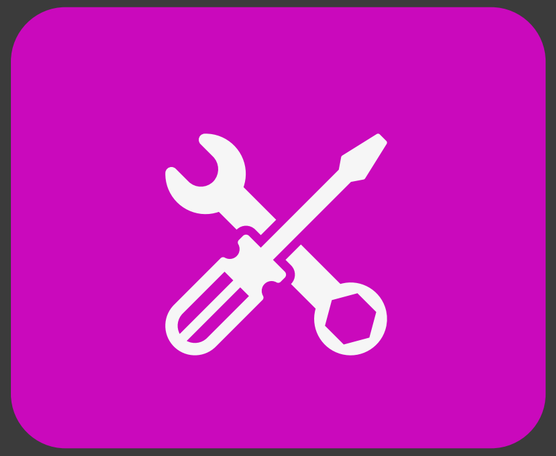
Welcome

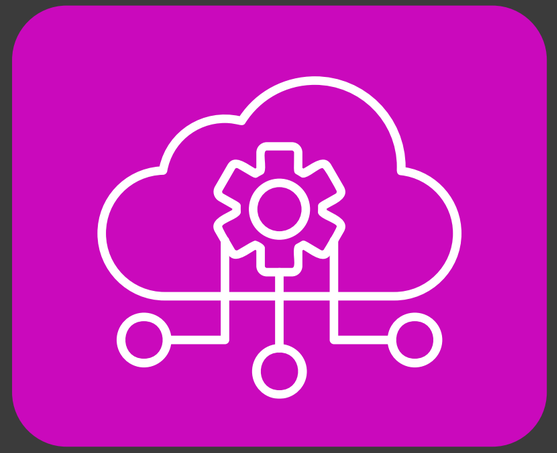
01
Maximising MarTech

02
Leveraging Technology

03
Questions

Maximising MarTech



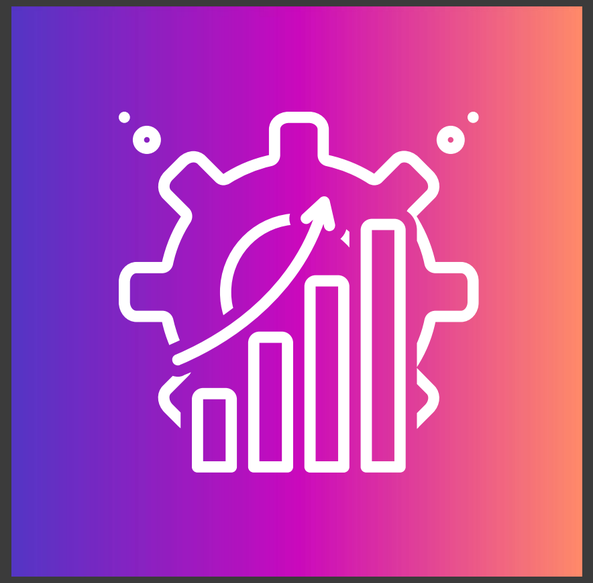


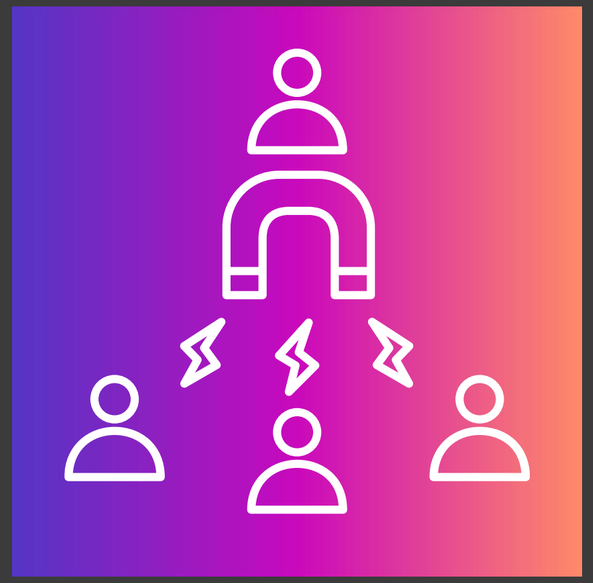
…that facilitate & enhance marketing activities & processes.

How?

