

salesforce

20 Best Practices for Marketing Optimization

Create better moments for more return on investment.



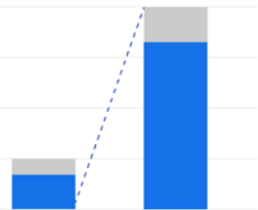
Calculated Insights



Top Performing Campaigns



Conversions



The right insights at the right time. It's easier said than done.

Every marketer wants to take a data-driven approach, focusing on historical and predicted performance to create more impactful customer experiences that lead to more growth with less investment.

Our [Marketing Intelligence Report](#) highlights:

- **94%** of marketers view their function as critical for driving growth
- **80%** of marketers say their organizations lead customer experience across the business

Yet there are challenges:

- **71%** of marketers still evaluate cross-channel marketing performance in silos
- **80%** seek improvement in ROI tracking and struggle with multichannel marketing effectiveness measurement

Despite these challenges, the path to optimization involves a mix of data, AI, automation, and [Agentforce](#) – always-on digital labor that can help employees and customers. Drawing on our extensive experience, we've identified 20 best practices to help marketers implement and use these strategies.



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Setting Goals and Defining KPIs

Before you begin anything, you need to align your goals and KPIs. Without them, you risk wasting time and effort on a project that doesn't satisfy stakeholders – which could result in lengthy pauses and resets.





1. Identify key stakeholders.

Who needs marketing insights? Who controls the data you need? Will you need approvals? Who is responsible for defining and achieving your KPIs? It's critical to identify who is who – and when they need to be involved. Consider creating a small core team dedicated to managing your marketing optimization. Once that is in place, you can expand to include representative stakeholders who can speak for involved teams.



2. Align on what's working and what's not.

Your goal is to be data-driven – so why not start by gathering some data on internal processes? Oftentimes, different people in the business have different opinions and assumptions: What tactics are working? Are you confident in how you measure ROI? What teams have the right data and which don't? Creating a picture of the current state of your marketing optimization practice – and sharing those insights with stakeholders – can help everyone align before you start thinking about goals.



3. Set your goals and objectives.

Work with your stakeholders to identify the strategic goals for the business. Is your business working toward acquisition? Driving loyalty? Increasing customer lifetime value? In other words, what does success mean for your marketing? Whatever it might be, clearly defining these desired outcomes will help you formulate a data strategy. Then, work backward from those. What data do you need to collect to inform your teams on how to achieve these goals? How can tools like Agentforce help you collect that data?



4. Determine your North Star metric(s).

While you likely have many different KPIs, it is often useful to single one out as your “North Star.” This can give everyone a goal to rally around and work toward. You'll want to make sure the rest of your KPIs ladder up to your North Star(s), so everyone feels they're making an impact.





5. Use Agentforce to set your benchmarks based on your goals and historical performance.

Benchmarking can be an extremely useful tool to assess campaign outcomes against historical performance. We recommend starting by benchmarking against your own performance first, since industry and competitor benchmarking can often be misleading and difficult to verify. Set your own bar. Use Agentforce to analyze historical performance data, compare it to industry benchmarks, and suggest realistic campaign goals. Best of all, agents continuously monitor performance and adjust benchmarks to ensure alignment with evolving market conditions.



6. Forecast your media plan.

Budgets are tighter than ever before, and customer expectations are even higher. This means your marketing strategy needs to maximize spend and impact. Before you launch a campaign, create a plan for your media spend. Use learnings from past performance and AI to make predictions about the future. Even if you can't forecast with 100% accuracy, it's important to predict performance and continue to improve the process going forward so you can make smarter decisions with your budgets. Optimizing paid media demands constant attention. Agentforce automates this process by identifying and pausing underperforming ads, recommending improvements, and adjusting goals automatically.



84%

of companies report a decrease or no change in marketing spending in the last six months.

* The CMO Survey: Managing Brand, Growth, and Metrics (2023).



