

The Ultimate Automation Guide for Marketing Professionals

Force24™
Marketing Automation

Index

06 What Tools Do I Need To Follow This Guide?

08 Tips

18 Building Perfect Plain Text Emails

20 Building Landing Pages With Automation

22 Lead Scoring

24 Learning About Your Audience

26 How To Use Engagement Curves

28 High Value Consumer Non-Ecommerce

30 Low Value Consumer Ecommerce

22 High Value Business To Business Contract Sales

36 B2B Lead Generation

42 Stimulating The Review Culture In Your Favour

52 Gated Content Downloads

60 Passing Hot Leads Directly To The Sales Team

66 Contact Information

Introduction

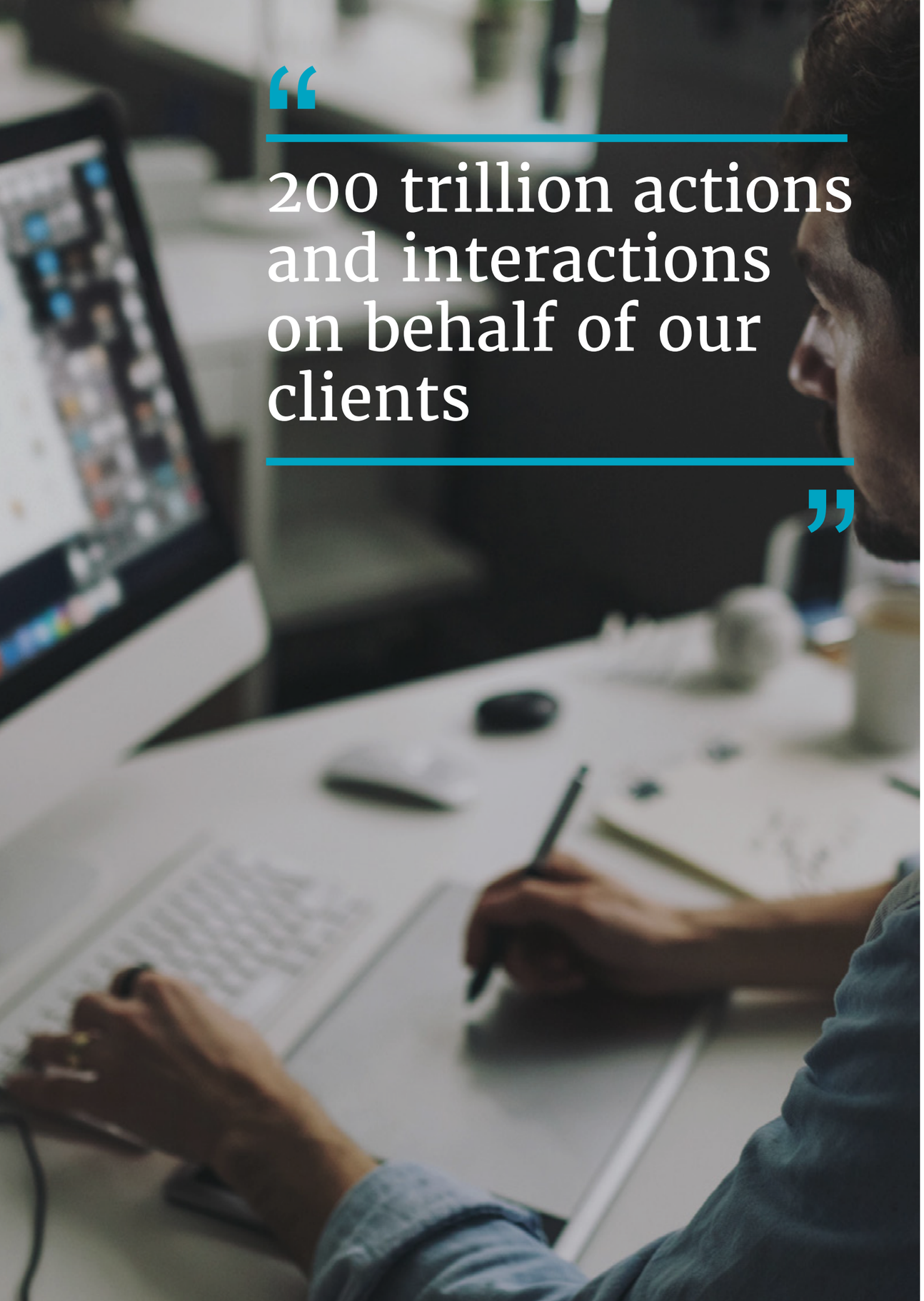
We are regularly asked to consult on the best practise journey techniques for many different scenarios.

Over the past 9 years we have developed a very good understanding of what works and what doesn't.

In this guide, we will attempt to consider many different scenarios and offer our humble opinions as to the best practice approach.

Not all marketing automation platforms are born equal and with this in mind, we can only offer advice for customers with a Marketing Automation platform with equal or more power to that of the Force24 platform.





What Gives Us The Right To Comment?

As a leading UK Marketing Automation platform vendor, we have observed and helped shape the industry, by developing tools and standards that help Marketers all over the world do more.

Within the Force24 platform, we currently hold over 25,000 active customer journeys and have computed over 200 trillion actions and interactions on behalf of our clients.

We pride ourselves on making sure each one of our clients feels loved and supported, and we do this by offering free training and support for life! Generous hey?

Well yes, but there is a reason for it! Because we offer such a high level of support and contact with our clients, we get to hear first-hand what’s making their life hard or what they get most value out of! Our competition doesn’t quite see it that way!

What Tools Do I Need To Follow This Guide?

That's an easy question to answer! You need force24!

As previously mentioned, we have honed our platform based on the advice and comments of our customers, which is why we are quickly growing to become the leading UK based Marketing Automation services provider.



But... we understand we can't work with everyone yet. So in which case the tools you will need are as follows:

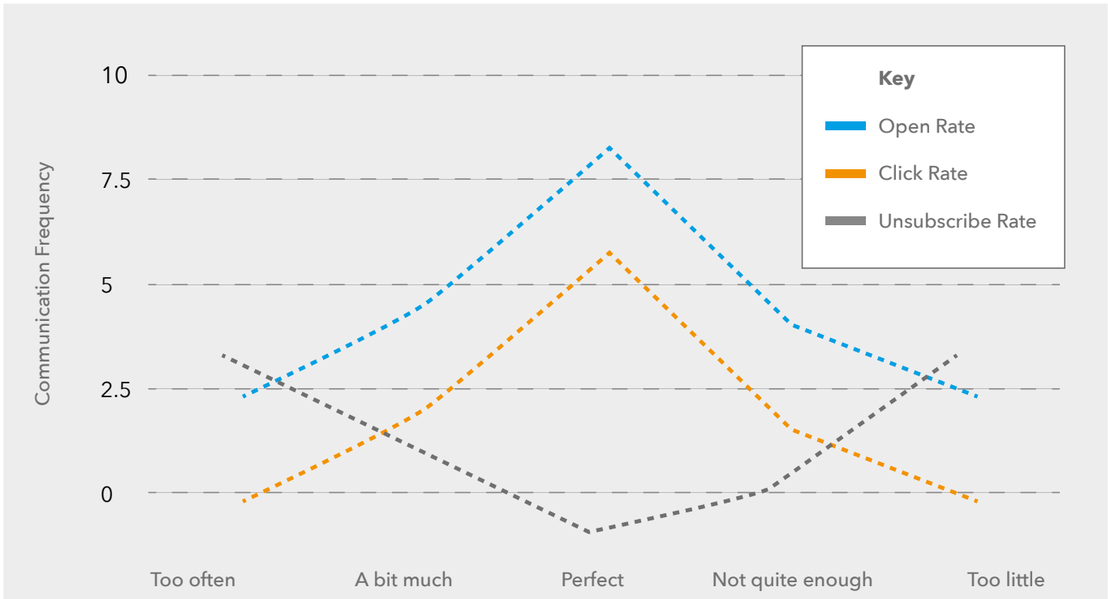
- An email service provider with an email template editor that ensures mobile compliant emails – very important
- The ability to monitor a user's website engagement
- A lead scoring platform
- The ability to build landing pages – rather than direct traffic
- An automation engine with the following features:
    - CRM integration to push key contacts to the sales team. The key to discovering the gold is pushing the hottest contacts into the sales team quickly
    - An extensive external integration app library to the major marketing apps you use in your business. Where possible, automation is to take all of the load. Integration works to save the marketers time and not be relied upon for any part of the process
    - A delay module that can take into account times of day. A classic issue with automation platforms is not being able to reset a user's activity back to optimal engagement hours. This means the time of day/day of week the users original trigger action is ignored after a delay stage
    - An automation engine that can make decisions based on time of day. When sending an email we need to know if the call/contact centre is open at the time we send the email, this may affect our choice on what to send

Tips

Base Penetration

It's important to keep an eye on over penetrating your base. But it's also critical to not under penetrate your base.

The symptoms of an over penetrated base look very similar to that of an over penetrated base. The key is to find the sweet spot as illustrated below:



Many marketers over estimate the value of their communications and the attention of their readers.

To demonstrate this we usually ask you to name one commercial email you received into your inbox yesterday. 9 times out of 10 people can't name one, but occasionally when somebody does remember, they tend to recall a brand they are engaged with. This is the key, relevance rewrites the frequency rules.

Value Of Content

On average, it takes 5-6 commercial touches until the message has sunk in. So, don't be offended if the uptake on your amazing content is low from the first email. Build your strategies to take this into account, and make sure you stop when the user engages.

Base your opinion after you have tried to push the message several times.

Connect Up The Sales Team

If you do not have your sales CRM integrated with your Marketing Automation provider, we would recommend this is something you look into... empower sales with the power of your marketing and power marketing with the power of the sales teams efforts.

You should (at least) be able to push new contacts from sales and those in active discussions through to Marketing Automation as you may wish to treat these differently. You should also be able to create tasks for sales teams to call your hottest leads quickly.



Open Rates Are Not To Be Trusted

Of course, open rates are a key metric within the marketer's tool box on which to base opinions, but remember no two open rates are the same.

