
Really.
20 insider tips
you need to know about
marketing automation

Marketing Automation (or 'MA' for the purposes of this guide), is an amazing time-saving tool, a great way to organise your marketing processes and provides a backbone for running and reporting on marketing activities and plans from start to finish. It can help strategic marketing approaches and operational marketing delivery in equal measure.

However, the whole MA side of things needs to be ventured into with the right attitude, plan and skills to make it worthwhile and provide the best value possible - without it being error prone, cumbersome or discarded for not fulfilling the perceived benefits that were offered in the first place.

Whether you are new to MA, just considering starting out or you have been using MA for a while, there are a number of considerations which need to be taken into account. If you follow these tips and consider the following pitfalls, it will be simpler to make the most of the wonderful world of MA and gain results and ROI from your time and investment.





Fail to prepare, prepare to fail

Rome wasn't built in a day and neither is an MA program. Whether you are implementing a brand new MA platform into your organisation, or you are building and launching your latest campaign, you must prepare effectively to ensure that your efforts result in success. Don't overlook the details of what needs to be done, by whom and when. **Think action, person, timescale.**



Automation is hard work

Automation by the nature of the word seems to imply that MA will run itself with no external involvement. This is not the case. It should really be called technological marketing enablement (but that is a bit of a mouthful isn't it, so let's stick to marketing automation). MA is a robot that needs to be set up correctly, programmed to function as expected and continually fed data, emails and content to keep it happy. It will not solve all of your marketing woes (or make you a cup of coffee) as soon as it is switched on – but it can with time and input (except for the coffee bit, get a Nespresso machine for that).



Watch the clock

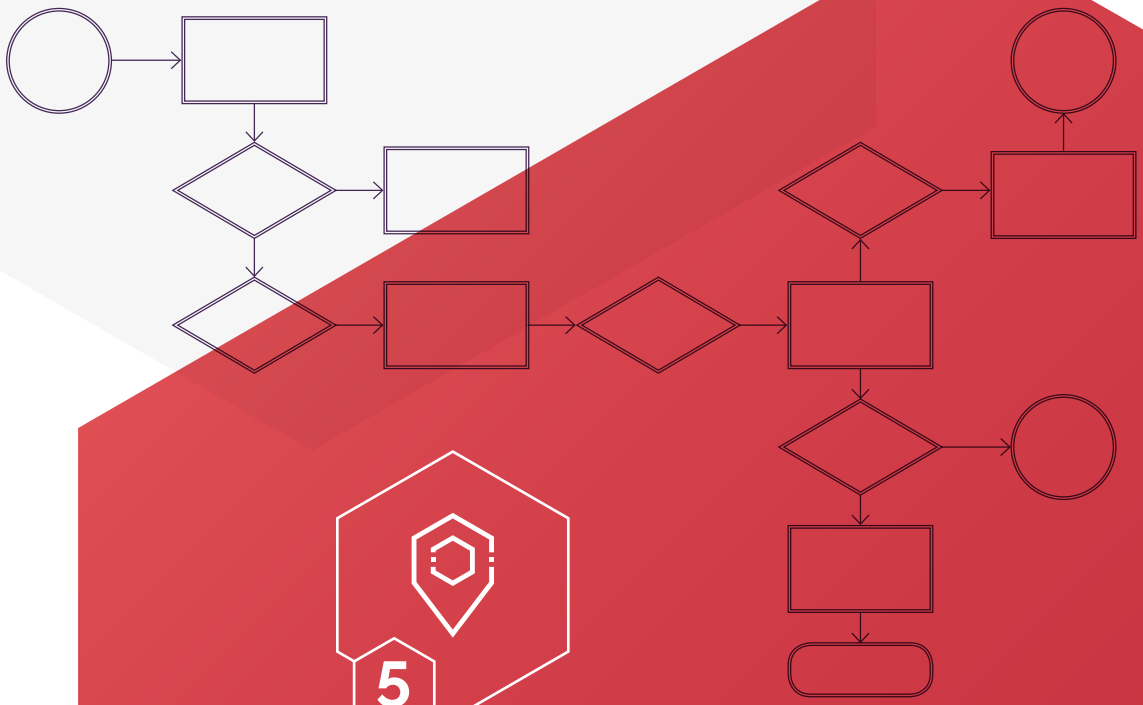
Implementing a new system and then setting up trigger campaigns, API integrations, workflows, landing pages, loading data etc. takes more time than you think. To make sure there is not a last-minute rush and everything runs smoothly, leave enough time to complete all actions AND leave a bit of contingency as a safeguard too. If you don't use your contingency time, you can sit back with a biscuit or bar of chocolate (or piece of fruit to be healthy) and marvel at how efficient you are.

