



The Practitioners Guide to Marketing Automation





Introduction

Burnt out? Falling behind on lead quotas? Overwhelmed with data? It's the saga of the business marketer, and it's an all-too-common tale. But where the most successful marketers have separated from the pack is in taking advantage of marketing automation to do their busy work for them.

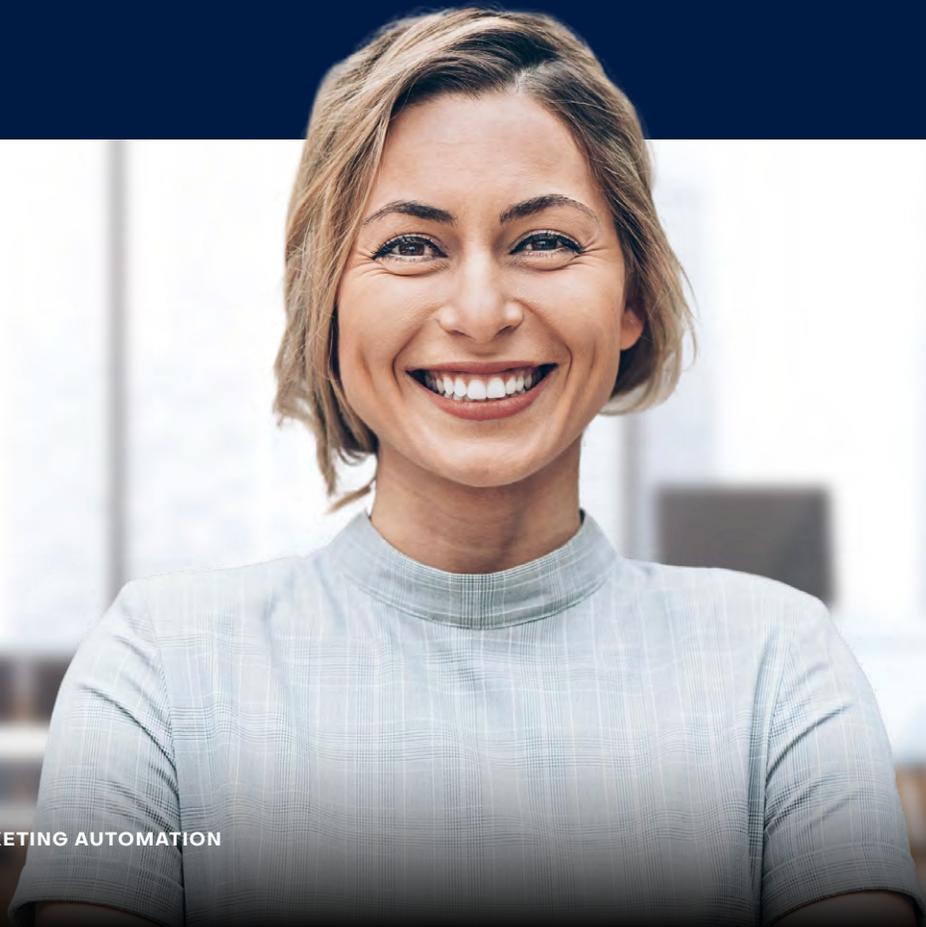
Today, marketing automation allows teams to attract more visitors, capture leads, nurture and qualify prospects, and drive sales alignment—all without breaking a sweat. But with a multitude of vendors to choose from, it can be overwhelming to not only pick the right platform, but implement, drive adoption, and start seeing results as soon as possible.

This guide explores what it takes to make your marketing automation software work for you and turn your team into a well-oiled machine that drives ROI all day.

What is Marketing Automation?

Marketing automation software streamlines the creation, management, and analysis of marketing campaigns, web and email engagement, and leads in a single software.

