



The Newcomer's Guide to Marketing Automation



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Introduction

As marketers, we spend months developing and executing our new inbound marketing plan that puts content development, search engine optimization, paid search, and social media marketing as the cornerstones. At some point, if you've done it right, you may be faced with the classic growth-mode problem of sales and marketing: a fire-hose of leads. While it's a good problem to have, it's no longer practical for your sales reps to work each of these leads manually while simultaneously maintaining a high close rate.

You need to figure out a way to make your sales reps more efficient while continuing to work with, and educating, prospective customers about your product or service.

RingLead had this very challenge, and while we maintained strong relationships and product integrations with many of the marketing automation companies, we never had the need to use the platforms ourselves. Now that our marketing machine was in full gear, we decided it was time to invest in the technology, and we began the planning phase for rolling out our marketing automation program.

Like every new initiative, there were some bumps in the road and valuable lessons learned. Here are some of the lessons in our first full year as newbies using marketing automation.



Keep an eye out for great tips from marketing automation rockstar, Josh Hill.

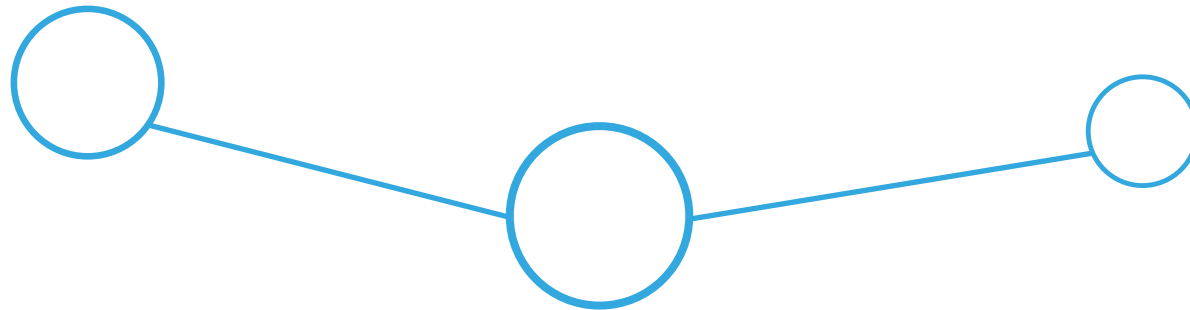
1. Marketing + Technology

Before you jump head first into a marketing automation roll out, it's important to assess the skills required. Ideally, the project lead should have an equal blend of marketing and technology skills. They should be just as comfortable with database administration as they are with persona-building exercises and SEO.

This role stems from a new breed of marketers from the latest surge in marketing technology: the marketing technologist. Scott Brinker, the co-founder and CTO of Ion Interactive, writes extensively about this on his blog, Chiefmartec.com and describes the requirements as:

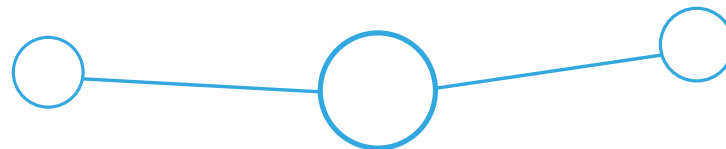
Marketing has become a technology-powered discipline, and therefore marketing organizations must infuse technical capabilities into their DNA.

If your team doesn't have this person on staff - a marketer with technical capabilities in their DNA - than you will need to hire an experienced individual or a consulting firm that specializes in marketing automation. Otherwise, a perfectly-planned and executed roll out is unlikely.



“ *The best project outcomes I have seen are when the project lead is embedded within Marketing and works at the intersection of Marketing, Sales, and Technology. This ensures alignment across disciplines.* ”