In today's market, ESP's are faced with an awkward decision:

Display bot activity in 'open and click rates' and show strong stats

or

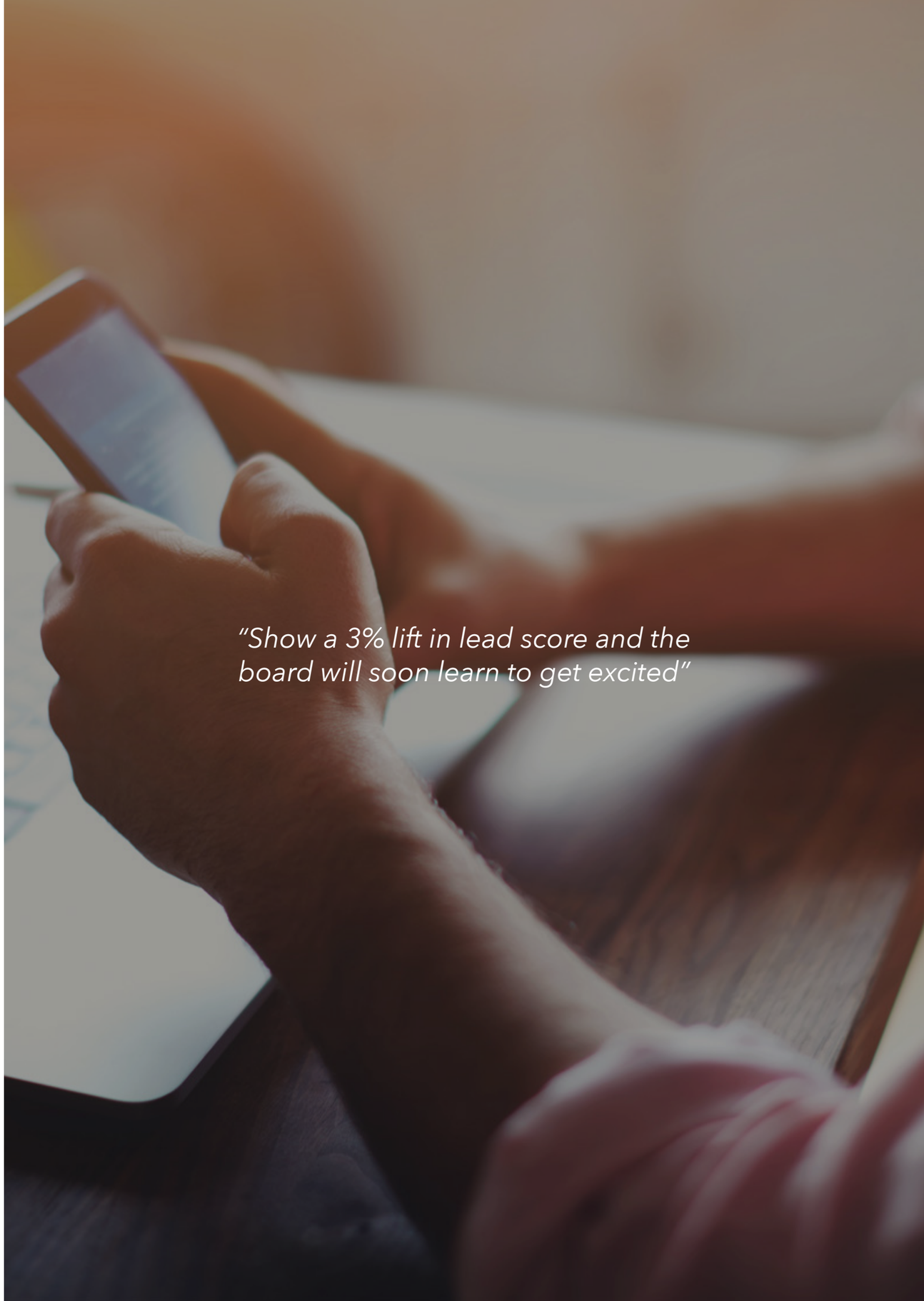
Do not display bot activity and show a lower open rate

Now in the world of automation its absolutely imperative that we only report the actions of users, and not the actions of spam checker bots making sure our emails are virus free.

Instead focus your attention to the engagement of the base using an average lead score metric to demonstrate message fit!

Open rates are so far removed from bottom line profit, nobody on the board is impressed when you demonstrate a 3% open rate increase. However, from our experience high lead scores are the pre-runner to ROI! Show a 3% lift in lead score and the board will soon learn to get excited.

> In the world of automation its absolutely imperative that we only report the actions of users and not the actions of spam checker bots



Follow The Engagement, Not The Click

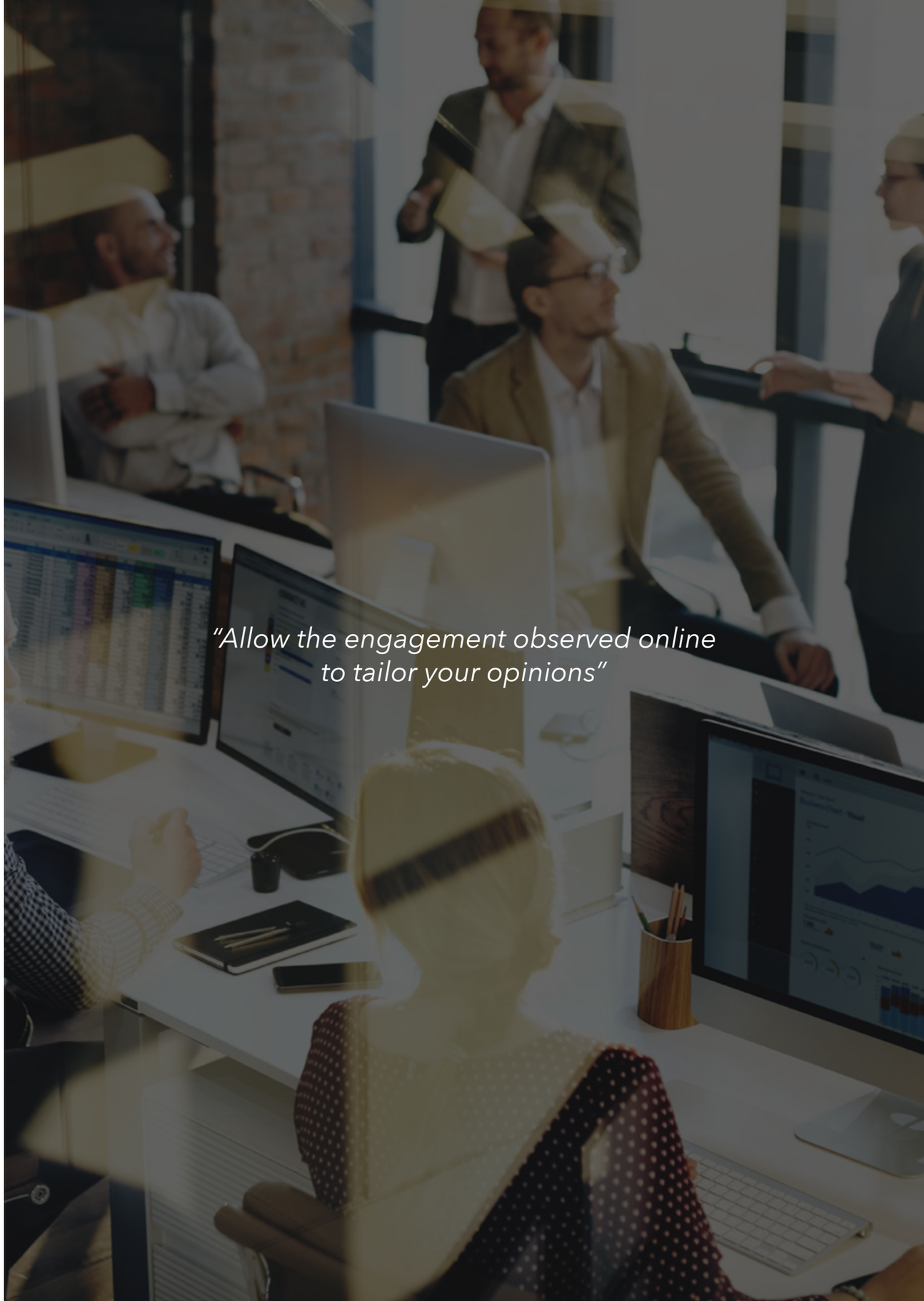
Before the advent of automation platforms being bundled with detailed web activity tracking, the click was all we had to go on! Now we can consider every page the user looks at and has ever looked at.

We want to know what they do while browsing freely, because that's when I get the real insight.

To demonstrate that point, in the kitchen retail world, lower priced, value products generate the highest click rates. – the same bargain hunters, viewed and ultimately purchased more mid to premium products.

Allow the engagement observed online to tailor your opinions.







Email/SMS Is The Bait Not The Full Meal

Let's remember simple principals and componentise your collateral!

Define the roles as follows:

Email
- A hook, generate interest, intrigue and inspire

Landing Pages/Microsites
- Convert interest and intrigue into enquiries

Brochures
- Inspire, lead and generally generate a desire

Website
- Introduce, lead, create a funnel for a user to walk down

Sales Professionals
- Sell!

Deliver The Content Over Time

Remember, you may have a complicated message to instil into your contact base, but that doesn't mean they want or have the time to consume it. The power of automation allows you to distil the message down and deliver it over time in bite size chunks.

In a simple HTML email, I like to ensure no more than two paragraphs and at most 2 calls to action, whereas in a plain text email I am happy to allow more content but remain focussed on a very small and simple overall message.

> The power of automation allows you to distil the message down and deliver it over time in bite size chunks

Split Test

One of the questions we get asked on web demos is can we split test our email campaigns and of course you can… but let's understand what split testing should be. A split should vary the mechanism message, content or offer, not just a subject line. Obviously, you should only split test one mechanic at a time. But these are the factors that drive engagement, and the ultimately the bottom line.

Let's put this in to context. If the wording of a subject line is the difference between the contact buying and not buying, I would suggest the brand relationship is weak and you may have some brand rep work to do to first, producing more relevant and targeted communications. So, let's assume we understand our base and have identified what to say and to whom. The next stage is to consider the approach needed to pull the contact back into the sales funnel.

Perils Of Plain Text Reply Management

Remember, when building a journey that utilises plain text you must be able to manage the replies. You must use an automation platform that enables you to direct replies from specific stages to specific sales users or a monitored marketing inbox.

Many contacts send messages as a reply back to these plain text messages, these may be unsubscribe requests or sales enquiries. Either way, you must review the replies and act accordingly.

The Force24 system allows the user to reply and maintains the original message. If a contact requests to be removed you can simply scroll down and click the unsubscribe link in the footer of their email to remove them or update their subscription preferences.

> “Use an automation platform that enables you to direct replies”

Control The Whole Environment

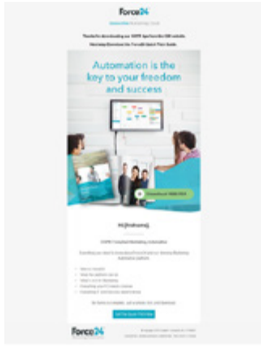
One of the biggest factors to success in delivering a successful campaign is around controlling every aspect of the user’s journey. By that I am specifically referring to landing pages! Every marketer knows they need to build an email but few are prepared to build landing pages to support the campaign. Perhaps it’s too hard or they don’t have time. Either way, your biggest block to conversions will be “click leakage” around your website.

