



MARKETING OUTLOOK 2008: EXECUTIVE SUMMARY

SENIOR EXECUTIVES CHART A COURSE FOR
STRATEGY AND SPEND



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INTRODUCTION

In our second annual outlook study, the Chief Marketing Officer (CMO) Council reached out to more than twice as many marketers than it did in the previous year. For 2008, we gained insights from 825 respondents (compared to 350 for the 2007 report) at companies doing business in every region of the world.

Not only did we go wider and deeper (asking more than 20 online survey questions), but we gathered perspectives on everything from selling cycles, sources of influence and trust, organizational and operational changes, as well as planned areas of investment in programs, processes and technologies.

What we are seeing is much stronger sensitivity to engage directly with customers and learn more about what shapes, influences and impacts purchasing decisions and intentions to do business. The move to quantify “customer affinity” and increase “customer advocacy” has become a new measure of marketing effectiveness and is strongly advocated and modeled by the CMO Council in a separate report to be released in January, 2008, called “Profitability from Customer Affinity”.

The top challenge for marketers remains to better quantify and measure the value of marketing programs, growing customer knowledge, insight and conversations is seen as slightly more important than upgrading the efficiency and effectiveness of marketing organizations in 2008 compared to 2007.

Continuing the trend to increasing operational visibility, marketers still report their number one accomplishment in 2007 was improved accountability of the marketing organization, the same as what was reported for 2006. However, in 2007, marketers have been much more focused on using customer data and analytics for better targeting and effectiveness, than fixating on brand image and identity and new messaging platforms, which were among the top accomplishments in 2006.

Unfortunately, for the agency vendor community, turnover continued in 2007. Similar to our previous report, a good percentage of marketers changed web development, advertising and PR firms last year with recurring complaints about lack of innovation, no value-added thinking and poor creativity. While PR firms suffered the most in 2006, web design consultants topped the list of casualties in 2007.

For executive recruiters, the good news continues to center around the need for new talent. Adding new competencies and capabilities is the third priority for senior marketers in 2008. Key competencies they want to develop are marketing and customer analytics, as well as strategic planning, business development and product marketing.

While marketing performance measurement dashboards topped the list of solution needs in 2007, the focus for 2008 is far more revenue and demand-based with email campaign management and customer relationship management solutions leading the procurement intentions list.

While spend is tracking upwards in both years, the allocation of dollars is moving away from advertising and public relations towards customer-facing and lead and response generation spend in 2008. Heading the list of spend areas for 2008 are events and trade shows, direct marketing, sales support and online marketing. Further down the list are advertising and PR which were far better placed in 2007.

We believe you will find our 2008 Marketing Outlook Report valuable as a barometric indicator of the function's value, vitality and global relevance. An executive summary of the report is available at no cost. The full report can be downloaded from the CMO Council web site for \$199.

Donovan Neale-May
Executive Director
CMO Council
donovan@cmocouncil.org

INTERPRETIVE COMMENTARY ON QUANTITATIVE RESEARCH

Revelations abound as 825 global marketers surveyed by the CMO Council in late 2007 list the year's top accomplishments and provide an assessment of the progress they are making in improving the perception and trust of their function in organizations worldwide.

The comprehensive online study was conducted in partnership with e-Rewards and co-sponsored by Deloitte Consulting LLP, Marketo and TechTarget. Marketers in companies of all sizes address the challenges they face in the year ahead along with the operational and organizational changes needed to drive performance, efficiency, accountability and value.

With greater demands on marketing budgets, the CMO Council identified top areas of spend, planned allocations, as well as adjustments to marketing expenditures in 2008. The Marketing Outlook 2008 report digs in to what measures and metrics are being embraced to determine the business impact and value of marketing dollars.

For those on the agency side, senior marketing decision makers reveal what relationships are in jeopardy and why the turnover is so high among their current agency partners. For solution or hosted service providers, there are insights into what new competencies, platforms and disciplines are being introduced to boost productivity and effectiveness of marketing groups.

KEY FINDINGS REVEAL:

- Improved accountability of the marketing organization and using customer data and analytics for better targeting and effectiveness were the two top accomplishments in 2007. This was followed closely by adding new internal resources, capabilities and skill sets.

The Rocky Road to Value Perception

79% of executives surveyed believe marketing is making significant or reasonable progress in improving the perceived value of the function. **21%** of marketers are either still trying to gain traction or are stalled and losing credibility in their organizations.



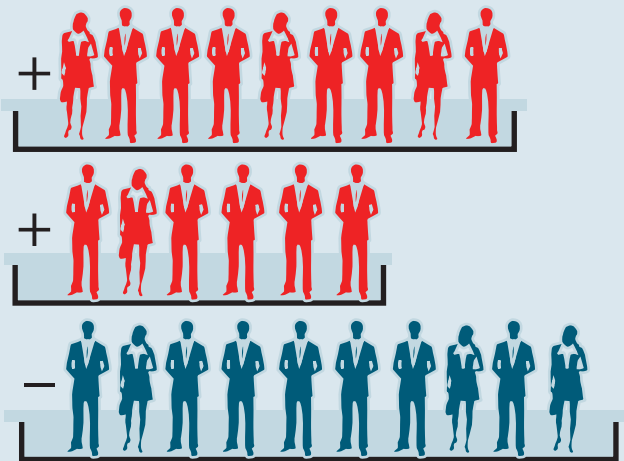
- Quantifying and measuring the value of marketing programs and investments remains the top challenge in the year ahead, report some 53 percent of survey respondents. Other key priorities include growing customer knowledge, insight and conversations, as well as upgrading the efficiency and effectiveness of marketing groups.
- While some 79 percent believe marketing is making significant or reasonable progress in improving the perceived value of the function, 21 percent of marketers are either still trying to gain traction or are stalled and losing credibility in their organizations.
- Those marketers gaining ground in raising credibility and stature point to the following factors as key to underscoring marketing's value:
 - Impactful branding and communications
 - Awareness and reputation gains
 - Building internal relationships with sales & finance
 - Improved customer relationships
 - Quality of leads and opportunities
- Important organizational and operational changes planned for 2008 included adding new competencies and capabilities, improving accountability of the marketing organization, deploying content and web site management solutions and implementing marketing ROI and/or resource allocation capabilities. This focus on organizational improvement is not surprising considering that 50 percent of CMOs are hired to fix broken marketing organizations, reports the CMO Council.

