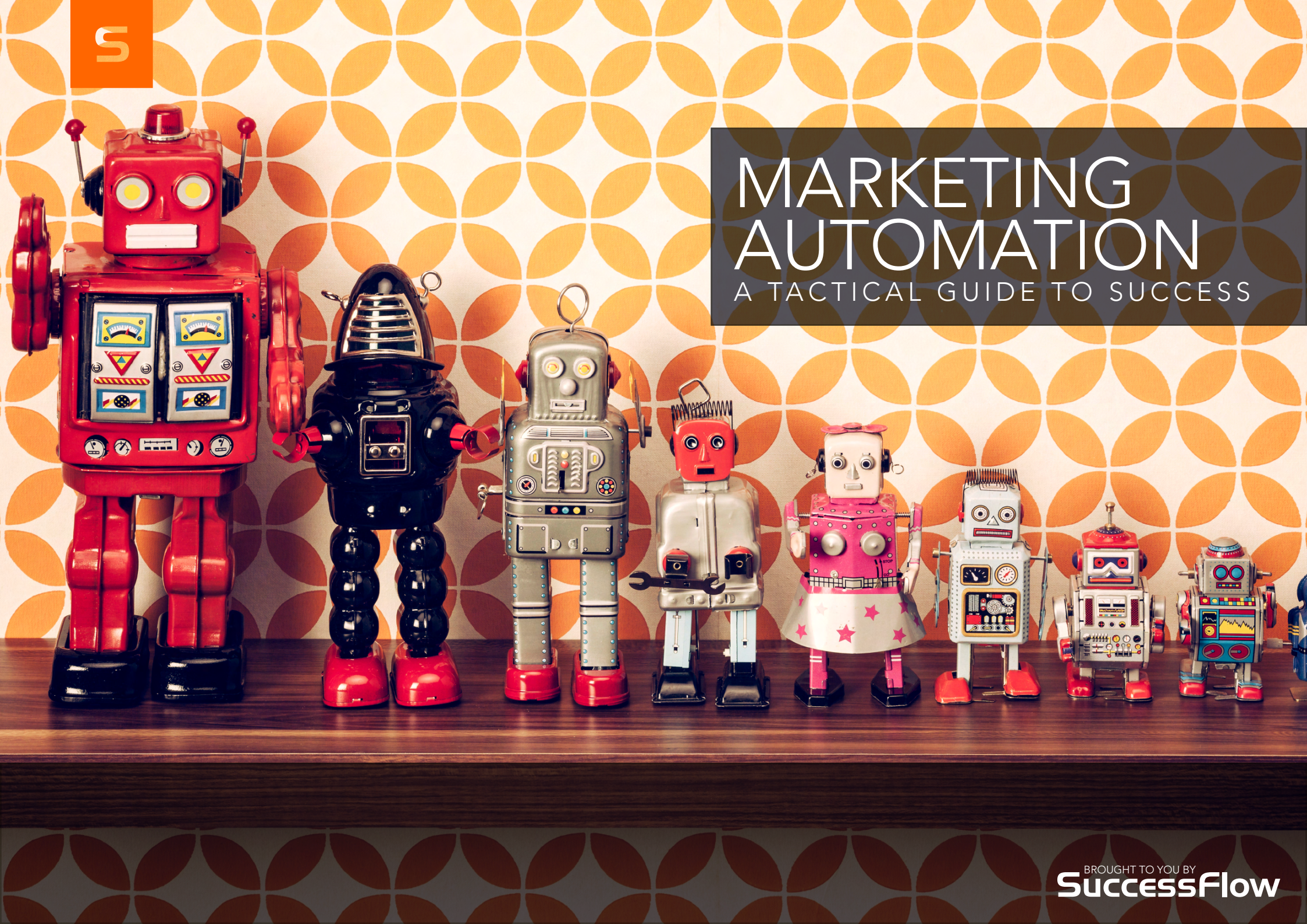


MARKETING AUTOMATION

A TACTICAL GUIDE TO SUCCESS

BROUGHT TO YOU BY SuccessFlow

How do successful companies manage marketing automation?

