



# Marketing Automation for Success

*A practical guide* to engaging customers,  
creating sales-ready leads and boosting revenue

# What is Marketing Automation?

One of the biggest changes for B2B and B2C organizations is that the customer is driving the buying process more and more. Particularly for B2B companies, the buying process frequently is a long and complex journey that requires the right management and nurturing. Marketing and sales strategies and activities must now connect with steps in the buyer journey to be able to **engage customers and grow revenue**. Smart marketers have been turning to Marketing automation as a new way to successfully shepherd customer engagement opportunities that will lead to improved sales outcomes.

Marketing has the growing responsibilities of attracting new customers and helping convert more leads into sales. Manual processes cannot handle what it takes to produce relevant, **personalized responses** to customers throughout the buying process, matching the right content to the right point in time. Marketing Automation platforms enable Marketers to create and manage customer interactions with **greater speed and customization**. Marketing automation expands what can be accomplished for multiple campaigns, and raises the level of sophistication for customer conversations. Marketers can go from setting up single email campaigns to designing entire sets of emails and multi-channel content that enrich and expand customer interactions.

### Where Marketing Automation Makes a Difference

- *Change how emails and content are used to engage customers*
- *Manage targeted, multi-touch engagement campaigns*
- *Quickly set up landing pages and web forms*
- *Send different messages to different customer segments*
- *Achieve more high quality, sales-ready leads*
- *Analyze which marketing campaigns are most effective*
- *Decide where marketing campaign dollars should be spent*

## Marketing Automation Impacts More than Marketing

The immediate benefits of marketing automation are clear improvements to process efficiency, flexibility and creativity. Both marketing and sales teams see significant time savings related to lead gen activities, especially when sales and marketing objectives are aligned.

Marketing automation also holds significant value in these areas:

- **Strategic approach to customer relationships and engagement that will yield a greater lifetime value**
- **Customer-focused vision shared with the entire organization for better outcomes**
- **Better integration and collaboration across the enterprise**
- **Effective contribution to continuous revenue growth**



**Marketing automation has seen the fastest growth of any CRM-related segment in the last 5 years**

(Source: Focus Research)

A strategic view of marketing automation pays off when organizations are planning programs and tactics to help achieve long-term business growth. A strategy that shows positive impact across the organization, especially in terms of success metrics and ROI, will gain faster support not only from the CMO, but the CEO and CFO.

Marketing automation opens the door to integrated marketing strategies where campaigns take advantage of integrated processes

for Web and email activities that better target prospects. Marketers can create automated campaigns that work across multiple channels (websites, email, and social media) to better connect with customers at any point in the buying journey. Integrated marketing, in partnership with marketing automation, improves the outcomes of marketing campaigns - marketing tactics executed in silos generally produce a much lower ROI.

### Marketing Automation and Emails



## The "New" Email Marketing

Email marketing continues to be a top marketing channel. With the sophisticated personalization made possible by marketing automation, email marketing takes on a fresh approach to produce optimal results and provide the right content for customers. Email drip campaigns leverage relevant messages and content usually triggered by customer interactions with the brand and where the customer is on the buyer journey. Marketing automation makes email more effective as a part of integrated multi-channel marketing, where email can interplay with other content types to provide an exceptional customer experience.



**Companies that invest in marketing automation solutions see 70% faster sales cycle times, and 54% improvement in quota achievement.**

(Source: Bulldog Solutions)

