



Intelligent Marketing Automation

Get Your Feet Wet

The Holy Grail of Marketing:

AUTOMATICALLY REACT IN THE MOST RELEVANT AND MEANINGFUL MANNER TO HOW A VISITOR IS INTERACTING WITH YOUR WEBSITE OR MARKETING CAMPAIGN.

Marketing automation is gaining ground, and fast. This critical business element is rapidly becoming a de facto component to any fully functional organization where lead generation, development and marketing have anything to do with delivering revenue. Marketing automation is quite simply, intelligent. When applied with strategic logic, it builds decisive efficiencies across the entire lead generation lifecycle.

Their complexity is only limited to their ability to integrate with other tools or systems. At the high end are full featured SaaS based, or stand alone systems which are complete, turn-key marketing automation platforms 'in a box'. At the low end are simple email lists or newsletters.

” **78%**

Of marketers saw a return on investment with their online lead generation due to marketing automation.

*BtoB Online

That's a pretty compelling statistic. Almost makes it sound like developing a marketing automation strategy is a good idea. Good; I think you should too.



DON'T BE SCARED OF A LITTLE AUTOMATION

Sure, the term marketing automation can sound a little intimidating and there is definitely a lot going on at the high end. But that doesn't mean that you need to spend \$40k on a fully fledged automation solution. Start with some realistic and attainable goals.

Start with a newsletter or the quintessential email list. Provide one action and an unsubscribe link. The unsubscribe link will remove them from the list and you didn't lift a finger. That's automation. But you can't stop there. What about the links in the email? Are they tagged with tracking? Do they link to pages that contain additional action? Are these visits tracked? Do you know which links in the email attracted the most clicks? Are you measuring the effectiveness of the email subjects? Are you running A-B testing on your landing pages?

Every single step along the visitor's path is vital to feeding your marketing automation strategy. Each data segment provides something unique about that visitor which can be processed into that person's individual's lead nurturing and communication workflow.

THE GUTS

What makes up a marketing automation setup? Well each situation is different, however there are some core architectural components that build the framework, such as a car needs wheels.

Main Ingredients

All marketing automation software is primarily used for lead generation. Some other 'salesy' jargon may also refer to segmentation, content personalization, lead scoring, relationship marketing, cross-sell and up-sell management, customer retention and marketing ROI measurement.

All software platforms require the following core components:

- **A Central Marketing Database:** This database contains all the marketing data which is generally arranged by customer or lead (CRM).
- **A Relationship Marketing Engine:** This is the brains of the operation and runs the automation of the marketing processes and conversations across off-line and on-line channels.
- **Analytics:** The analytics will display the performance of the campaigns across varying metrics such as A/B testing, successful email opens, conversions, etc... Analytics may also communicate to the Marketing Engine in order to automate certain optimization features.



BASIC AUTOMATION

Basic marketing automation solutions are generally SaaS based software solutions that automate simple, repetitive marketing tasks.

- Email marketing platforms
- Website analytics
- Aggregated social sharing platforms

Basic Marketing Automation Example: Webinar Signup

- Build landing page with web form (SEO'd for the topic)

- Write blog post about webinar with links to landing page
- Share blog post across social networks
- If there is already an active email list; send event invite to list
 - Set timer for 3 days
 - On third day check emails for registration, if not, send reminder
- Registration form completion triggers event details email.
- Day before event, send reminder to all registrants
- Wait one day after event
- Send different reminder to attendees and non-attendees

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ADVANCED AUTOMATION

Once we get past the basic features, advanced marketing deployments can get complicated fast. We also start seeing more integration with other enterprise based platforms such as customer records management (CRM), content management systems (CMS), eCommerce systems, social media platforms, etc... Enterprise marketing automation systems generally start providing the following:

- Full marketing intelligence including advanced workflows and rule switching
- Multivariate testing and A/B testing for landing pages
- Reactive landing page optimization based on A/B testing data
- Lead scoring
- Drip marketing and nurturing
- Advanced and detailed campaign analysis and analytics
- Advanced workflow automation (will usually need significant setup)
- And on and on...

