

# Marketing Automation

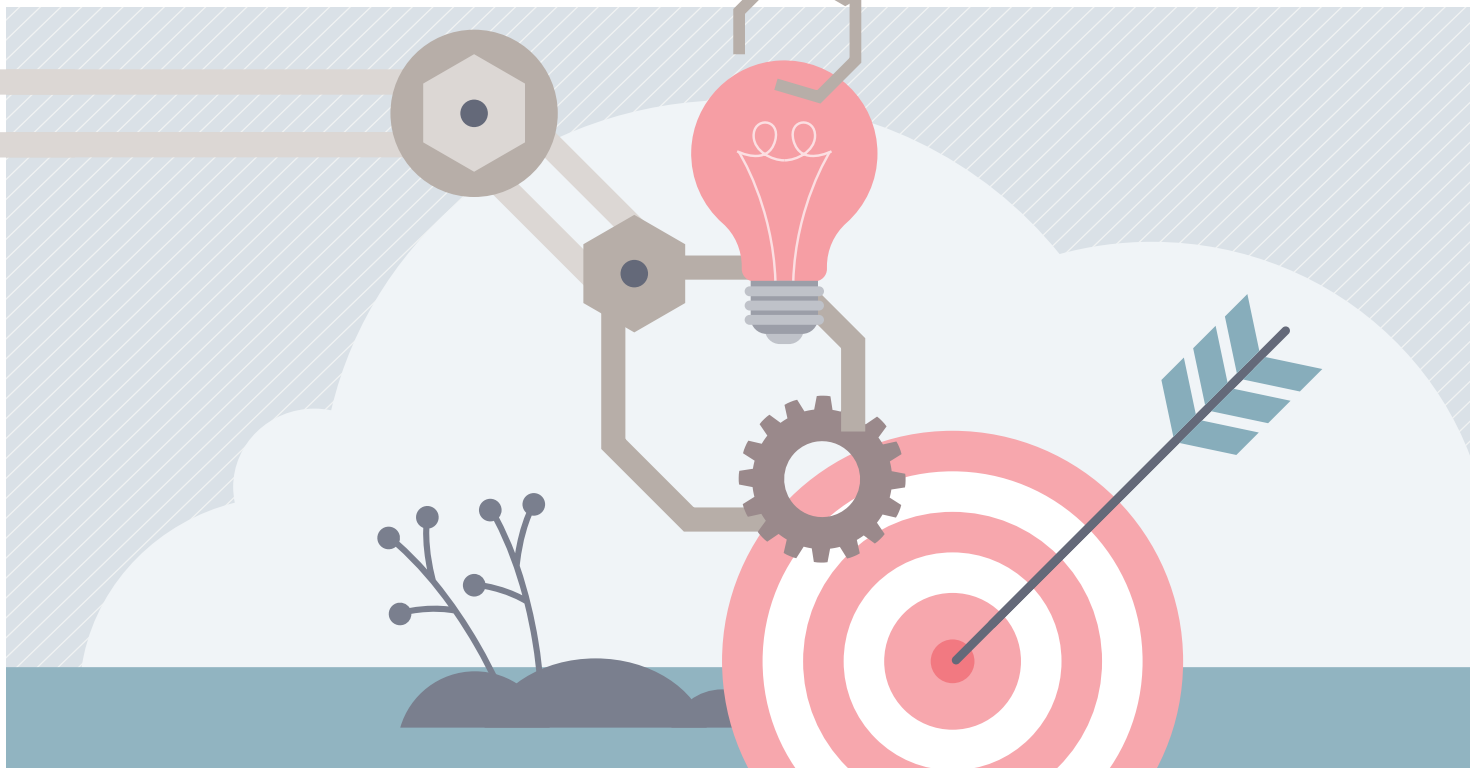


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INTRO TO

# Marketing Automation



## Main Features of Marketing Automation

### Track content

Allows you to track, organize and analyze how your content is performing, so you can determine what works and what doesn't.