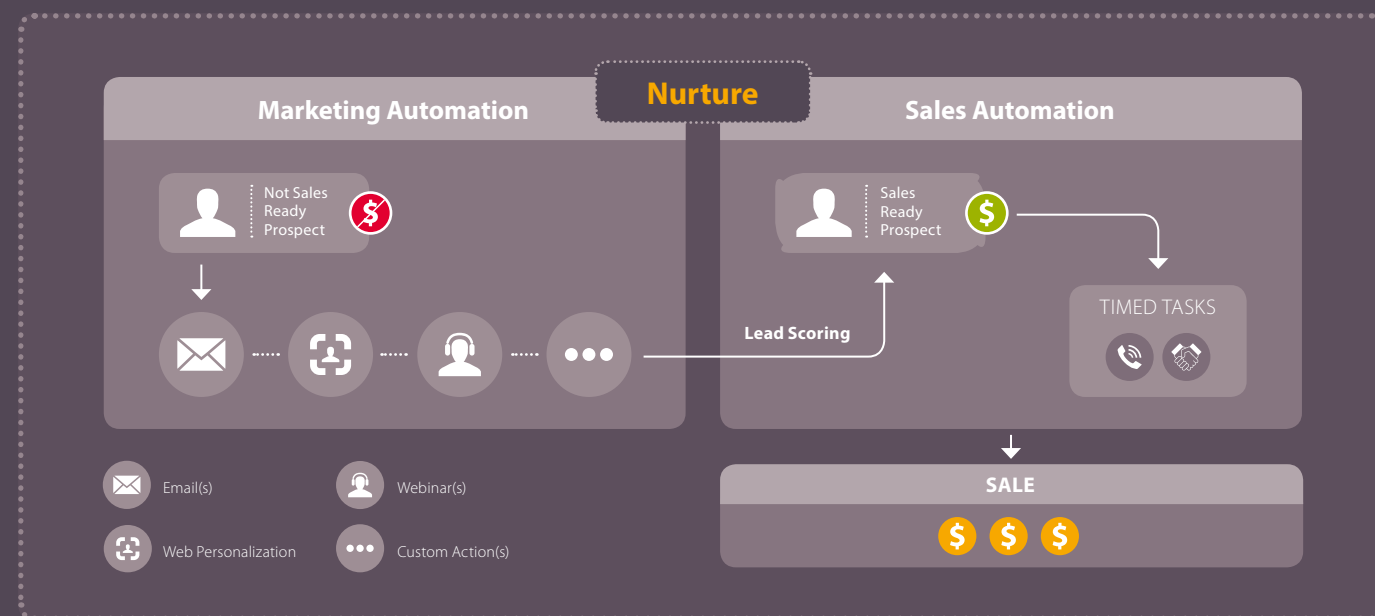
### Marketing Automation in Action

Many organizations are new to marketing automation and do not fully understand the range of uses for these new capabilities. While most will successfully leverage marketing automation for certain use cases, there are many ways marketing automation makes a difference for marketing, sales and the customer experience.

The most valuable use cases revolve around the customer: not only for nurturing leads but for growing the ongoing customer relationship and for enhancing the customer experience with the brand.

### MANY USES FOR MARKETING AUTOMATION...

- **Customer Engagement Management:** customer segmentation, personalized content, marketing automation processes, and analytics to engender positive interactions with the brand during entire customer lifecycle
- **Lead Management and Nurturing:** sophisticated processes to shepherd more leads to sales-readiness
- **New Market Acquisition:** campaigns to leverage new customer segments, new product markets – get to market faster, gather valuable intelligence on new customer attributes, refine marketing and sales processes in light of new intelligence
- **Optimize Email Quality and Relevance:** decrease the effort required to send emails, personalize targeted messages, and improve overall effectiveness
- **Maximize Selling Time for New Business:** deeply qualify the best prospects, spend selling time on high quality leads, and greatly improve sales outcomes
- **Complex Campaign Management:** enable and manage complex marketing campaigns across multiple channels, understand how customers want to engage on each channel, deliver the content customers want on a particular channel
- **Quarterly Sales Push:** targeted campaigns to improve Response-Opportunity-Close ratios
- **Capture Purchase Behaviors:** tap into digital footprints of customer online activities, send personalized messages, build customer intelligence to detect changes in behavior and predict future behavior; better knowledge for future offerings and campaigns
- **Post-sale Customer On-boarding:** send informative emails to new customers to enable better product / service adoption, better customer satisfaction



#### Use Case: Lead Nurturing

Lead nurturing has become very important to today's buying process – frequently, prospects are most of the way through the buying journey before they're ready to interact with the sales team. So marketing must step up to ensure continuous engagement with the prospect that will help move the prospect towards a buying decision.