Beginning purely as a mechanism to deliver automated electronic marketing messages, marketing automation has steadily evolved. Today the term refers to **comprehensive marketing management platforms**—and they're continuing to expand their capabilities.

Current platforms provide enhanced functionality for disseminating a broad range of content across a wide variety of platforms, and include **marketing, nurturing, tracking and reporting.** If utilised to its full potential, a good marketing automation suite can contribute significant results and provides an excellent return on investment.

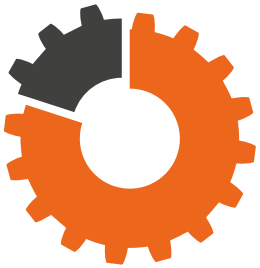
Marketing automation leads to **improved effectiveness and efficiency** across a range of marketing activities. It offers savings in time and money, while enhancing your connection with prospects and customers. This means that the question is not 'should we employ marketing automation?' but 'how and when should we employ it?'

WHAT OUTCOMES YOU SHOULD EXPECT

- Create and build relationships and trust with potential prospects and clients
- Significantly increase lead generation with less effort
- Close the gap between marketing and sales, resulting in substantial top-line revenue growth
- Allows for more targeted and effective marketing campaigns
- Take the guess work out of marketing and shorten the sales cycle
- Provides analytics so you can capitalise on your most successful channels and campaigns

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Is it worth the investment?



80% of prospects who **show interest but fail to buy** will actually make a purchase at some point within the next 24 months. **With marketing automation** you can nurture those prospects to make sure you **capture that sale, rather than your competitors**



Businesses which nurture prospects through marketing automation **experience a 451% increase** in qualified leads. Furthermore, nurtured leads spend **47% more on purchases** than non-nurtured leads

The Annuitas Group, November 2012



Companies which adopt marketing automation achieve **53% higher conversion rates** (from initial touch to MQL) and a **3.1% higher annual revenue** than non-adopters

Aberdeen Group, July 2012

DID YOU KNOW

Nurtured leads produce, on average, a 20% increase in sales opportunities versus non-nurtured leads *DemandGen Report*

61% of B2B marketers send all leads directly to sales; however, only 27% of those leads will be qualified *MarketingSherpa*

The average sales cycle has increased 22% over the past 5 years due to more decision makers being involved in the buying process *SiriusDecisions*

Marketing automation drives a 14.5% increase in sales productivity and a 12.2% reduction in marketing overhead. *Nucleus Research*

By 2020, customers will manage 85% of their relationships without talking to a human *Gartner Research*

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What challenges will you face?

When we ask companies why they haven't implemented marketing automation, we're typically given one or more of the following answers. But you can always overcome these issues—and they shouldn't prevent you from employing this powerful marketing tool.

We don't have the rights skills or resources...
Start simple, focusing on a few key elements, and build up to fully automated processes gradually. Identify your target audience and build a foundation on to which you can add more complex elements in time. This gradual start will generate you a few quick wins as your team gains knowledge and experience.

Our content is not ready...
Develop a content strategy to produce a few key pieces across the year that can then be re-purposed into smaller offerings for repeat use. With automated marketing you can host and deliver this content across different channels, and different stages of the sales cycle.

Our marketing database is poor...
Employ tools to clean and validate your database and then use marketing automation to build an up-to-date database, capture information and profile your database. A smaller, cleaner database is far better than large quantities of dirty data.

Our sales and marketing teams don't co-ordinate...
A key strength of marketing automation is its ability to bring sales and marketing into alignment. It enables hot leads to be passed on to sales in real time, and sales can track their exact path to this point.

We don't know how to create a strategy...
Building a plan with your key stakeholders is your first step—develop a phased approach and act on it, revisiting and amending when necessary.

We just don't have the budget...
No one needs all the bells and whistles straight away and you can initiate marketing automation on a modest budget. Once you can show a good return on investment, you'll have the business case to increase the budget. The Marketing Benchmark indicates that companies are only spending an average of 7% of their overall budgets on marketing automation.