### Track prospects

Monitor traffic and research how people move through the marketing funnel, ensuring you are ready to act when your leads trigger a specific action.

### Host content

You can upload and publish your content on one platform and analyze how your marketing efforts are performing.

### Automate leads

Set up personalized campaign experiences allowing multiple efforts for different audiences.

## Categorize leads

Group the leads based on their readiness to convert to customers, allowing you to create targeted campaigns.

## Nurture leads

Utilize lead scoring, actions the leads take, and if they are cold, warm, or hot to help you nurture leads.

## Maximize efficiency with landing page

Effectively gain leads and customers in one digital space by building landing pages.

## Utilize email marketing

Send hundreds of emails to specific target demographics based on their interests.

## Integrate various programs

Eliminate the need for repeated data entry tasks by integrating your automated tools with other software tools.

## Establish Artificial Intelligence (AI)

Chatbots can have human-like conversations with customers at different hours of the day, doing the work of the entire department of humans.

## Organize social media marketing

Build brand awareness by automating your content on social media.

# What Can Marketing Automation Do?

## Build relationships

It helps you understand your customers, making your interactions more personal and richer.

## Personalize campaigns

Categorizes your online experience based on behaviors, traits, and insights. Send the right campaigns to the right people at the right time.

## Follow up on potential sales

Utilizing follow-up reminders, abandoned-cart emails, or customer-service questions can help you keep leads engaged and more likely to result in a sale.

Develop strategies to nurture leads into customers by giving them the experience they desire.

## Score leads

Marketing automation can help you gather, analyze, and respond to various metrics, such as sales readiness, demographics, behaviors, and attributes.

## Track customer journey

You can track the customer journey and see how long it takes a customer to make a transaction, what they need to complete a purchase and what marketing assets are the most beneficial.

## Implement complex strategies

Delivers value to your customer regularly while strengthening the relationship and perception of your brand.

## Promote efficiency, saving time and resources

Your team gets to focus on a higher-level task, which allows you to enhance the customer experience.

## Automate reports

Keeps your data safe and free from human error.

## Measure and analyze

Helps you make changes to improve processes.

# Marketing Automation

# Best Practices

# and Benefits

Utilize these best practices to help make your marketing automation campaign successful.

## Focus on your target audience

When creating your marketing automation campaigns, keep your target audience in mind so you can create specific content and avoid generic messaging.