Without marketing automation it would be very difficult to maintain meaningful nurturing for every potential lead and customer contact. Marketing automation enables customer-segmented communication tracks to provide content and messaging based on prospect behavior, interest levels, and demographics. Manual processes could never scale to meet the demands of such sophisticated and targeted lead nurturing.

## Marketing Automation Done Right

One of the most important outcomes of marketing automation should be improved **customer experiences**. Why does the customer experience matter? It frequently increases the lifetime value for individual customers, which obviously impacts business success and ongoing revenue. Using tools like marketing automation to help provide positive customer interactions can lead to customers becoming brand advocates. The value of customers as advocates: Priceless.

Through **marketing automation processes, customer segmentation, personalization, and lead scoring criteria**, marketing and sales can get to know their customers better, and how they prefer to interact with the brand – for future as well as current needs. Marketing automation done right can prevent a 'one-size-fits-all' approach to customer interactions and can do a much better job of giving customers what they need when they want

Marketing automation has a very clear role for revenue growth, particularly through improved collaboration with the sales team. By engendering more quality sales-ready leads in less time, marketing enables the sales team to concentrate on what they do best – closing deals with the right customers. With the right approach and strategy for marketing automation, organizations frequently see revenue results in the short term, as well as building sustainable processes for on-going revenue growth.

Integrating marketing automation with CRM and SFA systems enables marketers to track and analyze leads during the entire buying journey. Marketing campaigns can be more clearly related to sales outcomes, revenue and ROI, to show the value of marketing efforts and help with allocation of budget and resources to the specific campaigns that are delivering the best results.

**Lead generation marketing effectiveness increases with marketing automation. Marketers report an increase in six key outcomes as a result of implementing marketing automation, with 6 in 10 reporting increased quantity and quality of leads and close to half reporting increases in the percent of leads accepted by sales and the total marketing revenue contribution.**

(Source: [Lenskold Group](#))

*"Even if my profit and customer value had not increased the way they did, I'd still be better off," Griggs says. "I'd have customers that like me and trust me that much more, and who will stick around longer."*

(Source: [MarketingSherpa marketing automation case study](#))

## Avoid the Pitfalls

While marketing automation can improve multi-touch customer interactions, marketers must be smart about every step to avoid making costly mistakes that result in lost customers, lost opportunities, and lost revenue. Marketers must always remember that an overarching marketing strategy should direct the implementation of marketing automation platforms. The technology itself doesn't engage and convert prospects – it's the marketing plan in place that makes it all happen.

Relevance has a short shelf life: keep an eye on automated content and triggers, and conduct periodic reviews to ensure that messaging and content are appropriate, fresh and aligned with the proper customer segmentation.



» **1 Automated, Not Robotic**

Marketing automation can take personalization to the next level based on lead scoring data and other customer intelligence. Content and messaging adaptability is essential and highly possible with a marketing automation platform – opt for ‘natural conversations’ with customers instead of stiff, impersonal ‘corporate speak’.

**2 Marketing Automation Also Means Content Strategy**

Just as marketers need an overall marketing strategy to get the most out of marketing automation, the organization’s content strategy is equally essential. Content must be high quality, useful and valuable from the customer perspective – otherwise marketing automation messaging and content quickly become spam.

**3 Keep the Content Focus on Customer Interests**

Most prospects convert into leads based on interest in a particular product or area of concern. Marketing automation content should relate closely to those interests, until the prospect indicates a desire to move on to other products or topics.

**4 Think Big, Start Small**

It’s important to construct an overarching marketing strategy, but it also makes sense to start off with phased marketing automation implementations to understand how marketing automation works best for the organization. Lessons learned from starting small will inform and fine tune the overall approach. Faster wins from small steps help to gain buy-in and collaboration from the sales team, and ultimately, upper management.