S How do I form the right strategy to move forward?

To **form a cohesive strategy**, you'll need to address each of the key elements of marketing automation—database segmentation, content creation, outbound messaging, lead nurturing and analytics. **Develop a phased approach** reviewing each stage, as you go, to **learn what works and what doesn't.**

Steps to success

- ☐ Do your **research** on the possibilities and apply to your goals and objectives
- ☐ Run a strategy **workshop** with key stakeholders to ensure their priorities are addressed
- ☐ Create a **marketing framework** using tried and tested methodologies, such as SOSTAC or RACE, allowing for a phased approach
- ☐ Set **realistic goals** for your marketing and sales KPIs, such as the number of marketing/sales qualified leads, number of opportunities, number of activities a sales person has completed, remembering to filter them by time or region as necessary
- ☐ **Review regularly** and amend as necessary



How can I engage with my target audience?

Speaking to **your audience**, with the appropriate information is critical, so you need to **understand who they are**, their pain points and how to solve them. **Marketing automation**, in conjunction with a **good content framework**, will give you the tools you need to do this.

Steps to success

- ☐ Place **tracking codes** on your website so you can start to build up a profile of your prospects behaviour and interests
- ☐ Create **specific personas** to personalise your communication
- ☐ **Integrate your CRM** into your marketing automation platform to ensure you have a single view of your audience at every level
- ☐ Make sure you have the marketing automation **lead forms** deployed across your entire web site
- ☐ Use a third party data tool to **analyse and clean** your data on a regular basis

EXAMPLE PERSONA



NAME	Suzi Parker
AGE	26
OCCUPATION	Marketing manager
STATUS	Single
LOCATION	London

BIOG

Suzi is the marketing manager at a medium size company with a marketing team of 6 people. Her team owns the tools used by marketing, from email marketing software to their CRM, and works with all of their segment. Her goals and metrics are clear - sales pipeline in the form of opportunities or sales accepted leads - and she runs campaigns to hit goals.

PROFESSIONAL GOALS

Grow a strong industry reputation
Pipeline generation for her sales team
Campaign management for maximum ROI

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How important is my content?

The quality of your content is probably the single most critical factor in the success of your digital marketing. Prospects are continually bombarded with content so to stand out from the crowd you need to give them something they can value.

For successful content creation, you'll need two key elements:

- ☐ A **content framework** which allows you to produce the different types of content suited to each segment of your database
- ☐ A content production process by which you can maintain a **consistency of tone and brand message** across segments and channels

The next stage is to produce the **premium content** you'll need to generate leads. This is value-added content such as webinars, white papers and guides—high level, thought-leadership pieces that position you as an influence in your market. You'll also need to create **supporting content to drive traffic** to your premium items.

With constantly changing search engine algorithms it is imperative to have that your web-based content is **optimised across all devices.**