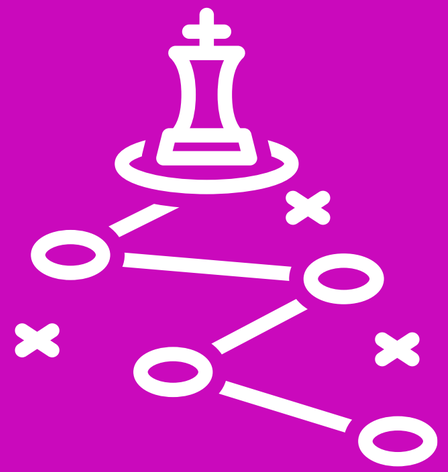
- Automation & AI
- Data Management, Segmentation, Analysis & Insights
- Personalisation
- Optimisation
- Engagement & Retention

The Outcome(s)





So, how do we leverage MarTech?



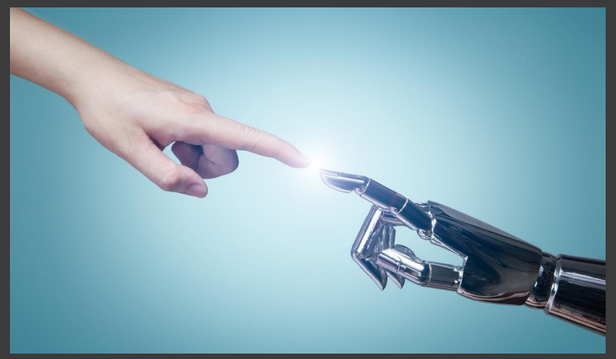
Email Marketing

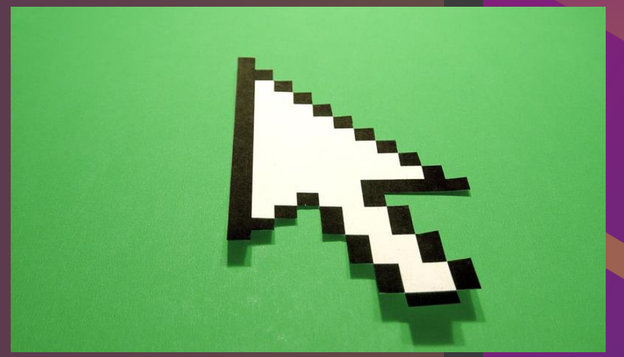
ActiveCampaign

mailchimp

dotdigital

Whats New?





	ActiveCampaign	mailchimp	dotdigital
AI			
Ab’d Carts	✓	✓	✓
Automations			
Campaigns			
Data Mgt			
One Click			
SMS			
Personalisation			

	ActiveCampaign	mailchimp	dotdigital
AI	✓	✓	✓
Ab'd Carts	✓	✓	✓
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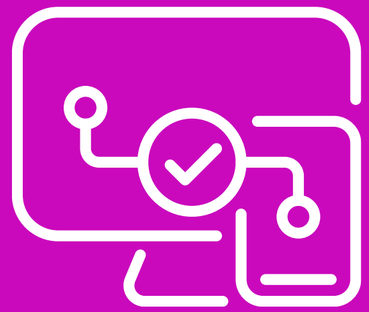
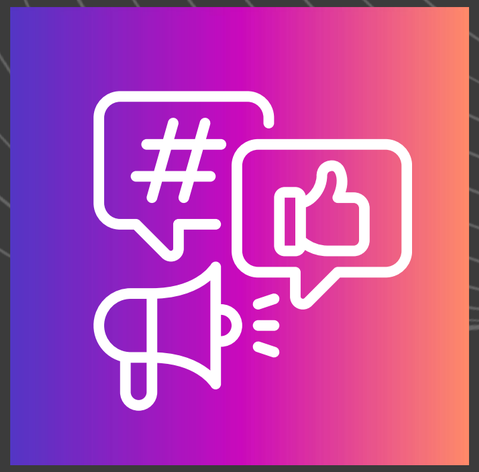
Data Mgt	✓	✓	✓
One Click			✓
SMS	✓	✓	✓
Personalisation	✓	✓	✓