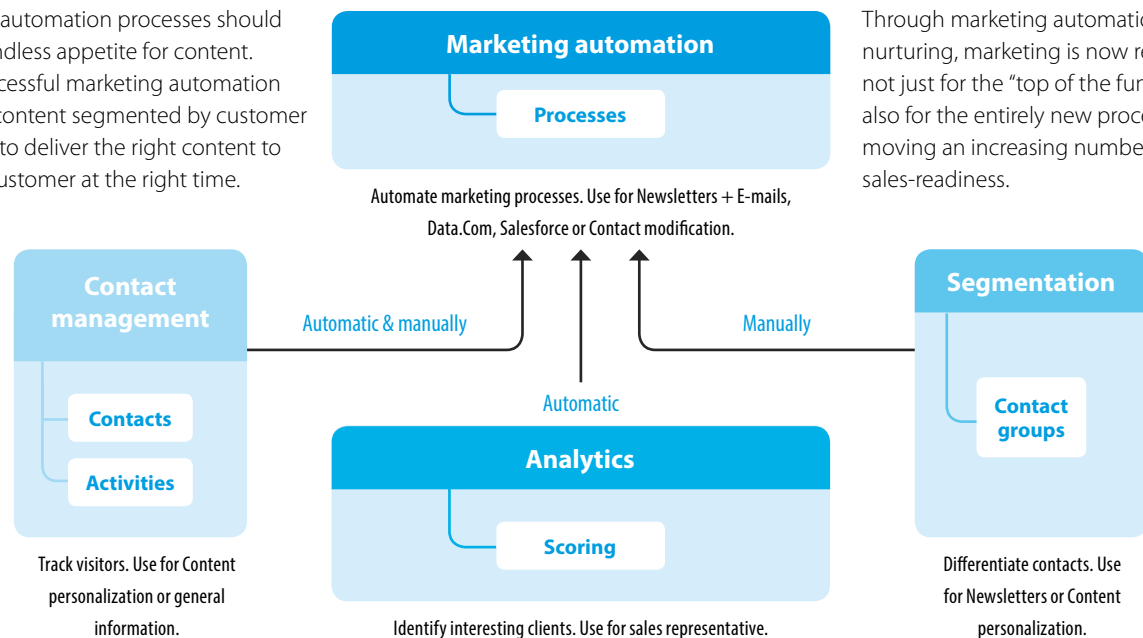
## How the Pieces Fit Together

Marketing automation platforms orchestrate capabilities for improving lead management and engendering quality customer experiences with brands. Typical capabilities include lead scoring and nurturing; email / drip marketing; contact management and customer segmentation; personalization; and rapid creation of A/B landing pages. Robust process design and orchestration capabilities are also essential to successful marketing automation implementations.

At the core of marketing automation is content: strategy, design, creation, and management. Well-designed marketing automation processes should drive an endless appetite for content. Highly successful marketing automation pivots on content segmented by customer attributes, to deliver the right content to the right customer at the right time.

All of the components of marketing automation produce valuable customer intelligence, particularly when marketing automation is integrated with CRM systems and customer service solutions. Such customer knowledge enables organizations to be more proactive in providing positive customer interactions. Marketing automation components like lead scoring contribute to the measurement of the value of each customer engagement, throughout the customer life cycle.

Equally important is aligning marketing automation processes and objectives with the sales process. Through marketing automation and lead nurturing, marketing is now responsible not just for the “top of the funnel”, but also for the entirely new process of moving an increasing number of leads to sales-readiness.



# 10

## Real Life Examples of Marketing Automation

**THE FOLLOWING BUSINESS CASES** show the most common uses for marketing automation. They vary in starting point, or “trigger”, which can either be started manually or automatically. Any of these triggers can be set to kick off your predefined automated steps; your workflow, of which you can have many. Each marketing automation workflow consists of a starting point, multiple steps (which sometimes include decision points), and a final step.

