

# Marketing Automation

Increasing efficiency and transparency through Marketing Automation or Marketing Information Systems.

# Introduction

A management information system provides information that is needed to manage organisations efficiently and effectively.

Marketing Automation is the name given to software platforms designed for marketing departments and organisations to increase efficiency and gain insights. These software platforms are broken down into three major areas:

**Market Intelligence** - aims to track social media, emails, webpages and links to track the behaviour of anyone interested in a product or service to better understand their intent.

**Marketing Automation** - focusses on moving leads through the marketing funnel to become sales ready.

**Advanced Workflow Automation** - encompasses automation of internal marketing processes such as budgeting, planning, workflow and approvals, marketing calendar, internal collaboration, digital asset creation and management and everything to support the operational efficiency of the internal marketing function<sup>1</sup>.

Managers should always be looking at how human resources can be best utilised to focus on increasing your organisations revenue and retaining existing customers, whilst maintaining and keeping in line with your brand integrity.

Your organisation does not have to revolutionise the way it operates overnight, however, the evolution can occur simply by taking consistent small steps and investing the time to implement the right systems that will help grow your business from a solid and scalable foundation.

## Areas to consider when tackling a Marketing Automation Project

### Setting up your CRM correctly for insights

The greater your organisation understands your brand, your target markets and your strategic direction with products and services offered, the better the chance you have of setting up your CRM as correctly as possible (from the start) to capture valuable information.

Enabling your CRM to capture valuable information about clients such as social interactions; websites viewed; blogs read and purchase history will definitely help bring you closer to your conversion goal.

### Understanding email marketing

Email lists have a natural decay. In B2B marketing email lists tend to expire at a rate of 25% per year due to employees leaving organisations or changing roles<sup>2</sup>.

Often reports and processes can be built to supplement your email marketing system so that you can correctly target the right organisations.

For example, it may be as simple as producing a bounce back report and having a human resource contact the organisation to find out what happened to the contact and who the replacement contact is. This information should then be updated in your CRM.

Understanding how to get the most of your email marketing system (through automated reports) is important to keep your subscriber list up to date and ensure that awareness is retained.

### Understanding your touch points with your target market

Your prospects and clients interact with your organisation on many different levels and in many different ways. They may:

- Interact face to face with a sales person
- Fill out a contact form on your website
- Read an email and click on a link
- Call your office to ask a question or give feedback
- Interact via social media

Whatever the case, it is very important to understand all of the touch points via adequately tracking and developing a greater understanding of your prospect or client.

### What role does social media play in all of this?

Firstly, not all social media is for all organisations and defining how you want to use social media is important before jumping into this realm.

Do you really want to 'like' the Facebook page of your local coffee shop? Probably not, as you are more than likely to go in there on a regular basis to have a chat with your local barista who knows you by name already (and more than likely knows your order). Your experience with them may not extend beyond getting a coffee before jumping on the bus, so if anything, your deeper interaction may be a call ahead to order your coffee.

If your product or service is highly involved, very dynamic or has a 'cult' following, then social media may be the right path to continue the conversation and educate your audience.

The beauty is that once this process is defined, there are systems and tools that will help you easily manage your social media broadcasts, help to give you insights through analytics and even bring the interaction back to your CRM.

### **Search and online advertising**

93% of B2B buyers use search to begin the buying process, so where are these targets directed? Smart techniques can be used to direct targets to microsites with specific calls to action and information capture<sup>3</sup>.

This will help you understand where your targets are coming from, your conversion rate from that particular source and give you an indication on your ROI for that particular advertising channel.

### **Segmentation helping to strengthen existing relationships**

Organisations often convert a sale and then forget to keep the dialogue open and relevant in a formalised and systematic way.

Understanding the historical interactions with your organisation can also help define future interactions through cross sell, up sell or retention strategies.

Developing a segmentation model helps you to keep on top of feeding the right types of information to leads and existing clients. A part from targeted marketing, it also enables sales have targeted and meaningful interactions.

### **The importance of a content distribution strategy**

Systems are there to help you achieve your goal in a more targeted and efficient manner and should complement a solid content strategy.

Your ultimate goal is to enhance your target audience interactions and relationships with your organisation without annoying them with a system that is an effective SPAM machine.

The same traditional rules apply of keeping your content and communication timely and relevant whilst adding value. If your target is interested in a topic or area, then be sure to provide them with as much information as possible, before moving onto the next area<sup>4</sup>.