Key Challenges in 2008



- Quantifying & measuring the value of marketing programs & investments **(53%)**
- Growing customer knowledge, insight and conversations
- Upgrading the efficiency & effectiveness of marketing groups

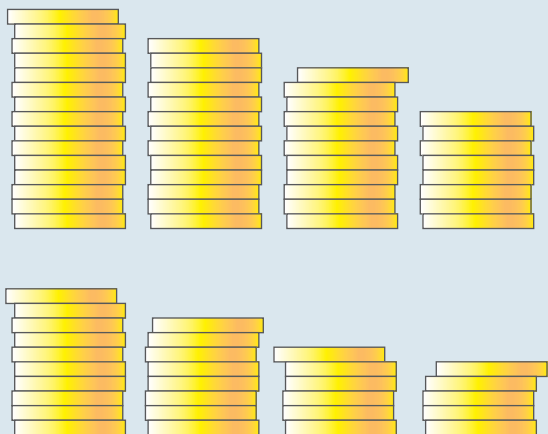
2008 Key Organizational & Operational Changes



- Adding new competencies and capabilities;
- Improving accountability of the marketing organization;
- Deploying content and web site management solutions;
- And implementing marketing ROI and/or resource allocation capabilities

- With a strong focus on organizational effectiveness, senior marketers have identified key areas of system and solution spend to automate processes, optimize lead generation and improve measurement. The top six areas of investment include:
 - Email campaign management
 - Customer relationship management (CRM)
 - Marketing performance measurement dashboards
 - Customer intelligence and solutions
 - Search engine marketing (SEM)
 - Sales and marketing integration tools
- When it comes to expenditures, 37.6 percent of respondents say annual budgets will not change in 2008, while 33.1 percent expect to increase spend by up to five percent, and almost 10 percent say their budgets will grow between six and 10 percent. Only 7.6 percent expect to see budget increases greater than 11 percent. Last year, the majority of global marketers (52.6 percent) had budgets that equaled less than four percent of revenue and 35.4 percent said their spend was between four and 10 percent of revenue.
- The 12 leading areas of marketing dollar allocation in 2008 are expected to be:
 - Strategy and branding
 - Events and trade shows
 - Operations
 - Direct marketing (including telemarketing, mailings, email)
 - Sales support
 - Online marketing (web site, SEO, SEM, viral, podcasts/blogs, communities)
 - Advertising
 - Market research
 - Systems
 - Merchandising and promotions
 - Public and analyst relations
 - Customer data integration and analytics

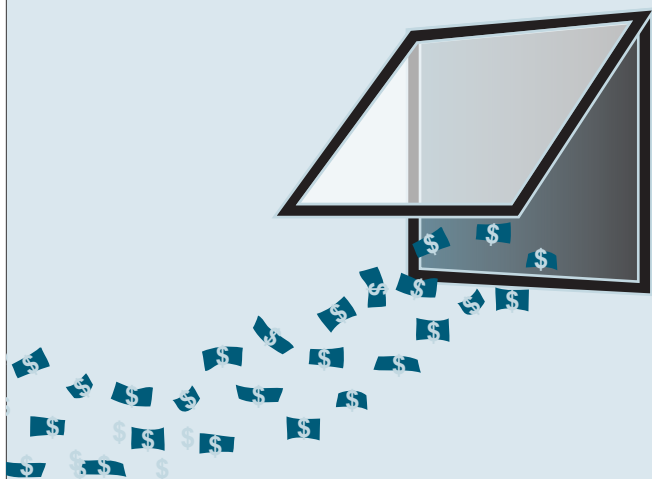
The 12 Leading Areas of Marketing Dollar Allocation in 2008 are Expected to be:



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- Market research
- Systems
- Merchandising and promotions
- Public and analyst relations
- Customer data integration and analytics

- When asked how they tracked and measured return on marketing spend, nearly 20 percent of marketers said they did not, and 34 percent said they were planning to introduce a formal ROI tracking system. Typical measures included revenue, profits and market share; volume, caliber and conversion of leads; as well as direct response metrics.
- Marketers reported significant agency turnover in 2007 with advertising (41 percent), web design (38 percent) and public relations (26 percent) firms most frequently changed in 2007. Special markets (e.g. ethnic), demand generation, hosted services/solutions and sales promotion had the lowest incidence of substitution.

