



**The buy-in
blueprint:**
unlocking
support for
new technology



Contents

This content is co-authored
by Twilio, SendGrid, and
Segment teams.

Contents	02
A tale of two departments	03
7 steps to unlock cross-functional decision making	04
That's a wrap	22
About Twilio Segment	23
Recommended reading	24

A tale of two departments



If you're reading this, perhaps you've already encountered a situation where you see the value of adding a particular product to your marketing tech stack, but getting your engineering team's buy-in (both figuratively and monetarily) is a particular type of juice that perhaps isn't always worth the squeeze.

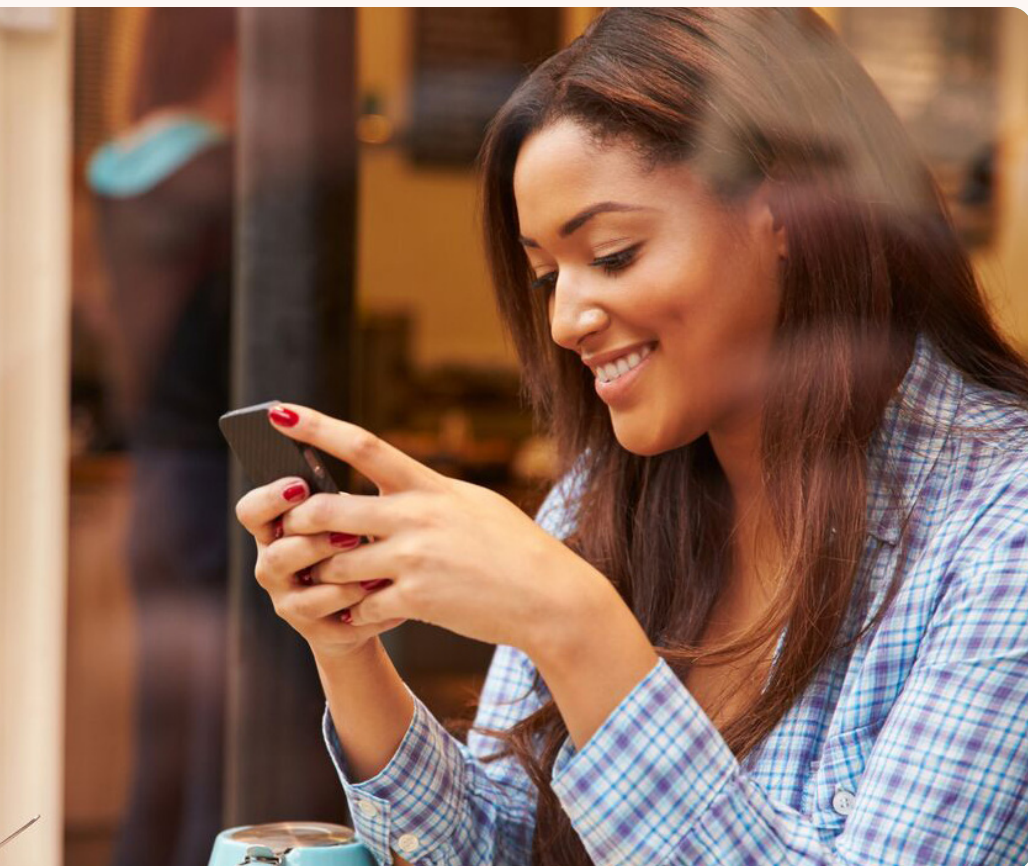
We get it.

Cross-functional collaboration can often feel like two teams speaking different languages. But finding common ground and shared focus to reach a mutual solution is integral to greater company success and staying ahead of the competition. Misalignment between engineering and marketing can lead to inefficiencies, delays, and missed opportunities.

Bottom line? You may have different ways of getting there, but your end goal should be the same.

Recognizing this need, we put together this guide as a step-by-step roadmap for achieving alignment and cross-functional collaboration, with a particular focus on a crucial project: launching new marketing software that can support both teams' needs. As marketing and engineering teams converge around this project, this guide offers valuable insights and actionable strategies to ensure mutual value and early adoption.

7 steps to unlock cross-functional decision making



1. First things first: Get to know your tech team

Before throwing out a campaign brief or launching a kickoff call, consider doing some prep work and actually getting to know your tech team, including the tools and language they use, as well as how and why they work. Showing an interest in how their team functions offers a foundation for true partnership and ultimately helps further your product purchasing goals. You can kick off this process by doing some initial research on the following categories:

1. Tool time

Lightly familiarize yourself with the tools your technical teams use for performing specific tasks, such as coding, testing, deployment, or project management. This knowledge will enable you to communicate effectively and understand their unique workflows.

2. How to ask for help

You'll also want to educate yourself on where their team goes to answer questions or ask for help. Is there a specific ticketing system? A designated Slack channel? Maybe it's a good old-fashioned face-to-face meeting. Knowing how and where they prefer to answer questions will make it easier for you to reach out when you need their expertise.