Creating a Data Foundation

Once you have your KPIs and goals in place, you can start to connect your marketing data in a unified model. This step is absolutely critical and often the hardest. But without it, you risk hallucinatory insights (that is, insights based on patterns that don't actually exist), taking action on false data, and ultimately hurting your business more than helping it.





7. Set the right expectations: Crawl, walk, run.

Marketing data is complex and there's a lot of it. Begin with an initial set of data sources and progressively incorporate additional channels to mature your analysis. This will minimize data error and build a solid foundation before tackling more sophisticated integration and measurement practices.



8. Decide on a central data repository.

The customer journey today is multichannel, which means performance data is, too. Driving successful outcomes requires a comprehensive view of all campaign investments. Once you've defined your data sources, you need to break down silos: Define a single place where all your marketing performance data will live. Then, begin to define a comprehensive data model (in other words, the relationships between your data fields). Agentforce can help automate and scale this effort by pulling in customer data from various sources and ensuring a consistent brand experience across all touchpoints.



9. Design a data model taxonomy.

Quality is just as important as quantity when it comes to your data. Make decisions with data you can trust by establishing a common framework with consistent data structure and categorization, making it easier to extract meaningful insights. For example, make sure you have one name for “campaigns,” one name for “creative,” and so on – so that when you bring in new data from divergent sources, you can compare apples to apples. Once the taxonomy is set, AI tools can analyze existing campaign-naming conventions and standardize them into a common format, ensuring consistency across all campaigns and improving organization and searchability. AI tools can also extend and enrich the data, identifying new categories and fields mapped to your taxonomy. With consistent naming conventions for your campaigns, governance standards, and ongoing data validation, you can be sure your insights are accurate and trustworthy.



Turning Data into Insights

Once your data is ingested and modeled, it's time to turn it into insights. This is where all your previous effort pays off. But the work isn't done yet. While that data is ready, you still need to figure out the best ways to uncover insights that will make the biggest impact on your business.





10. Create an accessible “data dictionary.”

Having a data model isn't enough: It's just as important that stakeholders across the business understand it. While you build the model, ensure you're also keeping a record of definitions for your naming conventions. Then, ensure that “dictionary” will be clear to anyone who might explore it later – for example, you could link field names in dashboards to definitions or enable a “search” function in the document, or use Agentforce to ask the agent questions about the underlying data.



11. Focus on outliers first.

Investigating a campaign, channel, or strategy can be overwhelming. Usually, there is a sea of data, and it's not immediately clear what is meaningful and what isn't. AI and Agentforce can significantly accelerate this process by analyzing large datasets and surfacing key insights, such as identifying unexpected trends, anomalies, and areas for improvement. A good place to start is with outliers. What is above or below the average? Why? This doesn't always tell the full story, but it can be the leading indicator for what's working and what's not.

Marketers can then use Agentforce to delve deeper into these insights. By chatting with agents using natural language prompts, simply ask the agent, “Based on this data, what areas should I prioritize for optimization?” or “What are the most significant opportunities for improvement?” Marketers can quickly identify key areas of focus and develop data-driven strategies for enhancing campaign performance.



12. Go beyond engagement.

While engagement numbers, like impressions and clicks, are useful, they usually aren't enough on their own. Too often, marketers report only on how a campaign was received, without completing the context of how much it cost. A campaign can have high engagement, but if the cost to run it is high, it can actually be a loss for the business. On the other hand, a campaign with minimal engagement but tiny costs could prove more effective in the long run.





13. Make your data tell a story.

The magic behind data is its ability to explain the past and inform the future. Tracking behaviors, detecting anomalies, and revealing trends can help you create a narrative that guides strategic decisions. Once you've uncovered insights, don't just drop them into a report. Instead, transform all those raw numbers into a narrative visualization so the impact isn't lost on stakeholders. Marketers can even ask Agentforce to analyze the data and generate specific recommendations for improvement, instead of just presenting charts and graphs.