Marketing automation helps marketers gain better results with increased efficiency. It takes the tedious tasks from campaign processes like email marketing and lead scoring while tracking web and email interactions. Through automatic tracking, scoring, and pre-set rules, marketing automation allows marketers to send hyper-personalized messages to prospects at scale. This increases prospect engagement and lead qualification before sending to sales.



Marketing automation platforms work by allowing you to:

Track & Capture

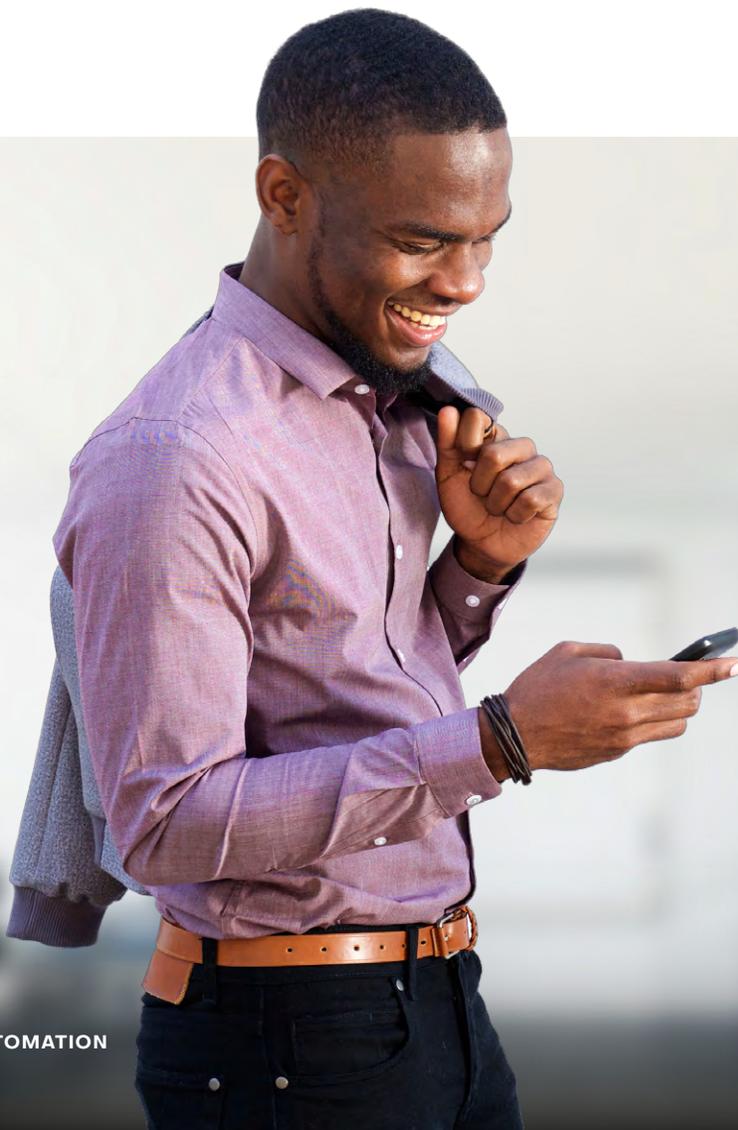
Track prospect activity before and after conversion. Once a prospect converts, the lead is stored within the platform. You can segment leads for campaigns based on criteria like engagement, firmographics, or demographics.

Nurture & Score

The platform then nurtures leads using rules that automatically send personalized content while also scoring them based on activities you determine are valuable to your business. Once leads hit scoring thresholds, they can be automatically passed to sales via CRM integration.

Align & Win

A marketing automation platform integrated with CRM streamlines the entire lead management process by equipping sales with marketing intel and helping you realize how much your marketing qualified leads (MQLs) are worth.