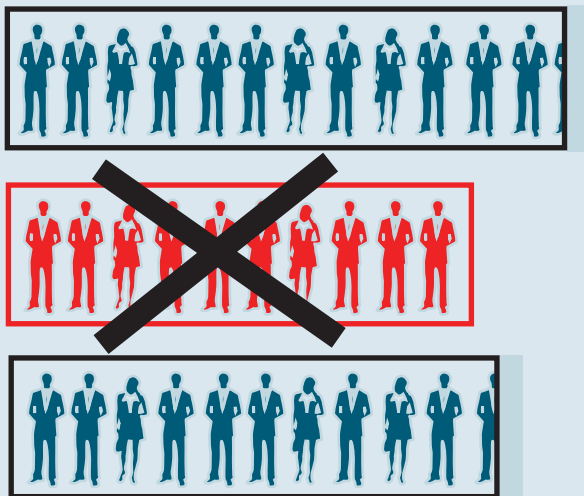
Tracking Marketing Dollars



Nearly **20%** of marketers do not track their marketing dollars. **34%** said they were planning to introduce a formal ROI tracking system.

- The need for global scale and size did not seem to be a factor in agency switches. Rather, performance issues were the most prevalent reasons for swapping out agencies in 2007. These included:
 - Lack of innovation
 - No value-added thinking
 - Poor creative
 - Quality of work
 - Results and deliverables
- Looking out, some 45 percent of marketers expect to change an agency resource function in 2008 with web design and development topping the list, followed by direct marketing, advertising and public relations.
- When it comes to shaping and influencing senior marketing opinions, peers are seen as the most trusted sources for marketing insight, information and management practices. Other leading sources are analysts and researchers, organizations and associations, business journals/magazines, trade publications and customer communities. Least influential are broadcast news outlets, major daily newspapers and blogs.
- On a personal and professional development level, senior marketers' top priority is to reach out to customers and advance their market insights in 2008. They also want to grow relations with sales and channel organizations, better manage time and schedules, further interact and collaborate with peers, upgrade title and areas of responsibility, as well as set aside more time for family and friends.
- In the talent sourcing area, senior marketers rank the following six competencies as key areas of staff development and recruitment in 2008:
 - Marketing or customer analytics
 - Strategic planning and business development
 - Product marketing
 - Database marketing
 - Vertical market expertise
 - Customer intelligence

The 2008 Agency Shuffle

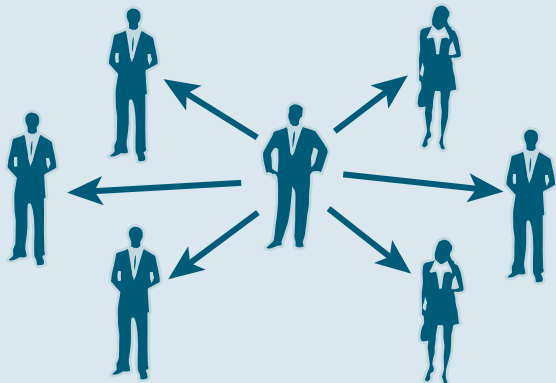


45% of marketers expect to change an agency

Topping the list are:

1. Web design and development
2. Direct marketing
3. Advertising
4. Public relations

Molding Marketing Minds: Who has influence?



Peers are seen as the most trusted sources for marketing insight, information and management practices.

Least influential are broadcast news outlets, major daily newspapers, and blogs.

TOP SOURCES FOR MARKETERS

1. Peers
2. Analysts and researchers
3. Organizations and associations
4. Business journals/magazines
5. Trade publications and customer communities

- Venting on the biggest sources of aggravation and frustration, senior marketers pointed to the following conditions as top of their list:
 - Organization culture
 - Senior management mindset
 - Insufficient budget
 - Having to do more with less
 - Politics and power plays
 - Being too reactionary and tactical

Executive Exasperations



- Organization culture
- Senior management mindset
- Insufficient budget
- Having to do more with less
- Politics and power plays
- Being too reactionary and tactical

CONTRIBUTED EXPERT COMMENTARY

2008 MARKETING OUTLOOK: EXECUTION MATTERS – DELIVERING ON COMMITMENTS, IMPROVING PRODUCTIVITY



By Dave Couture
Principal, Deloitte Consulting LLP

Marketing professionals demonstrated strong results in 2007. Based on responses to the Chief Marketing Officer (CMO) Council Marketing Outlook 2008 survey, top accomplishments include:

- Improved accountability within Marketing
- Better use of customer data for targeting and acquisition
- Development of new capabilities, including interactive media and marketing analytics
- Successful support for new product launches and go-to-market programs

Perhaps most important, marketers increasingly managed to avoid expensive branding and advertising campaigns that may achieve the momentary “wow”, but do not help deliver a consistent and compelling brand experience.

However, as we move into 2008, much remains to be achieved. In many organizations, marketing analytics are still in their infancy. The relationships most important to marketing need strengthening. Meanwhile, senior executives still expect more bang for their marketing buck, given that 75% of all marketing budgets will vary less than 5% from 2007 levels, as highlighted in the Marketing Outlook 2008 survey.

Consequently, 2008 results will depend largely upon solid execution – delivering on commitments while demonstrating productivity gains. Effective execution, in turn, requires enhanced relationships, improved alignment and better resource allocation.

ENHANCED RELATIONSHIPS:

Marketers know what it takes to maintain a laser-like focus on customers. In 2008, marketing professionals should focus efforts on enhancing relationships with colleagues in sales, customer service, finance and IT. Each of these organizations contributes to the effectiveness of Marketing. However, less than 1/3 of the Marketing Outlook 2008 survey respondents reported progress in building these relationships in 2007. Go on a sales call, visit a contact center, collaborate with Finance in developing new approaches to tracking and analyzing marketing spend and encourage IT to explore and evaluate emerging tools that will help Marketing improve its effectiveness and productivity.