Who's Getting Down with Marketing Automation?

ADOPTION OF ENTERPRISE MARKETING AUTOMATION

Complete adoption of enterprise marketing automation is on a sharp rise. This is the all encompassing, feature rich implementations. No longer can we rely primarily on a managed email list. With so many channels to answer to from mobile to desktop and from social to search, our workflow needs to be able to instantly shuffle leads into various categories and secondary workflows.

The value of marketing automation software is placed on its ease of use, the presence of simple dashboards and the display marketing performance.

Marketing executives want to maintain control of the automation efforts without involving the IT department which was known for stalling and road-blocking all kinds of marketing initiatives of the past.

The overall price of the software becomes less of a deal breaker when the ROI is palpable such as in cases where the team is achieving its business goals with increased and measurable efficiency.

DETERMINING ROI BY THE NUMBERS

The core ROI goal for marketers engaged with marketing automation software is to achieve an increase in conversions, convert more prospects to leads and more leads to customers; sounds simple enough.

The following shows the results of a survey operated by BtoB (www.btobonline.com) that outlines the adoption rate for Marketing Automation features and where companies feel they get a return on their efforts.



WHY MARKETING AUTOMATION

Where is the ROI

Companies tell BtoB Online Where they saw the Returns





SMB companies make up largest growing sector as people understand marketing and automation software becomes more accessible

COMMON FEATURES

Core components of Marketing Automation systems vary dramatically from platform to platform. Worth noting is gauging the needs of your marketing department when developing the components to ensure that all pieces are necessary and integral to the manner in which the team develops and nurtures leads.

Some of the most common components include:

Email marketing

An email marketing tool is used for nurturing and email list. It manages emailing a specific list of leads that have been captured using varying web forms

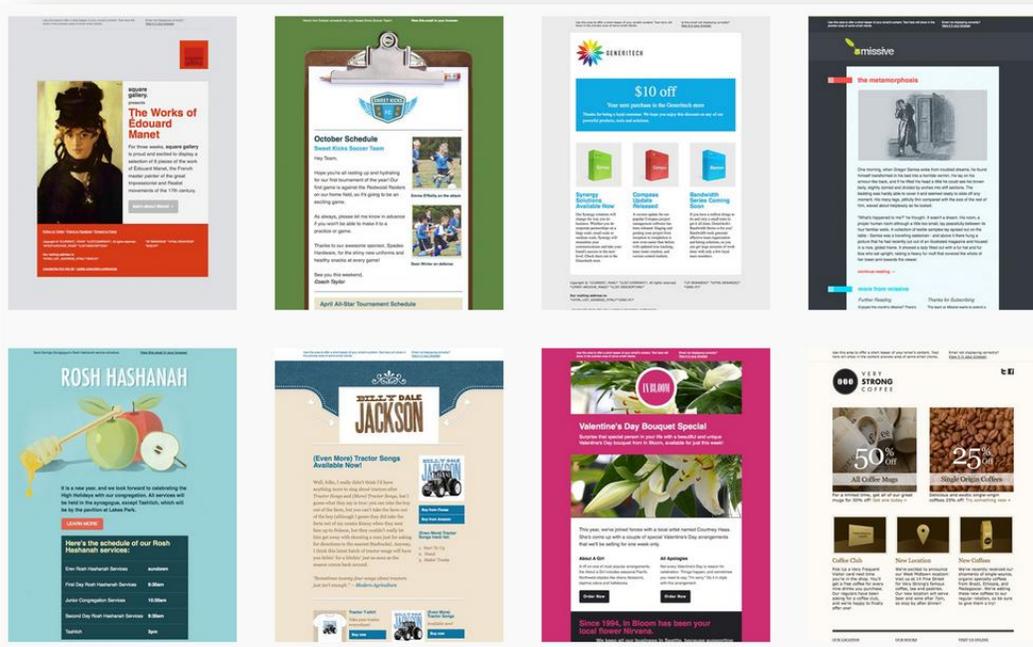
and campaigns. Each form will develop into a new topical list of leads such as from a Whitepaper on SEO tips to a free e-book covering strategic use of video. Each list will require varying types of content in order to maintain interest based on the lead's initial interaction.