14. Run analysis while campaigns are in flight, not just after.

Marketers and agencies will often run a campaign and not report on its effectiveness until it's already run its course. This can lead to massive overspends and makes it easy to ignore the data in future campaigns. Instead, ensure you're checking on campaigns while they run. That way, you can tweak spend, placements, and creative to improve performance.



80%

of marketers say they struggle to measure and evaluate multichannel marketing effectiveness.

* Gartner Multichannel Marketing Survey (2023).





15. Create goals and pace yourself.

Speaking of in-flight analysis, one of the best techniques to accomplish this is in-flight pacing. For this, create a goal for every buy and campaign. You might set a target to hit a certain number of conversions within a month, with a certain amount of spend. Then, you can track the pace of your media spend at a regular cadence and prevent overspending early on or running out of budget too soon. Media pacing ensures a consistent presence for your brand and allows for real-time adjustments – which can help you maximize ROI and campaign success.



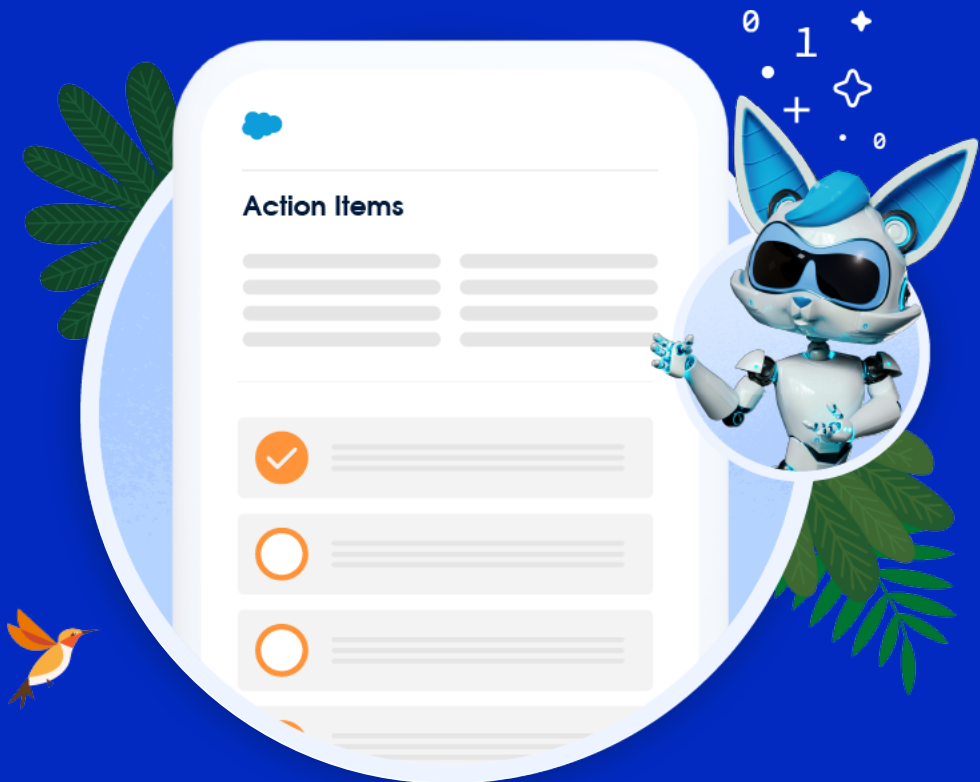
16. Add insights into planning contexts.

Your marketing team likely creates media plans on a regular cadence – probably monthly, quarterly, or yearly. Use Agentforce to ensure historic performance from previous plans is included in this step. For example, by describing campaign goals, the agent will ground that prompt in data from Data Cloud, as well as the company brand guidelines and historical performance, to create a complete campaign brief. Post-launch, Agentforce can also summarize performance so marketers can quickly take action to optimize future campaign KPIs.



Making Insights Actionable

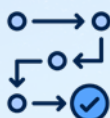
Finding insights can often feel like the end of the story, but the best insights ultimately don't matter if they're not acted on. And that step is often easier said than done, especially at large companies, where change and internal communication can be slow and bureaucratic. Luckily, there are a few ways to help ensure your insights are actually being used.