3. Collaborate and listen

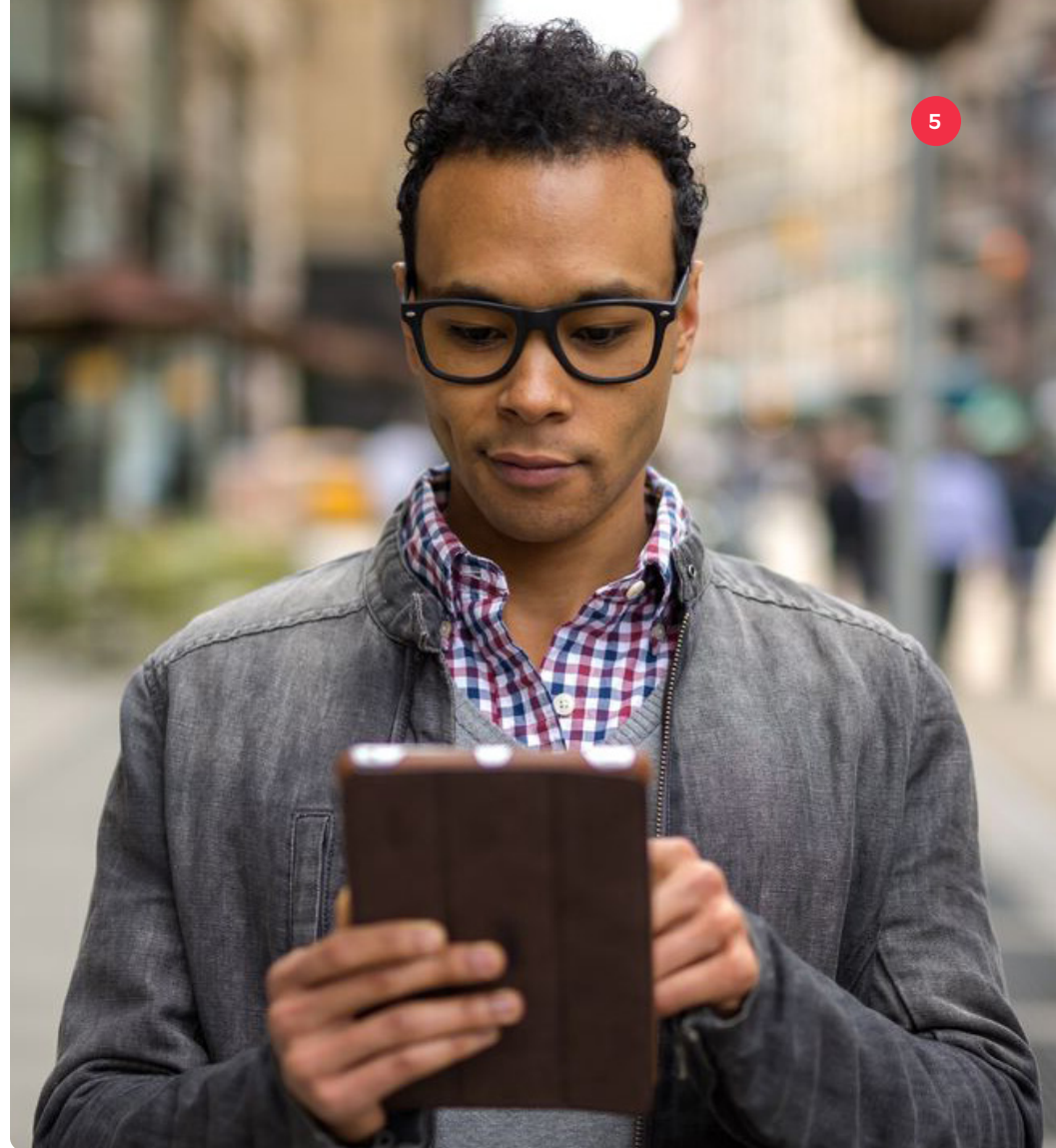
Reach out to the individuals you will eventually partner with to ask them about their personal preferences specifically around collaboration. While some might prefer a meeting to hash out the details, others work asynchronously and prefer email/Slack for the paper trail and to get back to you at a time that works best for them. Find out how they like to collaborate and adapt your approach accordingly.

4. Speak their language

Take the time to understand some of the jargon, acronyms, and terms that may not come naturally to you as a marketer. While this doesn't mean fluency, it does mean showing effort and that you're working hard to be a true partner.

5. SWOT your existing relationship

Engage in open and honest discussions with your technical contacts using a SWOT analysis (or Strengths, Weaknesses, Opportunities, and Threats) to evaluate current relationship between your marketing and engineering teams. Identify areas where collaboration is working effectively and areas that require improvement or attention. Your future project should help bridge some of these gaps and can also be a selling point based on that when it comes to appealing to your technical teams for purchase.



Bottom line

This initial research will lay the groundwork for productive collaboration and ensure that both marketing and engineering teams work together seamlessly towards shared success.

2. Define your desired outcomes

While you may already know the reasons why you need a new marketing solution, you'll want to ensure everyone – your teammates, your cross-functional partners, and your decision makers – are all on the same page about how a new solution can solve your problems and what it can help your business achieve.

To start, ask yourself a few key questions:

1. Why do we need this software? What problems will it help us solve?
2. Do we have a current solution that solves this issue? If so, why are we looking to replace it?
3. Are there other teams that could benefit from this solution?
4. Do we have a deadline for implementing and using this new solution?
5. Do we have the budget and internal resources to support this solution? If not, does the potential revenue/profit growth of the solution merit bringing in external resources?



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unlocking support for new technology**

With these answers in hand, you'll have a better understanding of whether purchasing a solution is the right decision for your business at this point in time, or if you should take another route for the time being. If it is what's best for your business, it's time to think more carefully about and document your needs.

At Twilio Segment, we use something called the [Value Generation model](#) to help build one, centralized view of your requirements to help map the potential outcomes of a new technology solution and help drive team alignment. The framework's four key elements include:

Use cases

What are you trying to do and for whom? These can also be thought of as business and technical requirements.

Outcomes

What's the desired outcome of each use case?

