



The Marketing

Automation Quickstart Guide





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Introduction

In today's competitive and fast-paced marketing environment, marketing automation is one of the most powerful tools marketers have at their disposal.

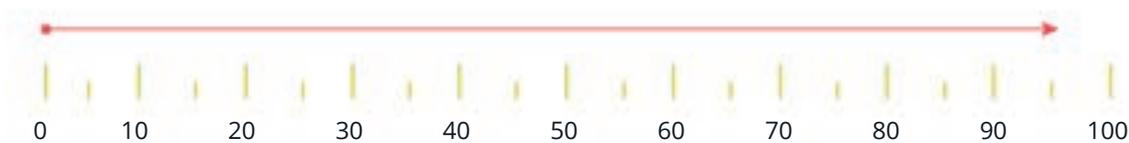
This innovative technology empowers you to do more work with less manual effort in order to reach a larger audience in a more personalized and relevant way.

More importantly, it enables you to drastically enhance your marketing efforts so you can attract, engage, and nurture more qualified leads into loyal customers.

According to our State of Marketing Automation report, conducted alongside London Research:

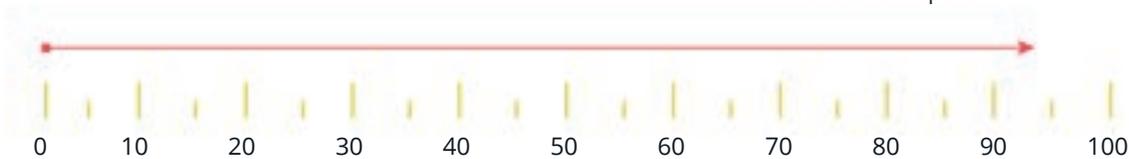
95%

OF MARKETERS
believe new customer acquisition is either critical or important



93%

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believe new customer acquisition is either critical or important



Of those customers surveyed, **55%** also said their companies are using marketing automation, and another **28%** said their organization plans to invest in new software within the next year. These stats demonstrate that marketers are on a mission to achieve greater ROI from their efforts and that they view marketing automation as the correct path toward achieving their marketing goals.



The move toward marketing automation makes sense, especially since marketers who use this technology:



But to get this kind of success, you need to lay the groundwork so that your marketing processes are ready to be automated. If you're new to marketing automation, this might sound complicated, but it only takes a few simple steps to make sure you're fully prepared to make the most out of this solution.

In this guide, we'll give you a simple roadmap that will help you prepare your organization to adopt marketing automation. With a little effort, you'll see results right away and accelerate your return on investment.

Ready to get started? Let's go!





1 Build a Foundation for Success

As with any successful program, having a solid foundation from which to launch your marketing automation strategy is key to your long-term success. While many of us want to jump right into using our platform, not having a strategy around how we plan to use it to target our audience will result in random acts of marketing and cause more harm than good when it comes to increasing our bottom line.

Building that foundation, however, is much more simple than it sounds. For small and mid-size marketing departments, a few days are all it takes to get your house in order so that you can leverage the power of marketing automation. Having the essentials in place will empower you to quickly get your marketing automation efforts up and running — and then expand and optimize them over time.

The three “Must-Dos” to Get Started:

Assemble and check the Hygiene of your Data

As you collect your data, consider indexing your lists for ease of reference; you can further segment these moving forward, but this gives you a good starting point. The process of assembling your data is also a good opportunity for you to make sure that all your contacts have confirmed their emails and opted-in to receive communication from you. This is an important step to take because using data that has not been validated can negatively impact your email reputation and lead to issues with deliverability in the future.



Gather your Content

Get your eBooks, white-papers, sell sheets, webinar recordings, etc. into one place. Place them all in a folder or create a simple spreadsheet inventory so you can easily access your assets as you build out new automated programs. Many teams choose to do a full content audit at this point, which is great if you have the time, but isn't necessarily a must-do at this stage in the game.