## Segment your customer database

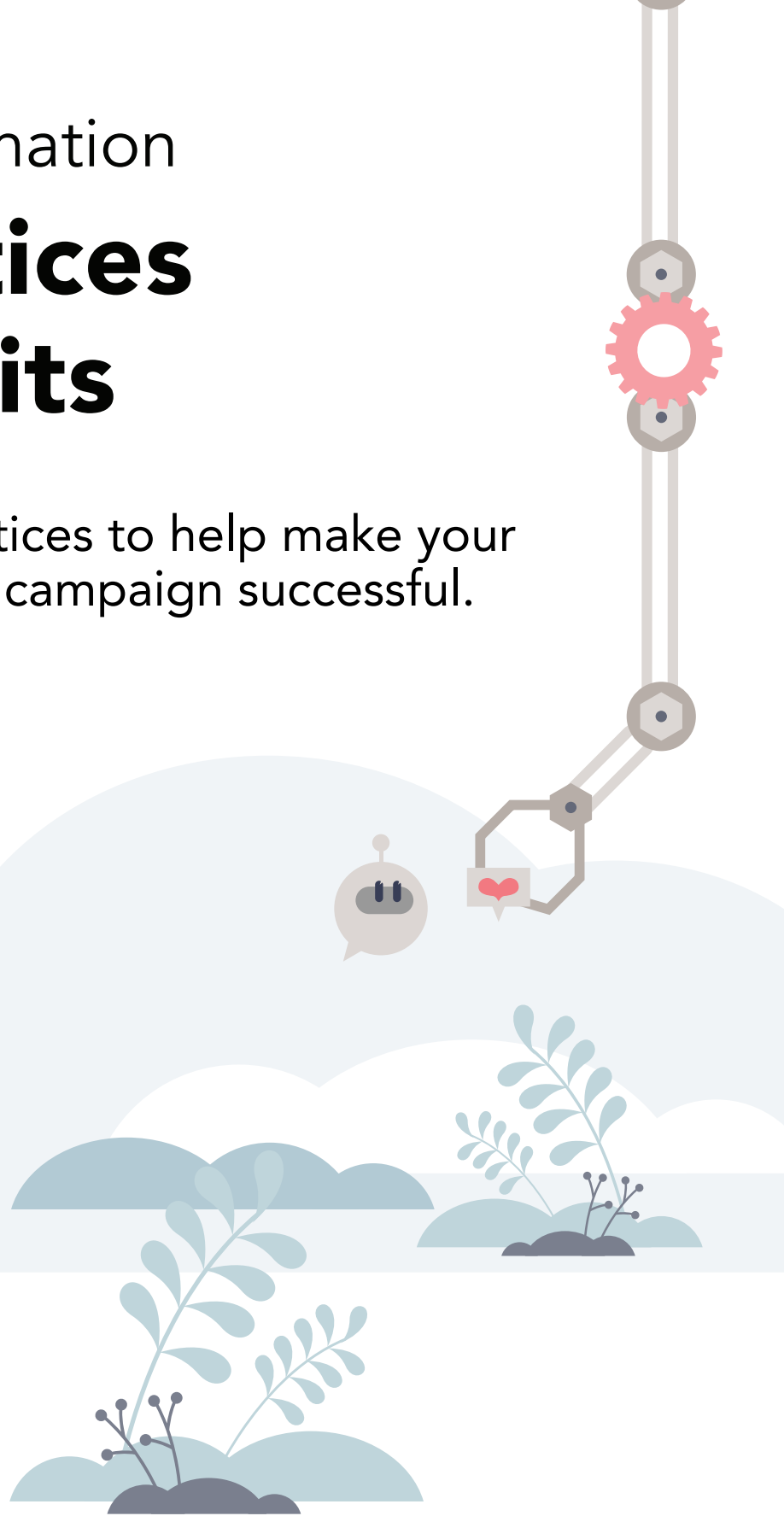
Consider the customer you want to engage and why. For example, do you want to segment your audience by age group, or will it be more effective to segment by career level?

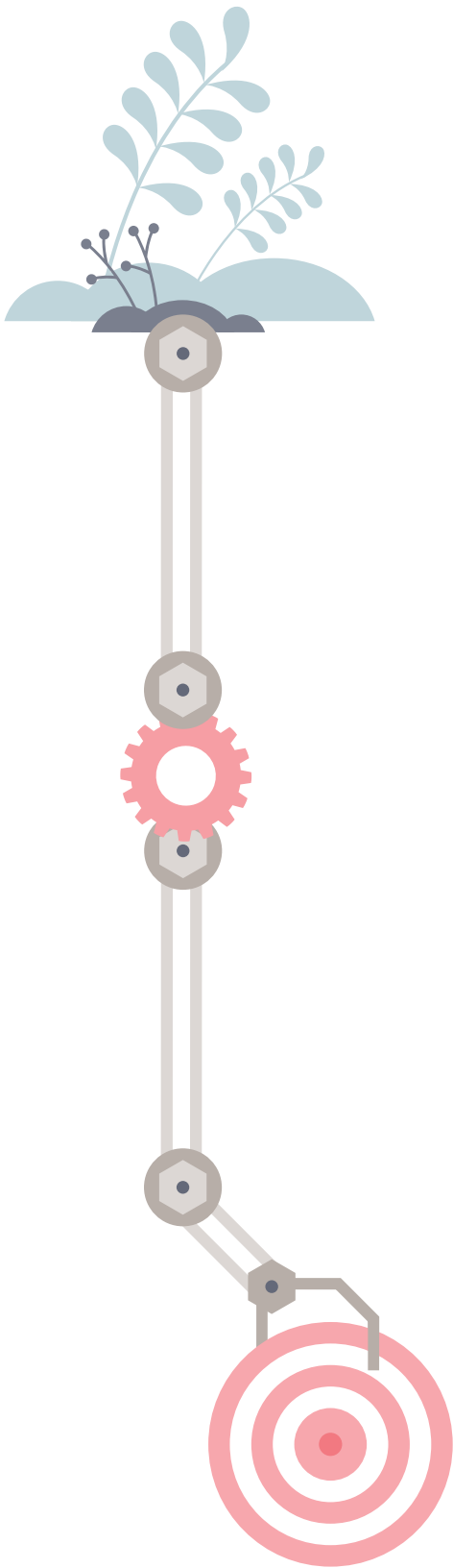
## Understand your customer's journey and buying cycle