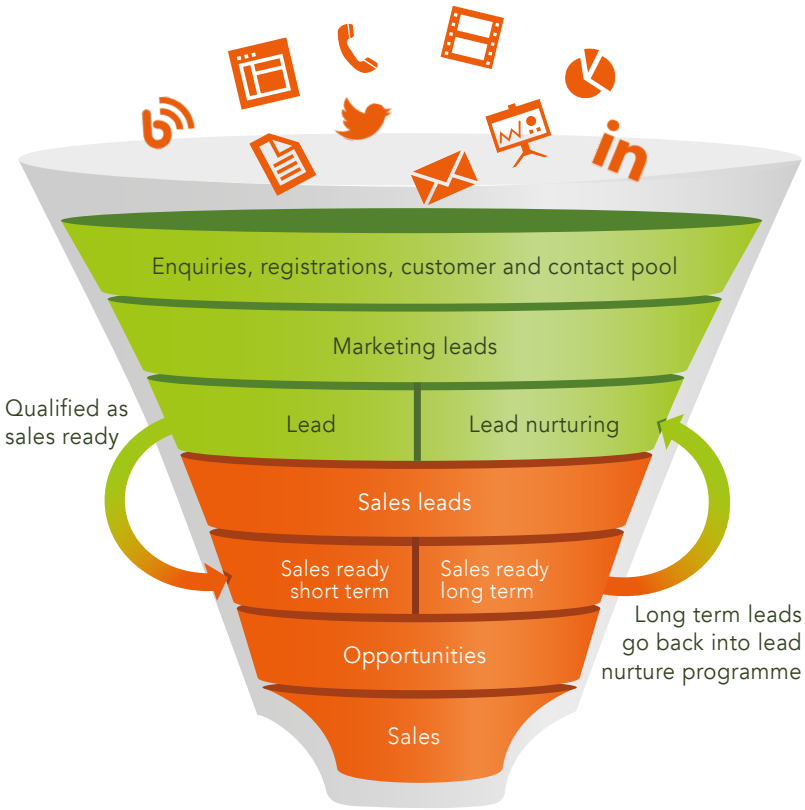


Can I increase lead generation?

Email continues to be the most popular and an **effective form of digital marketing**—and a good marketing automation platform will make all your email campaigns even more effective and more track-able. **However, marketing automation** enables you to do **far more**—it offers a central platform across all channels to **capture all lead activity** and turns visitors into new prospects, which can be **converted into leads.**

Steps to success

- ☐ Create a **multi-channel campaign** schedule to maintain a consistent flow of engaging content
- ☐ Keep web forms short and simple to start with and then use **progressive profiling and pre-filled forms** to build up information on your prospects
- ☐ **Re-purpose your content** across channels to improve lead generation
- ☐ Use secondary landing pages at strategic points along the customer journey to present similar relevant content, **keeping the user engaged.** This will increase the chance of consumption and help to bolster your position as a thought leader
- ☐ Take care to **allocate leads** to the relevant nurture programme and pass them to the appropriate internal team member as soon as they're sales ready