While sending an email would be the most typical action in these examples, marketing automation is more than an email workflow engine. Your workflow steps can include the updating of contact attributes, the importing of data to your CRM, the management of

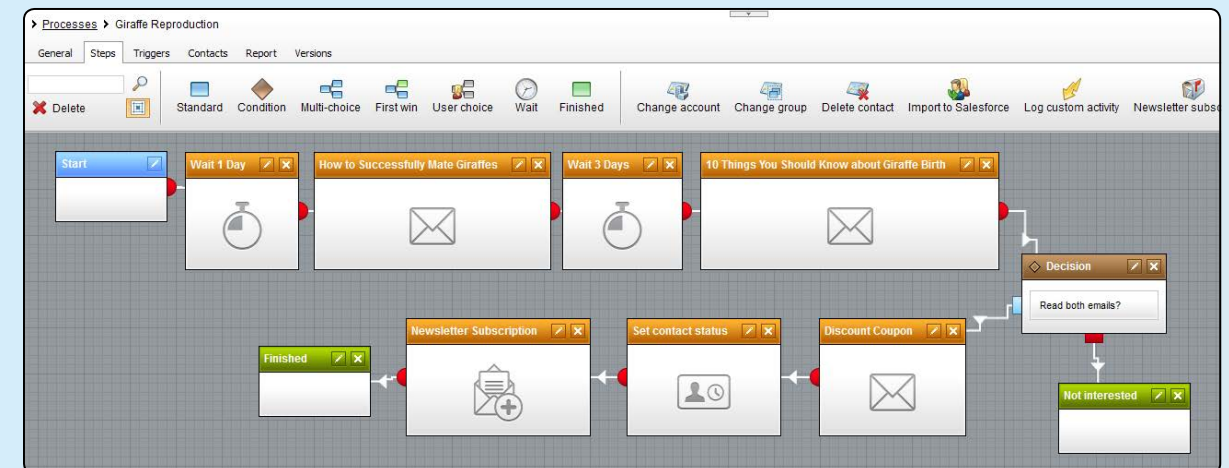
subscriptions, and others. The contact attributes can be used in the **personalization of your website** content enabling you to tailor visitor experience according to their specific interests, which provides an additional communication channel to email. Marketing automation is also closely linked to your lead scoring activities (a system that helps you classify website visitors according to how likely they are to become customers using a points/ scoring system, as not only can scores be used as triggers, but a user’s score can be affected by their progress through a workflow.

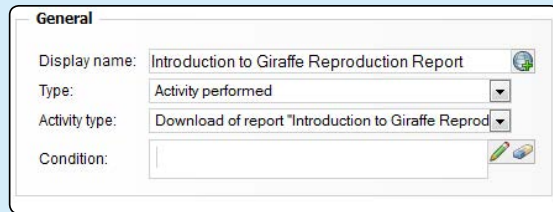
**1. Topic-oriented lead nurturing, trigger: content download**

Create a set of emails that focus on an industry-specific topic being covered by your inbound marketing efforts. Let’s say you’re in the giraffe business and your topics are “giraffe breeding equipment”, “giraffe stabling” and “giraffe reproduction” you might have a couple of articles, white papers or webinar recordings ready for each topic.

As an example, when a site visitor downloads the report: **“Introduction to Giraffe Reproduction”**, from your website, it can trigger the marketing automation workflow entitled **“Giraffe Reproduction”**, within which you have multiple materials prepared that cover the specific topic of interest.

The first email in your workflow might point to your **“How to Successfully Mate Giraffes”** webinar recording and the second email might promote your **“10 Things You Should Know about Giraffe Birth”** article. If the visitor reads both emails, they can be sent a discount coupon for further enticement and you might ‘tag’ them as being interested in giraffe reproduction, which changes their status to “reproduction”. This new status might then also be used to personalize their experience of your website, with content being tailored to the theme of reproduction. Finally you can trigger an invitation to subscribe to your **Giraffe Newsletter on Reproduction**.