Knowing your buyers' process will help you create targeted, relevant content.

## Map your lead management flow

Lead management flow is a set of steps your team follows internally to help drive leads through your funnel seamlessly. Knowing these steps will help you determine trigger points that affect the flow and get everyone aligned.





## Create a workflow/flowchart

A flowchart describes the structure of a customer journey, their touchpoints, and when automation is most effective. A flowchart will help you determine when you want people to enter your workflow and how you want them to move forward.

## Set specific objectives about what you hope to achieve

Collect data about your marketing strategies and set automation goals so you can measure your progress.

## Define and present your goals

Be specific about what you hope to achieve with your marketing automation campaign and make practical choices with your investment in a marketing automation software/platform.

## Collaborate with other teams

Get input from the different teams affected by the marketing automation campaign.

## Create process visualizations

Utilize graphics and diagrams to show the big-picture objective of your organization.

## Prepare your content strategy

Build your content library by creating engaging, relevant messaging to reach leads throughout the customer journey.

## Plan for a slow rollout

Stagger your marketing automation launches. This will help increase deliverability, avoid appearing as bulk emails, and flatten the curve for follow-up.

## Test everything and adjust as you go

Pay attention to how your marketing automation campaigns are doing with various types of testing. Spend time checking out analytics to figure out what is working and not working.

# Marketing Automation

## What Types of Marketing Can I Automate?

Marketing automation is beneficial to all parts of your business. In our blog, What Types of Marketing Can I Automate, we gave you a glimpse of what automation can do for different areas of marketing. Now let's break down the benefits of automation.

### Customer Relationship Management (CRM)

When you automate CRM, you can collect customer data in one convenient space and access the data easily. You will better understand where the lead is along the sales funnel, which will help you create and send relevant marketing materials.