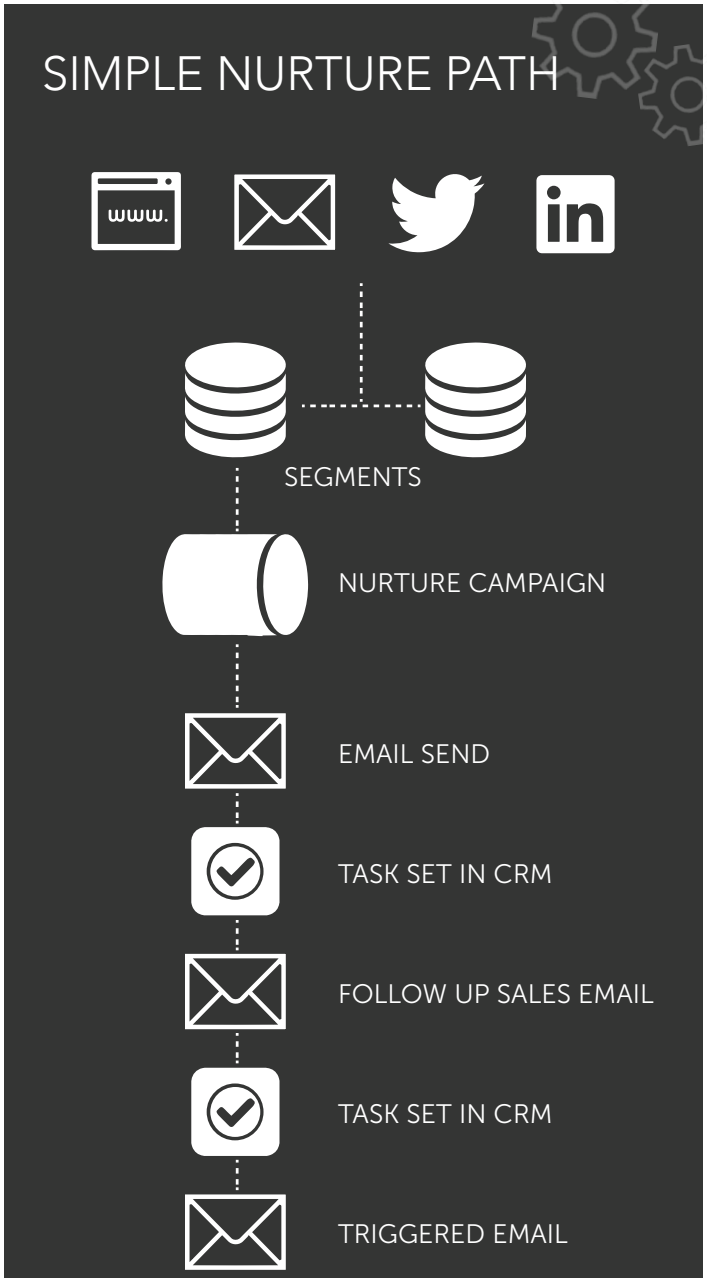


What is the best way to nurture my leads?

When it comes to setting up a nurturing programme, **start off simply,** don't overdo it and bombard your prospects with unnecessary messages. We suggest initiating a straightforward nurture programme for **one or two key segments** of your database, then rolling it out to other segments once you've established a successful blueprint.

Key points when developing a nurture programme:

- ☐ Think about the **call to action** to motivate your audience to engage with your brand
- ☐ Nurture your segments with **consistent messages**—this will always result in higher conversions
- ☐ Incorporate **email and social content** in your nurture programme for new leads, with task generation for your sales team
- ☐ Your content should ease your prospects into the sales funnel
- ☐ Nurture your current customers to generate **upsell/cross-sell** opportunities—increasing revenue from existing customers is much more cost effective than the generation of new business
- ☐ Scoring is a great way to **prioritise your leads** based on profile and behaviour
- ☐ **Regularly review** your nurture programmes to make sure they meet your goals



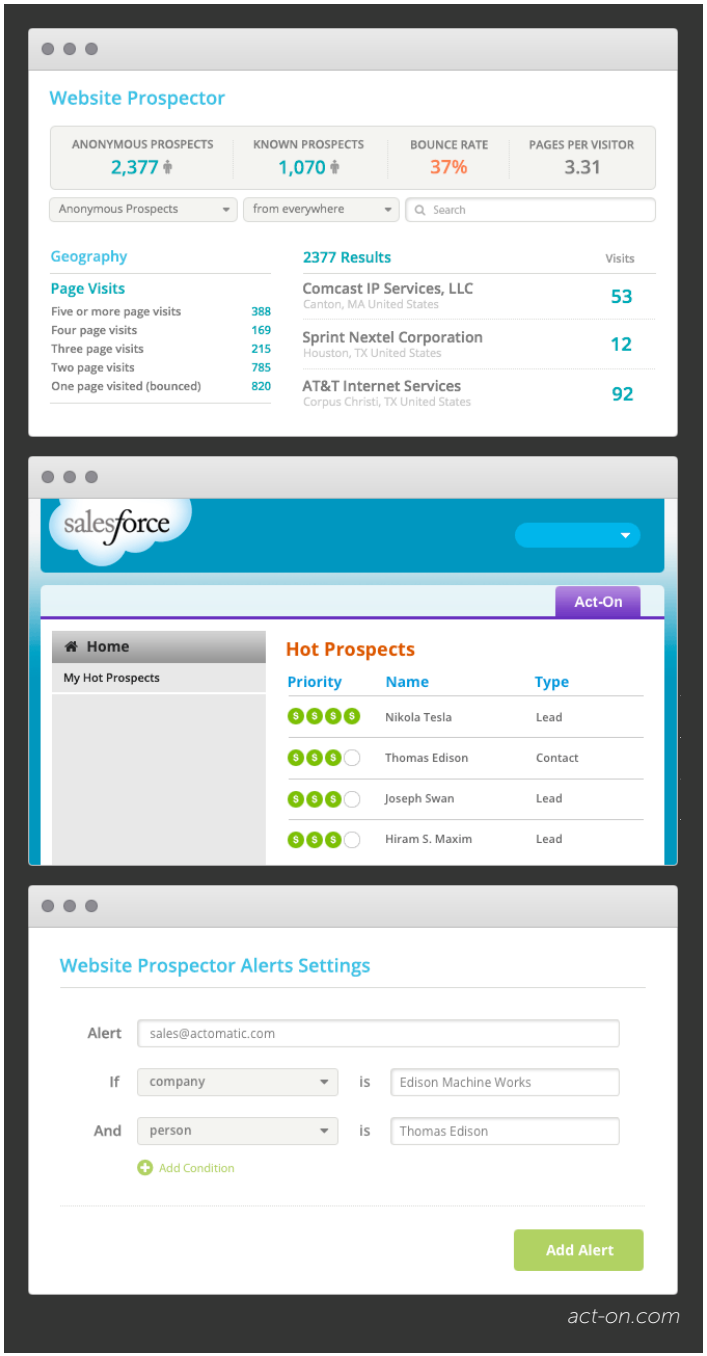
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How do I improve sales and marketing alignment?