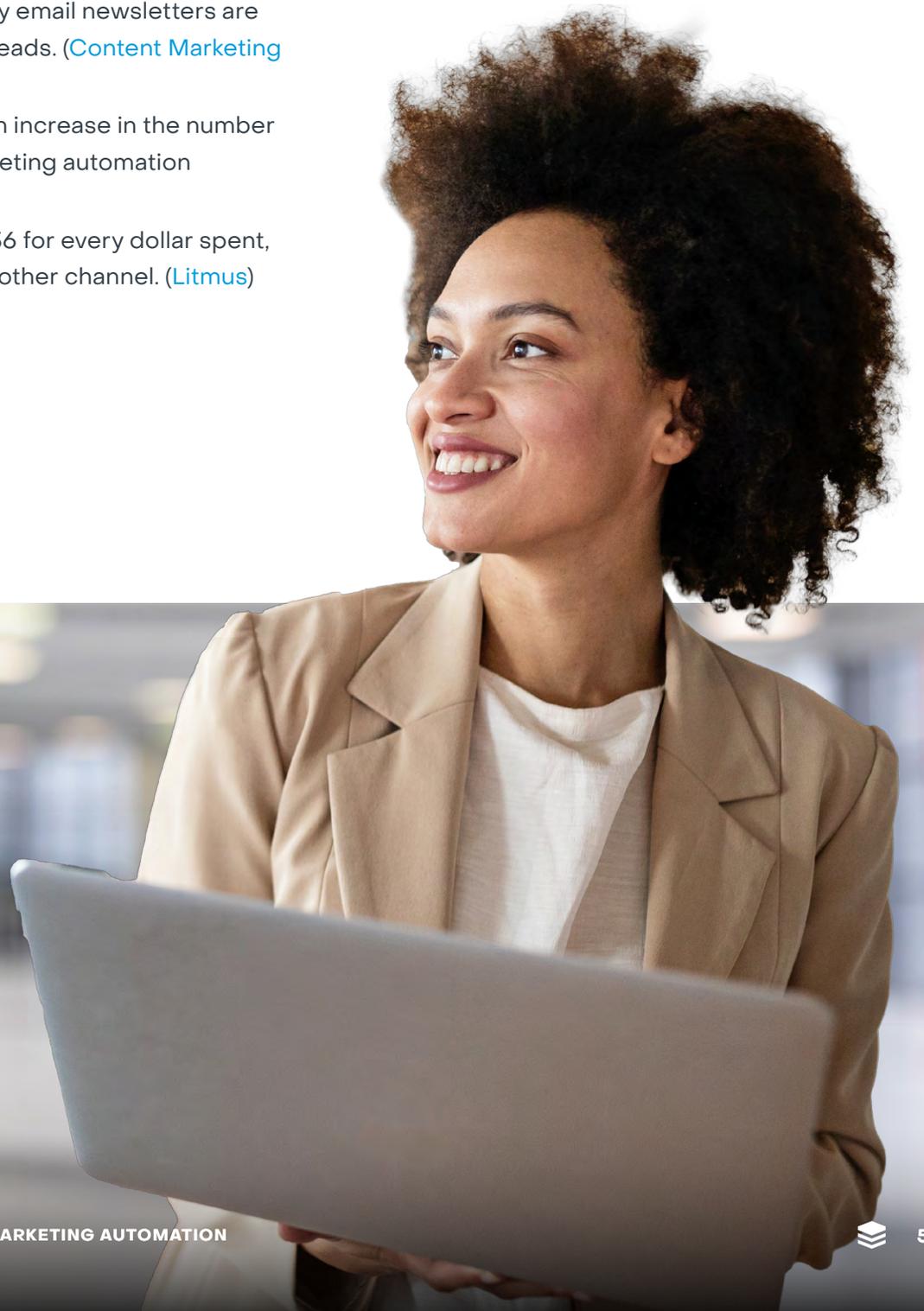
The Benefits of Marketing Automation

The biggest benefit of marketing automation is also the simplest. Automating marketing processes gives you time back to market, drive leads, and deliver revenue. In other words, you'll finally have the flexibility to act on new ideas and put your marketing expertise to work instead of wasting time just keeping the lights on.