#### Benefits:

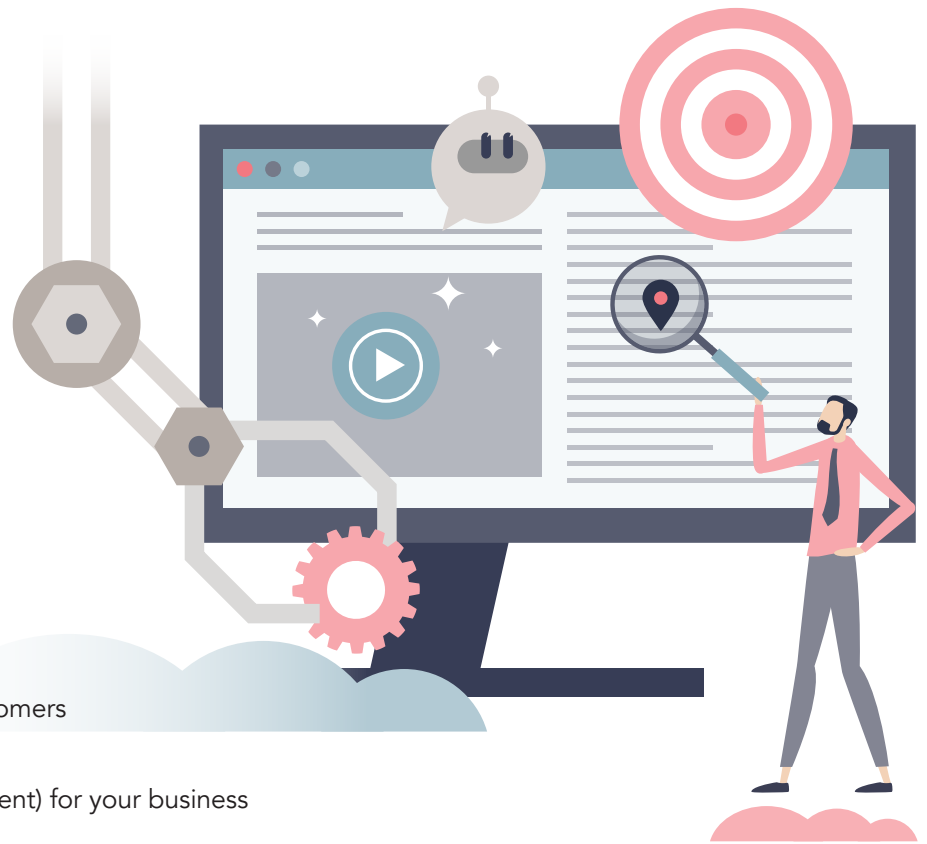
- Provides a better customer experience
- Allows team members to communicate internally through social notes
- Increases customer engagement

### Email Marketing

Automation helps you customize email templates to create dynamic emails that you can schedule to send after specific triggers. The most effective time to use automation is for abandoned carts, newsletters, welcome emails, promotional emails, and automatic replies to customers' questions.

#### Benefits:

- Fosters loyal relationships with your customers
- Cuts down on repetitive tasks internally
- Provides the best ROI (return on investment) for your business



## Landing Page

Marketing teams can build effective landing pages quickly when you utilize automation. These landing pages communicate specific information at different stages of the funnel and then guide potential customers through to the completion of a purchase.

### Benefits:

- Optimizes your landing page for all devices
- Grows your email list
- Increases conversion rates and lowers customer acquisition costs

## Web Form

When you use automation, you can generate dynamic web forms quickly and easily, specifying custom data fields to collect the information you feel is essential.

### Benefits:

- Collects the data you need
- Improves the users' experience
- Helps you improve buyer personas, customer service, and your products or service

## Social Media

Automation allows you to schedule and publish content on multiple social media platforms. Programming answers to FAQs into social media chatbots will automatically respond to customer questions.

### Benefits:

- Projects a consistent brand personality
- Increases engagement with your audience
- Frees up time for the marketing team to create dynamic content
- Provides analytics that measures the performance of your social media efforts

## Blog

Incorporating automation helps you create engaging blogs promptly, customizing images, text, and your Call-to-Action button. In addition, the software allows you to schedule and post blog articles automatically to your website and social media platforms and send emails once the new blog posts are published.

### Benefits:

- Gives you more opportunities to connect and engage with your customers
- Maintains consistency with your content distribution
- Encourages personalized content to reach your desired target market





## Multi-channel marketing

Automation streamlines various processes and helps optimize operations throughout your business. Updating, categorizing, and safeguarding data will be possible.

### Benefits:

- Maintains a unified brand experience across all marketing channels
- Gives each channel a unique message but still aligns with your brand's core strategy
- Gains insight into future marketing tactics
- Provides the data you need to convert more of your target audience to customers

## Customer Segmentation and Management

Automated customer segmentation allows you to classify data based on specific demographics and behavior traits. Once you have this information, you can target customers and provide personalized and meaningful content.