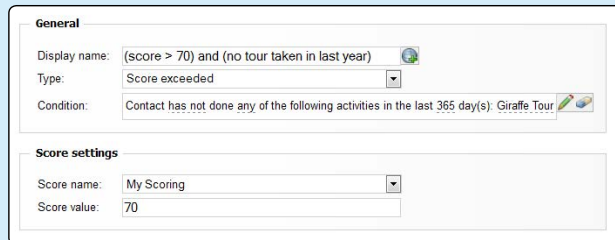
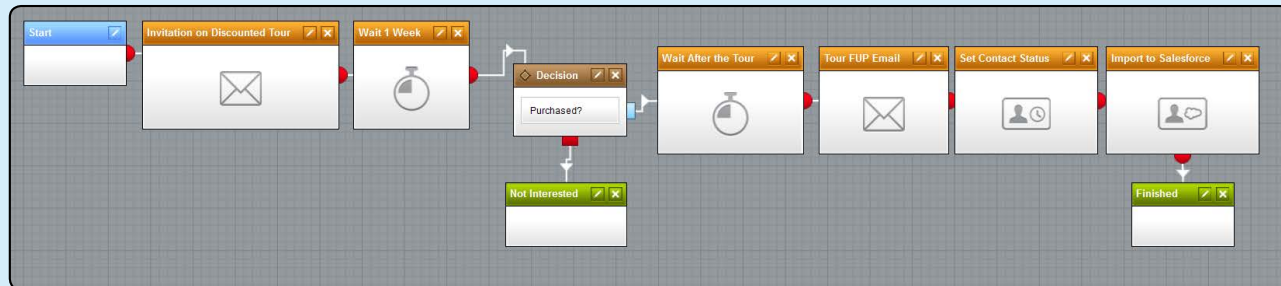
The starting point (trigger) for this marketing automation workflow is the download of a particular document – in this case, the “Introduction to Giraffe Reproduction” report.

## 2. Increase sales readiness, trigger: achieving high lead score

Examine your sales funnel to find out which action/activity most closely precedes actual sales and is therefore key to converting the customer. Set up a lead scoring system on your website and once a lead reaches a certain score, automatically offer them the activity you identified as being key. This will help you to turn a bigger percentage of your leads into real opportunities in a shorter time.

Coming back to your giraffe business; let’s say you have realized that most people are convinced to **buy a giraffe** once they have

seen them on a tour of your stables. You can now set up your workflow so that, once contacts have been identified as being highly engaged with your offer and a good fit for your business, they are offered a **discount on a tour**. After they attend the tour, they receive a follow-up email and, with their contact status having been set up and imported into your CRM, your sales team is equipped to immediately start working with them.



Achieving a certain score is the trigger here; however, we still want to make sure we don’t bother those contacts who have already been on the giraffe tour, so we exclude this group by using the Condition field as shown in the screenshot.

## 3. Abandoned Shopping Cart, trigger: shopping cart abandonment

Leverage the most common scenario for e-shops. Automatically contact those site visitors who added any item to their shopping cart, but for some reason didn’t complete the buying process. You can contact them to:

1. remind them of their forgotten purchase (“There is a giraffe left in your shopping cart!”)
2. get valuable feedback on why they didn’t finish the purchase (“Not enough space for a giraffe?”)

3. offer a special discount to your loyal, long-term buyers (“You were about to buy a third giraffe – get it with free delivery now!”)

