MY AWESOME GUIDE TO

MARKETING AUTOMATION SUCCESS

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YOUR GUIDE TO MAKING YOUR MARKETING AUTOMATION YOUR MARKETING AWESOME

Marketing automation is no longer a 'nice to have' but well and truly a 'must have'. However, getting internal buy-in, fleshing out high-level objectives, keeping up with processes and aligning Sales and Marketing are all hurdles that have to be overcome. If you can overcome them then you can transform your marketing automation from average into awesome. In this guide we lead you step-by-step on your journey to marketing awesome, from your very first step all the way through to campaign refinement. Read on to find out more.

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Once the decision has been made to implement, the process of getting buy-in internally has often been such a big step that typically the actual implementation can suddenly come as a bit of a shock 'deer in the headlights' moment when marketers sit back for a second and contemplate how they will deliver through this new system. For most marketers, a move to marketing automation means a fairly major shift in approach, from the creative to the scientific, from left brain to right.

Marketing automation changes the focus to inbound marketing, looking at the buyers' journey from start to finish, from identifying a problem and assessing solutions to actual purchasing and even repeat orders, supported by outbound marketing techniques to give an extra 'push' where required. For this new change in approach to work, a more methodical, analytical approach to marketing is critical. If you don't adapt to this way of thinking, your marketing automation is unlikely to deliver what you expect from it. You would expect

some training requirement, but we are really talking about a new mind-set, fundamental to the success of your marketing automation programme.

This paper provides a roadmap guide to successful marketing automation implementation, outlining key stages in your on-going marketing automation delivery and development. We will also look at best practice tips and emphasise learning points during the stages and propose metrics that you should be considering throughout.

If you are serious about taking a buyer-centric approach, your marketing needs to be closely aligned with sales to look at the entire customer journey. Marketing and sales automation systems provide the technical capability to integrate, but to truly achieve a seamless approach you need to look at aligning the people doing the day job if marketing automation is to achieve measurable revenue attribution in the longer term.

If you don't adapt to this way of thinking, your marketing automation is unlikely to deliver what you expect from it.

Measurability is critical throughout successful marketing automation implementation. When you first start to deliver campaigns through your new system, focus on two critical success factors:

1. Delivering early wins; and

2. Laying the foundations for long-term success with your marketing automation system.

Without early success, your hard won trust in investing in marketing automation is at risk as key stakeholders may then feel cheated if they don't see results, especially the sales team who tend to focus on short-term results. On the flip side, if you don't plan for the longer term, you risk not setting up the processes and best practices that will ultimately make marketing automation pay back in spades by being able to track specific revenue generated back to your marketing campaign spend. Unfortunately, you will need both at the same time, not forgetting that you will need to carry on with current business. It's a fairly big ask, but this guide should provide some inspiration for a structured approach to success.

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MILESTONE 1
THE JOURNEY BEGINS

When embarking on a marketing automation programme, the first stage needs to focus on demonstrating early success while also paving the way for longer term strategies.

As with any good planning, it begins with deciding what you are trying to achieve, establishing objectives. Your initial business case proposal will no doubt have addressed this, so the next step is to flesh out those high level goals into more tactical objectives. Regular reviews and assessments will also aid a successful outcome.

Once your objectives are set, an important area to consider is your skill set. Often marketing automation skills are not readily available within your department, so how will you develop this? If you can enable your team with the right skill set and build their knowledge from the outset, you will pave the way for long-term marketing automation success.

It might also be helpful at this stage to look at service providers that can boost your team. Even if you don't need fully outsourced support, it is helpful to know who to turn to if you need specialist support.

Introducing marketing automation is a major change in approach and so there is a good chance that you will not have team members with marketing operations skills and experience within your department already. Marketing operations people are more likely to come from a technical background, perhaps web/digital or project management disciplines. It is important to recognise that the skills required are quite specialised and are likely to be beyond the reach of your more junior team members to start with – don't expect your execs to turn into marketing ops professionals after a couple of vendor training sessions!

Key skills required of a strong marketing operation professional include: a logical mind, an eye for detail, web/ HTML skills, an understanding of data, reporting and analytics plus excellent communications skills at all levels. Of course it helps if they also have previous experience of your chosen marketing automation platform.