What do you need for genuine alignment between sales and marketing? Begin with **shared definitions and collaboration on mutual goals.** Marketing automation adds to this by providing **shared metrics** to define the sales and marketing pipeline that are transparent to both functions.

The key to using marketing automation to align sales and marketing:

- ☐ Set **CRM tasks** so sales can immediately pick up leads that are sales ready
- ☐ Set **alerts** to show whenever prospects engage with your brand by landing on key pages or consuming content
- ☐ Give sales access to your **marketing intelligence dashboard** with a full history on the lead
- ☐ Create a **lead recycling** process so that sales can pass leads back to marketing if they're not sales ready
- ☐ Set up sales emails in the marketing automation platform so **sales emails can be tracked**



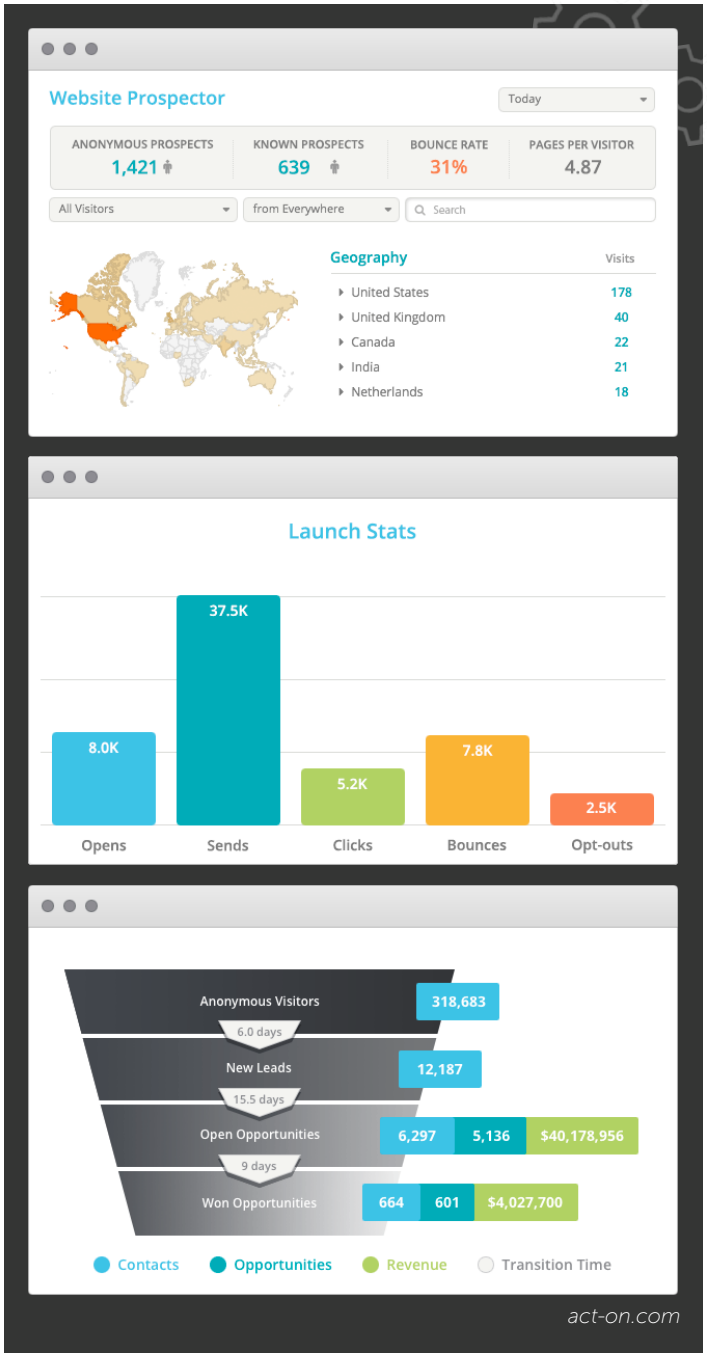
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What will I learn from analytics?