- 31% of B2B marketers say email newsletters are the best way to nurture leads. ([Content Marketing Institute](#))
- 80% of marketers saw an increase in the number of leads after using marketing automation software. ([VB Insight](#))
- Email drives an ROI of \$36 for every dollar spent, which is higher than any other channel. ([Litmus](#))

Build a Comprehensive Strategy That Sticks

Choosing the right [marketing automation platform](#) is crucial. While it won't nurture leads or fill your pipeline on its own, it's how you set up and activate the platform that will help you achieve your marketing goals.



A marketing automation strategy clearly outlines your objectives, details how you will achieve those objectives, and includes a plan for measuring success. We recommend a phased approach:

Phase 1

Define your most important business objective and what you hope to achieve from using a marketing automation platform (e.g., generating higher-quality leads? Better understand your buyer's journey?). Start small by shoring up foundational processes like lead scoring. These processes will inform a variety of your marketing and sales efforts, making it critical that they run smoothly and accurately.

Phase 2

Keep initial user functionality basic and build as you go. Start by releasing simpler functionality to help users learn the system and processes before moving to more advanced capabilities. As your users get their feet wet, add more complex processes/functionality and information to the mix. This might include integrating your social media platform with marketing automation to provide a complete picture of your engagements.

Phase 3

Once you've found your stride, remember continually building on your processes and capabilities. Consider limiting the scope of each new iteration, as the smaller the project, the easier it is to manage the building, testing, and implementation requirements. This ultimately allows you to react to any necessary changes and bring progressions to life faster.



Getting the highest ROI out of your marketing automation system depends on how well you use it. Beyond the basics, try these ways to extend your marketing automation abilities to embed them in your marketing program further and make them last.

1. Analyze Results

Compare all aspects of your marketing efforts, including campaign statistics, lead scoring results, form abandon/completion rates, social sharing, etc. Make sure you have enough content and a clearly defined path to conversion.

2. Optimize Deliverability

Set up a sender policy framework (SPF), which is an email authentication system designed to prevent email address spoofing by allowing domain owners to specify which internet hosts are authorized to send emails on their behalf. Setting up SPF will increase your email deliverability rates.

3. Brand Templates

Take ownership of your messages by adding your company logo and design elements (font, background colors) to everything you automate. Don't forget to add your logo to your emails' "forward to a friend" buttons.

4. Encourage Subscription

Give new subscribers a way into your content while growing your list. This could include email newsletters, product alerts, or upcoming events.

5. Manage Preferences

Give your subscribers options for their email preferences (instead of opting out altogether) by setting up a subscription center. This also allows you to map back to fields in the CRM you can use later to create queries in segmentations, reports, etc.

6. Customize Dashboards

Customize your dashboards and analytics reporting, so you immediately see the data that's most relevant to your team. This might include email delivery time or webinar attendance and can change as needed along with your goals.

7. Evolve Programs

Start thinking about what else you can automate inside your marketing automation software. This could include custom notifications, sales communications, and even internal messages. Make your marketing automation system a one-stop-shop for all company emails, invitations, events, [forms](#), and more.



Winning at Marketing Automation

Making your marketing automation system stick requires planning and a little elbow grease. Before launching, set your program up for success by:

- Involving the right people in the decision (leaders, practitioners, affected departments)
- Outlining goals and how the technology can help you achieve them
- Choosing a [platform that can grow](#) with your needs



Avoiding a Failed Implementation

Implementing a marketing automation system doesn't have to be challenging, but it requires due diligence. Start with these strategic advantages to not only launch but start reaping the benefits of automation as soon as possible:

1

Align Your Stakeholders

Start by identifying and aligning all of your stakeholders. In the case of marketing automation, this typically includes leaders from sales and marketing and possibly a representative from IT. Meet and collaborate to set expectations for the software and ensure transparency among the group going forward.