17. Create cadenced reports for every stakeholder.

It's critical that stakeholders get regular insights delivered to them, rather than having to search for them on their own. This gives them something to rely on when making decisions and helps make sure people across the business are bought in to your insights. Work with each stakeholder to figure out what they need. For example, executive stakeholders need a high-level strategic view of campaigns across regions, products, and business units. Channel teams want insights down to the campaign tactic and creative level. Use this information to describe the metrics, visualizations, and narratives relevant to each stakeholder's needs and responsibilities to the agent. Use these tailored insights to generate tailored reports.



18. Create a clear process for data requests.

While reports should focus on KPIs and strategic projects, sometimes stakeholders need ad hoc insights. If there's not a clear and simple process for making these requests, it can lead to chaos quickly – or even worse, people can drop them all together, if they don't feel like they're worth the time. Agentforce can quickly and easily respond to ad-hoc data requests from stakeholders. For example, a marketer can simply ask the agent, "What were our top-performing social media posts last month?" or "How many customers have made repeat purchases in the past year?" and receive the relevant data and insights in a matter of seconds.



19. Make sure your data is accessible.

While outbound reporting is critical, it's just as important that stakeholders have the ability to explore the data on their own. Marketers often need insights fast, or else they may want to run experiments on their own. While there should be clear guardrails (for example, marketers shouldn't need to edit your data model), make sure the marketing team feels empowered to be data-driven on their own.

Agentforce can empower stakeholders to explore data themselves while ensuring data integrity and security. Agents can also help prevent misuse of data by setting appropriate access controls and guidelines. This ensures that sensitive data is protected and that stakeholders only access and use data in accordance with company policies and ethical considerations.



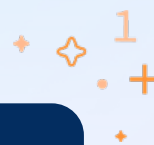
20. Stay aligned with your stakeholders — and vice versa.

Once things are up and humming, it can be easy to fall into your regular reports and data requests. Make sure you meet with stakeholders on a regular basis to review what's working and what's not, as well as what the strategic priorities are for each team. This kind of brainstorming is where you can pinpoint areas to improve and ensure your data isn't getting stale.

71%

of marketers evaluate cross-channel marketing performance in silos.

* Third Marketing Intelligence Report.



What's Next?

With these 20 tips for marketing optimization at your fingertips, it's time for action. Pick a few tips from each chapter and implement them gradually, allowing you to track progress and ensure lasting impact.

Start with goal setting. Consider these key questions:

- Is this specific?
- Can we measure this?
- Is this feasible?
- What's our timeline?
- Can this be revised later?
- Where can AI help?

Reflect on your marketing from the past year: Identify what needs improvement and works well, using data and feedback as your guide.

After you have this discussion, write down the three most important themes and needs you discovered:

1. _____

2. _____

3. _____

These will be your three goals. Turn the page to break them down into manageable, actionable plans to empower your team.

Ready to build a data-driven, agentic marketing organization? Build better moments and get more return on investment with Marketing Intelligence. Visit our [webpage](#) to learn more.

Goal 1

Goal Write the first goal you discovered.	Action Item 1 What can you start doing today to get closer to this goal?
	Action Item 2 When that's done, what can you do next to keep things moving?
	Action Item 3 What will you need to do to consider this goal complete?
Why is this goal important?	
How can we measure success for this goal?	

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Goal 2

Goal Write the second goal you discovered.	Action Item 1 What can you start doing today to get closer to this goal?
	Action Item 2 When that's done, what can you do next to keep things moving?
	Action Item 3 What will you need to do to consider this goal complete?
Why is this goal important?	
How can we measure success for this goal?	

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Goal 3

Goal Write the third goal you discovered.	Action Item 1 What can you start doing today to get closer to this goal?
	Action Item 2 When that's done, what can you do next to keep things moving?
	Action Item 3 What will you need to do to consider this goal complete?
Why is this goal important?	
How can we measure success for this goal?	

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