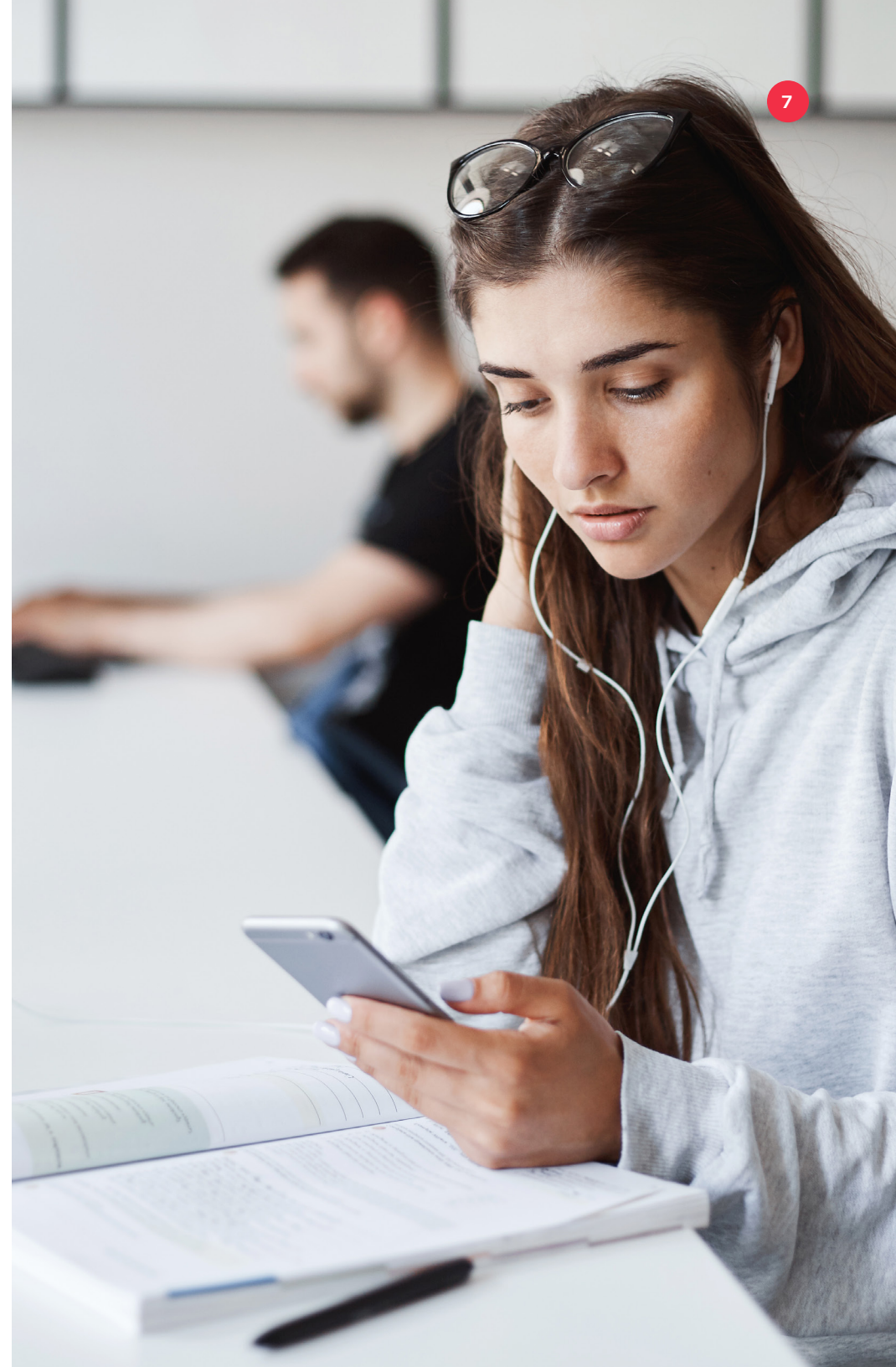
Stakeholders

Who has an interest in that outcome?

KPIs

Which metric validates if you've achieved your outcome? (Optional, as not everything is quantifiable.)

Let's see this in practice. Say your company is considering purchasing a customer data platform (CDP) like [Twilio Segment](#). Here's what your CDP Value Generation model might look like:



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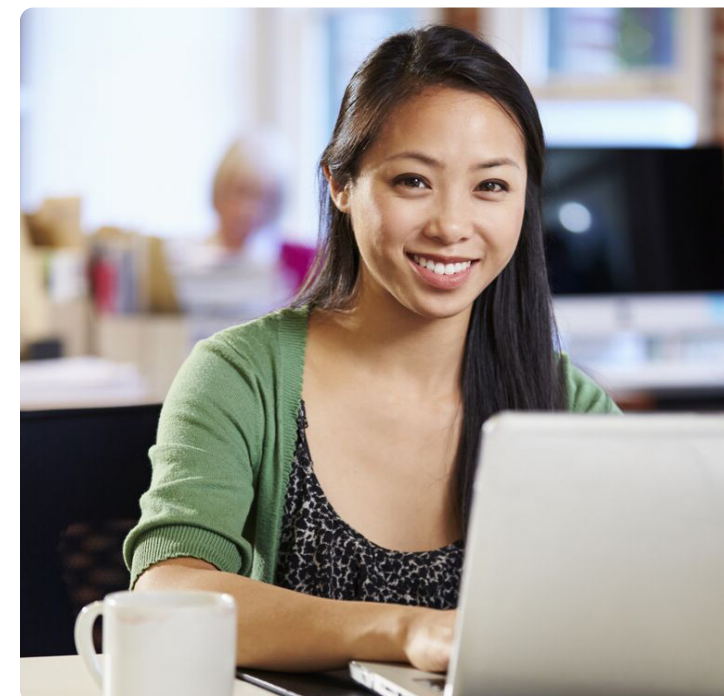
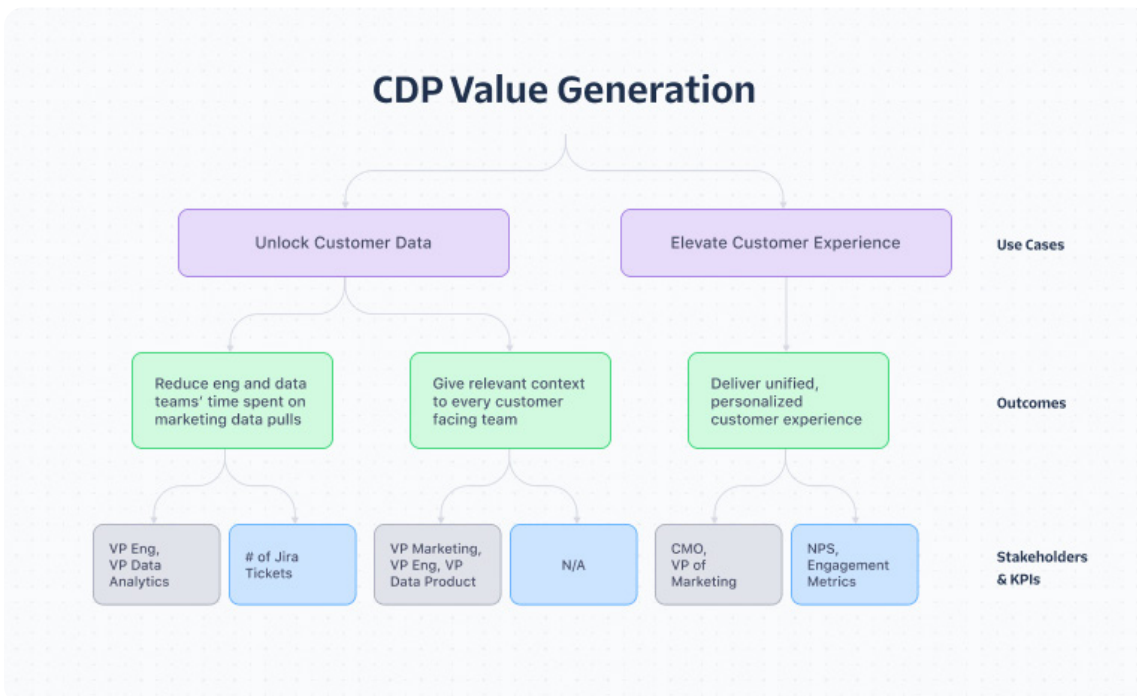
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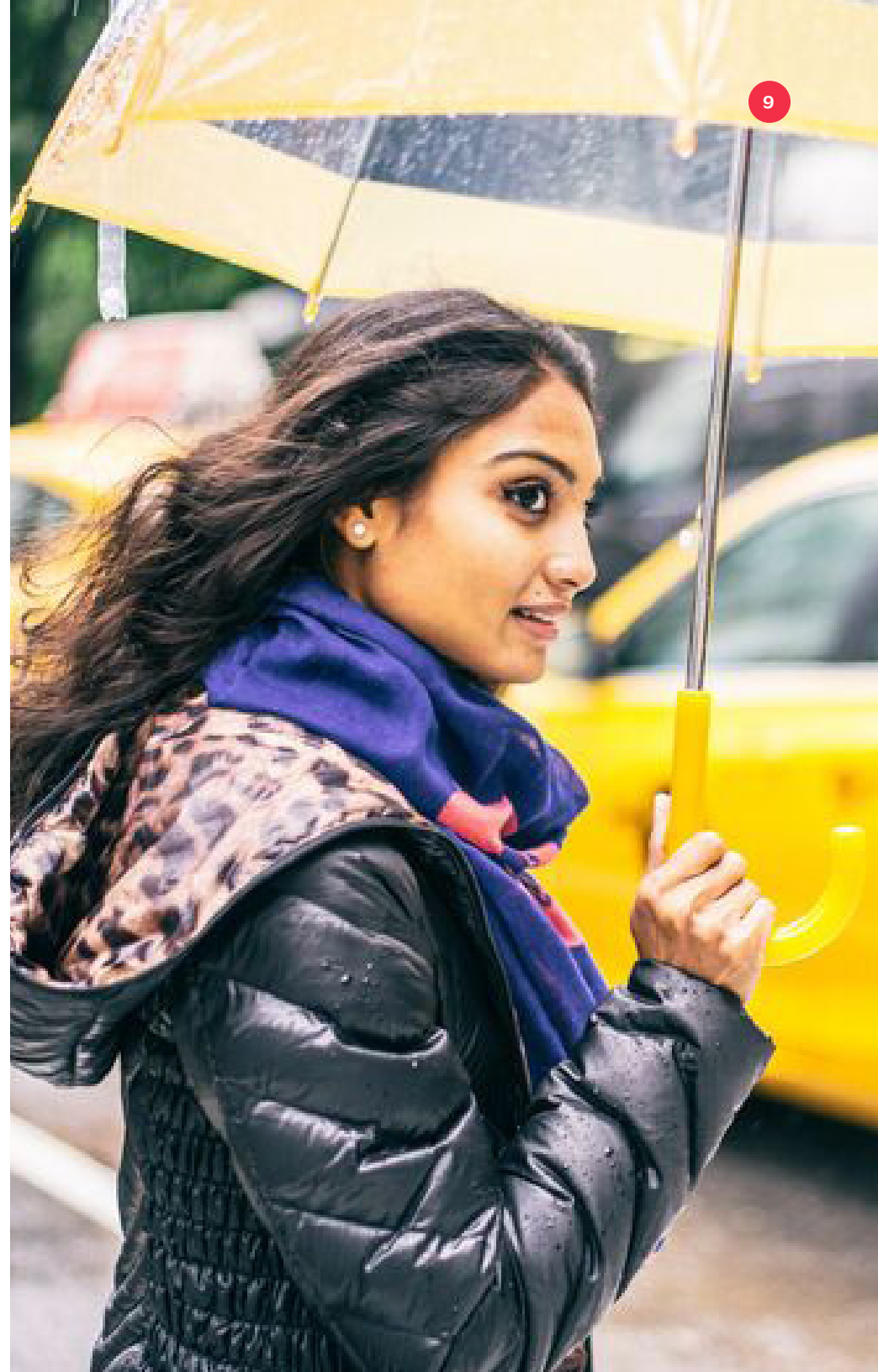
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unlocking support for new technology

You'll also want to loop in your engineering team and other key stakeholders at this time too, so you can better understand their needs for the tool as well. This might include your senior marketing leaders and other cross-functional teams who could benefit from the tool like data analytics, product, and customer service teams.

In addition to this list, you'll also want to make a list of your selection criteria (or your must-haves and nice-to-haves). This will help direct your search as you start evaluating solutions later on.