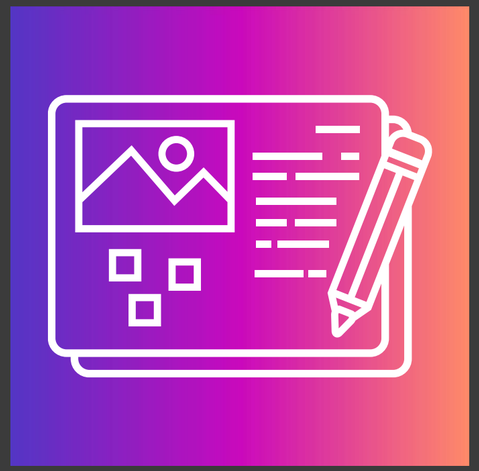
Maximising MarTech

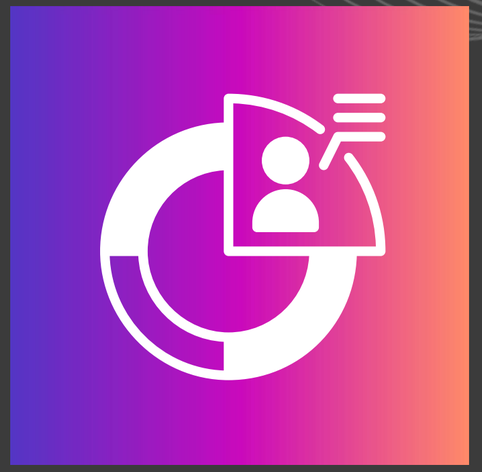


...that work together to facilitate & enhance marketing activities & processes.