### Benefits:

- Gains an in-depth understanding of your audience
- Optimizes advertising
- Boosts conversion rates

## Lead Nurturing

Automated lead nurturing carries prospective buyers smoothly through their sales journey. Several essential features include automatically qualifying, segmenting, and nurturing leads. Automation also allows you to create campaigns for different segments of customers.

### Benefits:

- Increases team productivity and performance
- Improves client success and satisfaction
- Allows you to manage your sales funnel more effectively

## Lead Scoring

Incorporating automation helps you track the leads' level of interaction, providing insight into how to approach them. Knowing their level of engagement with your brand allows you to move them more efficiently from marketing to sales.

### Benefits:

- Strengthens the relationship between the marketing and sales team
- Delivers more high-quality leads
- Increases the conversion rate

## Marketing Analytics

Utilizing automation helps marketers measure the success of various marketing campaigns, including social media, blogs, and email. Your team can efficiently acquire statistics and analytics from different channels and store them in one central location.

### Benefits:

- Allows you to get the most out of your marketing campaigns
- Maximizes your ROI (return on investment)



# Marketing Automation

## The Best Marketing Automation Software

Company	Overall Score*	Free Trial	Price \$\$\$\$	CRM Integration	Email Marketing Automation	Ease of Use	Build Landing Pages	Lead Management	Social Media Automation	Testing	Analytics & Reporting	Segmentation
Active Campaign	8.6	yes	\$\$	8.8	8.7	8	7.6	8.6	8.5	8.5	8.5	8.8
HubSpot	8.6	yes	\$\$\$\$	7.7	8.3	8.6	7.8	7.8	7.8	8.2	7.9	8.4
Sales Force Marketing Cloud	8.4	yes	\$\$	8.1	7.6	7.7	7.3	8.5	7.7	8.2	9.1	8.4
Constant Contact	8.4	yes	\$\$\$	7.7	8	8.8	7.2	8.4	9.1	7.4	8.5	6.5
Mailchimp	8.3	yes	\$\$\$	8.3	8.5	8.7	8	8.5	8.6	8.3	8.2	8.5
Marketo	8.2	yes	\$\$\$\$	7.9	8	7.6	7.6	8.3	7.3	7.9	7.1	8.2
Sendinblue	8	yes	\$\$	9.3	7.7	8.6	7.3	8.5	8.4	7.4	7.8	8.4
Eloqua	7.8	no	\$\$\$\$\$	8.2	8.3	7.7	8.2	8.3	7.2	7.9	8.5	8.2

\*The above scores are based on a scale from 1-10. The companies have close overall scores, but the services they offer vary. Score based on meta-analysis completed based on internal research and findings.

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When reviewing the above options, consider these criteria:

**Feature set/** Look for solutions that meet your requirements.

**Ease of use/** Ensure the software has an intuitive interface and can easily do your desired tasks.

**Integrations/** Select a tool that integrates with the systems important to your marketing and sales team.

**Support/** Choose a vendor that stands behind its product and treats all customers with the same level of support and customer service.

**Pricing/** Consider all the costs involved as well as the terms of the contract.

# Marketing Automation

# Implementing a Marketing Automation Campaign

Implementing a Marketing Automation Campaign blog explored essential steps for setting up your automation campaigns and best practices. Let's examine some marketing campaign examples to prepare you for creating your own campaigns.

## Welcome Campaign

This campaign is your first chance to make a great impression on your customer. It lets you start a conversation with new customers and encourage them to connect to your brand.