Certain selection criteria you might want to consider include:

- Whether you want a cloud or hosted solution
- Whether your system integrates with the rest of your tech stack
- What support needs your business will require
- How the vendor handles data security
- How it manages user access and permissions
- The overall user experience of the tool and how easy it is to use
- Whether it has the analytics and reporting tools your team needs



Be sure to review each of these categories and compose your list of must-have features and nice-to-haves. This ensures you know what features and functionality you'll need as you start your search and what will rule out potential vendors. For example, our team looking to buy a CDP might create the following list:



Must-have features

- Ability to integrate with existing tech stack
- Ability to consolidate and potentially replace existing marketing channels
- Customer data unification and identity resolution
- Customer profiles
- Data compliance features
- User data permissions
- Strict privacy and security measures
- Ability to easily activate data and build omnichannel marketing campaigns
- Ability to scale with our business as we grow
- Proven leader in scalability and reliability with minimal platform downtime
- Industry-leading deliverability rates



Nice-to-have features

- AI and machine learning
- 24/7 live customer support
- Dedicated implementation specialist
- Intuitive user interface

You can even go a step further and map each of these features to the business and technical requirements you outlined in your Value Generation model exercise earlier. Mapping how specific software features can address each of your business's current pain points can help you build an even stronger case for this new software. Plus, it'll make your lives so much easier when you kick off your search and know exactly what you're looking for.

3. Identify key stakeholders and project boundaries

We've all been in meetings and on projects where there are a lot of great ideas, but no real action or outcome. For true collaboration and momentum, you need clearly documented roles and responsibilities. Establishing those individuals early on and gaining their buy-in at each stage is integral to success.

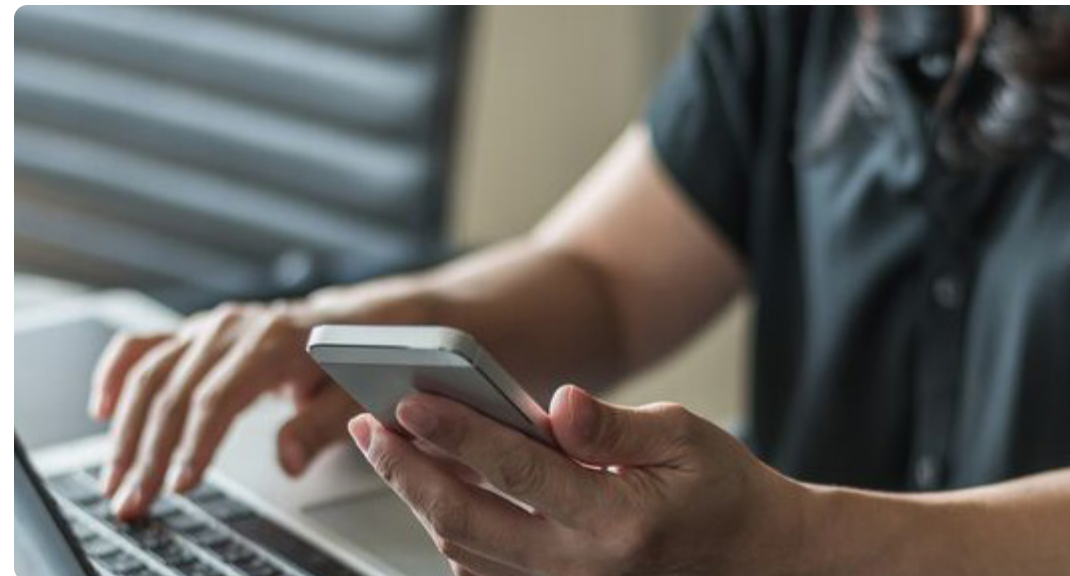
In this section, we'll explore how to identify these stakeholders and how each role can play a crucial part in decision-making, and ensuring alignment throughout the project.



Dream team roll call

- **Project Champion:** Choose wisely! This person holds the power to escalate and champion the project.
 - **How to get their buy-in:** Engage them early on by highlighting the benefits and aligning the project with the organization's strategic goals.
- **Business Owner:** This stakeholder articulates business goals, KPIs, and use cases.
 - **How to get their buy-in:** Demonstrate how the collaboration between marketing and engineering teams will drive growth, improve customer experiences, and contribute to the bottom line by streamlining processes to use fewer engineering resources.
- **Technical Owner:** The technical owner understands the current technical architecture and allocates resources like engineers and data scientists.
 - **How to get their buy-in:** Showcase the technical advantages of collaboration, such as streamlined processes and fewer engineering requests leading to increased efficiency and the ability to leverage automation to merge complete and real-time customer activity across a multitude of channels.

- **Marketing Owner:** The marketing owner defines campaign requirements and owns downstream activation tools where customer data is utilized.
 - **How to get their buy-in:** Emphasize how collaboration will enable targeted marketing efforts, personalized customer experiences, and the ability to a/b test and experiment with a system that has advanced functionality such as integrated event streaming, profiles/id resolution, audience management, and so on. Even further, highlight streamlined processes around access to complete, real-time customer profiles without needing to constantly make requests to technical teams.



Another approach that Twilio Segment regularly uses is the popular project management tool called the RACI model which breaks down a project something like this:

- **Responsible:** The person (or team) directly responsible for executing a specific task or project. They are typically the ones doing the work (whatever that may be) and ensuring it gets completed by a specific deadline.
- **Accountable:** This individual (or team) is the one ultimately responsible for the project's outcome. They have the authority to make final decisions, allocate resources (or budgets), and decide if the project moves forward and how.
- **Consulted:** This role involves individuals or teams who provide input, expertise, or advice related to a task or decision. They are consulted for their insights and knowledge but do not have the final decision-making authority.
- **Informed:** As it sounds, this person or team needs to be kept in the loop throughout each step of the project. While they are not involved in execution or decision-making, they still need to be aware of updates and results.