2

Choose the Right Product

How do you choose the right marketing automation platform? Start by determining what you hope to get out of the system and mapping them to vendor capabilities. Then, compare options based on those capabilities and other factors like pricing, reputation, service, etc. You'll also want a total solution that can show you the ropes. Look for a provider with upfront training and [resources](#), so you have a contact for questions and feedback. Use your trainer as a resource in your first inbound marketing campaign and even build tests before diving into the real thing.

Other Ways of Finding the Right Software for Your Business

- **Read user reviews.** What are current customers saying?
- **Follow brands on social.** Do they regularly engage with their customers and the greater industry?
- **Align your company size to a vendor's specialty.** Do you need a comprehensive suite that can handle enterprise challenges? Or would you do better with a simpler toolset and one-on-one guidance?
- **Stay up-to-date on new players and market changes.** New products and solutions constantly enter the market. Can the tool you choose compete with the latest and greatest?



3

Build a Roadmap

Anticipate your short- and long-term implementation efforts by building out a roadmap that guides your strategy. At what point will you visit your lead scoring process? And when will you revisit it to ensure it's still meeting your needs and make any improvements?

4

Train Your Users

Achieving high ROI requires high adoption and usage. You need to train users on working in the platform and inform them of any new processes you're implementing. Increase adoption by showcasing the benefits of the marketing automation system and how it makes their jobs easier.

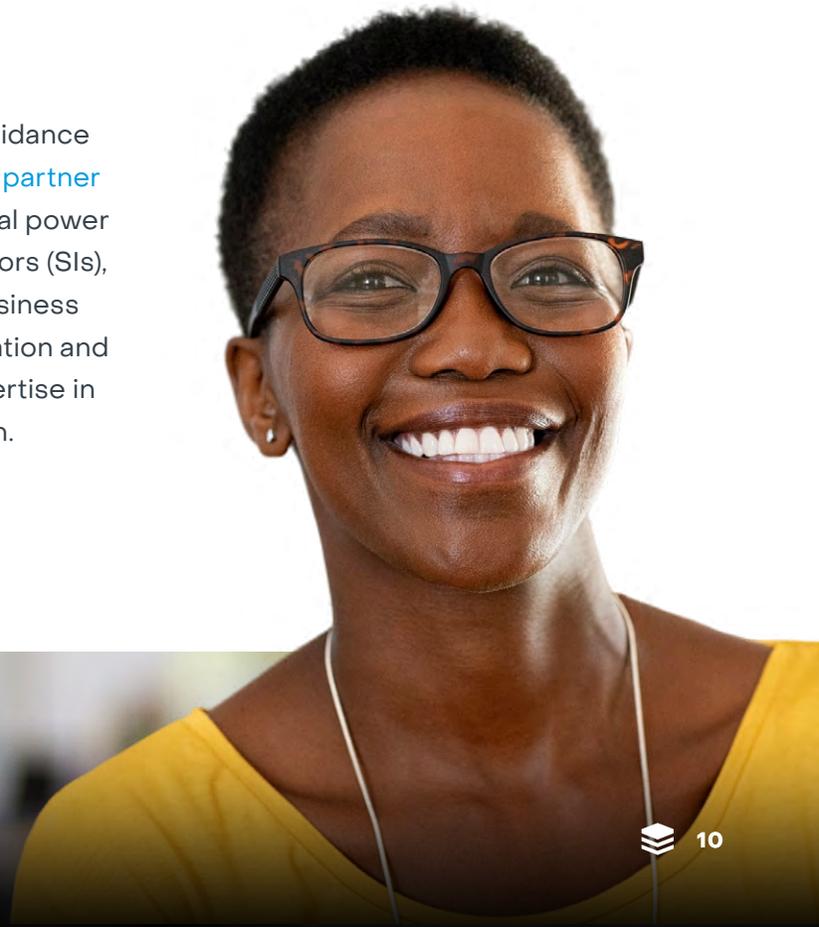
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Test, Analyze, and Update

Regularly review your data to see how your campaigns perform and where users might need some extra help. You'll also want to test the impact of any updates you make to ensure they produce the desired outcomes.