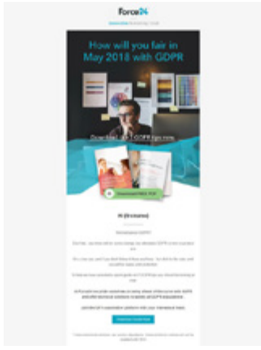
Giving users a simple focussed page in which to land provides a seamless transition from what was discussed in the email or SMS. Conversion rates sore from 1-2% to 10-15%.

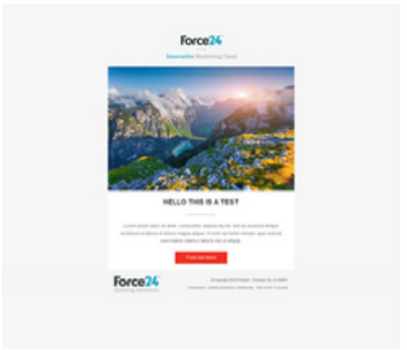
Develop A Campaign Template

Time is of the essence and every marketers time is precious. It’s great practice to build very simple campaign templates, both emails and landing pages, that can easily be swapped out to portray a new message. This allows you to spend more time doing what matters and also gives that consistent brand message.

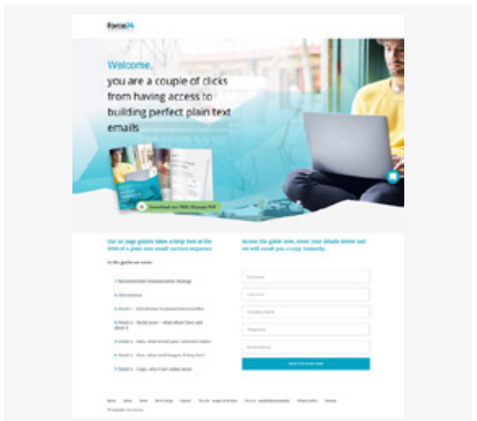
Take a look at the following example of that exact principal:

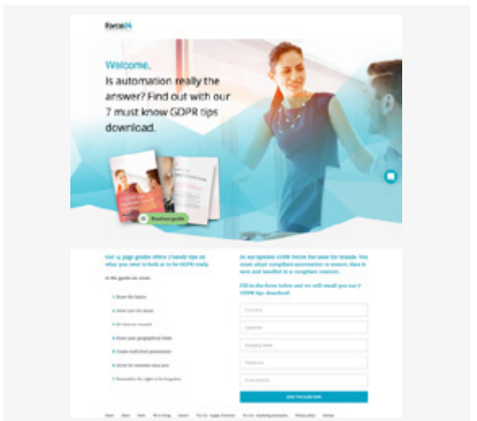






Both emails were developed from the same simple template (above)
This same principle can be applied to campaign landing pages too (below)



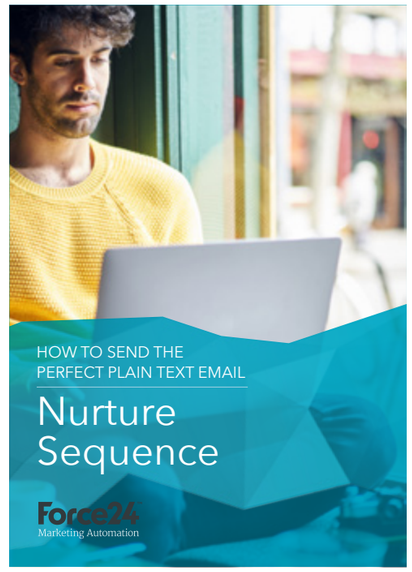


By providing this consistent approach you are also able to accurately assess your evolution, content and messaging credibility on the basis the assets were identical.



Building Perfect Plain Text Emails

An essential part of b2b nurturing is producing quality plain text emails



Download the guide:

Learn How To Plan And Implement Your Next Plain Text Email Campaign

Here at Force24 we have produced a guide titled "How to build perfect plain text emails"

You can download your copy of this powerful guide on the link below:

http://landing.force24.co.uk/Nurture-Seq/Thanks.html

Building Landing Pages With Automation

Automation obviously brings you a wealth of tracking power, and gated content for tracked users is no longer necessary (because you know when someone has done something or not via web tracking).

However, use this extra information with care and be aware how your new options affect campaign dynamics:

1. If you maintain the gate on content for tracked users, you will introduce a fall out rate at the gate. However, contacts submitting information to receive the gated content, do so knowing that a sales call may follow, thus giving the sales team an easier call on the back of a gated content download.
2. If you remove the gate for tracked users, you will receive a higher number of content downloads, but will reduce the quality of the calls made by the sales team on the back of the accessing of the content.

It's also worth noting when you implement a content download via an email link, (see gated content download later in this guide), you allow the user base to refresh the data held and renew the user permissions.



Types of Engagement Tracking

Within Marketing Automation, you have more touch points that you can use to track your users. We have detailed these common touch points below:

Email Opens – The standard and most common, but let's consider this as being the weakest form of intent.

Email and SMS Clicks – Also very commonly used for triggering, again in our opinion, a very weak form of intent.

Web Site Browsing Behaviour – This is less common. The Force24 platform tracks users on every page they visit on your website and often gives the greatest insight. For example, I may click an email relating to garden furniture but end up browsing home décor. In addition to page views you can also track search filter values, for example as I browse a selection of products I may set a price range, a preferred colour etc. Also, because web tracking is cookie based, the tracking will still report user engagement anytime they return to your website from any source.
SMS Replies – I may use SMS replies to trigger an automated sequence. I need to be able to consider the words used and search for content within the text string.

UTM and Campaign Code – Using UTM codes passed from your paid search and social, you can identify lead sources and categorise contacts based on the inbound campaigns they engage with.

Lead Scoring

Lead scoring is the process of giving contacts a numeric value to portray their level of engagement.

Having worked with many businesses over the years to help establish effective lead score models, we realised the outcome was usually the same so we decided to take things back to basics and understand the role of lead scoring, and develop a standard methodology any business could use.
It consists of 2 very simple components:

The scoring

This considers the online engagement we observe of a contact. So, if a user performs any of the following actions, we will apply the associated score:

Action	Score
Email Open	**1**
Email/SMS Click	**2**
Web Page View Any page of your website viewed online	**4**
Direct Page View As above, but we increase the score if the user has not come from an email or sms click (they found their own way to your website)	**5**
High Value Page View These are pages on your site that denote buying intent (such as a cart page)	**10**
Goal Page View When a user has completed a goal	**20**

Each score is added to the current contact lead score value and will remain there for 30 days.

The tipping points

These are the score values at which we consider it appropriate to act. The tipping points vary for each business. The best part is, it's really easy to understand the tipping points for your business using trial and error.

In our business, we use the following example:

Score	Action	Score
0-39	Do Nothing	Allow the users to browse freely
40-69	Call	At this point the contact is usually accepting of a call and had accumulated some questions that a supportive member of the sales team may address
70+	Expedite a call	At this point we usually uncover the fact that the contact has an active requirement and is considering supplier options. A supportive member of the sales team can usually instigate the sales process for contacts reaching this tipping point.

Over complicating the lead score process in our experience serves to confuse the meaning of the score.

The scoring will remain a constant for all contacts in your base and the method will not change. However, the tipping points will. So you may decide that contacts with a particular job title should not be pushed to the call action until they reach a much higher score.

Learning About Your Audience

Engagement Curves

In order to maximise your returns through automation you must understand your contact's buying habits.

When we understand the journey a contact undertakes when considering buying and using your products, we can begin to plot appropriate messages to encourage (or nurture) them along the correct buying path.

To help illustrate this point, the boffins here at Force24 decided to develop a user engagement model. Taking into account the behaviour of millions of contacts over several years, we applied the latest AI and machine learning techniques to establish a contact engagement model.

Everyone is different, makes different choices and is influenced by different things – yet strangely we behave in a very similar way to each other. We were able to consider a variety of different engagement profiles and categorised the behaviours to create models for:

1. *Low value consumer e-commerce*
2. *High value consumer non-ecommerce*
3. *High value business to business contract sales*
4. *Low value business to business product/service sales*

Sales

It's important to note, your objective as a marketer is to not necessarily change the curve or affect the curve, but to work with the curve to understand what to send and to whom.

“Taking into account the behaviour of millions of contacts over several years, we applied the latest AI and machine learning techniques to establish a contact engagement model.”

How To Use Engagement Curves

Axis

The Y axis represents engagement. This is measured typically via lead scoring. Lead scoring gives an accurate view as to the current engagement of a contact. Force24 developed and deploys with all client accounts the Standard Lead Scoring methodology. This takes into account email engagement, SMS engagement and splits website engagement into normal web pages, high value web pages (such as cart pages) and goal pages (thanks pages). The higher the lead score, the more engaged the contact is. The X axis represents time. This can be worked out for your business based on an estimate of the average sale gestation period.

The Commercial Zone

On each chart, you will see a grey zone labelled the commercial zone This zone is the area where we have recorded a higher chance of a sale being made. Contacts showing engagement levels outside of the commercial engagement zone are very unlikely to buy at this stage. This doesn't mean they won't buy or don't want to, but need further nurturing and or time before you can sell to them. We call this the passive engagement zone.

The Blue Line

The blue line represents the average engagement of contacts completing a sale. This is the one to watch as this helps you build your model and determine what to do when people hit that score band.



The Trends

As previously mentioned, users act in an eerily similar way, which is great for marketers as we can begin to map a route to a sale.

In the first instance, most models showed a rapid growth of engagement followed by a sudden dip. We have put this down to the fact that most people perform a research phase of any purchase first. This phase in some instances would then take the contacts outside of the commercial engagement zone (i.e. you can't sell to them yet). This would usually be followed with a steep incline to the point of purchase.

The timeline

The time line was an attribute that varied immensely from company to company and product to product. So, it's important to establish your own time line based on the data you already hold.

High Value Consumer Non-Ecommerce

Taking a closer look at High value consumer non-ecommerce, for example kitchens, bathrooms or vehicles

The interesting observations here are:

The commercial zone is very big, we put this down to the fact that most consumers are opportunist and retail brands are aware of this, and present offers like 75% off sale and 0% credit. This has essentially accelerated the sale and made it more accessible.