### Examples

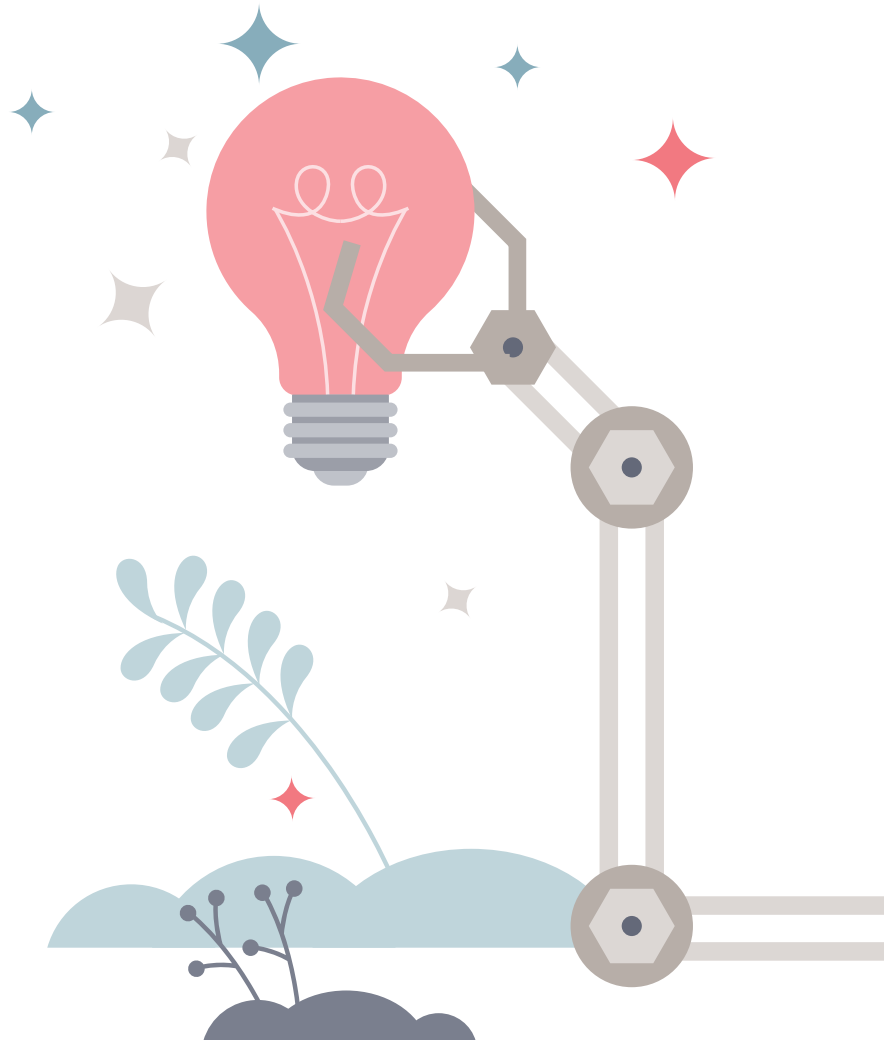
- Welcome customers with a one-time email sent 24 hours after a customer makes their first purchase
- Send a series of emails to onboard customers
- Provide a set of educational emails

## Win-Back Campaign

This campaign is a fantastic opportunity to improve customer retention.

### Examples

- Email customers who haven't shopped with you in an extended time frame, reminding them that you are still here for them
- Share new products
- Offer a discount on future purchases



## Brand Loyalty Behavioral Campaign

This effort is a great option to utilize the user data you have collected across multiple touchpoints.

### Examples

- Segment and target your audience with relevant, personalized messaging based on their purchase frequency
- Reward customers who have purchased an order over 70 dollars or more with a 20% discount on their next purchase
- Send incentives, such as a gift or discount, to inactive customers

## Customer Feedback Campaign

This type of campaign helps you obtain a real-world review of your products.