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Don't forget the housework

The basis of any marketing automation program and campaign is data - contact data to be precise. At the core of any fine-tuned MA machine is a clean, spotless contact database. By 'clean', I mean the data is processed for errors and correct values in the right data fields, whether manually or using cleansing formulas or programs.
If you don't clean your data before you load it into the system, you may have duplicates of the same contacts with different data against each contact record, you won't have standardised values to setup segmentation, you won't have clean email addresses to send emails to, and you won't have the right data values to personalise with (i.e. first name). There are a number of issues that arise from dirty data. **Remember, rubbish in equals rubbish out.**





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Now you're on the map

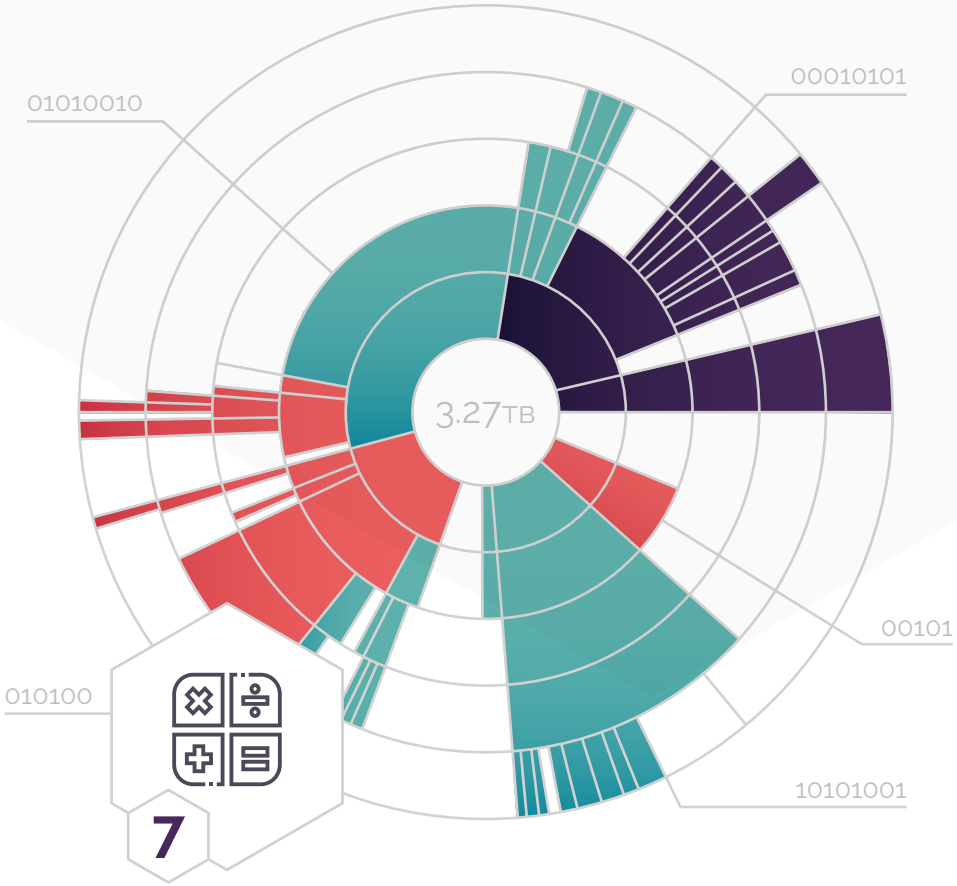
To future-proof all of the amazing data work that you completed in point 4, you need to have a data management process in place to keep everything neat and tidy. A mapping document to define standardised values for any new data that is loaded into the system is a must. These standardised values should also be used on drop down menus, and where possible, on any data-capturing forms. Any manual data entry points (those pesky humans) need to have a defined data entry process and be trained appropriately. Importantly, key people should be identified as guardians of your data to ensure it stays clean.