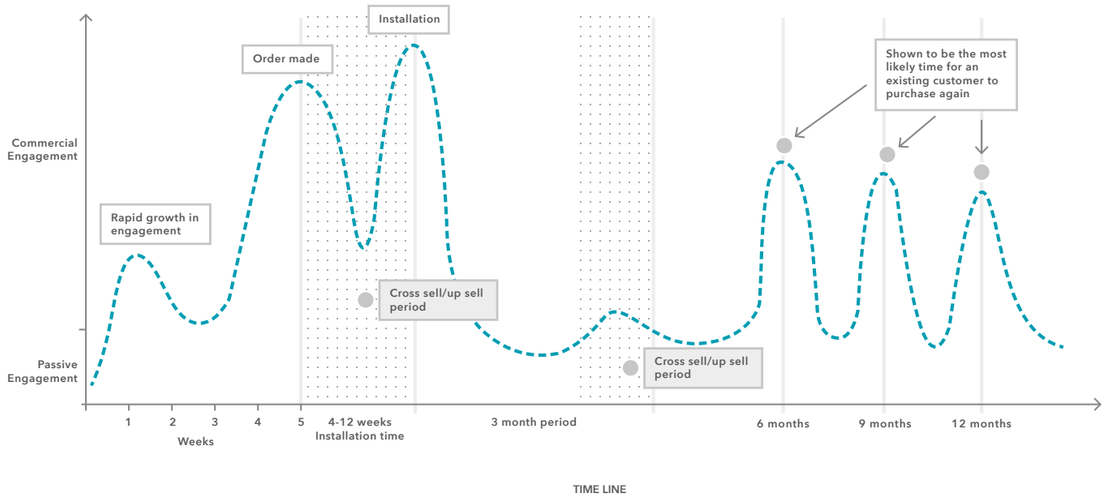
The initial dip remains within the commercial zone. Contacts are susceptible to strong commercial offers even in this stage.

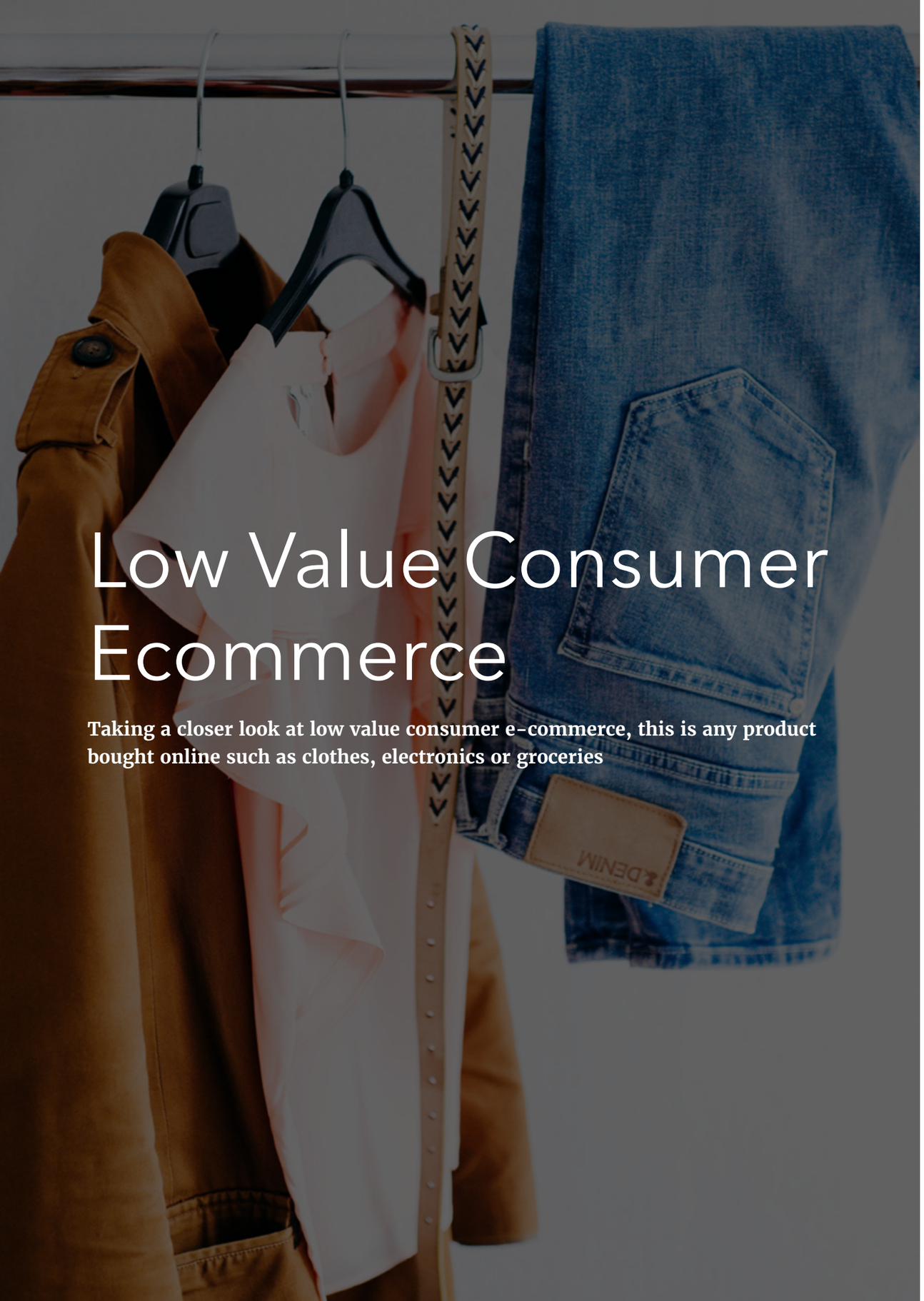
Post sale and pre-delivery, the engagement drops to a point but again remains within the commercial zone, meaning cross sell and upsell opportunities exits. However, the key observation being engagement is at its lowest at the mod point between sale and delivery, therefore the strongest time is either just after purchase or just before delivery.

Delivery engagement is the highest peak of engagement (more than the point of purchase).

The post-delivery engagement decline is rapid and usually quicker than the pre-purchase growth of engagement. However, this stabilises and sits somewhere at the very bottom of the commercial zone for the duration of the products life span.

Three Further diminishing peaks were observed following delivery, these represent further sales opportunities and can be capitalised up to keep engagement alive.





Low Value Consumer Ecommerce

Taking a closer look at low value consumer e-commerce, this is any product bought online such as clothes, electronics or groceries

The interesting observations here are:

The engagement zone here is much smaller, meaning users browse more and remain within the passive engagement phase for longer. You can't sell to me, but you can lead me.

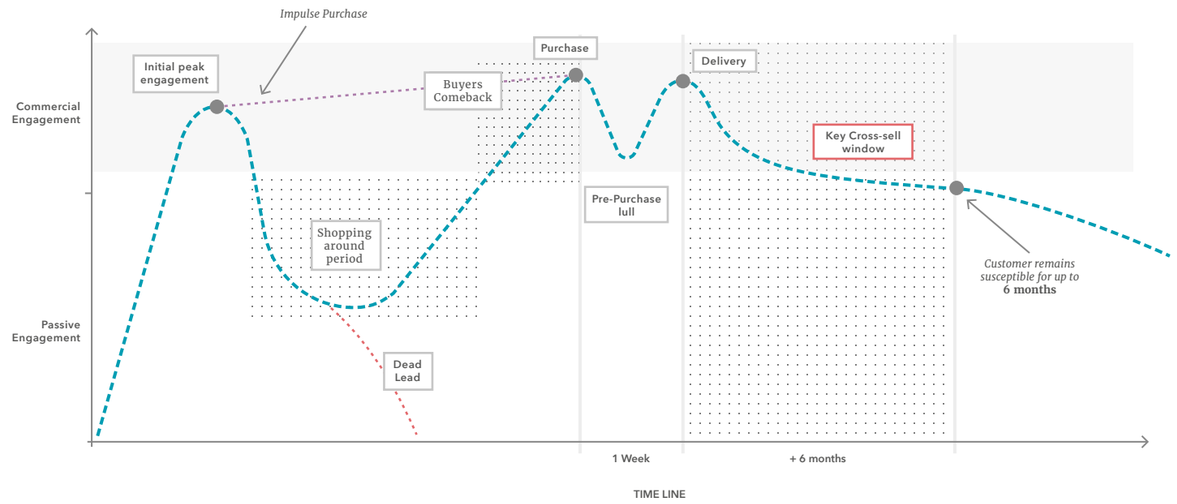
There was a second very similar less dominant model that showed the users going straight to purchase from the first peak in engagement (purple line).

The dip takes the contact well outside the commercial engagement zone, a rise back to the purchase engagement being slightly slower and longer than the initial engagement.

The contact remains in the engagement zone for quite a long while after purchase. With only a small dip post order, pre-delivery.

The contact remains within or close to the engagement zone for several months. The rate at which the contacts engagement diminishes is much slower than the rate in which it first grew.

No further definitive models illustrating peaks of engagement post sale were observed. This means your period to maximise life time value is within 6 months (in the case illustrated). If no further purchases are made in this period, it will be significantly harder to do so after.



High Value Business To Business Contract Sales

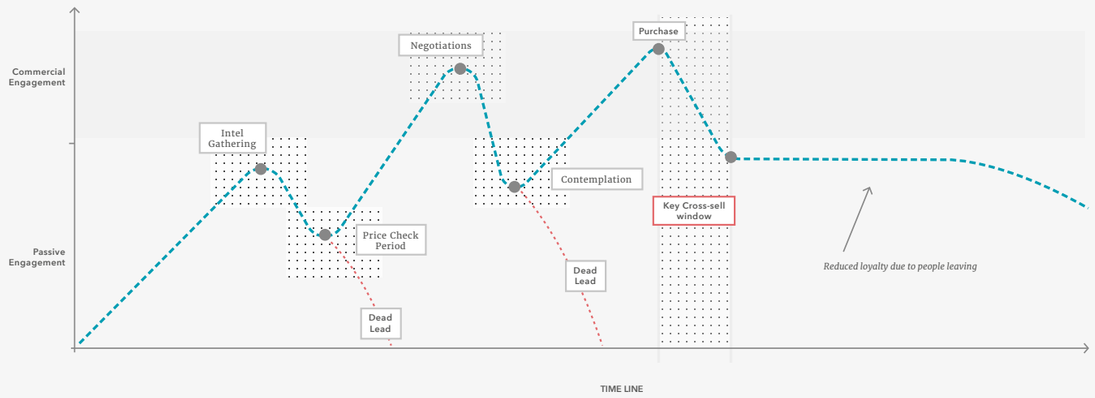
Let's take a closer look at high value business to business contract sales. This is any capital equipment, or high value B2B purchase

The interesting observations here are:

A small commercial engagement zone, meaning contacts often don't have the ability to buy and require authorisation.

An extra peak before purchase! This is the most important aspect of this particular curve. This indicates the presence of a "negotiation" phase, where the contact has narrowed the supplier down and wishes to drill down into detail. This phase was followed by a sharp drop out of the commercial zone. This then showed a tendency to either die at this point or gain traction again.

From the point of purchase, we noticed very few models indicating anything other than a decline in engagement post purchase.