Consider your Marketing Automation Strategy

As you collect your data, consider indexing your lists for ease of reference; you can further segment these moving forward, but this gives you a good starting point. The process of assembling your data is also a good opportunity for you to make sure that all your contacts have confirmed their emails and opted-in to receive communication from you. This is an important step to take because using data that has not been validated can negatively impact your email reputation and lead to issues with deliverability in the future

Once you have the basics in place, you'll be ready to start sending emails, attracting and scoring leads, driving ROI, and much more. Remember that your marketing efforts don't have to be completely perfect when you're just getting started. You can build your programs up and out as you learn by doing and begin gathering useful insights that will help you deliver a more personalized experience.

We'll show you how to harness the power of automation and segmentation in the upcoming section, “Implement a Pilot Automated Program.”





2 Sync with Sales

Once you harness the power of marketing automation, you'll be able to deliver a larger volume of high quality, sales-ready leads. It's a result that is sure to make both your sales team and executives smile.

To keep them smiling over the long term, take time now to put follow-up processes in place with the sales team. It's this open dialogue that will ensure sales gets the leads they want, and that they are promptly attended to so they can seize the opportunity to close a deal before it slips away.

This process doesn't have to be perfect from the beginning; the most important thing is that sales and marketing are collaborating to develop a solution that benefits both teams. We recommend that you start simple by developing a pilot program and then tweaking and optimizing that program over time. We've put together an easy step-by-step guide on how to do that in the next few pages.



Set Up Your Pilot Lead Management Program

Connect Your Marketing Automation & Crm Systems

This connection will allow you to notify sales when they have new leads to follow up with. Your Act-On Customer Success Manager can help you set this up..

Meet with Sales to Explain the Benefits

Get your eBooks, whitepapers, sell sheets, webinar recordings, etc. into one place. Place them Show your salespeople the new insights they'll be able to glean with the platform — such as which pieces of content prospects have viewed or how many times they've visited your website.

Learn who Sales Really want to Speak with

Have an open dialog with sales about lead criteria. Find out what they consider to be a salesready lead. Work with sales to agree on which contacts are handed over as sales leads and which need more nurturing. By involving sales early, you pave the way for a long-term working relationship where both teams have input into your lead definitions and how you set up your lead scoring program later on.

Agree on a Handover Process

Define how qualified leads will be distributed to reps, and make sure everyone on the team knows exactly what to expect when they receive a new lead.

Define a Sales Follow-Up Process

In the beginning, your definition should be simple and loose. For example, after a prospect views product-related content, sales will give them a call within 48 hours.

You'll refine all these processes as time passes and both teams get a chance to see what's working.





3 Assemble your High-Performance Team

Getting the most out of your marketing automation system means getting the right team members involved in the deployment. When done right, you will be able to deliver the results of a large marketing department with just a small staff. For example, using Act-On, Absolute Exhibit's experienced an 84.5% increase in revenue, improved marketing and sales alignment, and gained access to better data, segmentation, and tools to launch personalized campaigns.

Despite being part of a two-person team, Act-On's marketing automation empowered Catherine Hess, Absolute Exhibit's senior marketing manager, to launch a wide array of marketing efforts to help the business stand out in a competitive environment.

[Read the success story.](#)

But to see the types of results like those Absolute Exhibits experienced, you need to ensure that the people on your team (big or small) are fully prepared to leverage this technology.

On the next page, we outline the key competencies you should have in place or that you need to start building into your team.



Core Competencies You'll Need

Strategy & Goal Setting

Identify a resource to put the strategic backbone of your programs in place. Make sure this person can set measurable goals (such as "increase Q2 leads by 10%") and a strategic plan to achieve the goal. In smaller companies, the CEO or marketing director often drives strategy.

Marketing Operations

Designate someone to implement and monitor the programs you build. Look for someone who is naturally tech savvy and learns new systems quickly. Act-On University offers a wealth of live and self-paced training to help them master the platform quickly. Regardless of your subscription level, you'll get ongoing customer success resources for the lifetime of our relationship.

Content

You'll need a resource to manage and produce emails, landing pages, images, and supporting content for campaigns. Your internal team can do this or you can rely on an agency, freelancers, or Act-On Professional Services.



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Assemble your High-Performance Team (cont)

Regardless of the quality of talent that exists in your team, it is highly likely that you'll need some help getting started while you become more acquainted with your platform. So consider supplementing your internal capabilities by outsourcing all (or parts of) the planning process to accelerate success.