IMPROVED ALIGNMENT:

Leverage internal relationships to drive cross functional alignment between the brand promise and the delivery of the brand promise at all customer touchpoints. Brand and outstanding creative rank as high as ever. However, with an increasing number of customer touchpoints and interactive channels, a guerrilla attack on a brand can undermine the best messaging and the most engaging creative in a matter of moments. Take the lead within the company to make

sure that every function understands its role in delivering the desired customer experience. It only happens when activities are well orchestrated, managed and measured.

Similarly, more clearly align with agency partners. Based on the Marketing Outlook 2008 survey, a large number of marketers made changes to their agencies in 2007 or expect to make changes in 2008. The reasons for agency changes include:

- Lack of innovation
- No value added thinking
- Poor creative and/or poor quality

We often notice significant disconnects between what Marketing expects from its agencies and how the agencies are compensated. Take a fresh look at your agency objectives, contracts and performance measures. Make sure they are aligned appropriately. The old adage – “you get what you pay for” – still applies.

BETTER RESOURCE ALLOCATION:

Nearly 55% of the Marketing Outlook 2008 survey respondents indicated they do not track and measure the effectiveness of marketing spend or have minimal ‘line of sight’ between business results and marketing efforts. Only 7% perform analysis to understand the causal relationships between marketing, revenues, and profits. Make this the year to better understand the drivers of market response:

- Know which marketing activities generate the greatest near and long term ROI
- Quantify the trade-offs, inter-relationships and elasticities of brand, advertising, promotions, trade shows and other sales and marketing levers – to know where you’re investing too much or too little
- Understand how public relations, competition and other external variables affect sales

In 2008, execution will matter more than ever to marketing organizations. The savvy marketers will be those who pull the right levers in getting there.

CONTRIBUTED EXPERT COMMENTARY

2008 MARKETING OUTLOOK: MARKETING 2.0 HITS A TIPPING POINT



By Jon Miller
VP of Marketing, Marketo

A tipping point is when something unusual becomes common, driven by the stickiness of the idea and its adoption by socially influential connectors.

Marketing 2.0 is by no means a brand new idea, but this year's Marketing Outlook survey demonstrates that 2008 is the year it will tip into the mainstream.

COMPARING MARKETING 1.0 AND MARKETING 2.0

Just as Web 2.0 rose out of the backlash from the excesses of Web 1.0 techniques, Marketing 2.0 is rising in response to the backlash (and growing ineffectiveness) of traditional marketing techniques.

Let's compare the characteristics of traditional marketing (a.k.a Marketing 1.0) with Marketing 2.0:

- **GAINING THE PROSPECT'S ATTENTION**

Marketing 1.0 was about using push marketing tactics, such as cold calls and unsolicited email, that work but only if they interrupt the customer's attention. In contrast, Marketing 2.0 uses "behavioral marketing" techniques to engage when and how consumers want, in direct response to behaviors and buying signals.

- **CONTROLLING THE MESSAGE**

In Marketing 1.0, marketers thought they can control the message as well as the customer's buying cycle and agenda. In Marketing 2.0, customers interact with each other, and marketers nurture passion and engagement from their best customers – marketing with prospects rather than marketing to them.

- **MEASURING ROI AND ACCOUNTABILITY**

Marketing 1.0 was characterized by a severely limited ability to demonstrate ROI and marketing accountability, which led to the perception that marketing is a cost center. But Marketing 2.0 gives marketers the ability to measure the bottom-line impact of every marketing activity, to quantify the impact of changes to marketing budgets, and to demonstrate marketing's impact on revenue.

- **ALIGNING MARKETING AND SALES**

With Marketing 1.0, combative relationships and finger pointing between sales and marketing was the norm. Marketing 2.0 enables a strong sales and marketing alignment, with a single revenue funnel that starts with marketing and moves seamlessly to sales.

Today's CMO lives in a world where traditional marketing practices are no longer acceptable. Consumers don't want to be interrupted, and have found ways to screen out, throw out and tune out unwanted marketing messages.

They use online tools and techniques to seize control of their buying process, seeking out the information they want when they want it. Already, 80% of decision makers say they found the vendor, not the other way around. (Of course, the smart marketers were the ones who made sure they could be found when and where the prospect was looking!) At the same time, online marketing techniques have raised expectations for marketing measurement and accountability. CMOs are now held to the same level of accountability as their counterparts, the CFO and head of sales.

Marketers who excel at Marketing 2.0 need traditional marketing skills such as the ability to spark discussion and passion, as well as “left brained” marketing skills including segmentation and targeting, testing and optimization and quantitative planning and measurement.

2008: THE TIPPING POINT

2008 is the year when Marketing 2.0 will “tip” from a fringe concept to a mainstream one. A necessary critical mass of early adopters is talking about and using Marketing 2.0 techniques, and as a result the mainstream is now beginning to recognize its importance.

We see this in the progress companies have made with the key building blocks required for Marketing 2.0. According to this year’s Marketing Outlook survey:

- The #1 top accomplishment for marketers in 2007 was creating improved accountability of the marketing organization.
- The #2 top accomplishment was the use of customer data and analytics for better targeting and effectiveness.
- 79% of respondents say they made significant progress during 2007 in improving the perception and value of marketing within their company.