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What's your preference?

No preference centre, no opt-ins. No opt-ins, no GDPR compliant data. This is a bit dramatic but it is true. Firstly, preference centres prevent you from losing contacts from your database as unsubscribes by giving people a choice of marketing communication, rather than just a single unsubscribe. This means you may not lose them as they would still like to receive newsletters but not sales emails for example.

Also, they allow you to capture and confirm that a contact has opted-in to communications from you, what subjects they have opted in to and what date they opted in. Crucially, you can ask them what methods of communication they would like you to use when contacting them. This makes marketers and data compliance people both very happy, and the GDPR side of things is covered too.



Not using segmentation

This also refers back to point 4 to some extent. If you have clean data, you can segment it. This might sound like a marketing 101 basic thing to be doing, but you would be surprised how many organisations still don't segment their data. Campaigns targeted at different industry groups, job roles, pain points, messages etc. all produce better results both from a brand awareness perspective and a results attribution perspective too.

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Pull the trigger

A large part of MA's power and benefit is offered by trigger campaigns. This allows different emails and actions to be performed by the MA software when an action is taken by a prospect or lead. This could be sending a thank you email when someone submits a form, sending them specific content pieces when they visit webpages about a certain subject area, or triggering an SMS to their phone to say happy birthday. Using someone's behaviour and actions to personalise their marketing experience can generate better results.

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Signals and scoring

Lead scoring provides a window into a lead's readiness to enter into a sales conversation. It allows you to take into account all of the different interactions that they may have had with your organisation along the journey, to create a full picture of their level of interest. By not using scoring, you are leaving all of the buying signals in silos, as unconnected signals. You are trying to look at what your leads are doing through a keyhole using a very small torch.



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Get the skills to pay the bills

It takes a wide variety of people and skills to setup a marketing automation system and ensure it runs correctly. You need marketing strategy and campaign planning to be covered. Then the designers, copywriters and developers need to build content and HTML assets such as emails. Your data guys need to get your data sorted and help with reporting. The marketing automation team need to set up and run the software. With a lot to cover off, it is best to have multi-disciplined teams to make sure all of these factors are covered.

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Don't be fast and furious

Don't try to run before you walk, this is never truer than with MA. There are so many amazing, complex things that you can do with MA software and it can be tempting to hook up predictive scoring or jump straight into complex routed email workflows. However, make sure you set the basics up first and build a scalable, phased approach to your MA development. Otherwise, you won't realise maximum benefit from the software and use it to its best potential.





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Practice makes perfect

You wouldn't try and run a marathon without training, you wouldn't try to fly a plane without lessons, so why send out an email without testing it? By using Litmus or similar in-system testing tools, you can make sure that your emails and landing pages will display correctly in all email clients or internet browsers, without breaking or looking odd.

A broken email can cause a lot of damage to your brand reputation. And equally, when building automation workflows, always dry-run the logic in the workflow to ensure that it is functioning as expected. You don't want to send CEOs content tailored to CFOs or emails translated into French to an English audience.



You don't know what you don't know

Leading on from testing in general, many MA systems allow you to A/B test emails, landing pages and more. If you don't use this functionality, you are restricting the insight you can gather from your audience about your campaigns.

Without specific, real-world insight, you cannot tailor future campaigns to make them perform better. **Test, test, test, is the motto to follow.** Try different copy, images, calls to action, designs, layouts and more!



It's time to get real-time

Dynamic content and real-time personalisation allows you to deliver hyper-personalised experiences. It allows you to use the data you have collected on a lead to deliver them highly tailored messages, through emails, landing pages or webpages.