Getting The Most Out Of Marketing Automation

Marketing Automation Strategies

Difficulty Ratings

In our guide, we have given each strategy a "difficult rating". We have assumed you are using the Force24 platform or a platform with similar strengths and capabilities. Platforms drastically vary in capability so please use this as rough guide only.

1 - A walk in the park

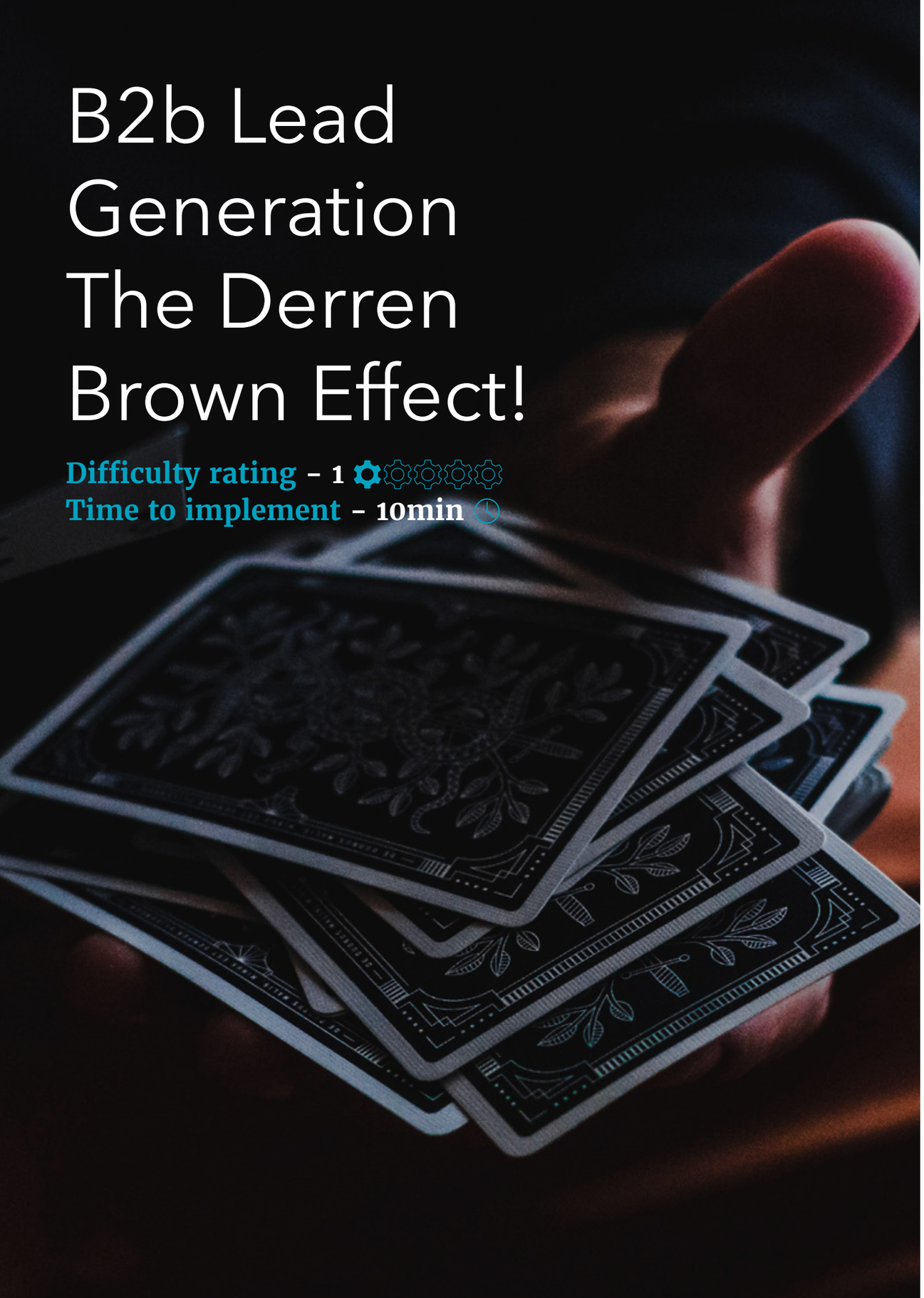
A novice could do it without any prior experience of automation.

5 - Expert Level

A professional's task which needs considerable thinking.

Time Estimations

We have provided a time estimation for the development of the journey alone. We have not made any provision for the creation of content or the creative assets required to execute the journey. The time element covers the creation and configuration of the journey itself.



B2b Lead Generation The Derren Brown Effect!

Difficulty rating - 1
Time to implement - 10min

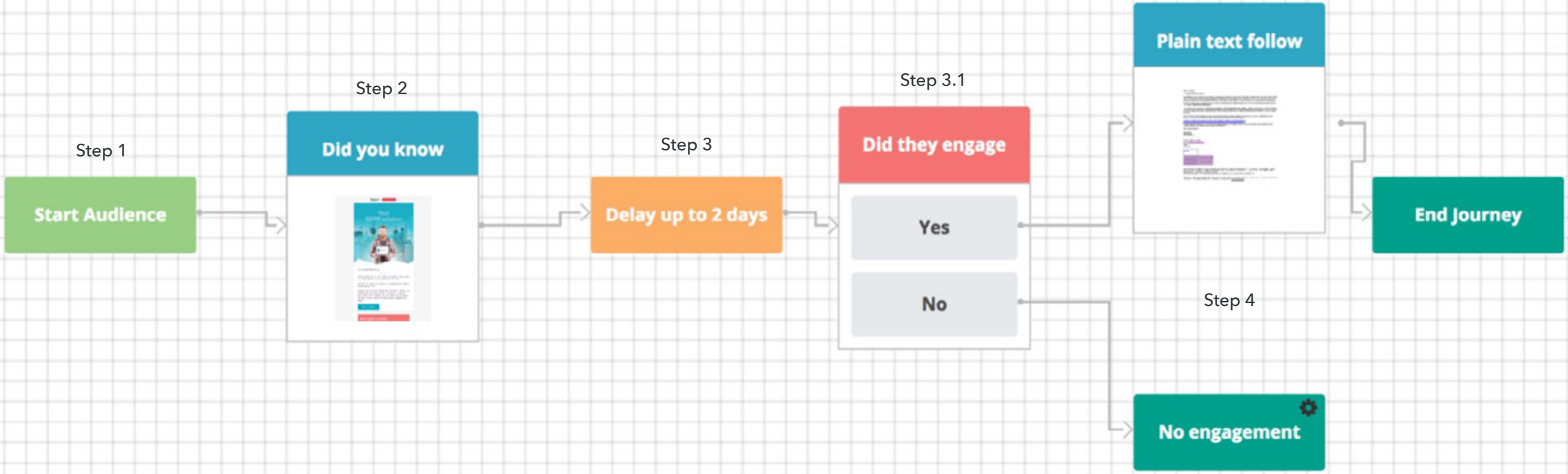
> This is one of the most powerful nurturing techniques that generates massively amplified conversion rates.

What is it?

This is where you introduce a topic or an insight from your brand and then later use this topic create a reason for a member of the sales team to engage.

This is one of the most powerful nurturing techniques that generates massively amplified conversion rates. Buyers are keen to ensure they are consuming the latest techniques and or using the best equipment.

By introducing a topic, observing the engagement around the engagement and following up with a sales person style plain text email, use this technique next time you want to maximise the engagement on a piece of content you wish to push.



How do I create it?

In this example, we will produce a single stage version of this journey. Please note, for best results you may wish to loop the journey with varying incarnations of the content.

Step 1

Define your start audience - who do you want to send it to?

This will typically be a defined contact list, but can work just as well when its triggered from a CRM or web interaction.

Step 2

Trigger your first branded introduction email

This email is usually sent from your brand email profile. In our case we will send this using the from display name: Force24

Step 3

Delay for a maximum of 2 days

Make sure your delay takes into account the time of day and day of the week. You must ensure your automated emails are not being sent at a bad time, for example, in B2B during a weekend or at unsociable hours.

Step 3.1

Make a decision - Did the user engage with the content or not?

In this instance, an email open indicator would suffice as enough engagement. Make sure you are connected to CRM and suppressing contacts that called in. Also make sure web tracking is enabled and you suppress contacts that downloaded/viewed the content you wished to promote.

Step 4

End the journey for people who did not engage

A good save is as good as a conversion. We do not wish to push content on people that are not interested in reading it, we risk the possibility of a good prospect unsubscribing.

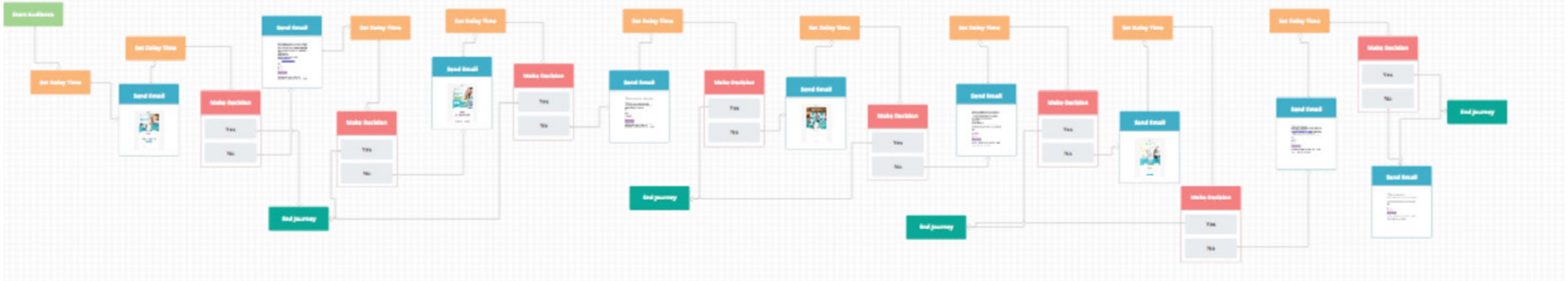
Step 4.1

Send the plain text email for contacts that engaged to the introduction email

This email will trigger after the 2-day delay and only be sent to those contacts that engaged with the previous email. This email should be sent from a human name rather than a company email. The construction of the content should reference the content discussed or introduced in the first email. The primary CTA should direct the users to read more online about the subject.

Expanding the sequence

Here is a view of the same journey scaled up over a number of weeks:



Remember

- *The conversions are likely to come on the second email rather than the first.*
- *The plain text emails may generate legitimate replies and you must be ready to handle these replies in your sales team.*
- *You can play with this model and expand this to be many stages over many weeks, first introducing a concept with the brand and then following up with a plain text from a member of the sales team.*
- *When you use any plain text email from a sales person its important you have connected your CRM platform to ensure your automated emails do not cross over with real life engagement with that client/contact.*

> “The second email will achieve circa 70-80% open rates with CTR’s of 30-40%”

What do the results look like?