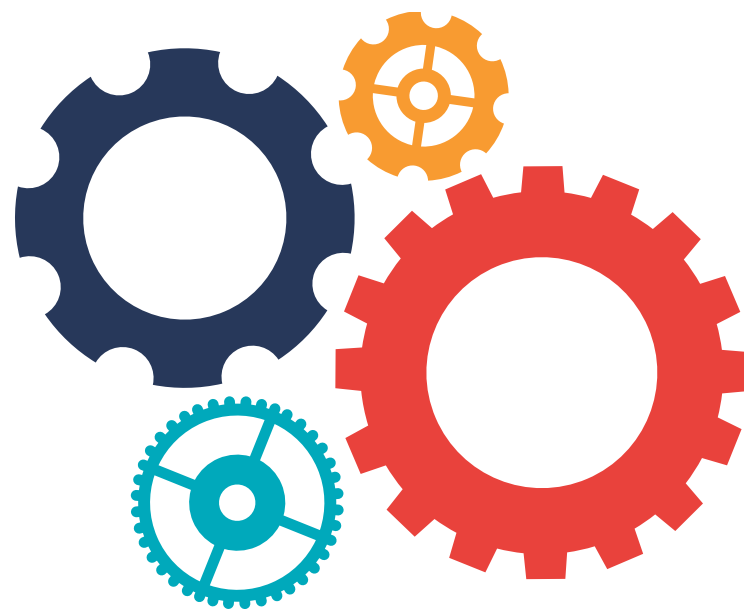
-- Josh Hill, Marketo Practice Lead at Perkuto



2. Automate More than Marketing

Marketing automation is somewhat of a misnomer, as the platform can (and usually does) automate many processes in addition to marketing. Our marketing automation programs benefit multiple departments - sales, customer success, even billing/collections - so each department, especially Technology, IT and web teams, needs to understand how the system works.

For example, our billing/collections and many customer success processes are automated with the help of Marketo, so it would be crazy not to include these teams in the process of building out automated campaigns for their benefit.



Retain this thinking throughout your planning phase, and get to know all of the departments, processes, integration points, and external systems that you'll be working with. When your marketing automation system starts talking to other systems, it helps to understand the available apps and integration points, which we'll cover in Chapter 6.

“ Marketing automation is powerful and can touch many functions. Take a phased approach. 1. Know all the systems. 2. Which systems and teams need this now? 3. Which can use it later? 4. What is the impact? Sales and Marketing will be on board quickly, so start there. Billing teams are system critical to the business and will need reassurance and careful work to bring them into marketing automation. ”

-- Josh Hill, Marketo Practice Lead at Perkuto

3. Collaborate with Other Teams

Since this system will touch multiple departments, getting input and buy-in from each of them is an absolute must. As you begin to map out your implementation plan, make sure that you're scheduling time with an experienced person from each department. There's no need to try to compensate for their experience when you can, in a relatively short amount of time, download their thought process and incorporate their feedback into your planned system.



For example, you may have originally planned to send an email to a new customer right after a deal closes, asking them to schedule a training session. However, your customer success team may tell you that's not the correct point in time to send that email, for instance, it should be after payment has been received. Had you went ahead with your original plan, you would be creating extra work for this department. Being educated on nuances like this can save you from (a) having to go back and fix things that were not set up correctly, and (b) prevent frustration from departments who felt that they should have been involved from the very beginning. And that is not a minor nuance to the teams that own this process.

According to Josh Hill, be prepared for pushback from each team. Be ready to phase in more complex situations later on, but also be ready to sell. Sell your colleagues on automation, saving time, and how you help them.

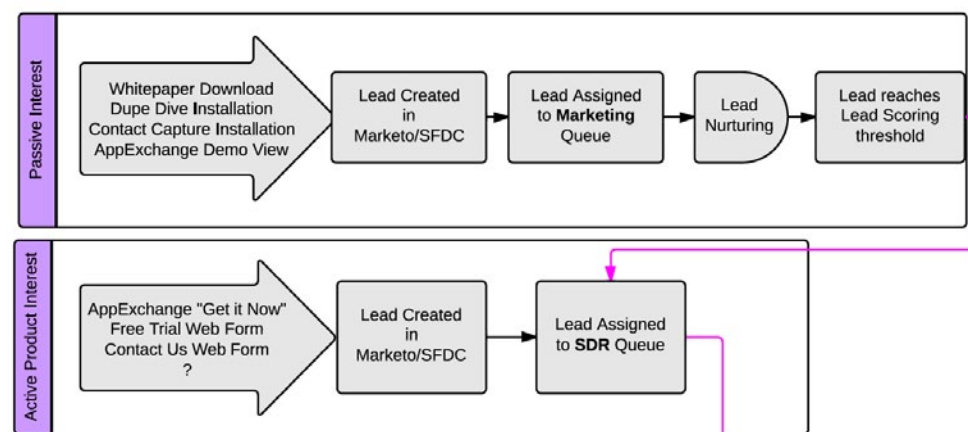
“ *Obtaining buy-in from each group and each team leader is key to your early success. Buy in is crucial from the heads of Sales, Marketing, and Technology.*