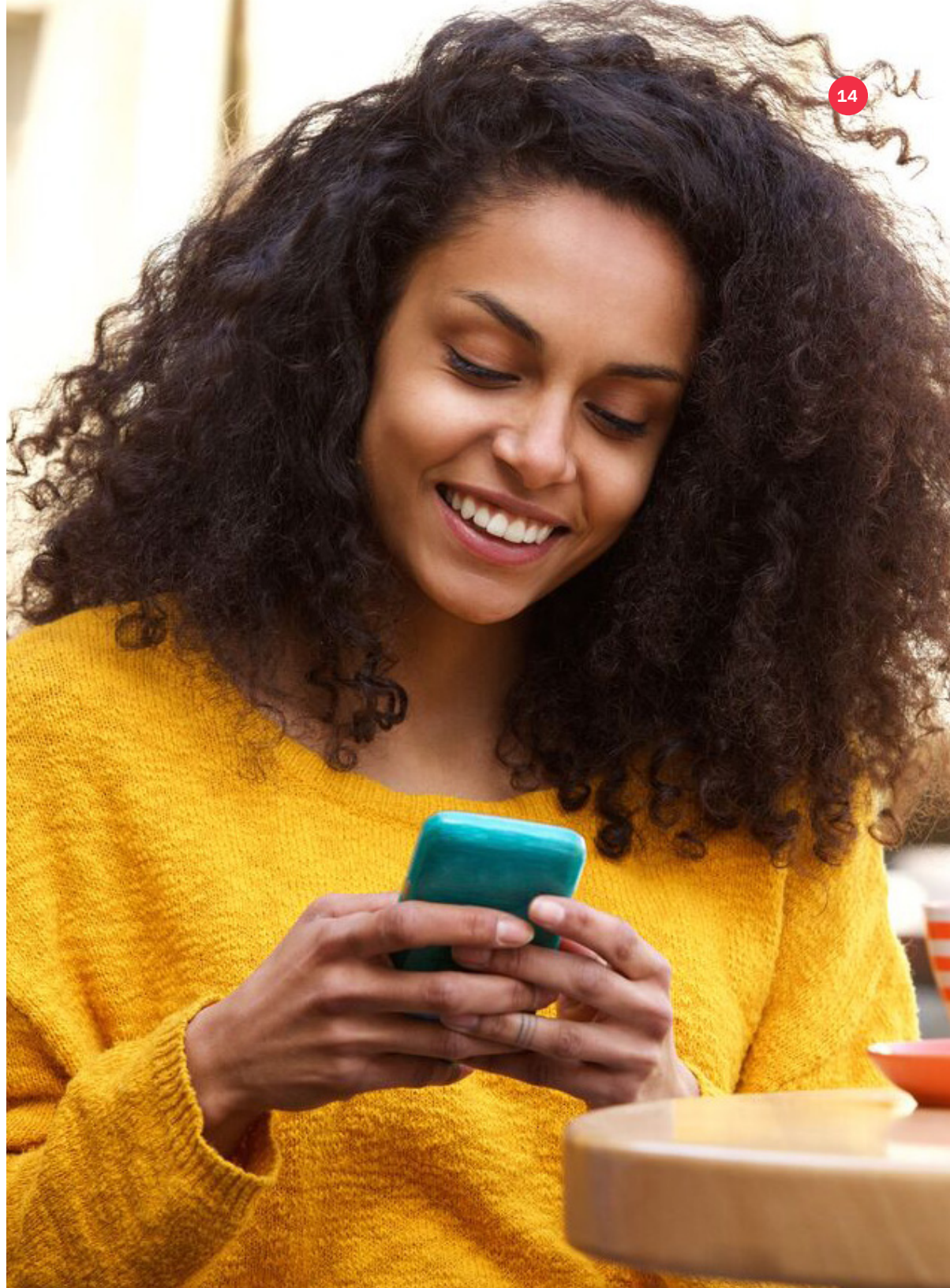
RACI Chart Example

Project Tasks	Senior Analyst	Project Manager	Head of Design	SVP Finance	SEO Lead	Sales Director	Senior Management
Phase 1: Research							
Economoetric model	R	I	I	A	C	I	I
Strategic Framework	A	I	I	R	I	I	C
Risk Factors	R	I	I	A	I	I	I
Phase 2: Research							
Product Specs	I	A	R	I	C	R	C
Design Wireframe	I	C	R	I	I	R	C
User Journey	I	C	R	I	C	R	C
User Experience Testing	I	C	R	I	C	R	C
Evaluation Framework	I	R	C	I	I	R	C
Development Backlog	I	R	C	I	I	R	C
Delivery Roadmap	C	R	A	C	C	I	I

The buy-in blueprint:
unlocking support for new technology

Once you've determined your key players for the project, you need to also establish clear boundaries and standards for success. Use the pre-research you did to understand how your technical team works to inform the following line items and make sure all your stakeholders buy into each of the following project boundaries:

- **Set up recurring meetings:** Determine cadence, and style (video, call, asynchronous updates, etc.)
- **Establish communication channels:** Slack channel, regularly updated Google doc/presentation, ongoing email chain, etc.
- **Be human first:** One of the biggest frustrations between any two teams is when we forget we're dealing with human beings and not tasks. Consider setting up a list of ways you'll deal with conflicts as they arise so you don't lose momentum on the project due to the occasional (but often unavoidable) disagreement.



4. Breaking down your budget

An important if not THE most important aspect to discuss at the beginning of your product purchasing journey is the cost of a tool and the often tricky chat about how to navigate the budget. However, with the right strategies in place, it's possible to align the financial needs of both teams and secure the necessary resources to move forward.

Here are three key considerations to consider when collaborating:

1. Lead with value

There's no sugar-coating it, deciding what department(s) will bear the financial responsibility for collaborative projects is a crucial and often hard conversation to have. Deriving the value for each department early on will make this conversation easier. Presenting the value proposition to each department could look something like this:

→ **Marketing:** Highlight how the new product and collaborative effort will increase the return on investment (ROI) of existing advertising spend. For example, by building a comprehensive 360-view of the customer, marketers can better inform targeted campaigns and achieve higher conversion rates, resulting in decreased CAC (i.e. drive customer communications through the most cost-efficient channel).

→ **Engineering:** Emphasize the technical benefits and long-term value that collaborative initiatives can bring to the engineering team. For instance, streamlined processes, enhanced data analysis, and improved customer experiences can lead to increased operational efficiency, reduced maintenance costs, and better product development (i.e. having access to a partner who has the most widely deployed APIs means you have a tremendous amount of access to examples, uses cases and suggestions from a huge community of developers).

Presenting the value proposition to each of these departments in a way that resonates with them will help make a compelling case for budget allocation.