Interestingly, this is a classic example demonstrating the weakness in reporting on open rates. Your first email will achieve your normal open and click rates, which if you follow the earlier advice within this guide, should be a few points higher than your normal.

The second email will achieve circa 70-80% open rates with CTR’s of 30-40%. Obviously on the face of it these are amazing, but let’s remember this is simply because we sent these contacts a message 2 days ago and we know they liked it! Either way its engagement you didn’t capture before this technique.

Stimulating The Review Culture In Your Favour

Difficulty rating – 2

Time to implement – 10min

What is it?

Gaining external brand credibility via review websites is pivotal to support your sales effort. As the momentum of the review culture is growing, reviews and opinions are becoming prominent brand allies. Harvesting quality supportive messages can no longer be left to chance. You must cultivate positivity and encourage users to leave their message for the world to see.

There are 3 key factors in play when you set out to enhance your review profile:

1. Marketing must have an understanding as to the quality of the product and service delivery. They must have the ability to materially affect the processes implemented and help to improve failing areas of the business. Listen to negative reviews and strive to deliver perfection for customers. All aspects of the business must be aware of their current review scores and be targeted on improving. Ok I know this is in a perfect world and it is rarely the case. But failure to mention it would be remiss.
2. Knowing when to ask for a review is almost as important. For example, asking for a review 3 months after buying a product drastically reduces the chances of receiving a review in the first place and increase chances of identifying fanatics (both good and bad). Your review prompts must be delivered at the time in which we feel engagement is high (please see the engagement curves). Some likely times to consider:
    - *Immediately after purchase*
    - *1 Day post delivery*
3. Vetting, asking for an internal review should always be the first step. This allows you to identify issues quickly and resolve them before they reach the public domain. Only when you see a positive engagement should you push for an external review.

> “It’s always important to make the contact feel like they have a chance of winning”

How do I create it?

In this example, we will assume a simple trigger such as product purchase. As already mentioned knowing when to trigger is paramount to ensuring the best possible engagement and results.

We will also take a simple integration with Trust Pilot to help us out (although most review sites support a simple link to a review location on the review website).

We have also taken the decision to give the user an option of 1,2 or 3 stars review. This is entirely up to you.

We recommend the following approach:

★☆☆ **1 Stars**

Send notification to Customer services of a possible issue

★★☆ **2 Stars**

Say thank you and nothing more for now

★★★ **3 Stars**

Say thank you and instigate a trigger from a review based site like Trust Pilot

You could use a scale 1-10 if you wished but the same three outcomes would apply:

★★★★☆ ☆☆☆☆☆ **1 -4 Stars**

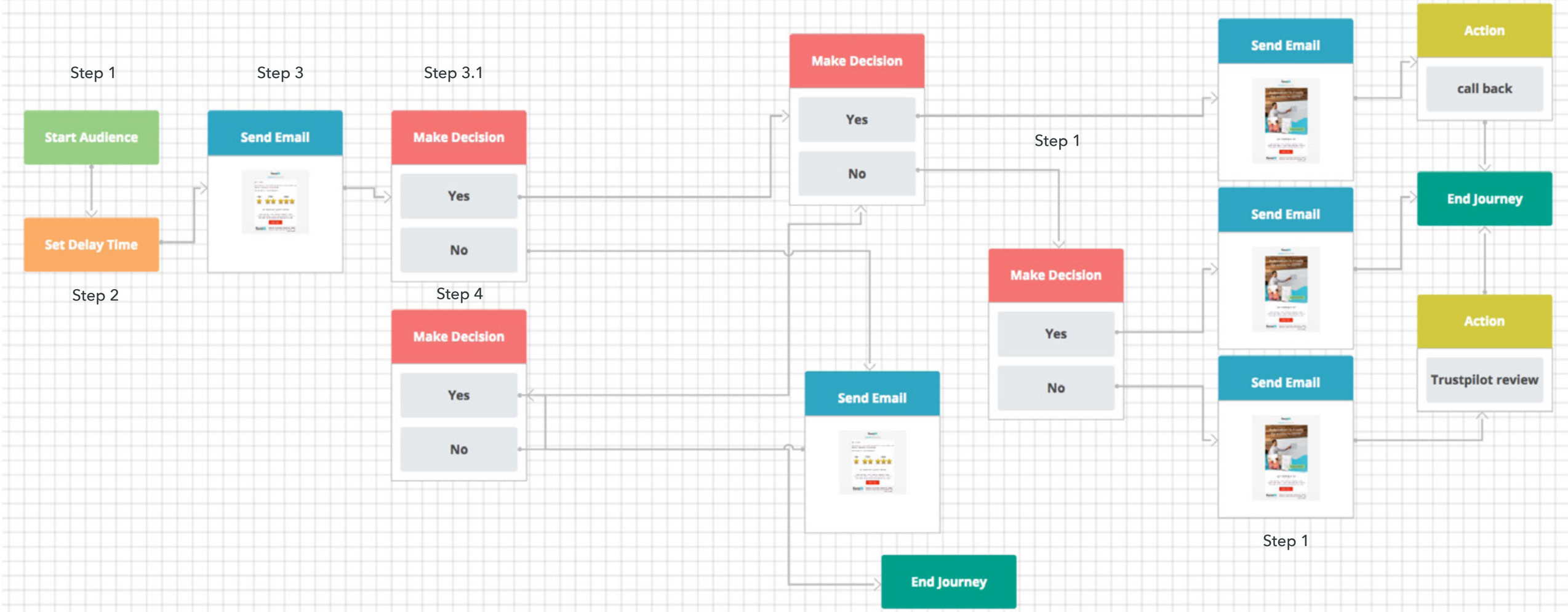
Send notification to Customer services of a possible issue]

★★★★★ ☆☆☆☆☆ **5-7 Stars**

Say thank you and nothing more for now

★★★★★ ★★★☆☆ **8-10 Stars**

Say thank you and instigate a trigger from a review based site like Trust Pilot



Combining reviews with prize draws is one way to help increase uptake and positive reviews. It's always important to make the contact feel like they have a chance of winning, therefore multiple smaller prizes are better than single larger prizes.

The key factor is to understand the value of any prize and build a commercial argument to the business to warrant using it. We often find an uplift in uptake is minimal, but let's be clear, an uplift is an uplift.

Step 1

Define your start audience. Who do you want to send it to?

Base your trigger point when the engagement is at its highest. I would suggest in this instance, straight after the payment is received.

Step 2

Delay

Its key to make sure you capitalise on your engagement. So, you may wish not to use a delay here, but I like to use one just to make sure we control when the user receives the request. Using this method, I have seen more positive reviews occur during social hours of the day rather than late at night.

Step 3

Send your simple review email

Send your review email from your 'brand from name' (in our instance, its Force24). This works better than attempting to use a human name, unless the individual contact has a relationship with a member of your team, in which case you may wish to use a data field to power the from name.

Make sure the subject line is simple and straight to the point. Remember to use a verb to ensure an action is defined. Some examples are:

- "Give us your opinion."
- "Tell us what you think and win!"



Step 3.1

Make a decision - Did the user complete a review?

In this instance, we have provided the user the ability to click a star rating within the email. This then leads on to a few more simple questions on a landing page.

A good save is a good as a conversion. We do not wish to push content on people that are not interested in reading it, we risk the possibility of a good prospect unsubscribing.

So we have two factors to consider here:

1. *Did the user click one of the star ratings in the email?*
2. *Did the user go on to complete the further survey?*

In our opinion, we are happy to accept the position of a customer providing their feedback in the email click, and do not push them to complete the simple questions on the landing page. Instead, we use the click from the email as being the key determining factor in customer happiness. The information gathered on the landing page is to supplement the understanding of the position.

We also feel with customer surveys, that a survey email open without a click constitutes the submission of a basic opinion of indifference, and rank this activity as a mid-weight rating, (I saw your email but don't feel you have done well or bad enough to bother telling you).

In the event a level of feedback was received, we pass the users to the YES branch of the journey.

In the event of no engagement being received, we pass the users to the NO branch.

Step 4

Times and delays

Within the Force24 platform, we have elected to use the "time out" delay option for 2 days. This means we give the users up to 2 days to perform an action. If after 2 days they have not performed any action, they are passed to the NO branch. However, if the user performs the action, they will instantly pass to the YES branch.

Remember the engagement curves discussed earlier in this document - engagement reduces as time elapses. So the time-out must be as little amount of time possible without appearing too keen.

We have opted for 2 days. Anywhere between 1-3 days is a safe place for this delay in our opinion.

Step 4.1

Send Reminder Email

Now let's send the reminder email. Perhaps try changing the subject line to be sympathetic of the fact they may have already seen the first email. Here are some examples:

- A gentle reminder, why not give us your opinion?
- Last chance to tell us what you think and win!

Step 4.2

Make Decision

Essentially this is the exact same decision as the one made at Step 3, as we are looking for any engagement received by the contacts.

In the event that a contact matches the criteria outlined, we will pass them to the YES branch. This will be connected to the same destination as the YES branch in the Step 3 - make decision.

If the user fails to respond in any way one final time, we will pass them to the NO branch which will then pass to an End journey component. Asking twice is plenty.





Step 5

Make Decision regarding review received and Stage 5.1 Make Decision

Users with a review will be passed to this stage for this make decision component to decide what the review outcome was.

Since a decision can only answer YES or NO, we sometimes have to "Stack" decisions to determine the actual outcome. We have done this in this example. We know from the previous Make Decision that the user has submitted a response, so we can perform an instant decision here. All we need to do now is decide if the outcome was 1, 2 or 3. So in this decision we ask, was the answer a 1?

If the contact meets the requirements of the query, we push the contact to the YES branch.

If the contact doesn't meet the yes criteria, they are by default going to the NO branch, so we push them to the second make decision 5.1. where the question will be: was the review response a 2? Thus assuming the only other answer possible is a 3.

Is the answer 2, move to the YES branch?

If any other answer is present, move to the NO branch, (which will always be a 3).



Step 6

Send Email

Depending on the review received, you may now handle and process the information accordingly. In this instance, we have triggered one of three email templates depending on the review.

I have suggested, should a bad review be observed (score 1), that the next step should be an escalation into the customer services team for a discussion.

Should we receive an average review, we will simply thank the user for their feedback and end the journey.

In the event we receive a good review, we will send an email thanking them and ask that they share their opinion with the world. You may then include a link to your preferred review engine or, (as we have), trigger a link from Trustpilot to be sent directly.

Once all steps are completed, we can end the journey.

Email Creative

As a quick note on this topic, the Send simple email survey should be, just as the name suggests, a simple email. Take a look at the creative example below. As you will see, we have outlined a really simple approach. The user has been presented with a very simple choice.