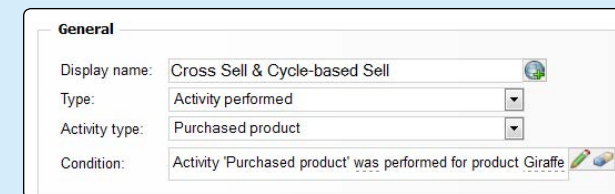
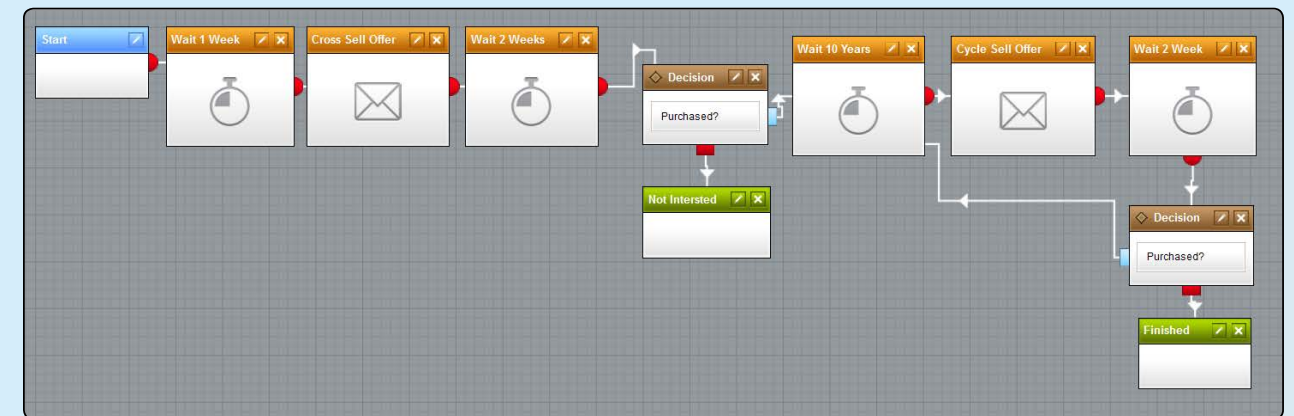
## 4. Upsell, Cross sell and Cycle-based sell, trigger: past purchases and sales cycles

Another great example of using Marketing automation for any e-commerce website is based on data from past customer purchases. Leverage this data using one, or a combination of these 3 methods:

1. Upsell: Offer new/better versions of what they purchased (suggest a better, faster, stronger giraffe)
2. Cross sell: Offer complimentary products to their purchase (e.g. the parasite-eating Oxpeckers (tick birds) that hitch a ride on giraffes’ backs, helping them stay parasite-free)

3. Cycle-based sell: Offer products that are being purchased in a cycle (as a Oxpecker’s life expectancy is lower than that of a giraffe, offer your customers their just-in-time replacement)

The following marketing automation workflow covers cross sell and cycle-based sale from the starting point of purchasing a giraffe. The first part of the workflow represents an offer of a complimentary product – the above-mentioned Oxpecker bird. If the bird is bought, the marketing automation continues with the cycle-based sell.



The initial trigger here is the purchase of a particular product – a giraffe, in this example.

## 5. After Sale Support, trigger: sales cycle stage

Establish an ongoing positive relationship with your customers by providing them exceptional after-sales support. This might include links to helpful training material and examples of the best ways to use the product, as well as assistance and future upgrades.

## 7. Wake Inactive Leads, trigger: inactivity of leads

Build up a list of contacts that previously showed a high level of interest in your product, but haven’t interacted with your site or company for a certain period of time. Send an exclusive offer or discount to these leads to re-engage them. This approach not only restores inactive leads, but also helps clean up your subscription lists for a higher email deliverability and click-through rate.