1.2 Focus on data

Marketers know that data is important, but it isn't always the most appealing aspect of marketing for creative individuals. Everyone knows how important it is, but nobody wants to deal with it. Like it or not, data is crucial as without current, good quality data, your marketing automation will not deliver your objectives.

Data completeness should be your focus; how complete are your data records, especially for data that you will use for segmentation and personalisation? How detailed is your data on customers and prospects, do you know who they are? (this might sound strange, but we have all received mailshots from companies offering us incentives to sign up when we are already customers which makes us feel a little unloved?).

Do you have all the data you need in the marketing automation system? For cross or up-selling campaigns as an example, your marketing automation system will need to know what the customer has already purchased. For many companies this is recorded in a back office system and so you may need to consider how this data can be integrated into the marketing automation platform. If not, how are you going to source that data? You also need to be aware of your data compliance, are you up to speed with the latest in data protection legislation? Your first priority is compliance but preference management should also be considered at this stage so that you can move towards a more refined 'opt-in' approach further down the line.

Data cleansing will need to become a regular occurrence and part of your on-going marketing automation processes.

At the start of the project, make the most of the opportunity to really look at where your data gaps are and define what your ideal customer contact profile will look like, this will assist you greatly in the longer term. It's important to remember that campaigns can also have a secondary aim of improving data quality.

Maintaining high standard of data quality is critical to the on-going success of your marketing automation system. As your data volume increases over time, your database is likely to consist of: contacts that you cannot communicate with (such as hard bounces or opt-outs), contacts that you can communicate with, but who haven't shown signs of life (sometimes called 'emotional unsubscribes'), responsive contacts (active prospects/customers) and finally contacts that you haven't included in any campaigns and so their status is as yet unknown. Marketing automation campaigns ultimately aim to reduce that last category to zero by continuing to qualify and refine your data.

1.3 Focus on content

Content is the second essential ingredient for ensuring marketing automation success. It's important to perform a content audit at this early stage in your marketing automation journey, identify what 'assets' you have, whether this is marketing collateral in the form of case studies, white papers or video content for example and where these apply in the buyer's journey? Who does it apply to? You will reap the rewards of this process in the long term as it forms the basis of a central repository of information which you can continue to build over time.

1.4 Building your bespoke user guide

In our experience, most marketers do not instinctively focus on documenting processes, but for marketing automation, this is vital. An important first step is to create a bespoke user guide. This is not a generic user guide, but more of a specific guide book that lays out how you do things in your organisation. In the same way marketers are used to the concept of documented brand guidelines, this is a similar concept but for every aspect of your marketing processes. Your guide should cover everything from naming conventions through to data standards and step-by-step process documentation.

1.5 Tracking success

Marketing automation is ultimately driven by the need for measurement of marketing success. Measuring from the outset is an important part of the marketing automation adoption journey. At this early stage, measurement criteria may be similar to metrics for an email marketing campaign. Indicators include open rates, click throughs, bounces etc. If you have been operating an email marketing tool, you will have some previous statistics against which you can benchmark to show success and feed this back to stakeholders to validate the benefits of marketing automation.

One area that may be new to you in marketing automation is the measurement /metrics related to your web site. Even if your prospects did not click through from an email campaign, did it generate additional traffic to your web site? Which are your main sources of traffic to your website, emails, search engines, social

media sites? It will become increasingly important to become familiar with these metrics and to refine their interpretation over time so it is worth familiarising yourself with these from the outset.

1.6 Sharing success with stakeholders

Throughout your marketing automation journey, it is vital that you communicate with key stakeholders. During Phase 1, it is important to validate their decision to go ahead with the investment in marketing automation, for the most part a fairly significant on-going investment. This is why it is important to deliver early success, demonstrating that there is a tangible return on investment and that the marketing automation system is well on its way to achieving its long term goals.

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MILESTONE 2
REAPING THE REWARDS

The second stage of marketing automation success is when you can start to see the results of your early work in setting up processes initially, as this is when we are trying to benefit most from automating a proportion of the buying cycle.