A Marketing as a Service solution, such as [Act-On Accelerate](#), can pair you with marketing automation experts who can help you develop, implement, and launch a marketing automation strategy that fits your organizational goals.

Outsourcing the initial planning allows your team to focus on learning and adjusting to new processes while getting much of the set-up work done at the same time. An experienced consultant will also be aware of common mistakes and can help you avoid them to prevent any setbacks.





4 Implement a Pilot Automated Program

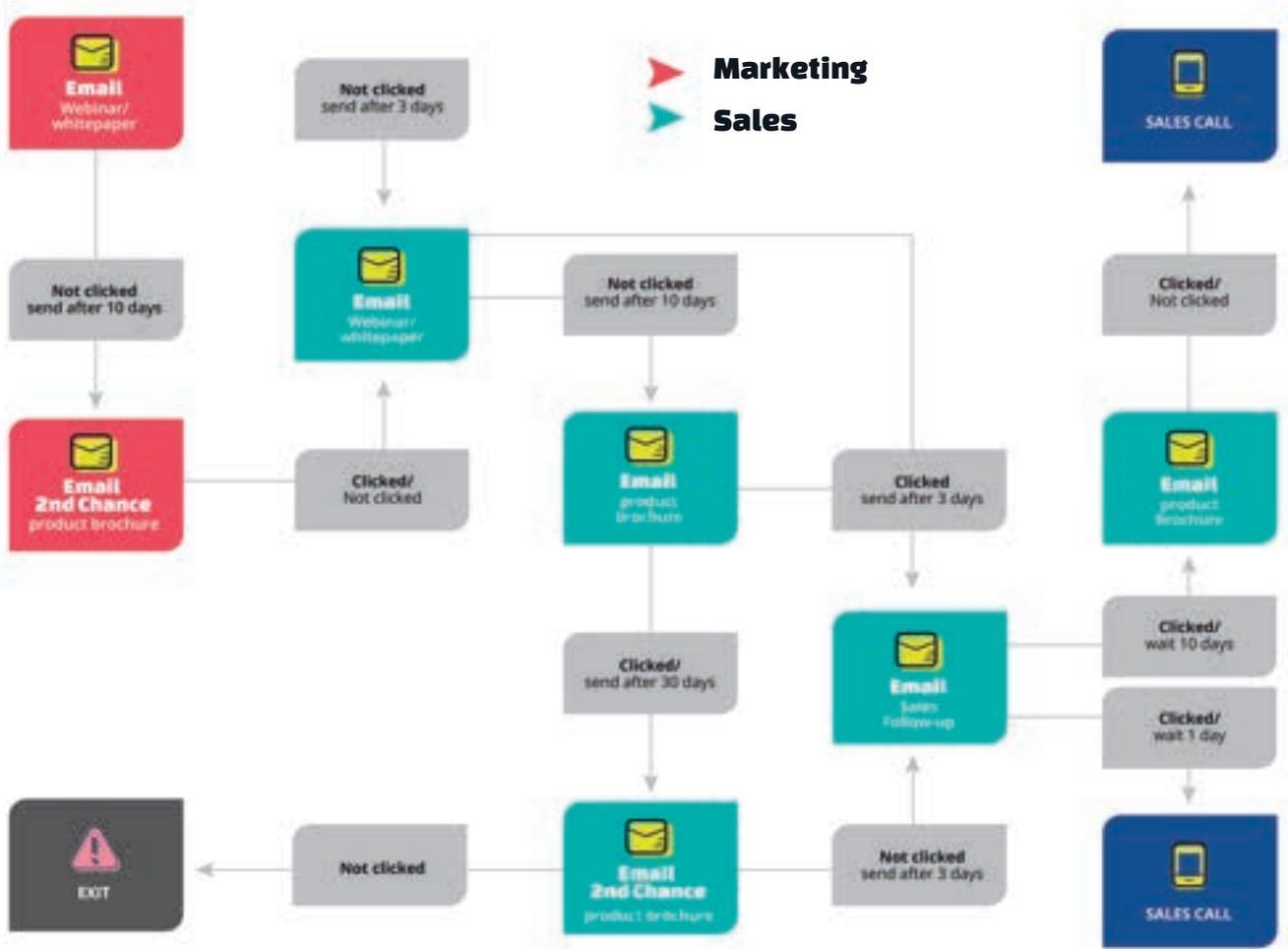
Once you've put your essential personnel and processes in place, it's time to start automating your programs. It's at this stage where you'll truly realize the tremendous power of marketing automation and how it easily allows you to customize your messages and deliver more personalized marketing efforts based on the behavior of your prospects.