## 6. Customer Happiness, trigger: high or low Net Promoter Score

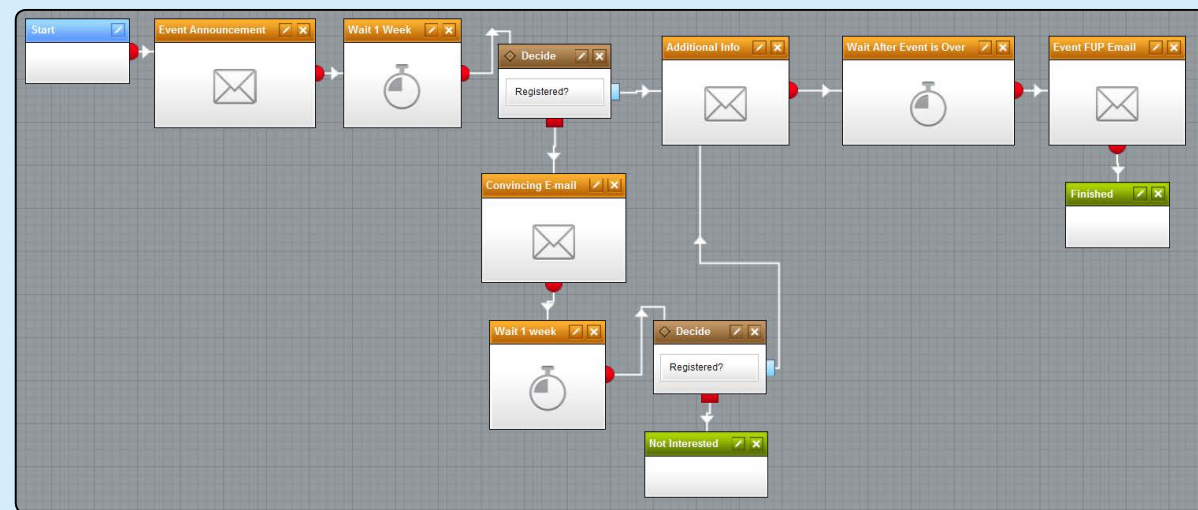
Having a regular survey on customer satisfaction is a precondition to this use case. Determine a score that represents respondent happiness and allocate your respondents to “happy” and “unhappy” groups. Send a “thank you” email to the happy ones and even reward them with exclusive content. Then, further segment your “unhappy” respondents according to their reasons for being unhappy and try to make them happy by addressing the issues they mentioned in the survey.

**8. Event communication automation, trigger: manually or event registration**

Whether organizing a live, one-to-one or online event, your communication with your customer prior to and following each event will be the same. Leverage marketing automation to fully automate these processes and avoid delays or inaccuracy in communication.

Perhaps you're holding a conference on "Giraffe Population Management". Use the initial email to ask your current customers to register for the conference. As the time of the conference

approaches, send registrants additional information on the program, nearby accommodation and transportation. Provide those who have yet to register with further arguments for why they should attend, or even a last minute discount and the chance to register again. After the event, send a "thank you" email to attendees, in which you also ask for their feedback and offer them links to recorded sessions.



**General**

Display name: Registration to Conference

Type: Activity performed

Activity type: Form submission

Condition: Contact is registered for event /Conference-on-Giraffe-Population-Management

The trigger for this one can be started manually, as shown in the marketing automation workflow picture, or started automatically after a site visitor registers for the event.

**9. Highly Engaged Persons, trigger: certain lead score and activities**

Set up a group of contacts whose members achieved a certain lead score and met certain additional conditions, such as repeated site visits, to build a list of your unpaid evangelists. Offer newsletter subscription or the opportunity of joining you on social media to use these highly engaged people as additional advocates of your product and company.

**10. Employees Training, trigger: manual**

Automate training for employees and add tests for them to take after particular parts of the training have been completed. This can be invaluable not only when new employees join the company, but also to educate current employees about trends, new company policies, etc. Marketing automation also allows the manager who oversees the training processes to see at which step of the training the trainees are at any given time.

**THE BUILT-IN MARKETING AUTOMATION OF WORLDCAST EMS ALLOWS YOU TO:**

- easily set up, change and manage marketing automation workflows and their triggers
- use Marketing Automation together with Content Personalization, Contact Management and Lead Scoring
- integrate marketing automation with Salesforce
- overview, manage and report on the current state of contacts within the Marketing Automation workflow
- choose from dozens of pre-set activities, conditions, triggers and steps or easily add custom ones
- rely on a solid CMS with an 9-year history of powering over 16,000 websites, including those of 60 companies from the Global Fortune 500

To learn more about marketing automation: <http://www.bpstudios.com/marketing-automation>

Marketing automation is just one of many online marketing features that make **WorldCast Enterprise Marketing Solution (EMS)** the integrated customer experience management solution of choice, helping you optimize your website and achieve higher campaign ROI. Unlike other Customer Experience Management (CXM) products, WorldCast EMS is an easy-to-use, out-of-the-box marketing solution that allows you to deliver real-time customer-centric marketing across channels and analyze results almost instantly.

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