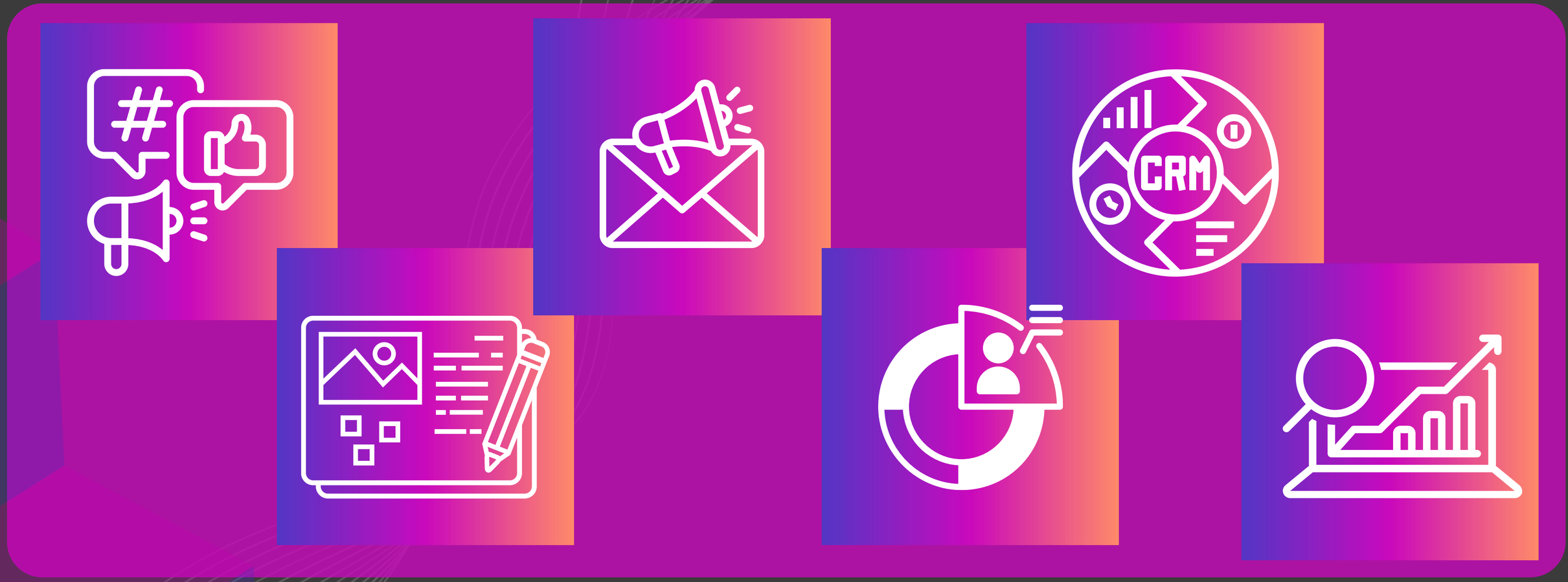


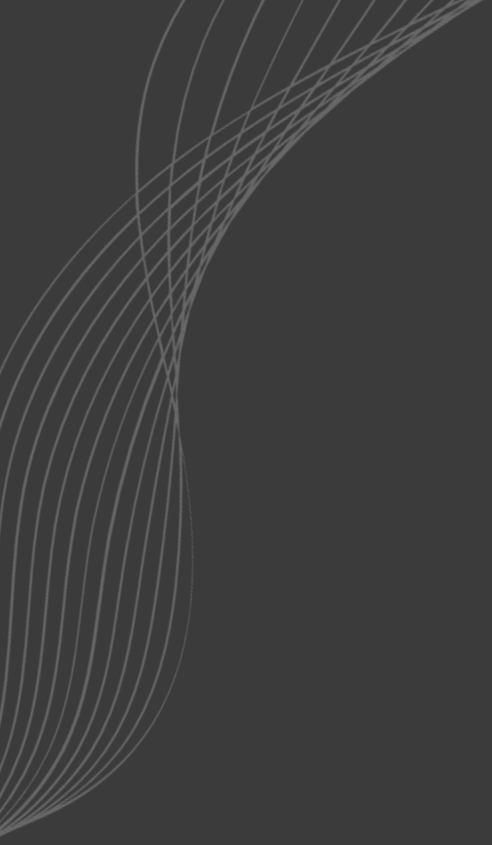
CRM





So what are they doing?





Centralised, reliable source of information that serves as the authoritative reference for an organisation.

Centralised, reliable source of information that serves as the authoritative reference for an organisation.

Marketing data, insights, and analytics are consistent, accurate, and easily accessible across different platforms and departments.

But they’re not there yet…

… and neither are we.

Marketing Technology Stack

Marketing Technology Stack

When was the last time..

Assess if your MarTech is fit for purpose?

Review what can be integrated?

Ensure you’re utilising the latest features?

Understand what could be automated via the tools?

Ensure your Use Cases are aligned with your strategic goals?

Identify the critical functions for your organisation and map them against your MarTech solutions?