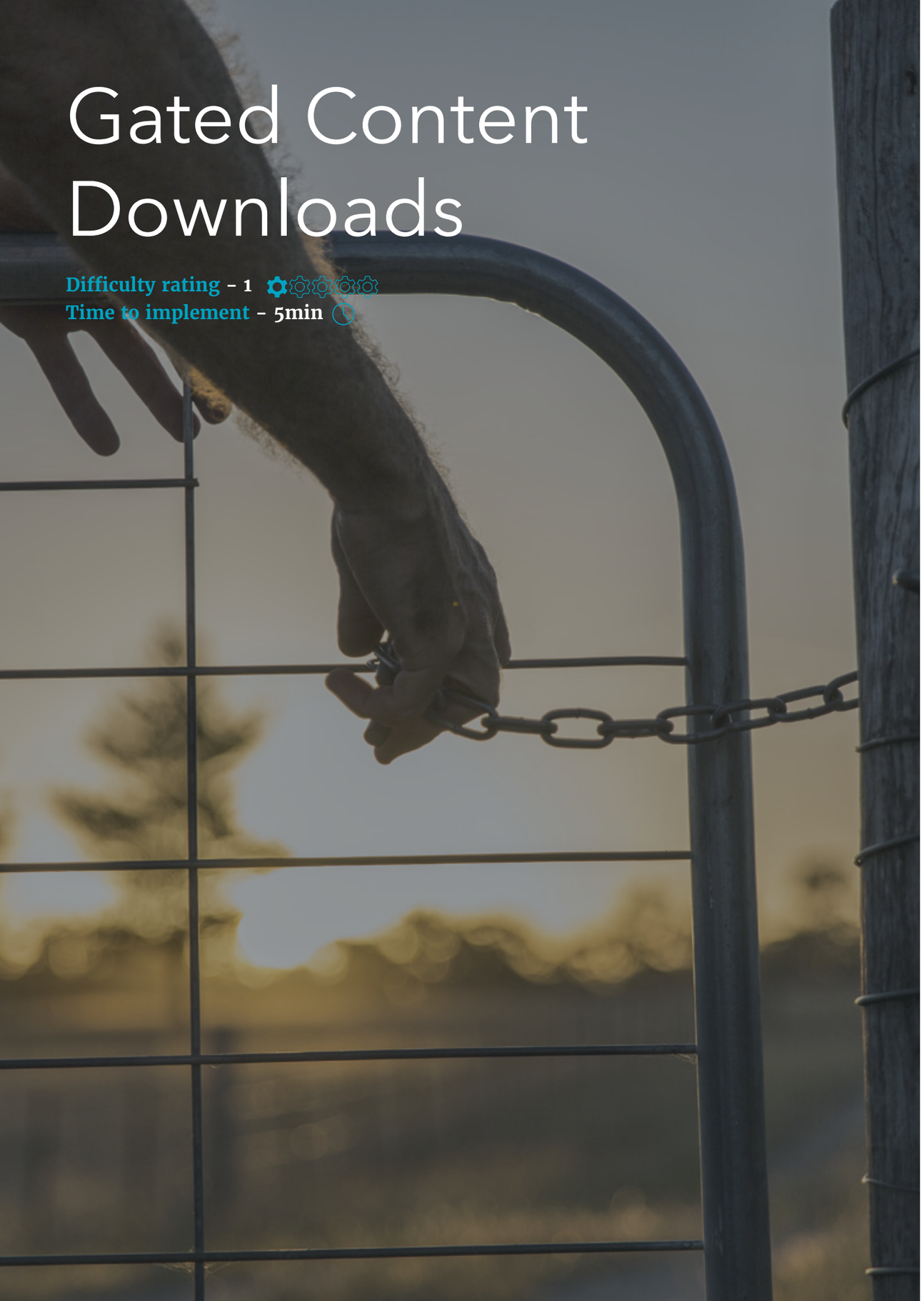
Remember:

- *The conversions are likely to come on the second email rather than the first*
- *The plain text emails may generate legitimate replies and you must be ready to handle these replies in your sales team*

What do the results look like?

Assuming the appropriate trigger points are selected and emails are sent at the height of engagement, you can expect to enjoy open rates in the region of 65-80%, with click rates into the 50%'s. This will be observed on all emails across the journey, with the exception of Step 4.1 (reminder email). This email is being sent to the contacts that ignored the first email, so you can expect to see a much lower open and click rate of 30-40% and CTR of 20%.

Taking this into account, you would expect to enjoy an overall 30-40% review conversion by implementing this principal.



Gated Content Downloads

Difficulty rating - 1
Time to implement - 5min

> Gated content is a great way to gather user's information and refresh data permissions

What is it?

Gated content is a great way to gather user's information and refresh data permissions. It's also a very quick way to damage the accurate data you hold.

Let's look at these two cases in detail:

1. *At the point of a gate I am within my right to stipulate that you must confirm your marketing permissions in order to receive access to this valuable content. I can then use the gate as a way of achieving a double opt-in. You are speaking to the user at the point when they see most value in your marketing content, and therefore stand the best chance of regaining a better level of marketing permission.*
2. *It's also a way that I can damage the accuracy of my data. How many times have you entered fake information into a form to gain access to free content? This becomes a problem when your Marketing Automation engine can append updated contact information to know contacts within your data base. Each entry may be harming your data!*

So, what's the answer?

By asking the user to enter their contact information, and then directing them to a confirmation page, you will see a large number of contacts heading back to the original data capture page to correct the fake entry they originally made.

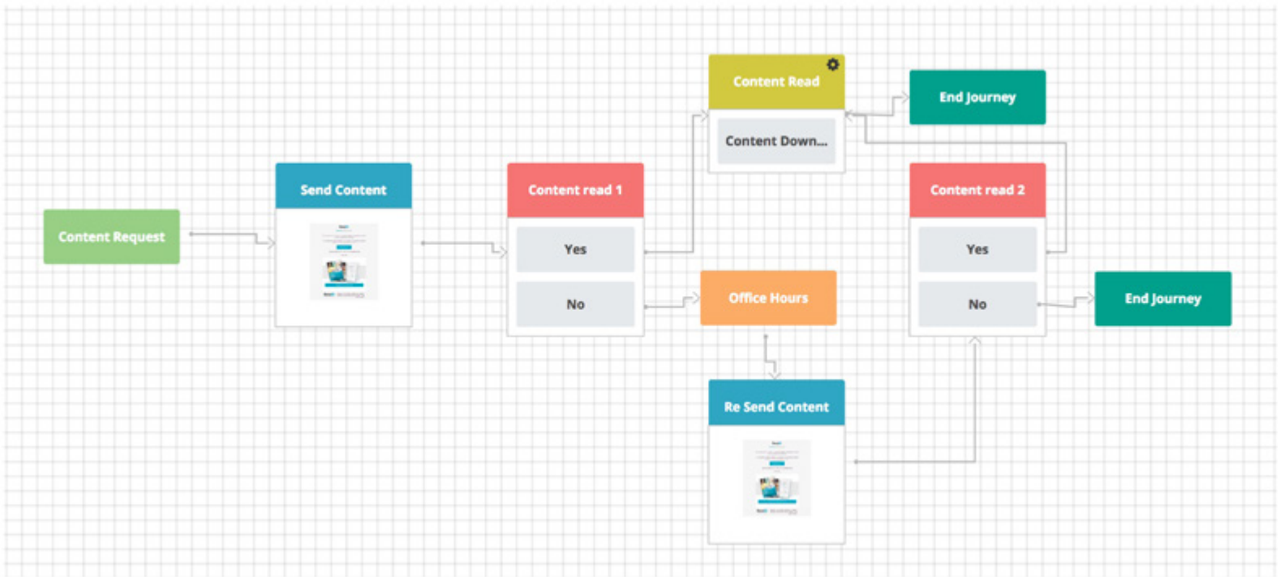


By lifting this kind of process into the Marketing Automation engine, you also gain the following efficiencies over hosting a file for instant access:

- *The ability to monitor a further level of intent, with an open rate attached to the email.*
- *The ability to retarget the user if they have not yet downloaded the guide.*
- *The ability to control the user journey using the Marketing Automation engines email design suite.*
- *You are refreshing the user's cookie on each instance of the click. This may be done on a different device to the device used to enter the information into the gate.*
- *You can build and manage a suppression list of contacts that cannot see your contact and the Marketing Automation engine will prevent the user from being sent this content, such as competitors.*

Tip: Make sure your Marketing Automation engine has a transactional email campaign status that can be applied to email stages of a journey. This means users who have previously unsubscribed will still be allowed to receive the content they have requested.



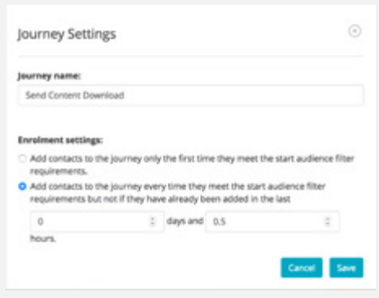


How do I create it?

Step 1

Define your start audience. Who do you want to send it to?

Within the Force24 platform this is an easy one, you can identify contacts based on the name of the form the contact has entered. It's a good idea here to ensure you set a time threshold on how often a contact can be triggered into the journey. In this example, I have set 0.5 hours (30min). Even though your Marketing Automation platform should not create duplicate contacts, in this instance, it would assume the contact has requested the content several times and vend the email for each submission. This approach still allows the user to submit the request more than once, but makes sure it's only when the user has actually requested it, rather than by accident.



Step 2

Send Content Link

Without delays we should vend the email as quickly as possible to the user. In this instance, I have used the Transactional email status (meaning even contacts that have unsubscribed can still receive the email).

Step 3

Make Decision on Contact Read

I like to use this step to see if the user has viewed the content behind the link. I have used the web activity tracking to see the user download the content from the website. Another option would be to consider if the user clicked the content link in the email, but in our opinion, this is a step down the tracking chain. It is always best to base decisions on the final point to ensure accuracy. If the user downloads the content, they will go to the YES branch. I have set the time out on this decision to be 2 days. This assumes that after this time the contact should go to the NO branch.

Step 4.1

Contact Read

In our opinion, it's a good idea to immortalise this engagement by inserting the contacts downloading the content into a human friendly list. In this case I have put my contacts into a list called Content Downloader.

Following this stage, this journey has done its job and I will pass the users to an End Journey component.

Step 4.2

Office Hours

Since my original trigger point was a user engagement, I have to be mindful of the fact that this could have been at an unsociable hour of the day or week. So, it's always a good idea to use a delay to reset the journey to a time window that you control. I have elected to trigger to the next stage, Monday to Friday 8am-6pm and Saturdays 8am -12pm. This may coincide with your office opening hours to provide support to users having issues.