2.1 Building your bespoke user guide

To get warmed up with marketing automation, there are some simple, early automated campaigns you can deliver to demonstrate the power of your new system. Some examples include:

- **A 'welcome' campaign for brand new prospects**

- **A re-engagement campaign for customers that have 'gone quiet'**

- **Events campaign templates – both on and off line. To remove the previous manual effort associated to the invitation, registration and follow-up process**

2.2 Keep up the paperwork and processes

Documenting your processes becomes increasingly important at this stage. Establishing a standard process for dealing with offline campaigns, such as trade show attendance, will become more important if you are to further develop your central repository and create a standard practice within the team. Once your guide book is comprehensive, you will be equipped to enable less experienced members of the team to deliver campaigns by following the guidelines.

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2.3 Keeping contacts fresh

We have discussed the importance of good quality data and, as part of good practices, you will need to have contacted everyone on your database to ensure that the data is current.

The requirement to check data accuracy should always be a consideration throughout your campaigns, rather than focusing on campaigns just to check data accuracy. It is also good practice to put in place metrics at this stage that will enable you to measure quality and data completeness.

Preference management is an important area that is sometimes neglected. It is important to ensure that you are adhering to the rules on this. Encourage your contacts to express their preferences on a regular basis and make sure that you act upon their requests. This provides useful information on your contacts and establishes best practice in terms of continuing the dialogue with customers.
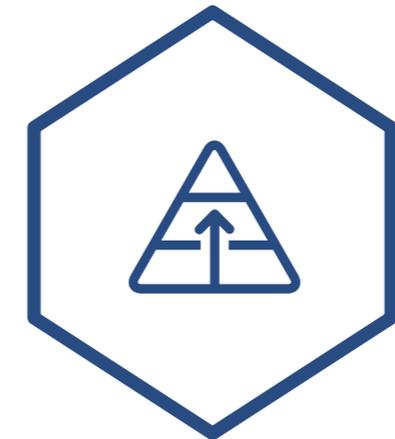
2.4 Getting to the heart of marketing automation with lead scoring

Few would argue that lead scoring is one of the key features to exploit within your marketing automation system. It is the key to enabling you to measure the quality of the results you are delivering to sales and ultimately to the business. At this phase in your journey, take the opportunity to develop your lead scoring ratings. Typically there will not quite be enough information available in the earlier stages to develop fully effective lead scoring and so it is a good idea to trial your scores, but perhaps not share the actual ratings with sales at this stage.

The rationale behind this is the importance of creating trust and building lasting relationships with the sales team. If you have not quite got it right, sales will quickly note that not many of marketing's top rated leads convert. Clearly this risks them going back to their old practices of their personal contacts during the second stage, you need to evaluate your interim lead scoring ratings by assessing sales conversion rates based on the results in your CRM system. This will give you an idea of whether top marketing qualified leads (MQL's) are converting and, if they are not, to go back to the drawing board and re-assess.

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MILESTONE 3
MARKETING COMES INTO ITS OWN

Within the first nine months or so, you will no doubt have built solid foundations with clear guides, well documented processes and grown the skills and experience of your marketing team within this new marketing automation mind-set. You are now well positioned to make the most of your achievements and demonstrate to stakeholders the amazing power of your new marketing automation system.

3.1 Alignment between sales and marketing emerges

You have already shown some success with the new system and have started to develop your lead scoring, laying the foundations for sales and marketing to begin to work in closer alignment. Conversion rates between stages of your lead pipeline will be measured and assessed along with marketing's contribution and influence on revenue.

Now is the time to share your lead scoring mechanism with the sales team, having already evaluated its effectiveness in the earlier stages. This will help to build on-going trust with the sales team and you can now look at conversion rates of highly scored leads together with them for an accurate view of conversion rates.

In order to maintain a good relationship with the sales team, it is important to consider a Service Level Agreement (SLA) with them. When establishing your SLA, some areas to consider include:

- A formal definition of an MQL and Lead Ratings

- The conditions by which a lead may be "rejected" by sales. Typically "I already know about this", "Does not meet agreed MQL definition" etc.

- The maximum time for a sales person to accept or reject a lead

- The maximum time before initial follow-up/ contact with the prospect

- The maximum time for a sales person to convert (or disqualify) an accepted lead into a sales opportunity (SQL)

- Escalation procedure for non-conformance to SLA.