*A successful roll out needs to include the customer lifecycle and which teams own each stage of that lifecycle. For example, **Stage 1:** Web, Marketing Communications. **Stage 2:** Demand Generation, Content, and Sales; **Stage 3:** Customer Onboarding; **Stage 4:** Account Management and Billing.*”

-- Josh Hill, Marketo Practice Lead at Perkuto

4. Create Process Visualizations

Instead of verbalizing your marketing automation workflow, create detailed diagrams which will help relay the big picture to your entire organization quickly and efficiently. Remember that a picture is worth a thousand words, and visualization allows for a quicker feedback loop. Suggested improvements can be discussed with these graphic aids and implemented faster than if you were to explain and re-explain the proposed system to each of the stakeholders.



Our marketing automation admin quickly learned that being on call to answer one-off questions positioned them as a bottleneck, so they spent a lot of time upfront, putting together detailed circuit diagrams that are posted to our company intranet for all to view. Here is one example that he created using a free tool called LucidChart. This particular diagram shows detailed activity happening in Marketo and Salesforce.

You can use this visual aid to prompt a discussion with multiple departments and stakeholders, gauging their feedback on the progression and timing of certain events. Schedule 1 to 1.5 hours to review these diagrams (any longer than that and you might lose people). Take in everyone's feedback, make some tweaks and then schedule a follow-up meeting (or meetings) until you get it right.

“ Remember to work with your CRM Admin (if you have one) to map out existing fields, field values, and any new fields required. What do you need to track? Who is responsible for what? Which reports do you want the system to spit out? Then work backward to determine what else you need in the system. ”

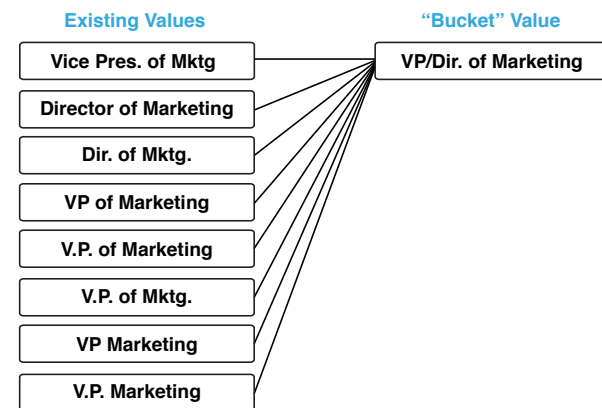
-- Josh Hill, Marketo Practice Lead at Perkuto

5. Prepare for Database Segmentation

Segmentation of your database and personalization of automated messages is one of the key benefits of using a marketing automation solution. This is why you should start thinking about how your data is organized and categorized before you implement a marketing automation platform.

One very common type of segmentation in marketing is segmenting by job title. You may wish to send one message to VPs of Marketing and a different message to sales operations; to accomplish this, you'll need to be able to segment your database.

The problem is, unless you've been extremely meticulous with each record that you have stored in your database(s), there are dozens of ways to account for each of these titles. We know that VP of Mktg. and Vice President of Marketing mean the same thing, but our software applications don't know that. To account for all of these different values, we can start to associate each individual value with one "bucket" value.



To start preparing for efficient segmentation, create a new picklist field, which we'll call "Title Bucket." This field should account for all of the different types of messages that you want to send. If you want to send one message to marketers at the VP/Director level, a separate message to the CMO and a separate message to the rest of the marketing department, you need a specific value in your Title Bucket picklist for each one.

“ Consider having a free text ‘Job Title’ field where leads provide their real title - the one that makes them feel good. Then ask for a ‘Role’ or ‘Seniority’ field which is your main bucket. If you really want to take the burden off the lead, run data management flows to map this data automatically. ”

-- Josh Hill, Marketo Practice Lead at Perkuto

6. Put Data First

Data is the foundation upon which your CRM and marketing automation systems are built, so it is only logical that you pay just as much attention to the data that is in these systems as the processes and workflows that you're building around them.