The key here, as in all your initial programs, is simplicity. Keep things simple so you can get up and running quickly and learn what works for you. In the next few pages, we show you an example of a proven automated nurturing program, followed by an execution roadmap.

Example Automated Nurture Program

A nurturing program is an automated email campaign meant to engage a specific audience based on their unique interests and behaviors. The series of emails offers a set of progressive messages, which may vary based on the prospect's interactions with your campaign. Each email is intended to educate, inform, or entertain and entice the prospect to take the next step in the customer journey. To improve engagement, we recommend offering a series of content assets or offers to go with each step. For example, the first step in your campaign can offer a webinar/whitepaper.

The second step might offer your target audience a case study where they can learn more about how others are benefiting from being your customer. From there, the remaining messages vary based on how your recipient chooses to interact with your content.





Implement a Pilot Automated Program (cont)

Build Your First Automated Program



Determine the Purpose

Determine the purpose of this campaign, and map it to your overall business objectives. Choose your goal, your offer, and the metrics that define success.

Select your List

If you have segments, choose those that are highly likely to benefit from and engage with the emails in your program.

Build Templates

Have an open dialog with sales about lead criteria. Find out what they consider to be a sales-Act-On's tools make it easy to build templates yourself, even if you don't know HTML. You can also repurpose existing assets or hire a contractor to create them.

Draft Content

Draft email and landing page copy. If the CTA is suitable for more than one segment, consider how you can adjust the language of the email and landing page to be personalized to each segment. Insert the copy into the templates, and save the files.

Set Up Your Program

In Act-On's dashboard, click Automated Programs > New, and walk through the steps. Schedule your program. (You'll be surprised by how easy this is.)





5 Optimize & Maximize Results

One of marketing automation's biggest benefits is the ability to see and measure your results.

You will know whether you hit your goals, and you will have data to guide program optimization over time. When you're getting started, focus on tactical metrics so you can optimize things like subject lines, email design, and calls to action. Reviewing and analyzing these metrics will help you learn your target audience's preferences and tailor your marketing efforts to improve engagement.

Over time, you can also focus on monitoring campaign and program metrics so that you can demonstrate how your efforts are impacting your organization's bottom line. When your marketing automation system shows how your team contributes to revenue, that's the most meaningful metric of all.

Measure What Matters

With Act-On, it's very easy to measure what matters. While the key performance indicators (KPIs) you track will depend on the goals of your organization and what matters most to your leadership team, below are a few metrics you should be monitoring consistently.

TACTICAL METRICS

- Email Opens
- Conversion Rates
- Downloads & Unsubscribes
- Attendance



CAMPAIGN METRICS

- Total Lead Volume
- New Sales-Ready Leads
- Lead Funnel



PROGRAM METRICS

- Close Rate
- Time to Close
- Cost Per Close
- Revenue Per New Customer



6 Reap the Rewards

Marketing automation can help you improve engagement and achieve a better ROI from your marketing efforts than ever before.

Despite the great impact that marketing automation can have on helping you achieve your marketing goals, it's important to keep in mind that your ability to reap all the rewards that stem from this innovative technology depends on a few key factors.