## **Marketing analytics is more than just website analytics**

With the introduction of Google Analytics, marketers have a tool that allows them to accurately measure what is occurring on a website. However, understanding website analytics is a small fraction of the understanding of a potentials experience with your organisation.

Marketing analytics aims to better understand and strives to answer some of the following questions (with regards to both potentials and clients)<sup>5</sup>:

- What first attracted them to your organisation?
- What did they enquire about or request to 'require further information'?
- What are the products or services that are commonly converting (or being requested) and why?
- What are the common marketing experiences that helps push them along the sales process?
- What do they expect from your organisation with regards to customer service, product development etc?
- What impact did advertising and campaigns have on them?
- Did social media drive sales or is it just an engagement tool?
- What references do they use to make an informed decision?

### **Get your internal processes right first!**

For any system to be effective, you need to have your current internal processes clearly defined, and an understanding of your current resource capability and limitations. Once this is known, you can then know the role of marketing automation within your organisation and to what level of automation you will implement in the short, medium and long term.

## The difference between Email Marketing and Marketing Automation

Here is a simple table that highlights the differences between email marketing and marketing automation<sup>6</sup>.

Features	Email Marketing	Marketing Automation
Lead Capture	Yes	Yes
Basic Segmentation	Yes	Yes
Email Templates	Yes	Yes
Create & Send Emails	Yes	Yes
Automation & Triggers	Yes	Yes
Reporting & Analytics	Yes	Yes
Mass Email Delivery	Yes	Yes
Email Campaigns	Yes	Yes
SEO Management	No	Yes
Web Behaviour Capture	No	Yes
Resource Management	No	Yes
CRM Integration	No	Yes
Behaviour Based Segmentation	No	Yes
Social Media Management	No	Yes
Lead Scoring	No	Yes
Multi-Channel Campaigns	No	Yes

## Market leading Marketing Automation software

The below list and descriptions were sourced from <http://www.capterra.com/marketing-automation-software>. Be sure to visit the website for the complete and comprehensive list.

### Salesforce Pardot

Accelerate pipeline, drive revenue, and align marketing and sales with Pardot B2B Marketing Automation. Track all prospect interactions on your site from downloads to page views then score prospects based on parameters you set. Put time back into your sales reps day with automated lead nurturing and real-time sales alerts, which allow reps to prioritize their time. Then, measure the true ROI of your marketing efforts with closed-loop reporting.

### Act-On

The Act-On Marketing Service gives you all the tools you need for successful online marketing! Whether you're just getting started with e-mail marketing, forms & landing pages, or you're looking to upgrade your lead gen programs with lead nurturing & lead scoring, Act-On offers the best way to get it done. Act-On has an easy-to-use interface which automatically profiles & segments your marketing data. It also integrates with two of the top sales & marketing apps: WebEx and Salesforce.com.

### Eloqua

Eloqua gives you the power to create, execute and monitor powerful demand generation campaigns combining email, direct mail, your website, your phones, RSS feeds, online chat and even SMS messaging. Eloqua offers marketers precise mailing list and lead management, including lead scoring and lead nurturing. In addition to excellence in marketing automation, Eloqua offers powerful tools for the sales team--allowing them to track and respond to their prospects' Digital Body Language.

### Marketo

Marketo provides dynamic, easy-to-use marketing automation software that enables marketing and sales to build a single pipeline. Marketo Lead Management automates demand generation, captures leads with targeted landing pages and smart forms, then nurtures with triggered and automated drip e-mail marketing campaigns. And Marketo is available on-demand without contracts or up-front fees. Learn more in our eBook - "Ten Tips for Best Practice Lead Management."

## HubSpot

HubSpot inbound marketing software helps your business get found online, convert your website traffic into leads & customers, and optimise based on your results. HubSpot provides easy tools for search engine optimisation (SEO); writing blogs & creating web content (CMS); leveraging social media like Facebook, LinkedIn & Twitter; that help your company get found online. You can then convert prospects to leads to customers with landing pages, lead nurturing/intelligence & marketing analytics.

## Oracle CRM

Software for managing your inbound and outbound marketing campaigns.

## Infusionsoft

Grow sales. Save time. Get organised. 23,000 thriving small businesses use Infusionsoft. Discover how Infusionsoft, the only all-in-one automated sales & marketing software built exclusively for small businesses, has helped them grow sales, save time and stay on top of it all. Automate your marketing processes from lead capture to email marketing to CRM and beyond.

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## Sources

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2. <http://blog.hubspot.com/blog/tabid/6307/bid/33458/Why-Marketers-Can-t-Rely-ONLY-on-Marketing-Automation.aspx>
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