



# Case Study: National Instruments



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*“Historically, marketing operations hasn’t been part of the budgeting decision-making process. Because of Allocadia, we’re now a key player in providing transparency into our marketing investments. Allocadia empowers us with a common language to talk with business leaders about marketing ROI instead of expenses, fueling a closer relationship with our stakeholders.”*

– Helena Lewis, Senior Group Manager for Global Marketing Operations and Technology, National Instruments

To determine whether or not your organization is efficiently and effectively delivering on its marketing strategy, you need to tie marketing budgets and plans to results. Any disconnect between upstream plans and downstream output can lead to misguided decisions. That was the situation facing Helena Lewis, senior group manager for global marketing operations and technology at National Instruments. And here’s the story of how her team brought together the right technologies, framework and stakeholders to enable a more effective, data-driven marketing organization.

### **Plans Got Derailed from the Get-Go Seeking Improvements and Efficiencies for Global Marketing Planning**

National Instruments (NI) is a \$1.3-billion-dollar high-tech company that makes engineering-centric hardware and software for test and measurement with more than 35,000 customers in 90 countries. The marketing team is made up of hundreds of marketers worldwide between corporate and regional teams. Pulling together budgeting and planning around the globe is no small feat.

It’s the job of the global marketing operations and technology team to manage the marketing planning process and enable the rest of the organization to devise the



strategy and plan, and execute. This team helps run marketing so the marketing team can do more marketing.

A few years ago, the planning process challenges were numerous. “NI is a consensus-driven organization, and while it’s good to give everyone a voice, it can complicate and slow the process.”

Another area for improvement was restructuring the marketing organization from a product and region point of view

rather than into global, needs-based campaigns. In fact, each region used to create its own version of a marketing plan—in Excel spreadsheets and PowerPoint presentations.

Combined, these issues made it an ongoing battle for the marketing operations team to operationalize marketing plans, and gain a high-level view of marketing’s activities and impact. And that meant it struggled to determine which initiatives were and were not successful.

In the end, Helena and her team were spending time and resources trying to unite marketing information and efforts from across the organization. “Without a single ‘system of record’ for all marketing plans and budgets and a way to organize everyone involved, we felt like hamsters on a wheel. It was a constant challenge to ensure our marketing investments were delivering the intended results,” recalls Helena.

### **Moving from a Global Challenge to a Global Solution**

As an experienced marketing operation professional, Helena had a clear vision of how marketing operations at NI should evolve. “We needed to think about our products the way prospective and existing customers do – as solutions that span the organization. This outside-in view then needed to be reflected in our marketing planning approach.”

To make that vision a reality, the marketing organization first needed to stop planning around the company’s products and instead develop campaigns aligned with the solution





approach that customers embraced. To support this would require evolving marketing functions and a campaign framework that served the entire marketing organization. And to support that evolution, Helena and team would need to identify and deploy the right combination of marketing technologies and processes.

### **Putting a New Operating Model into Play**

NI had long used the SiriusDecisions Campaign Framework, but in a piecemeal fashion. To make the framework work for hundreds of marketers, Helena's team worked with SiriusDecisions on small adjustments that retained the framework's original intent and worked for NI's unique needs.

Next came time to put together the right technologies to enable marketing to execute within the new framework. As an early adopter and long-time advocate of both Salesforce and Eloqua, Helena put a lot of stock into the value of those technologies. However, NI wasn't unleashing the full value of Salesforce and Eloqua without a way to reflect the marketing operations perspective.

"Allocadia had been on my radar for a few years but I needed the right business context to introduce it to NI. This was clearly that time. I knew Allocadia would enable us to operationalize the framework and make it easier for our team to apply it in their daily work and provide spending transparency," explains Helena.

Knowing Allocadia's capabilities and market perception, the team banked on it being the right solution to complete a best-in-class SaaS solution for marketing performance management.

Working hand in hand with Allocadia, the team sold the value of Allocadia to key stakeholders across the organization. "We would never gain global insights if we continued operating in silos. That's why it was critical to adopt a unified SaaS platform like Allocadia."

Once key stakeholders were on board, Helena's team orchestrated the implementation and integration details while balancing expectations. "When you're expecting big returns from your investment, you need to set expectations accordingly. Allocadia is a true partner, and helped me demonstrate the value of its solution before the sale, and helped us get the most value from it after the purchase."

## Transforming Marketing and Optimizing Performance



To connect budgeting to the planning process, NI identified targets and allocations by campaign. For example, a few years ago, 30 percent of the budget is assigned to overarching campaigns, 50 percent goes to product and platform specific demand creation and 20 percent is dedicated to region specific activities and company initiatives— such as account-based marketing and user conferences.

These formal guidelines allow NI to track how individual marketers and regions are aligning to intended investments within Allocadia's marketing performance management software. "The Alignment Score in Allocadia helps us validate alignment between our go-to-market plan and the budget," explains Helena. At the same time, NI needed to support newly created functions with global accountabilities, such as campaign managers. "While most of our execution and budgets are managed in the regions, we have roles who are accountable for the global campaigns. Allocadia gives these roles the ability to not only see what is being deployed, but also have insight into the investment. Allocadia has brought transparency to the marketing organization, that NI has never had before."

To provide insight across regions, the team uses Allocadia to generate reports along various dimensions, including program family, campaigns, media type, tactic type, and region. This makes it possible to merge planning and reporting with how the regional marketing organizations are executing.

"Now we have insight into the overall marketing budget and can clearly see how much is spent on operational expenses and how much is available for marketing execution. With this clear view across all regions, marketing operations can better determine how to drive efficiencies holistically," says Helena.