This could be written copy, imagery, content assets, subject matters and more, all specifically aligned with the lead's industry, job role or area of interest. It will increase your lead engagement levels by ensuring what is delivered is right for them and appealing to their needs, every time.



Get the inside track

Most MA platforms provide tools to track leads on your website. This links to point 9 about lead scoring and tracking all lead activity. In today's marketing landscape, people spend a lot of time researching products and services online, through your website. If their amount of web visits increases to daily visits or if they start visiting the 'how to buy' or 'contact us' pages more frequently, this should be taken as a buying signal.
By applying web tracking, you can use this information to contact them at the right time, when their level of interest peaks.



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Integrate to accumulate

From the moment the MA system releases a lead to the sales team to continue the sales cycle, the CRM system should take over. By having the two systems integrated together, leads can be assigned to a sales team member's queue automatically, as soon as they become a marketing qualified lead. All leads will be captured and processed as quickly as possible, without any 'falling through the cracks' or losing time before sales follow up. An additional benefit is that the revenue values for the opportunity, proposal and eventual sale can be tracked back into the MA platform to provide valuable attribution and ROI information against marketing activities.

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Back to basics

We love marketing technology. So much so that it is now called 'MarTech' and there are people in the world called 'MarTech Evengelists'. But we can all be guilty of getting wrapped up in the new sexy technological toy and forgetting the core principle of what we are doing... attracting people's attention, providing them information, being helpful, giving meaningful tools to solve a problem and proving value for a product or service. You can't shortcut the basics of producing useful content, eye catching designs and marketing campaigns that capture imaginations and give a little extra to cut through the noise.



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Review, adapt, change

"It's always been done this way". "We have always written this style of copy". "Our emails always look like this". "We have always targeted this segment". MA tools provide numerous metrics, reports and analytics to allow you to review the success of your marketing efforts. It is essential to use analytical methods to define what is working, what is underperforming and what simply isn't doing the job, full stop. Only then can you adapt and change your campaigning to improve results and make the most of marketing budgets. Using an analytical method also provides an opportunity to trial ideas and new approaches, whilst maintaining a way of clearly proving if you have been successful.

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The sales and marketing dream team

A true MA process defines the stages that a lead progresses through from capture to customer, and everything in between. To make MA (and arguably marketing full stop) work effectively, the process of lead handover should be seamless from marketing to sales. Marketing and sales should be one big happy family who share, communicate and connect. The sales department should be marketing's biggest customer. And the sales team should respect what marketing do for them. During the MA planning process both should agree what the ideal customer looks like, what success looks like and set mutually agreeable targets and outcomes. Then when setting up MA campaigns and deploying marketing activities, the journey from prospect to lead to customer will be a unified experience from start to finish.

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Marketing with a smile

Most of all, the key to MA success is enjoying what you do and having the passion to drive you forwards onto the next campaign. If you enjoy what you do, it will show both to your colleagues and your potential customers. Marketing and MA management is hard work, it takes a lot of will and effort, but it should also be rewarding and fulfilling too. By sticking to true MA principles of being prepared, maintaining communication, allowing adequate time and analysing results, you can make the whole MA and marketing game enjoyable and exciting.



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BONUS POINT: Take risks!

A final point I want to make is similar to point 18 but it can't be reiterated enough. Using the same shopping list formula of MA campaigns, channels and activities will provide a stable basis but it will not help you grow or disrupt your market. Every now and then, it is good to push the boundaries and try something completely different. Try a new MA technique, use different functionality offered by the technology you have or combine different skills and marketing ideas together. Shake the cobwebs off and have a spring clean. If you don't take risks, you will never increase your skills, knowledge or take over the competition!

Really.

At Really B2B, we continually strive to support our clients using the principles outlined in this guide and deliver optimal MA services to help them make the most of their investment and deploy the best marketing campaigns possible.

By combining the right mixture of the latest technical knowledge with a wide group of skilled individuals from all disciplines, we push the boundaries of MA and everything it can offer, both technologically and strategically.

Speak to one of our MA experts today on

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