With integrated CRM and marketing automation, you'll be able to analyse every stage of all of your digital marketing campaigns to **gain insight** into what works and what doesn't across your target audience. The process is **analyse—learn—optimise** and marketing automation allows you to do this to an unprecedented level.

Steps to success

- ☐ Make sure you are tracking **ROI of your campaigns.** This will prove invaluable for planning the themes and types of future campaigns
- ☐ **Monitor which content** is generating the most interest
- ☐ Produce reports across your entire marketing and sales funnel to **identify any pitfalls** in your cycle
- ☐ Always track and monitor all your **key KPIs,** including productivity.



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How do I decide which is the platform for me?

When it comes to choosing your marketing automation platform, there are several market leaders. These are the brands you're most likely to have heard of and they all offer **high quality, popular platforms.** Ultimately, your choice will boil down to what you need in terms of **functionality and your budget.**

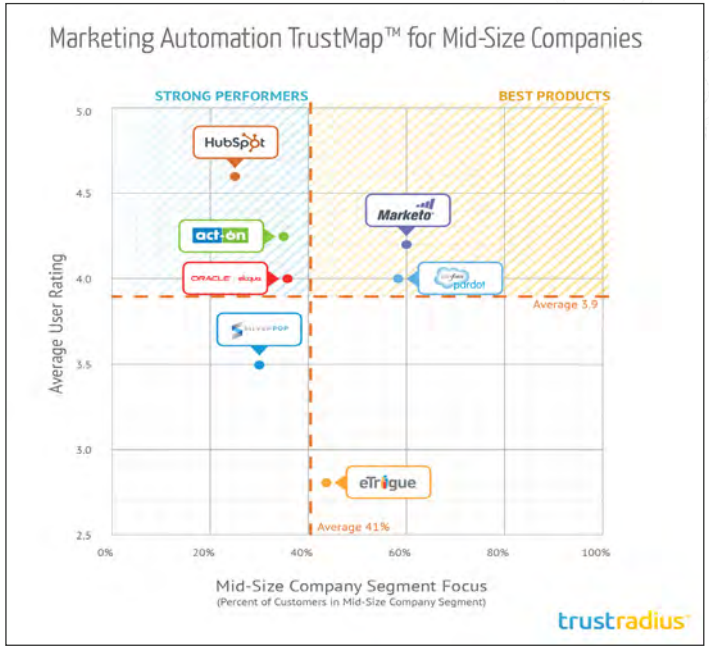
act-on This well-priced platform **aimed at SMEs** gives the top performers a run for their money. **Plenty of functionality** means it can handle a comprehensive marketing strategy—and it's **still expanding.**

