



MAKING **MARKETING AUTOMATION** A REALITY

There are a number of steps to take in order to successfully introduce, implement, and optimize marketing automation software into your business:

- **1 Build the business case**
Understand your objectives, and make sure they align with those of the business.
- 2 Get buy-in from stakeholders**
You need the CFO to sign the check and the CEO to drive tangible cultural change throughout the organization. You also need heads of other departments (particularly IT and sales) to understand and engage with what you're doing — and to support it. 
- **3 Understand the customer journey**
Set objectives and establish metrics for each step along the buyer's path.
- 4 Change the culture**
Make sure everyone understands and believes in the fact that the customer is now the focus of the business. 
- **5 Choose your platform**
Think about which additional technologies you need to integrate (now and in the future). View the training and understand the support available and at the product roadmap. You should also consider the impact this might have on your partners.
- 6 Develop your capabilities and skill sets**
Choose whether a center of excellence or widespread training and adoption suits you best. 
- **7 Develop your data capabilities**
Establish best practices around the collection, cleaning, storage, and use of data.

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Making Marketing Automation a Reality
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