Dirty data has a way of silently infiltrating your organization, creating frustration, inefficiency, and loss of confidence (e.g. dismal user adoption) in the systems themselves. It can affect each department and group of stakeholders in a very different way, but unless there is a "State of Our Data" address, the problem is not brought to the forefront of the organization's collective psyche.

Segmentation, messaging, and reporting crumble if the foundation is not secure, so make sure that you're paying attention to data normalization, deduplication and duplicate prevention, and whenever possible, data enrichment. For a complete guide on developing a comprehensive data plan, check out the ebook, Put Data First.

“*Dedupe and clean up your CRM before you connect your marketing automation system. Be sure to have the CRM enforce data quality through dupeblockers, ISO Country Picklists, and required fields.*”

-- Josh Hill, Marketo Practice Lead at Perkuto

7. Prepare your Content Strategy

Nurture programs, one of the key features in marketing automation platforms, are meant to re-engage prospects who have gone cold. One of the requirements of a successful nurture program is interesting, unique and useful content that you can periodically send out to these prospects in order to get them thinking about the problem and your solution.

Without interesting and compelling content to fuel these nurture programs, you're not doing much more than consistently spamming these folks. Take the time to plan and budget for content creation throughout the contact's journey: initial inquiry, hot lead, post-sales, and nurture.



8. How to Choose a Marketing Automation Platform

When deciding on a marketing automation platform, keep in mind what has led to some of the best products and best user experiences. What do the iPhone, salesforce.com, and Marketo all have in common? The products have a thriving marketplace of apps, allowing customers to customize and enhance the way that the products are used.

Salesforce has stated that customers who have installed one or more apps renew their platform license at a much higher rate than those who have installed any apps. The iPhone has become a phenomenal success largely due to their extensive network of apps. You should keep this in mind when selecting your marketing automation platform because you will most likely encounter a problem or functionality requirement that requires integration with



another system. With a closed platform, you're restricted to the features and tools provided by your vendor. But with an open platform, you can browse the available integrations or work with a consultant or freelancer to develop the functionality that you need.

If you're a Marketo user, for example, you can take advantage of the industry-leading business applications and service providers like Citrix, Twilio, Lionbridge and RingLead that are featured on the Launchpoint marketplace. The webhooks feature, a very flexible API that is available to Marketo users, positions the platform as the central hub of all of your customer and prospect communication. Using webhooks, you can easily send or request information from external systems as part of your automated programs.



9. Plan for a Slow Roll Out

After reading this ebook, you may feel just a tiny bit overwhelmed. Well don't sweat it, because the beauty of building a lot of these systems is that you can figure out ways to break up your launch into smaller chunks, allowing you to build a program or set of programs, take a breather, do some testing, and then move on to the next block of programs. Turning different aspects on incrementally is how all of the top-dollar marketing automation consulting firms do it, and you can too!

“ *If you are starting from scratch, focus on the big automation wins such as lead routing, data appending and management, and lead scoring.* ”

-- Josh Hill, Marketo Practice Lead at Perkuto

Conclusion

Even if you follow each and every one of these tips, you will most likely still encounter some minor bumps in the road, but don't get discouraged. Marketing automation is a journey, not a destination. You will always find ways to improve what you've built.

About Perkuto

Perkuto is a marketing automation agency at the nexus of technology and process optimization. With a team of certified consultants to optimize the lead management process, Perkuto implements, customizes, and manages Marketo and Salesforce.com for clients around the world.

Perkuto also develops products dedicated to improving the efficiency of marketing professionals. For more details, visit <http://www.perkuto.com/digesto>.

Contact Perkuto at [+1.514.913.3039](tel:+15149133039) or josh@perkuto.com.



Josh Hill is Marketo Practice Lead at Perkuto, a full service marketing automation agency. He is a Marketo Certified Expert, Marketo Champion, and experienced B2B marketer working at the intersection of sales, marketing, and technology. Josh writes for Perkuto and MarketingRockstarGuides.com.



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