Step 5

Re-Send Content Link

You can be assured that the contact has not downloaded your content and can safely send the link again. However, this time you must not use the Transactional status and instead use a normal marketing permission. This will prevent any contacts that have unsubscribed from being sent the second email.

Step 6

Content Read 2

Just like in the first make decision, we are looking to see if the user downloaded the content. In this case we simply cloned the first make decision.

If the user downloads, they will hit the YES branch and re-join the first make decision YES branch at step 4.2.

If the user does not download the content, they will go to the NO branch. At this point you may wish to carry on and send the contact a further email, but we feel it's better to leave them alone and end the journey.

> It’s our belief that contacts should be allowed to engage with your content freely without harassment.

What do the results look like?

Since this is a user requested content link sent to contacts only a few moments after they entered their contact information, you can expect to see open rates of circa 90% on the first stage with CTR’s in the region of 90%. Of the remaining contacts receiving the second stage email, you will see slightly lower results but ultimately extremely high.

Based on the full journey, you can expect to see 85+% of contacts requesting your content consuming your content, with the added advantage of being able to clean and re-permission the contacts requesting the data.



Passing Hot Leads Directly To The Sales Team

Difficulty rating - 1
Time to implement - 5min

What is it?

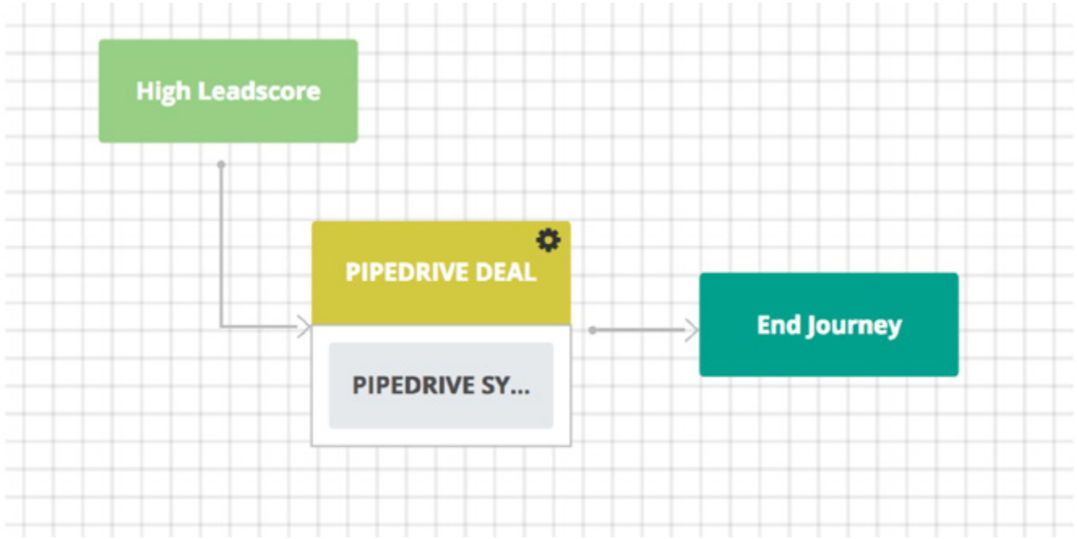
Possibly the easiest but the most effective journey you can implement. Passing the hottest leads into the sales team quickly for a personal interaction.

Not only does this approach help give customers a support environment, but also helps strengthen the relationship between sales and marketing.

In many organisations, we have seen marketing departments passing lists of contacts that had clicked particular emails to sales teams to follow up! Invariably this has one outcome – sales becoming disheartened with the quality of leads being passed to sales from marketing. In most cases the call would be met with a level of aggression from the recipient.

It's our belief that contacts should be allowed to engage with your content freely without harassment. This leads the contact to feel more relaxed when reviewing your product and service. That being said, there becomes a point in a contact's engagement when they may need a little help.

Within the Force24 Marketing Automation platform we deploy a standard lead scoring methodology to help businesses gauge the level of engagement of their contacts. This has been described earlier in this document – see Lead Scoring.

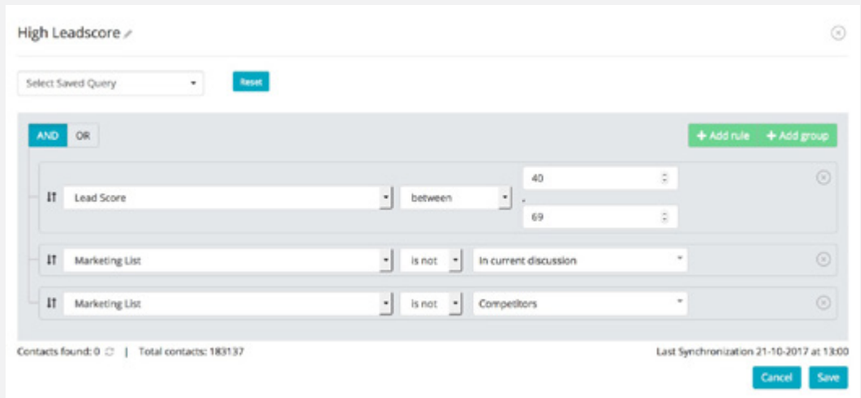


How do I create it?

Step 1
Define your Start Audience

In this example, we will look at pushing contacts with a lead score 40-69 into the sales team.

We will use the contact search function to find people within this lead score range, but I have also stipulated the contacts cannot be in a current sales discussion or be in our competitors list.



Step 2
Add contacts to CRM

At Force24 we use Pipedrive CRM. With 700 integrations, we are integrated with most major CRM applications.

In this stage, we have set an action to create a "Deal" within CRM for a sales team to follow up on.

Within a few seconds of a contact reaching the score, the sales team will have been alerted. You may decide it is appropriate to insert a delay between establishing the Start Audience and creating a deal in CRM. This is to prevent the sales team calling a little too soon.

Step 3
End Journey

All good things must come to an end. The journey has served its purpose and the sales team are now involved.

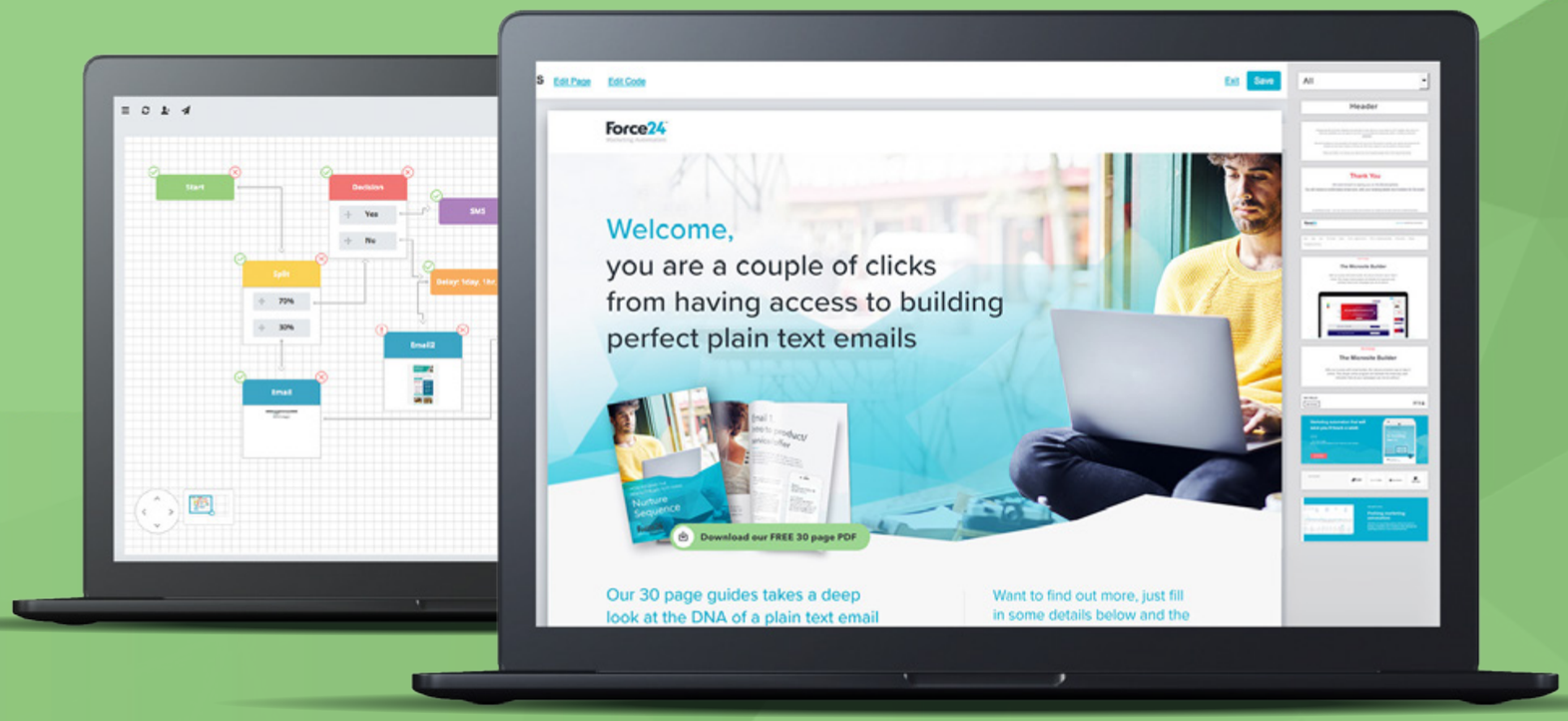


Easy to Use Interface

We pride ourselves on the development of simple to use technology. As a result, most Force24 clients progress very quickly on to what are perceived as incredibly complex journeys in other platforms, as well as saving on average 8 hours per week by removing menial tasks.

This interface does not stand still. In fact, our product development roadmap is powered by you! We listen very closely to the questions you ask, the comments you make and the problems you face, and we act, we refine processes and we develop new tools in line with these needs.

Plus, as you know, the support of our UK marketing and technical support team is included!



About Force24

Force24 is a world-class, UK-built, cloud-based marketing automation solution used by enterprise clients and niche SMEs alike. Trusted by leading brands such as WorldPay, Aviva & npower, the intuitive platform empowers marketers to generate faster, more efficient & meaningful conversations with customers & prospects. The result? Increased conversions, revenue & campaign ROI.

In fact, thanks to 8 million data triggers & the expertise of Force24's in-house marketing pros, the platform helps generate £50m revenue for clients each month!

What's more, the Fore24 team isn't just made up of tech gurus and marketing pros. We even have our own in-house GDPR expert to ease every concern and ensure clients are fully regulation-ready!

Get in touch

For further information please visit **www.force24.co.uk** or call **0845 272 5990**. Alternatively, to drop us a line or sign up for our upcoming webinars, email **info@force24.co.uk**

Force24™
Marketing Automation

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