If you want to achieve the best return from your marketing automation platform, you should consider the following:

Strength of your brand

Health of your data

Your relationship
with your list

Relationship with sales

Length of your sales cycle

Experience implementing
technologies

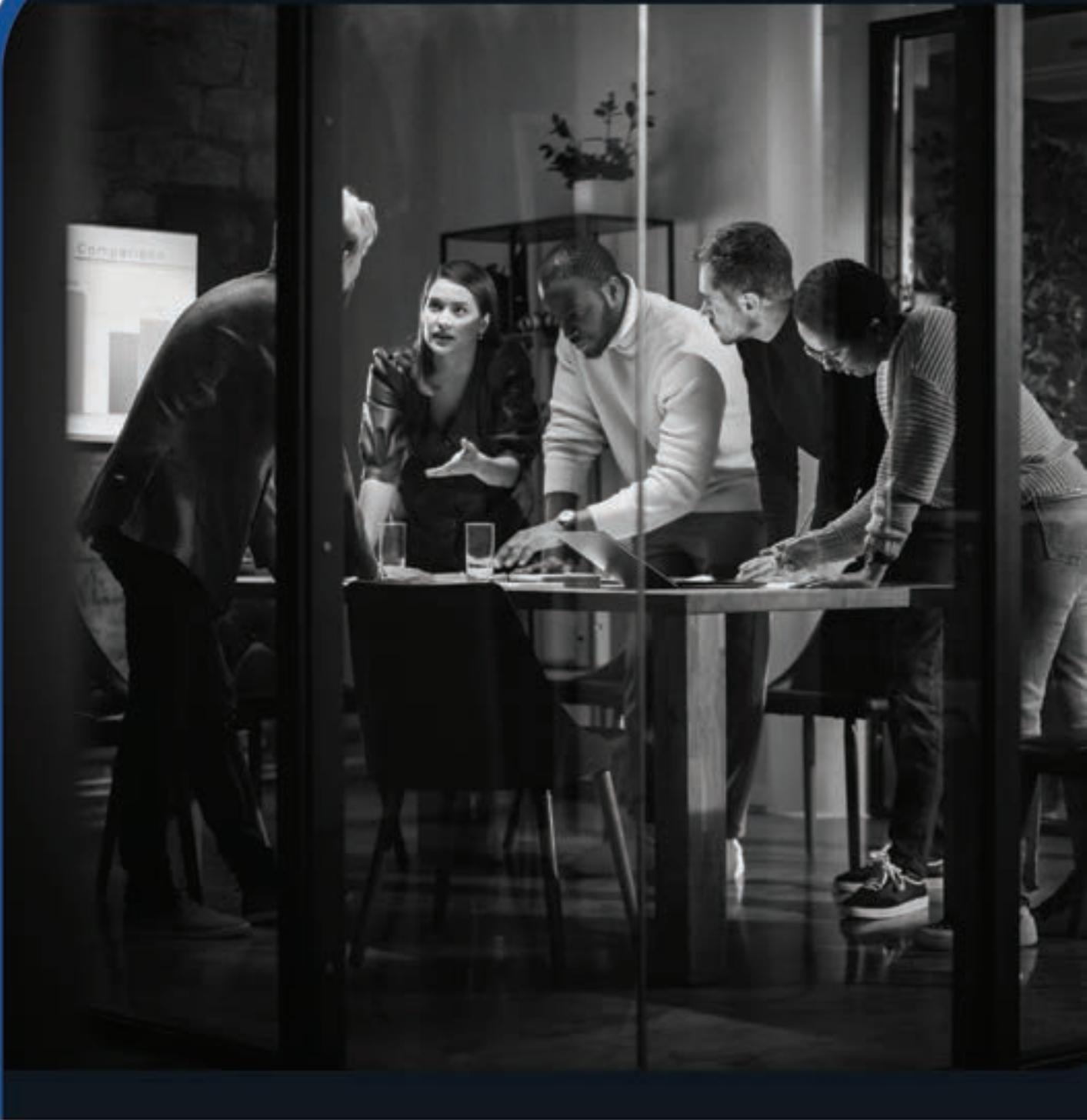
Current level of online
marketing activity



But even if your sales cycle is long and your team is short on experience, great returns are still within reach.

The key for success is to start simple, get organized, and be proactive. You'll be surprised how quickly your small efforts can snowball into big successes.

MARKETING



Get a Demo

Act-On Software provides solutions that empower marketers to engage targets at every step of the customer lifecycle.

Act-On makes customer data actionable so marketers can dream big and build smart, effective marketing programs to grow their businesses and generate higher customer lifetime value – all with the fastest time-to-value. For more information, visit [Act-On Software](#).



[CLICK HERE FOR MORE](#)