The right email marketing tool can make or break an entire email list. It takes ages to develop a good sized list so you need to make sure that your emails are engaging, relevant and personal.

Email Templates

A functional email marketing tool should also come chock full of email templates. The look and feel of these email templates should resemble very simple campaign web (landing) pages with highly personalized and meaningful content.

Here are a few excellent examples from [Mail Chimp](#):





Additional examples of great email templates can be found [here \(Mail Chimp\)](#) and [here \(iContact\)](#).

Graphical Message Builder

As well as a catalog of templates, a graphical message builder should be available to allow fully custom email messages to be created. It should also go without saying that all email messages should be completely mobile friendly. In reality, messages should be developed based on a 'mobile first' philosophy since a large majority of marketing emails are opened by smart phone with this number only expected to rise.

48.1% of marketing emails were opened via smart phone in Q2 2013 according to a report by Movable Ink. 38.1% interacted via desktop and 13.8% opened emails on a tablet.

Further, depending on the analytics you could further silo your list and templates into mobile and desktop lists and develop templates accordingly.

Advanced Analytics

Analytics are what allows the automation to really work its magic. It's like a mail sorting facility where depending on what flags the message 'receipt' has that will determine where the message is sent in the workflow or scoring strategy.

A simple check would be whether the message was opened on a smart phone, tablet or desktop. Once the same user triggers 3 opens on either, they would be placed in the appropriate 'channel silo' and would receive the optimized message in the future. At a bare minimum, all email metrics should communicate the following:

- Total Messages Sent
- Messages Delivered
- Total Bounces
 - Should include fatal 'non-existent user' as well as temporary bounces such as network unreachable or mailbox full errors
- Message opened / read
- Email 'conversions'
 - This is subjective to the marketer and what they feel constitutes a conversion
 - Generally this is measured as a CTR (click through ratio) value.
 - How many readers clicked from or took some sort of action presented in the email
- Unsubscribe numbers
 - And for the love of... please don't email a user again after they have unsubscribed (confirming unsubscribe)
 - This is a legendary email marketing fail!

Even with analytics in place, there are several instances that can skew the results such as email clients where graphics have been disabled; Gmail anyone? Also, in situations where a 1px image is used to measure email 'opens', this may not trigger the analytics if the email client is set to hide images. Some mobile devices and of course, text only email clients will not count opens that rely on a remotely loaded image.



On the other hand, analytics may record less than comprehensive data when emails are glanced at in an 'automatic preview' area of many email programs.

Landing pages

I suppose it's no stretch to say that landing pages ground all marketing automation strategies. From product pages to email capture and related web forms, this is where we direct the lead in order to gauge their intent or trigger the next phase in the lifecycle. Our earliest and most basic automation features were developed in conjunction with landing pages whether we knew it or not. Landing pages are used for email capture, webinar registration, whitepaper downloads, newsletter signup, product promotion, etc...

Because campaign based landing pages should be ultra focused, all marketing automation platforms that feature a landing page segment should also provide intuitive graphical design capabilities. Drag and drop forms, rule generators and lead scoring features should be built into all forms.

Web Forms

Someone who clicks a link in an email and then fills out a form on your website, is ultra engaged and should be scored accordingly. Web forms are integral to the landing page feature and are the easiest way in which to qualify and distribute leads.

Depending on the information that is submitted you can segment and automate follow up campaigns based on gender, region, referring website, hobby selection (runner, MTB biker or hiker); see the possibilities? Each checkbox can trigger a completely new relevant email target.

As mentioned earlier, each of these features must be able to communicate back to the platform with specific analytics in which to trigger the automated mechanisms.

For instance, a hard bounce will remove the address from the list and notify the administrator.

A smart unsubscribe feature will place a 1, 2 or 3 month hold based on selection and trigger a gentle follow up at that time.