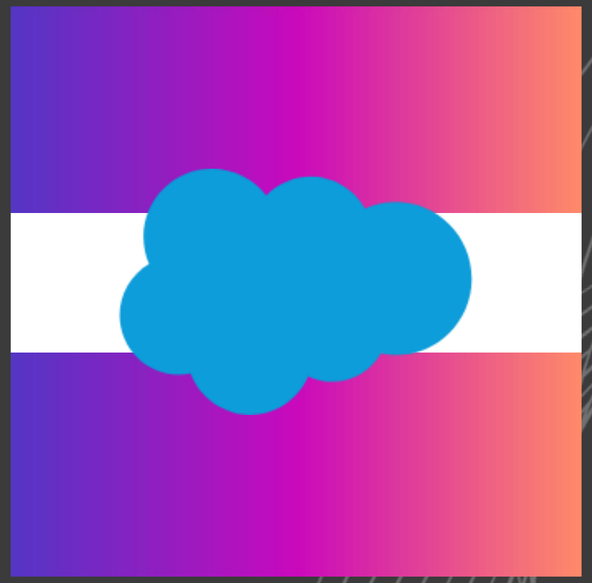
Marketing Technology Stack

Your Marketing Technology Stack

Your Marketing Technology Stack

Your Marketing Technology Stack

Some MarTech Leaders



Your Marketing Technology Stack

Dynamics 365

sproutsocial

mailchimp

Adobe® Marketing Cloud

Meta

Google Analytics

Your Marketing Technology Stack

Dynamics 365

sproutsocial

mailchimp

Adobe® Marketing Cloud

Meta

Google Analytics

Your Marketing Technology Stack

Dynamics 365

Advanced Email Marketing Tools

Power Automate

Dynamics 365 Connector

Microsoft Social

The Dataverse

SharePoint

Power BI

Projects

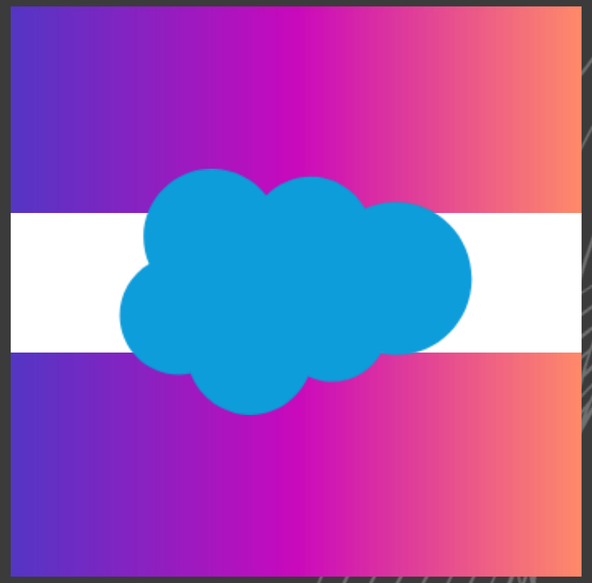
Finance

Teams

Your Marketing Technology Stack

Your Marketing Technology Stack

Some MarTech Leaders



Your Marketing Technology Stack

Your Marketing Technology Stack

Salesforce Marketing Cloud

Salesforce Nonprofit Cloud

Pardot for Nonprofits

Customer 360

MuleSoft

Tableau CRM

Social Studio

Salesforce CMS

Community Cloud

Salesforce Einstein

Your Marketing Technology Stack

Email Marketing

Social Listening

Personalisation

Advanced SEO

Donor Experience & CX

What’s coming in 2024...

Key Considerations

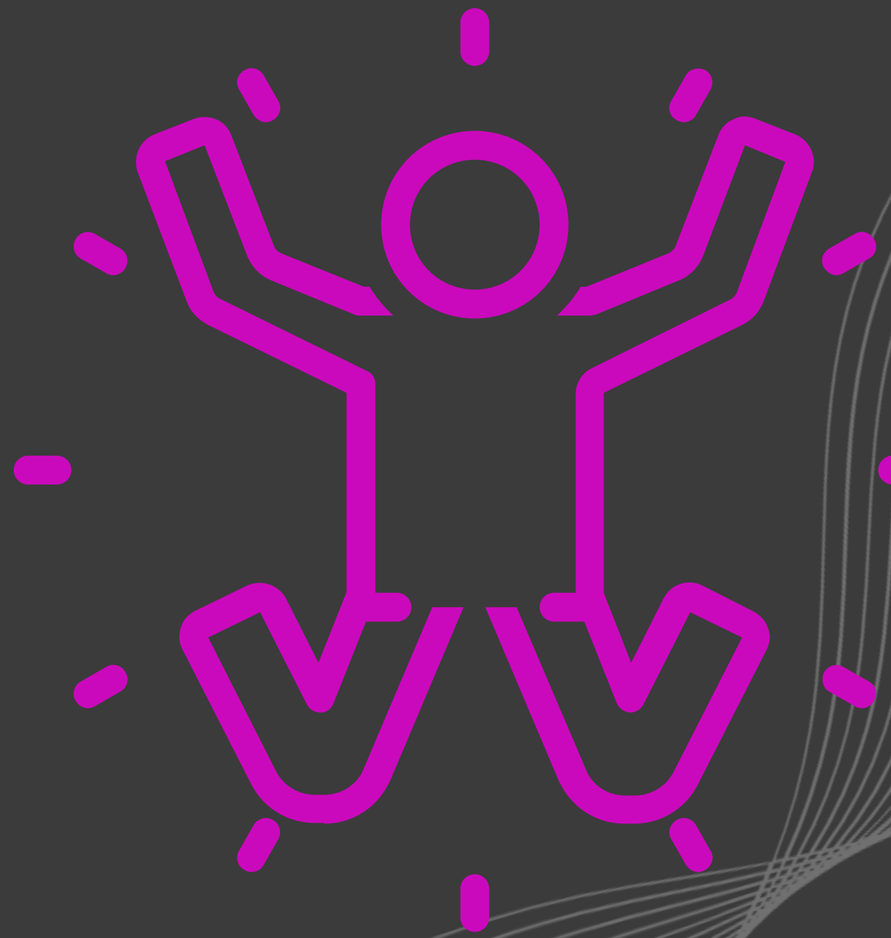
Can the tool offer the right features to manage your workflows?

Can it scale with your organisation?

Does it work with your existing martech stack tools?

Can you utilise the insights with ease?

Does it simplify your efforts without reducing the impact?



Maximising

operational efficiency

performance optimisation

integration

Leveraging

strategic utilisation

value creation

Innovation

Next Steps

Understand User Requirements and Stakeholder Needs

Define Integration and Compatibility Requirements

Define Clear Objectives and Goals

Research and Explore MarTech Landscape

Conduct a MarTech Audit review

Develop a MarTech Roadmap and Plan

Questions?

Next event:

Finance systems and cake

Wednesday 22nd May 2024 at 14:00 GMT

Royal College of Nursing, 20 Cavendish Square, London, W1G 0RN

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