As a result of this progress, many companies are now ready to embrace Marketing 2.0 techniques. Furthermore, CMOs are beginning to report that moving to Marketing 2.0 is a top-of-mind priority. In fact, the top two challenges CMOs reported in the survey are (a) to quantify and measure the value of marketing programs and investments, and (b) to grow customer knowledge, insight and conversations.

USE MARKETING AUTOMATION TO DO MORE WITH LESS

However, the road to Marketing 2.0 is still not easy. In fact, respondents at companies with less than \$100M in revenue report their single biggest source of frustration or aggravation is “having to do more with less,” i.e. the constant pressure to squeeze more results out of the same teams and budgets. Without the right tools to enable this efficiency, Marketing 2.0 seems like an unattainable dream.

This leads to the single biggest reason why 2008 is the year Marketing 2.0 will tip to the mainstream: the increased adoption of marketing automation technologies. According to the survey, 40% of respondents will add or deploy e-mail campaign management, 38% customer relationship management, 29% marketing performance measurement dashboard, and 27% will add sales and marketing integration tools.

Companies that use marketing software like this to automate manual processes, enable best practices and improve the measurement and analysis of results will have a clear competitive advantage, enjoying faster revenue growth and cost savings over those that do not.

Unlike the older marketing automation solutions (which were about Marketing 1.0), today's marketing automation solutions enable Marketing 2.0 by automating marketing campaigns that work on the prospect's schedule, not the company's. This is accomplished using "behavioral marketing" techniques that measure online and offline activity, allowing companies to read the "digital body language" of prospects and know exactly when a customer is ready to move to the next stage. Furthermore, unlike the prior generation of marketing applications, today's solutions use software-as-a-service and flexible licensing models to remove barriers to adoption. As a result, companies can trial the software before they buy and get it up and running without significant up-front expense or training.

CONCLUSION

A concept like Marketing 2.0 cannot tip to the mainstream unless the idea itself is compelling enough to stick in people's minds; it is used by socially influential early adopters; and the time or context is right. Add the ability of marketing automation software to automate manual processes such as lead management, quantify and measure program effectiveness and align the marketing and sales pipeline, and 2008 seems the right time for Marketing 2.0.

METHODOLOGY AND DEMOGRAPHICS

A total of 825 senior marketers participated in the online survey, which was fielded jointly by the CMO Council and e-Rewards, Inc. in late 2007. The research was conducted in association with affiliated organizations and partners such as the Experiential Marketing Forum and Worldwide Business Research. Co-sponsors of the CMO Council’s 2008 Marketing Outlook Report were Deloitte Consulting LLP, Marketo, Inc. and TechTarget.

A breakdown of aggregated respondent information appears in the tables below:

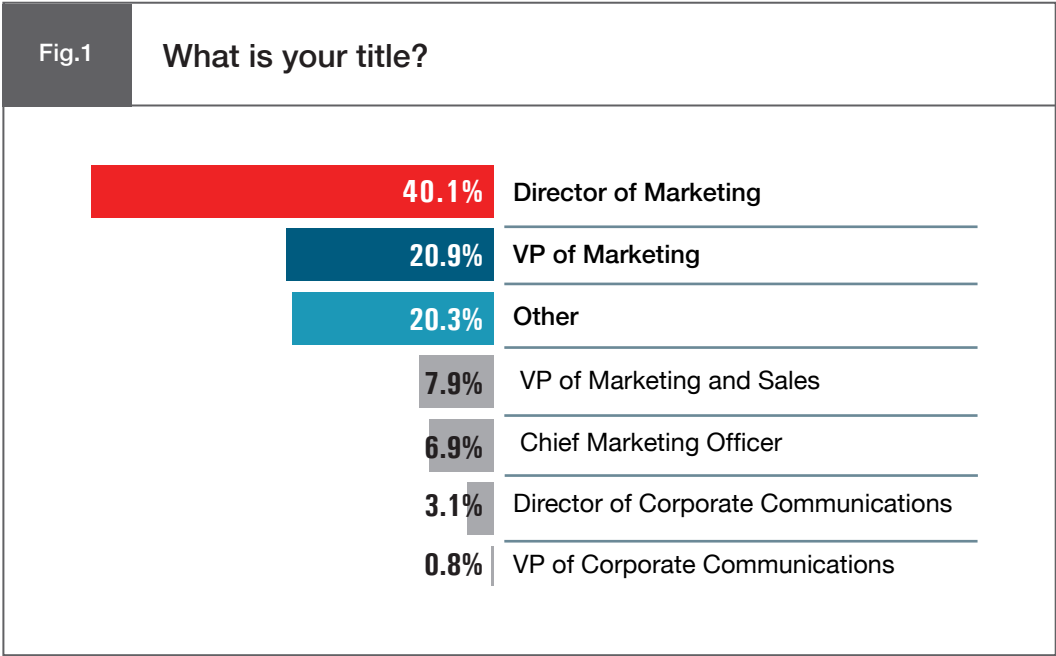


Fig.2

To whom do you report?