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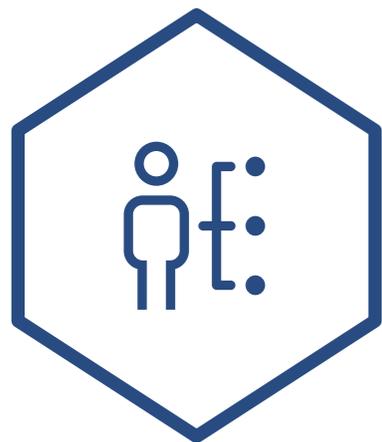
3.2 Taking sales enablement a step further

Maintaining a strong relationship with the sales team can be further reinforced by making the most of sales enablers, features within your marketing automation system that strengthen your aligned approach to lead management by allowing the sales team access to the marketing automation system.

Through system integration with CRM platforms, the sales team will be able to see detailed information about each customer before making any contact. Access to the so-called 'digital body language' helps the sales person to determine how engaged the prospect is together with their interest areas before making contact. Many systems include features such as the ability for individual sales team members to send out 'mini campaigns' using the CRM system or their email client, perhaps inviting some of their key contacts to visit your stand at an exhibition. In this way, marketing can contain all customer and prospect contact information in the same system and maintain brand guidelines without restricting direct sales activity. Sales enablers ultimately encourage the sales team to engage with the marketing automation system.

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MILESTONE 4
THE JOURNEY CONTINUES

Having invested in a comprehensive, structured approach and built your processes over time, by now your marketing automation should be running efficiently and effectively. It is at this stage that the operational side of maintaining success with marketing automation comes into play and where process and systems demonstrate their worth.

Prospects and customers should by now be categorised into where they are in the buyers' journey. This will assist you in segmenting and will equip you with excellent data for local campaigns. For example, if you are running a webinar on a certain topic subject, you will be able to match the relevance of that content to where the buyer is on their journey, providing an extremely tailored approach at the right time for that buyer. If the webinar is focusing on fairly detailed product information, it will be most relevant to contacts that are further along their journey as opposed to thought leadership content which would be more relevant to those just starting out.

Maintenance is key to successful on-going marketing automation. Below are some tips for maintaining high standards as your journey continues:When establishing your SLA, some areas to consider include:

- **Don't get complacent – it is easy to sit back and think that everything is in working order. Continue to reassess your market and customer behaviour, this is part of your marketing automation journey**

- **Focus on regular reviews – this will ensure that you are measuring results against objectives**

- **Look at skills and ensure service providers in place to support where necessary**

- **Continue communications with stakeholders – reinforce their decision to**

invest by measuring the results of your marketing automation campaigns and impact on revenues

- **Continue to monitor and refine automated campaigns**

- **Refine, develop and refresh appropriate content assets**

- **Review performance and refine measurement criteria**

- **Monitor and refine your lead scoring for maximum conversion rate.**

4.1 Getting more prospects and speeding up the process

Creating a powerful marketing automation engine is a significant investment that can generate amazing returns. By this stage, you will have automated much of the buying process and begun to fine tune certain elements. Your next challenge is to focus on improving the volume of prospects added to the system and to speed up the movement of buyers through their buying journey. Always look to future requirements while maintaining system knowledge and making the most of new product developments from your marketing automation tool vendor, such as social networking integration . If you take the approach that the marketing automation journey is on-going, requiring maintenance and a philosophy of continuous improvement, then your marketing automation system will continue to deliver revenue growth for your business.

ABOUT CRMT DIGITAL

CRMT Digital helps businesses align sales and marketing to increase demand and grow revenues through best practice consultancy, technical integration and outsourced marketing operations. As one of the first specialist marketing operations agencies in the UK, we have led the way in helping all types of businesses transform traditionally siloed sales and marketing activities into integrated programmes that deliver Return on Investment.

Our teams provide tailored services and solutions that support every stage of the marketing automation journey, combining consultancy with technical and operational expertise in leading marketing automation platforms including Eloqua and Marketo, and CRM platforms such as Salesforce.com.

For more information, visit www.crmtdigital.com or connect with CRMT Digital on one of the following social networks:

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