Hiring a Marketing Automation Consultancy

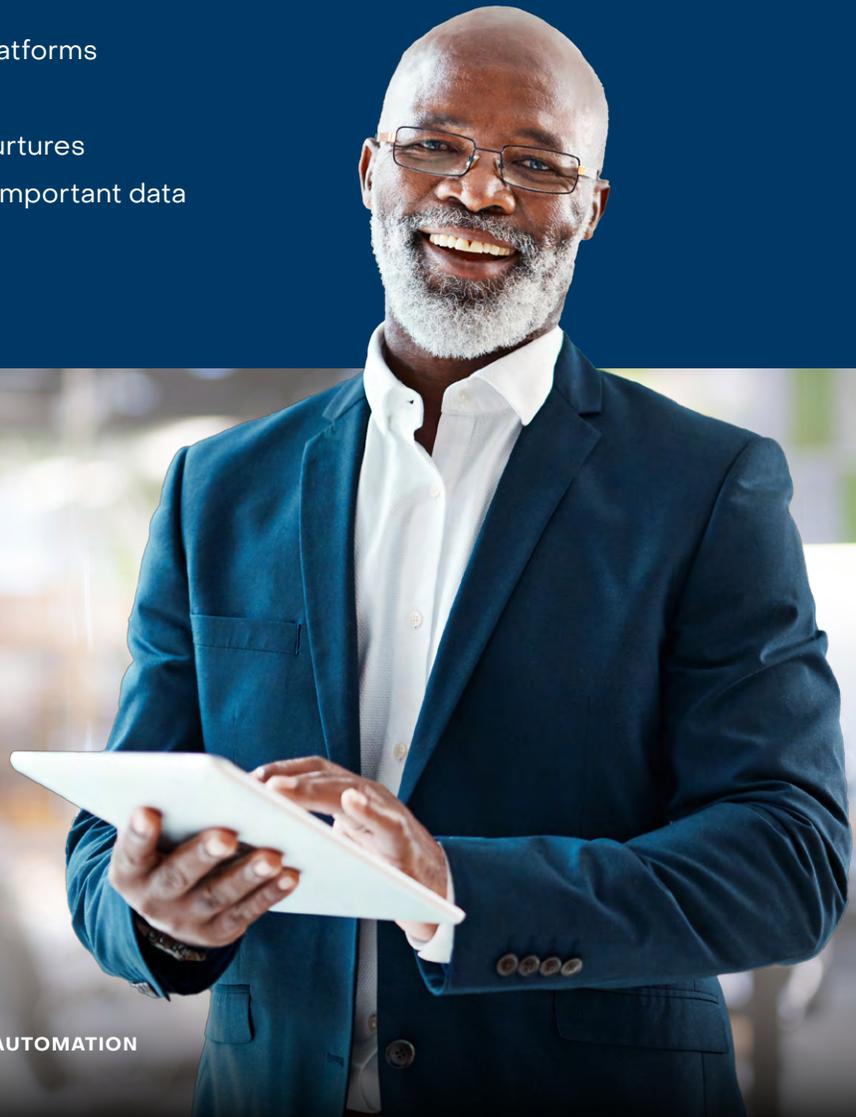
If you're a smaller company with little experience implementing new software or just need some guidance along the way, consider working with a [consulting partner](#) who can demonstrate the total capabilities and real power of the tool beyond email blasting. System integrators (SIs), agencies, and consultants help transform your business through pre-sale consulting and post-sale integration and delivery. Plus, they often have subject matter expertise in areas like sales, marketing, and service automation.



Integrate with CRM. Collaborate with Sales.