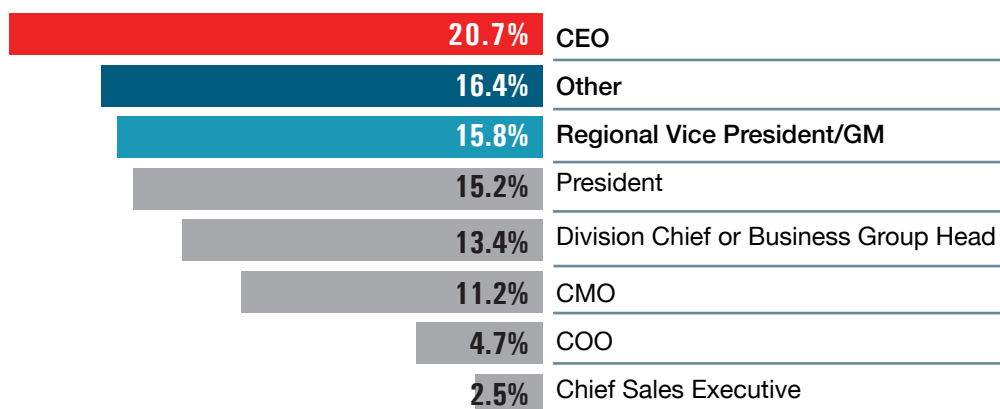


Fig.3

How large is your company?

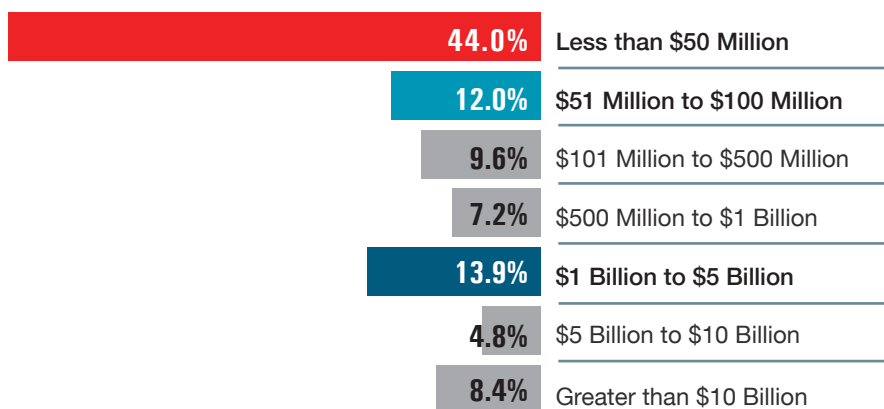


Fig.4

What is your current span of authority?

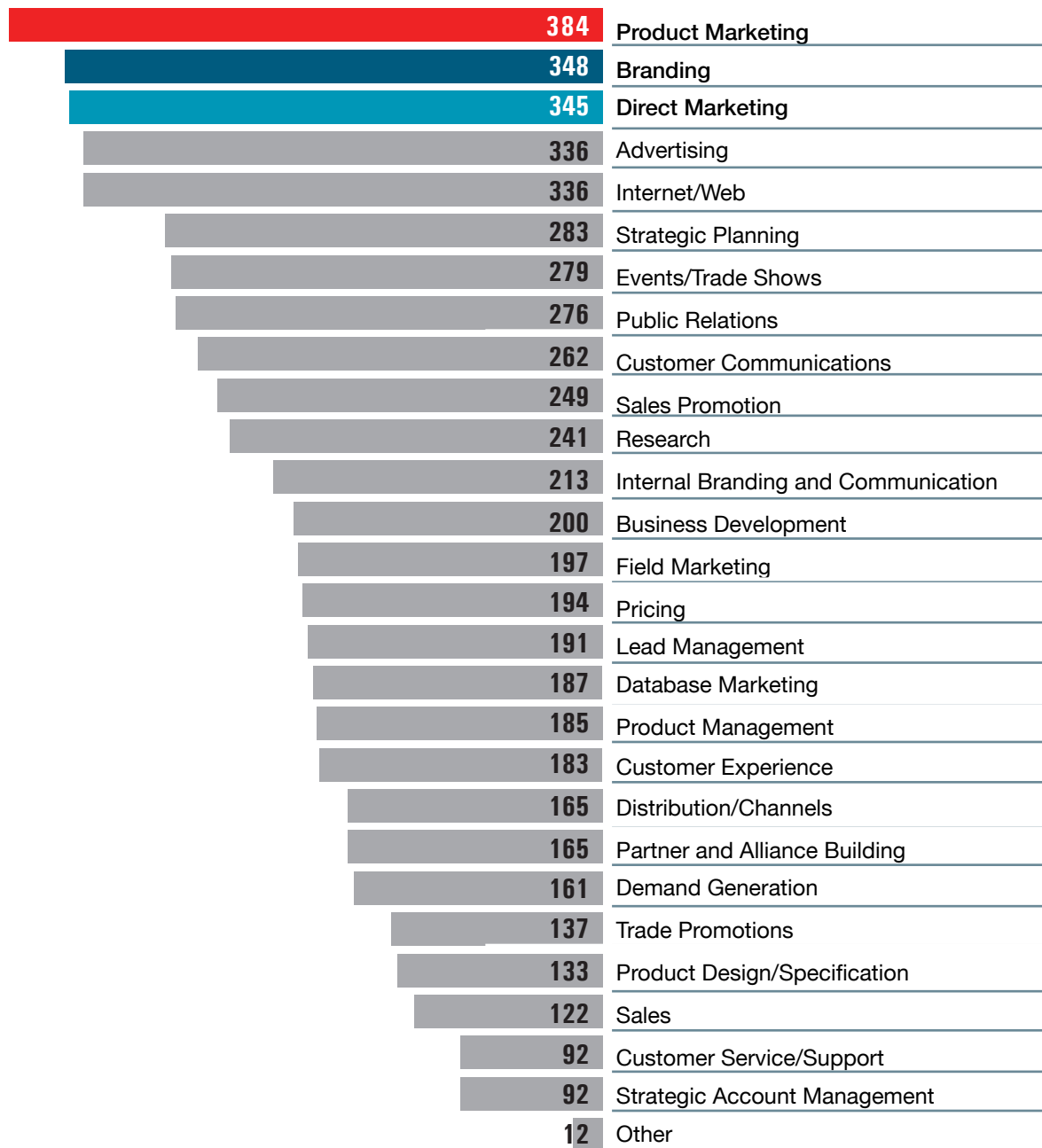


Fig.5

In which regions of the world does your company operate?