2. Explore solutions for collaborative budgeting

It's not always possible to divide the budget, but in the event that one department doesn't want to take the entire brunt of the bill, there are solutions you can consider to share the cost.

→ **Do a cost-savings audit:** Look for opportunities to optimize spending and reduce costs without compromising this particular project. Is there a way to remove rarely used platforms or programs from your tech stack in favor of one that does both? Can you combine project management tools? Compromise is huge here and often an overlooked opportunity to save even more money by seeing what is really being used, and what isn't.

**The buy-in blueprint:
unlocking support for new technology**

- **Create a collaborative slush fund:** Just like it sounds! Allocate a portion of both teams' budgets specifically for collaborative projects. This shared budget allows both departments to draw from the pool of resources based on project requirements, ensuring equal financial investment and encouraging collaboration.
- **Consider a return on investment (ROI) analysis:** Conduct an ROI analysis for the tool you are trying to pitch to demonstrate the financial viability and potential future value. Highlight how the benefits outweigh the costs, showcasing the long-term value and impact on the organization's bottom line.

3. Open communication is key

In order to have a truly transparent budget allocation conversation, you have to be willing to speak openly and you have to be willing to listen. Consider setting up an initial meeting to discuss the budget, track spending, and address concerns from both teams to encourage shared ownership. Effective budgeting is not just about numbers; it's about finding common ground that both marketing and engineering teams derive value from the marketing solution you agree to purchase together.



5. Evaluate potential solutions

Once you've identified your must-have features, your key stakeholders, and your budget, you can begin kick-off for your vendor search. There are many ways to discover and research potential solutions, including:

- Using search engines
- Asking your network for recommendations
- Reading analyst reports
- Looking at online reviews
- Browsing vendor websites

Once you've identified a few vendors you like, it's time to:

- 1. Do your homework:** Compare their features and functionality and eliminate any options that can't meet your needs.
- 2. Narrow down your choices and request for proposals (RFPs):** Create a short list of your top picks and ask them to share an [RFP with your business](#).
- 3. Schedule vendor calls:** Request demos and free trials from your front runners and loop in all key stakeholders and decision-makers to this step. Do we have a deadline for implementing and using this new solution?

- 4. Determine your front runners:** Once you've compared the products firsthand, decide which ones are the best fit for your business. Remember to ensure that each solution you're considering can integrate directly with your company's existing technology stack.
- 5. Talk with customer references:** If your team is divided between a few choices, request your top choices share customer references that you can speak with. This allows you to get your questions answered by someone who uses the tool every day and works in a similar-sized company or industry to your own.
- 6. Make your decision:** With all this information at your fingertips, make the final call and determine which solution is best for your business.





15 must-ask questions during software evaluations

1. We're looking for a solution that can do X, Y, and Z. How can your software help with those goals?
2. What are the three reasons that customers pick your platform over your competitors?
3. Can your system integrate with other solutions our company already uses?
4. Can we replace any of our existing solutions with this new tool?
5. What kind of customer and technical support does your company provide? What are your support team's hours of operation?
6. How customizable is your solution?
7. What does your current product roadmap look like? How often do you release new features and updates?
8. What is a typical implementation time frame and how quickly do customers start seeing tangible value from the solution?
9. Do we have the right resources/teams in place to support implementation and drive long-term success with the platform?
10. How much does your solution cost? Are these costs all upfront or recurring?
11. What security measures do you take to protect our data?
12. Can you meet our internal security and privacy requirements?
13. What's your customer renewal rate?
14. What are your biggest differentiators?
15. Can you give us 2-3 customer references to speak with?



Being patient can save you money

While software evaluations can be long and labor-intensive, finding the right solution is worth it. If you get it right the first time, you won't have to repeat this process again in one or two years, saving your team time, money, and your sanity.

6. Use tools that encourage cross-departmental collaboration

The success of your software buying process depends on your ability to bring all of your cross-functional stakeholders together and ensure they communicate. While calls and meetings are important, you'll also want to leverage tools that allow for asynchronous communication as well. This can help everyone stay up-to-date on the latest project developments and roadblocks, so there are no surprises along the way.

Here are a few tools we recommend your team leverage to help:

1. Project management tools

Project management tools like Jira, Asana, Airtable, etc. can help keep all of your key stakeholders and decision makers updated on progress, key tasks, deadlines, and roadblocks so everyone knows what's happening, when, and who is responsible. These tools keep everyone up-to-date on how things are progressing and how the overall project timeline is evolving.

2. Instant messaging tools

You'll also want to determine which channels your teams and individuals prefer to communicate with. While project management tools can be good for assigning new tasks and updating project progress, you'll probably need a communications solution whenever more in-depth discussions arise. While email can help, some individuals might prefer to use instant messaging tools like Slack or Microsoft Teams to address smaller, one-off requests and questions.

3. Twilio Segment and Engage Premier

Departmental data silos can hurt collaboration and information sharing across teams. Luckily, with a customer data platform like Twilio Segment, your business can pull together data from all of your customer touchpoints and data sources in one platform, making it easier to collect and manage your analytics data. Plus, you can then seamlessly launch campaigns, build customer journeys, and send customer communications from the platform.

When everyone in your organization works from the same data set, you can ensure all of your teams are speaking the same language and using the same numbers to make decisions. Of course, a centralized data hub can also help your organization build better-personalized experiences for your customers on each and every channel your business uses – a win-win.

[Learn how Twilio Segment can democratize customer data for your organization →](#)

The buy-in blueprint:
unlocking support for new technology

7. Post-mortem checklist: Continue to improve in the future

After you've purchased your new marketing tool and did so with successful cross-functional collaboration (Congrats, by the way!), there's still more work to be done. Beyond integrating the new system into the routines and rhythms of the employees who will be using it, it's also important to conduct a post-mortem evaluation to assess the effectiveness of the product and identify areas for improvement.

Four ways to analyze the success of your new system:

1. Make gathering internal feedback part of the process

If you send a survey several months after a project has wrapped, the chances of you getting quality feedback is rare (if you get people to participate at all). Conduct a post mortem as a final wrap-up step so you gather stakeholder feedback when it's still fresh. Collect insights on their experience with the tool as well as the project itself, including any challenges faced, successes achieved, and areas of improvement.





