

Marketing Automation – Basic Techniques

- Identify the areas of your revenue cycle that need the most improvement (lead generation vs. nurturing vs. sales/marketing alignment) and prioritize your goals
- Create marketing assets that will generate interest at every stage of the buying process (educational content at the beginning of the process vs. solution-oriented content for later on)
- Make a list of routine marketing activities in which your company engages (e.g. auto-response emails) and automate these first so you can spend more time on more creative strategies
- Evaluate your lead database and create segments based on lead source or profile information for your marketing campaigns
- Develop simple, automated workflows in the beginning (e.g. following up a form submission with an email from a salesperson that sends out content on a related topic)

Marketing Automation – Advanced Techniques

- Develop new ways to segment your lists by combining demographic information with behavioral data
- Create marketing assets targeted to specific buyer profiles or personas
- Start to explore more complex automated workflows (e.g. incorporating CRM activities and updates as workflow triggers)
- Coordinate the marketing and sales teams to create campaigns targeted at the “hottest” sales leads based on demographic, BANT, and behavioral data

Top Metrics to Measure ROI with Marketing Automation

- Increased conversion rates from each stage of your revenue cycle to the next stage (inquiry to lead; lead to qualified lead; qualified lead to opportunity; and so on)
- Increased revenue per lead generation campaign
- Increased sales productivity (e.g. speed with which deals are closed, values of these deals, etc.)
- Increased marketing productivity and effectiveness (e.g. ease and speed of creating and deploying campaigns; qualified leads and opportunities created per campaign, etc.)

Topics to Consider Before Purchasing a Marketing Automation Solution

- On-Site vs. on-premise
- Implementation
- Start up
- Ongoing costs
- Building creative strategies

Marketing Automation Features

Why Was Marketing Automation Created?

B2B lead generation has changed dramatically in recent years. The old days of mass marketing, big tradeshows, and buying lists don't work in a world where buyers use the web, search, and social media to take control of their buying process. Companies today meet prospective customers earlier in the buying cycle, and those customers want to engage with sales later than ever. As a result, the old model where marketing generates a lead and sends it over to sales doesn't work anymore. Instead, the best marketers are finding ways to bridge the gap between the day marketing first generates a lead and the day that lead is ready for sales.

Why Do You Need Marketing Automation?

- Raise open and click rates
- Shorten sales cycles
- Build a great relationship with sales
- Get seamless integration with your CRM (like Salesforce.com)
- Automate repetitive tasks and analytics
- Create new landing pages in minutes without IT
- Use A/B testing
- Access sophisticated reporting and analytics
- Win more deals and generate higher revenue per deal

Top Resources

- Start with a Lead - blog.startwithalead.com
- Modern B2B Marketing Blog - blog.marketo.com
- Salesforce - www.salesforce.com
- FOCUS - www.focus.com
- Funnelholic - www.funnelholic.com
- Lead Sloth - www.leadslloth.com