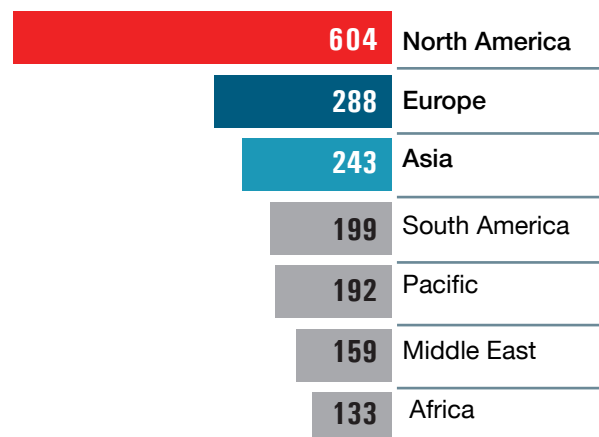


Fig.6

Is your business:

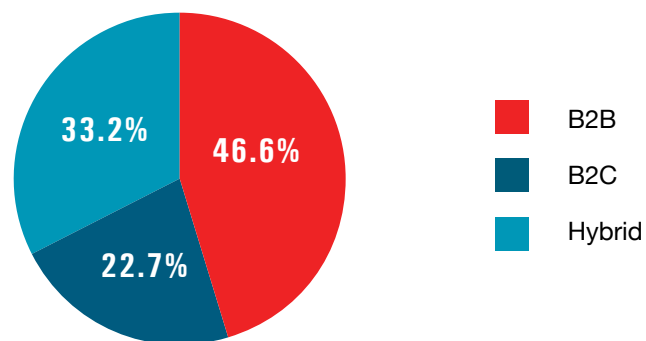


Fig.7

How long are your average sales cycles?

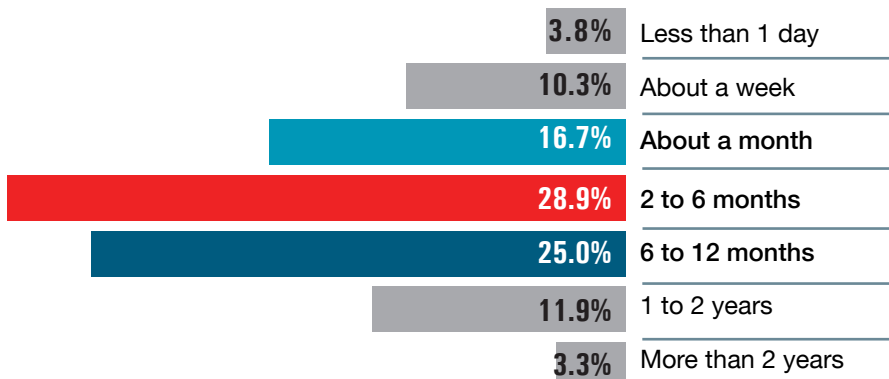
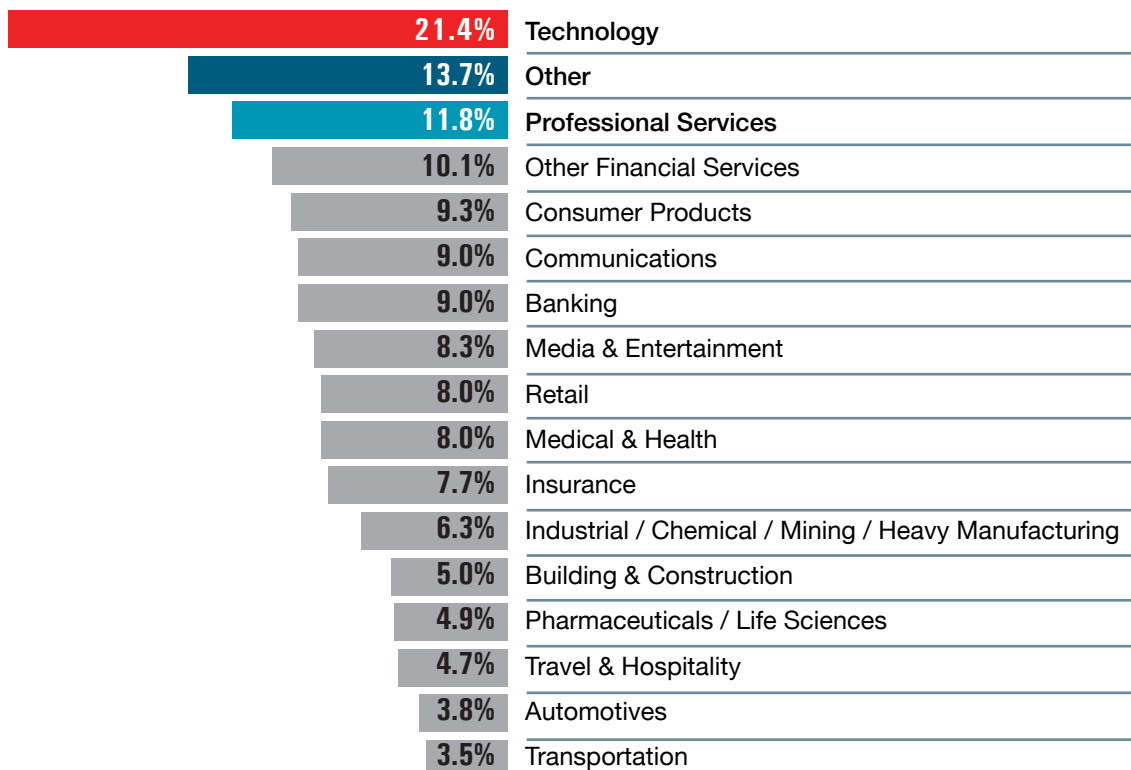