Just as [lead nurturing](#) success hinges on collaboration with sales, the secret to winning at marketing automation is also keeping them involved. This is because marketing automation changes your existing lead-to-revenue structure, making it critical for both sales and marketing to agree on the changes for a smooth transition. Aligning your marketing automation system with sales will help you collectively:

- Drive more qualified leads
- Nurture unqualified leads
- Sync and map data across both platforms
- Review lead scoring as a team
- Build sales steps into marketing nurtures
- Refocus your efforts on the most important data
- Increase ROI on marketing spend



Platform Integration

When choosing a marketing automation platform, consider CRM integration essentials such as:

- **Native Integration Capabilities.** Native integration ensures your data is inherently surfaced within your CRM's user interface versus inside of an iFrame window. Plus, if the CRM vendor has a mobile application, you can ensure the marketing automation data will render seamlessly in the app.
- **Syncing Frequency.** Real-time or near real-time updates are ideal. This ensures behavioral-based nurture campaigns are timely, and sales can quickly act on leads.
- **Custom Field Mapping.** Your CRM likely has some custom fields in it. Making sure you can map that information to your marketing automation is crucial for creating customized campaigns.
- **Out-of-the-box.** Is the marketing automation system you're considering an out-of-the-box solution, or does it need middleware to integrate? Middleware is a third party that enables the two systems to communicate and pass data between each other.





Once you integrate your marketing automation software and CRM, start by mapping your existing process, identifying what will change after deployment, and understanding how it will impact each other's workflow. You'll also want to discuss:

Lead Source

Your new marketing automation platform will track ROI in a way that may differ from your current model. Be flexible and decide the best way to adapt your sourcing process. Then, pull CRM reports to ensure you don't lose historical data. If you have a two-tiered lead sourcing model, you can convert it into one-source by combining them and overwriting the data.

Lead Status

Your pipeline and lead management process should operate bi-directionally between the marketing automation platform and the CRM. The lead status field plays a very important role in this workflow, as it impacts nurture campaigns and lead scoring. For this reason, both your marketing team and sales must reach a consensus on how you'll categorize leads.

ROI Reports

Lead-to-revenue reporting is one of the most valuable aspects of marketing automation. Once you establish lead sourcing, adapt your CRM so the lead source "follows" the lead from creation to closure. Map the original lead source created in the marketing automation platform from the lead to the contact and opportunity records in the CRM. Make sure the originating lead is associated with the opportunity, requiring sales to convert the original lead/contact as the opportunity owner.

Services to Expect from Your Marketing Automation Provider

Even when software is highly intuitive, you may still need a certain level of [service and support](#). From initial launch to ongoing relationship management, the best marketing automation vendors provide you with:

Onboarding

Onboarding is possibly the most important experience you'll have with your marketing automation provider. You'll configure your platform and learn everything you need to know to get started with marketing automation. When you "graduate" from onboarding, you'll be placed in the hands of your client success manager (CSM).

Supportive

Getting product support when you need it is invaluable. Be sure to select a provider that has support hours during your work hours. Your provider should offer a service level agreement (SLA), including response time and escalation protocol, should your case require an extra set of eyes. Sometimes these are buried in the fine print of your contract, but basic support should be included in your contract at no additional cost.

Client Success

Whether you have a client success manager, account manager, or relationship manager, this person is your go-to point of contact responsible for your success. You should define what success means to you during your onboarding process so your CSM can help you get there. And as your business grows and changes, they'll help you get even more out of the platform.

Managed Services

When your business continues growing and you need increased guidance, some providers offer a managed services or on-site professional. This person takes a customized and consultative approach to help you get the most out of your investment and act as an extension of your team, freeing you to focus on your strategic objectives.

Resources and Continuing Education

Look for a marketing automation provider that offers [refresher courses](#), regular thought leadership, helpful [release notes](#), and new product training to keep your skills sharp. Some even offer [courses for certification](#) in specific areas of sales, marketing, or IT.



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SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

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