2. Evaluate performance and user adoption

Getting immediate feedback however doesn't mean you shouldn't continue to evaluate the product itself and how users are adapting to it. Assess the impact of the new technology by measuring KPIs that were defined earlier to gauge the success and effectiveness of the tool in meeting the desired outcomes. Identify any areas of friction and barriers to adoption and implement education to help alleviate those issues.

3. Address issues and challenges

Based on the feedback and evaluation, make informed improvements to your process with the tool. This may involve providing additional training or support to employees, resolving technical issues, or making adjustments to the implementation strategy.

4. Continue to check in

Communicate findings and actions quarterly or biannually. Continue to be up-to-date on potential additional integrations. Finally, commit to continuing to optimize cross-functional decision-making processes. This is about the tool working for both teams, but it's also about teams working better together on future projects.

That's a wrap

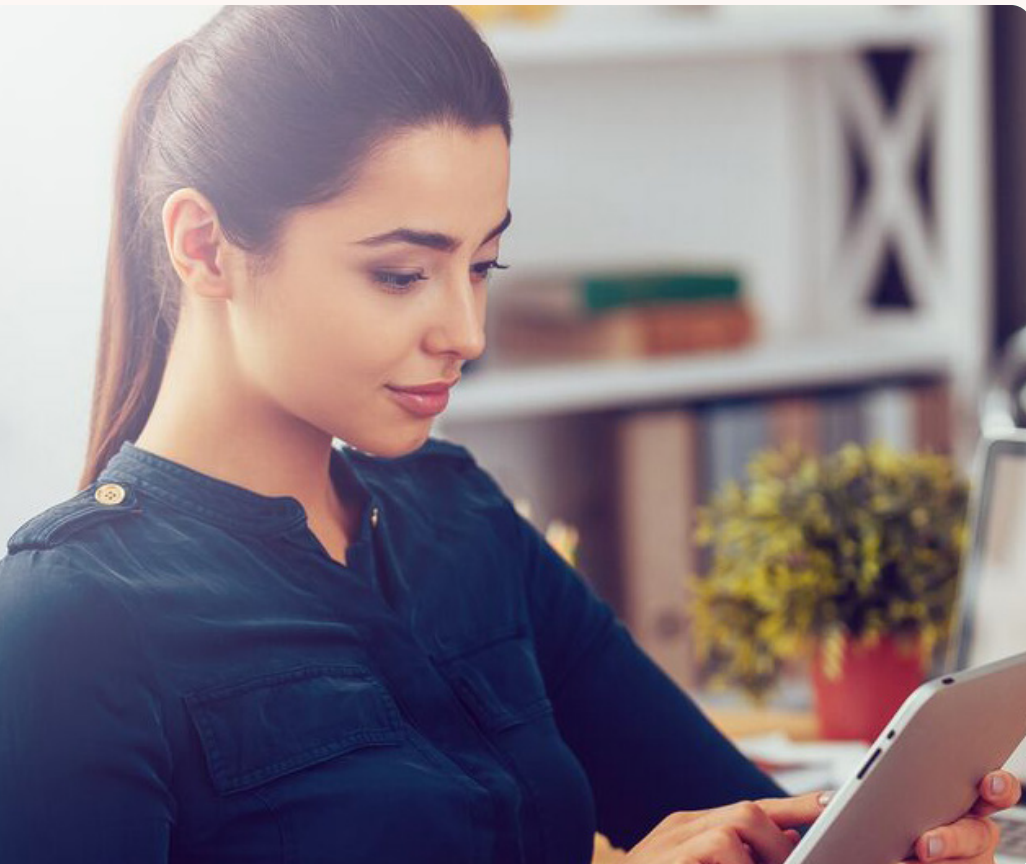


When it comes to gaining buy-in for new marketing software, cross-team communication is key. By following the seven steps outlined in this guide and including your key stakeholders every step of the way, there's no doubt you'll have a successful software search.

As a marketer, you know how to understand your target audiences and build exceptional experiences for them – and there's nothing stopping you from doing this with your internal audiences as well. Throughout this guide, we've discussed the importance of working closely with your engineering team to understand their pain points. When you kick off these discussions with your own colleagues, you might be surprised how often their goals (while different) are aligned with your own. Identifying and rallying behind these mutual goals can help your teams get on the same page during software evaluations and ensure you get enthusiastic buy-in from all your key stakeholders.

While choosing a new software solution requires a lot of time and effort upfront, the right solution can benefit your business and team immensely. An investment well worth making!

About Twilio Segment



Twilio Engage uniquely puts the power of a native customer data platform (CDP) and native omnichannel together in one solution so marketers can build data-first, personalized experiences that reduce costs and grow lifetime value.

Built “data up” on Twilio Segment’s CDP, Twilio Engage enables marketers to quickly activate real-time, first-party data across best-in-class integrated engagement channels as well as through 400+ partner channels from a unified solution without needing to rely on engineering resources—so you can go from idea to campaign in minutes. By providing a complete view of the customer and the ability to easily create and scale multi-step customer journeys across any digital channel, Twilio Engage helps marketers deliver more engaging and relevant customer experiences while driving long-term, efficient growth.

Learn how Twilio Engage helps marketing and engineering teams hit goals. Schedule a [demo here](#).

Recommended reading



3 steps to get buy-in for your customer data platform project

Getting organizational buy-in for a customer data platform can be challenging. We've plotted out a step-by-step guide to help ensure your CDP project sees early and rapid adoption.

[Read now](#)



Customer data platforms: build, buy...or both?

We break down the pros and cons of building or buying a Customer Data Platform, and discuss a third option: why not do a blend of both?

[Download now](#)



The 2023 guide to collecting and analyzing data

In this guide, we share what customer data is and the four major customer data types, as well as how you can start to put it to good use for your customers in a safe, secure way.

[Download now](#)



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If you would like to learn more about implementing flex,
speak to our [sales team](#).