Fig.8

Within which industry does your company compete?



CMO COUNCIL PROFILE AND PROGRAMS



CMO COUNCIL

The CMO Council is a private, non-profit organization dedicated to high-level knowledge exchange, thought leadership and personal relationship building among senior marketing and brand decision-makers in the global technology industry. Based in Silicon Valley, the Council works to further the stature, credibility, influence, and understanding of the strategic marketing function among business executives, opinion leaders and critical stakeholders in the technology sector. More than 1,200 technology companies are currently represented on the CMO Council, accounting for well over \$500 billion in aggregated annual revenues. These include top decision-makers controlling more than \$45 billion in global marketing expenditures for many of the world's foremost computer systems, software, networking, communications, consumer electronics, component, distribution, and consulting brands.

For more information, please visit our web site at <http://www.cmocouncil.org>

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DELOITTE CONSULTING LLP

Deloitte Consulting LLP's Marketing Effectiveness practice helps companies create value through the development and implementation of executable strategies. We don't create your brand, but we help you deliver against your brand promise.

Deloitte Consulting has assisted a number of the world's leading brands increase their competitive positioning, customer loyalty and marketing ROI by improving alignment and execution across all customer facing activities.

Specific service areas include:

- Marketing Strategy and Segmentation
- Marketing ROI and Resource Allocation
- Emerging Marketing Models and Tools
- Trade Promotion Management
- Marketing Resource Management
- Marketing Spend Effectiveness and Compliance
- Customer Experience Management
- Customer Analytics and Data Integration

We bring tailored perspectives to help address your specific challenges with industry focus and specialization in Technology, Media & Telecommunications, Consumer & Industrial Products, Financial Services, Healthcare & Life Sciences, Public Sector, and Energy & Resources.

To help our clients accelerate results, we bring proven methodologies and tools including Marketing ValueMap™ and MarketingPrint™ and leverage alliances with leading technology vendors including Oracle/Siebel, Epiphany, SAS, SAP, and many others.

For more information, please contact:

Dave Couture
Principal, Deloitte Consulting LLP
Marketing Effectiveness
408-704-2156
Email: dcouture@deloitte.com

Jonathan Trichel
Principal, Deloitte Consulting LLP
Customer Experience
469-417-3155
Email: jtrichel@deloitte.com

Jonathan Copulsky
Principal, Deloitte Consulting LLP
Customer & Market Strategy
312-486-3751
Email: jcopulsky@deloitte.com



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The executive leaders of too many companies think of Marketing as a necessary but distasteful cost center, not a strategic asset that drives revenue and deserves investment. Marketo's vision is to change that by helping you take more control over the revenue process and earn a seat at the revenue table.

Fundamentally, this requires you to:

- Drive revenue by filling the revenue pipeline with enough sales-ready opportunities.
- Improve marketing accountability and predictability by connecting your efforts to hard metrics like pipeline and revenue.

That's where Marketo comes in. We believe that marketing software can play an important role in helping you drive revenue and improve accountability. That's why we provide the operational tools you need to generate demand and manage leads, and are working on the analytical tools you need to plan marketing budgets, forecast results, and demonstrate bottom-line impact.

WHY MARKETO

Unlike other marketing solutions, Marketo is easy to use and easy to buy from existing budgets since we don't require annual contracts or up-front fees. Delivered as an on-demand marketing service and integrated with salesforce.com, customers can run their first campaign Marketo in less than one hour, with no IT support.

KEY FEATURES

- **Lead Nurturing:** Automate demand generation and lead nurturing campaigns
- **Email Marketing:** Dialog with prospects using complete email marketing functionality
- **Lead Scoring and Analytics:** Track online activity to understand lead interest and sales-readiness
- **Integrated Lead Database:** Create a single view of all marketing interactions
- **Landing Page Optimization:** Create, publish, and test targeted landing pages in minutes with a PowerPoint-like interface
- **Salesforce.com Integration:** Automate tasks and track sales follow-up, track campaign effectiveness from leads to opportunities to revenue

Marketo's blog, Modern B2B Marketing (blog.marketo.com), explores best practices in business marketing, ranging from lead management to landing page optimization to marketing accountability. **Get a FREE trial at www.marketo.com**

Phil Fernandez
President and CEO, Marketo
650-655-4832
Email: phil@marketo.com

Jon Miller
VP Marketing, Marketo
650-655-4837
Email: jon@marketo.com

Frances Evensen
VP Sales, Marketo
650-655-4835
Email: frances@marketo.com

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TECHTARGET

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