Implementation Challenges

With the exceptional rise in the use of marketing automation and it's dependant systems, many companies jump on the bandwagon with little insight or understanding of its broad implications.

A well meaning and strategically driven plan often fails to exploit the full potential of the technology. Several immediate



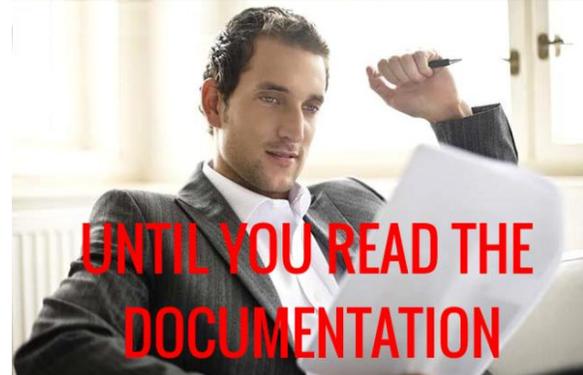
challenges await an unprepared organization at the cost of long term lead acquisition.

So often we find that leads are ready to engage, however without configuring the

appropriate lead scoring and follow up strategy, they 'cool off' and die, simply because of a lack of training with the tools.

COMMON REASONS FOR FAILURE

- Marketers that have developed an over reliance on email lists.
- Marketing departments that fail to modernize and evolve past the single channel email campaign mindset
- The untrained marketer who is unwilling to modernize will misinterpret marketing automation as a glorified spam tool
- The software itself lacks the intelligence to circumvent filters such as Google Priority and junk filters
- The software's inability to integrate and leverage other channels such as search, social media and web referrals
- Software that limits customer control in age when online marketing is shifting to customer led buying cycles
- And most importantly, marketing and sales MUST agree on the definitions of lead scoring and qualification





The Players

There are some real heavy-hitter players in the enterprise Marketing Automation space. This market is only going to grow and create more chaos in the selection process. When foraging in this ocean, be sure to have a PLAN! Your plan and needs will dictate the most appropriate software partnership. Below are some of the most commonly batted around Marketing Automation brands:

MARKETO

<http://www.marketo.com/>

ORACLE / ELOQUA

<http://www.eloqua.com/featured-content/intro-marketing-automation.html>

HUBSPOT

www.hubspot.com/

SALESFORCE PARDOT

<http://www.pardot.com/>

ACT-ON

<http://www.act-on.com/>

SILVERPOP

<http://www.silverpop.com/>

APRIMO

<http://www.aprimo.com/>

SALESFUSION

<http://www.salesfusion.com/>

SITCORE

<http://www.sitecore.net/Products/Digital-Marketing-System.aspx>

ETRIGUE

<http://www.etrigue.com/>

MINDMATRIX

<http://www.mindmatrix.net/>

GENIUS

<http://www.genius.com>

What Now?

Marketing automation is pretty intense. Meaning; that with the correct training and implementation, it will deliver an intense level of ROI and efficiency into your lead generation cycle. If you rely on some level of lead capture in 'any way', automation should be an immediate consideration. It's so easy for us humans to forget to follow up or set a reminder or appropriately catalog our leads. Why not let a robot do it for us?

Let's just leave with a few very important tidbits of information from these pages:



- Remember earlier when we showed you a report stat that said that **78% of business that used marketing automation saw a return on their Online Lead Generation?** That's pretty definitive!
- We also discussed how marketers that are unwilling to break out of their old habits are doomed to failure. You must evolve along with the software which means **re-learning some marketing strategies.**
- You must not stigmatize marketing automation as simply an email list management tool. See above if you still think this. It is so much more than that and is up to the limitations of the marketer running the software. **It's either stubbornness or lack of training.** Both will cost your company money so which is it?
- All systems come packaged with a **learning curve.** Expect to pour over documentation and sit through reams of training videos or in person meetings. Embrace it and you will come out streamlined and generating revenue much faster than before.

About Falcon-Software

Since 1993, Falcon-Software has been offering a unique combination of e-business strategy, creative web design and Web CMS application expertise when developing feature-rich website solutions for organizations worldwide.

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