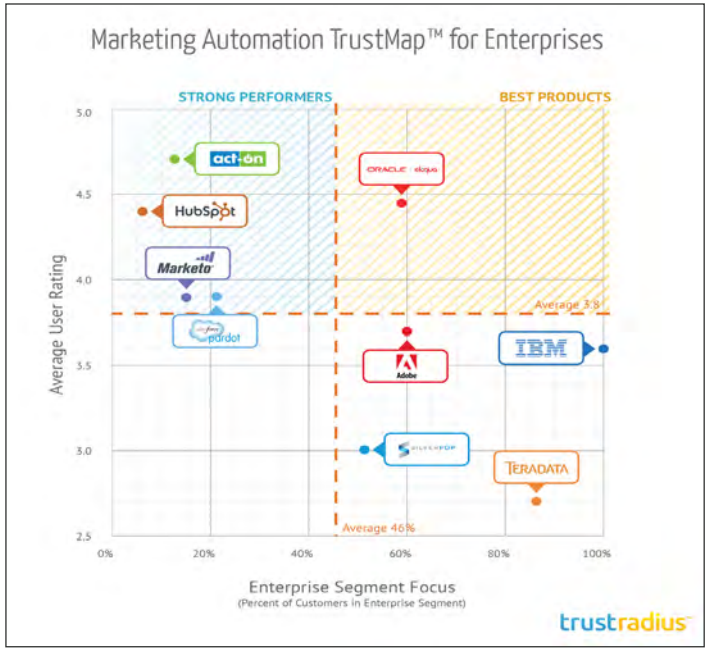
HubSpot Taking more of an **inbound approach** than its competitors, with strong **CMS and CRM functionality**. It's the best inbound solution currently on the market.

Marketo Covering **B2B and B2C**, high profile Marketo is still expanding its user base. Offering a choice of packages to suit **SMEs or enterprise** level, giving the widest coverage of the market.

eloqua From Oracle, it has the **highest level of functionality** on the market, this comprehensive platform appeals to enterprise level clients, but it's also the **most expensive.**

salesforce pardot Having been acquired by Salesforce, Pardot is in a position to offer a **truly integrated platform** and, thanks to a super slick user interface, it's rapidly become the number one choice for an **expanding range of customers.**





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Is marketing automation for me?

To summarise, marketing automation offers companies that utilise it to its full potential substantial benefits and an excellent return on investment. Running your digital marketing campaigns through an automated platform will **result in more leads of higher quality, better lead management, improved sales alignment and ultimately increased sales.**

Ask yourself the following questions and see if marketing automation will help you achieve your goals and objectives.

Do you want to increase lead conversion?	**Yes** Used correctly marketing automation can significantly increase lead conversion.
Do you want a shorter sales cycle?	**Yes** With automated processes the sales cycle will naturally shorten.
Are you struggling to maintain and build customer and prospect relationships?	**Yes** A shorter sales cycle and automated tasks allows for more time to nurture and create new relationships.
Do you want to increase lead generation?	**Yes** Allowing you to reach a greater audience with more content, lead generation will grow.
Are marketing and sales working together?	**No** Marketing automation will remove the stresses between these two teams.
Do sales prioritise the right leads?	**No** With lead scoring, prioritisation is so much easier.

STILL NOT SURE IF THE INVESTMENT IS WORTH IT?

There are many things to consider before investing in marketing automation. You may have already taken the step but not sure if you are making the most of your investment. From implementation of a new platform to consultancy on an existing one, SuccessFlow can help!

Why not arrange an online demonstration of how SuccessFlow can help with your marketing automation needs.

Either call us on 0845 680 5409 or follow the link below to book your appointment now.

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What should be my next step?

We always recommend **workshops with key stake holders** as a great way to formulate any form of long term stategy, such as, digital marketing strategies, content framework and a marketing automation strategy.

Get in touch with us and see how we can help make your marketing automation plans a success.

hello@successflow.co.uk

0845 680 5409

Request a call back

Connect with the authors



Adam Dore

Senior Functional Consultant

SuccessFlow Ltd



Mark Donkin

Managing Director

SuccessFlow Ltd