### Examples

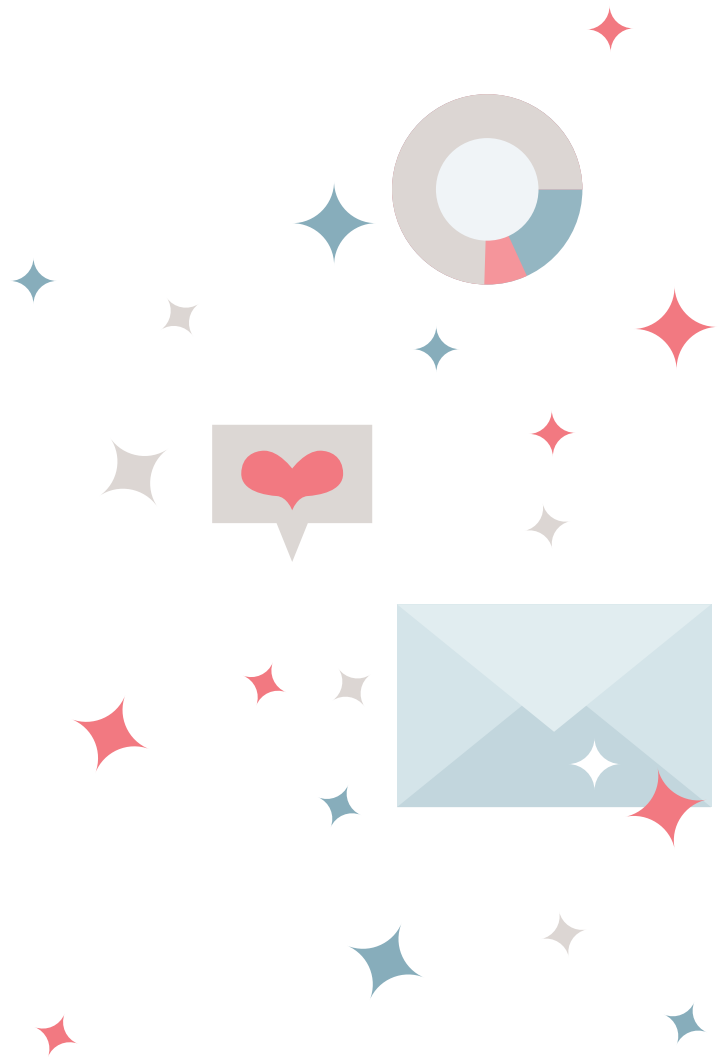
- Create an email asking for customers' feedback on your product/services
- Send customized emails to happy customers and include exclusive offers and discounts to keep them returning
- Contact unhappy customers thanking them for being honest and ask for a more in-depth review of their concerns

## Birthday or Anniversary Campaign

Utilize this campaign to show your customers they are valued.

### Examples

- Send a special offer on the customer's birthday or anniversary, encouraging them to return to shop with you again
- Set up a trigger to automatically send an email wishing the customer a happy birthday
- Include a special birthday discount to encourage a purchase



## VIP Customers Campaign

Loyalty programs are a great way to celebrate customers and help them feel special. As a result, your customers will stay engaged and devoted to your brand.

### Examples

- Send trigger emails once someone enters the VIP program
- Send an automated email to customers notifying them they have a reward available to use on their next purchase
- Set up automated emails offering early access to new products and special promotions for customers who spend a certain amount of money

## Abandoned Cart or Re-Engagement Campaign

This campaign will help bring back lost customers and boost revenue.

### Examples

- Send an automated reminder to a potential customer who hasn't completed their purchase, reminding them that their items are still in the cart
- Send an email requesting feedback about why the customer didn't follow through with their purchase
- Add a discount code to entice them to finish their purchase

## A/B Testing Email Marketing Campaign

Create this campaign to test different versions of your marketing messages and track the engagement levels for each email.

### Examples

- Create two variations of your email subject line and send them to email subscribers
- Change one of the aspects of the Call to Action
- Change the length or style of your email copy
- Change the number or types of photos you include in the email
- Change the day of the week you send the email

