

# Weekly Power Up: Marketing Automation Strategy & Automating the Nurture Process

Welcome!



# Agenda

1. General Principals
2. Developing a Strategy
3. Lead Scoring & Funnels
4. Building with Act-On

# General Marketing Principles

## Desired Result

Lead Scoring + Lead Nurturing  
= 50% more sales ready leads  
33% lower cost

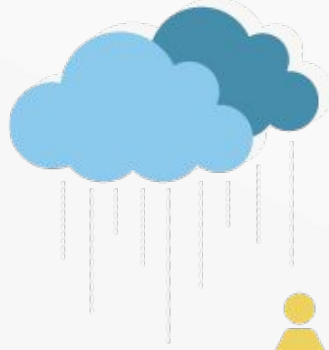
Source: Forrester Research

## Reality

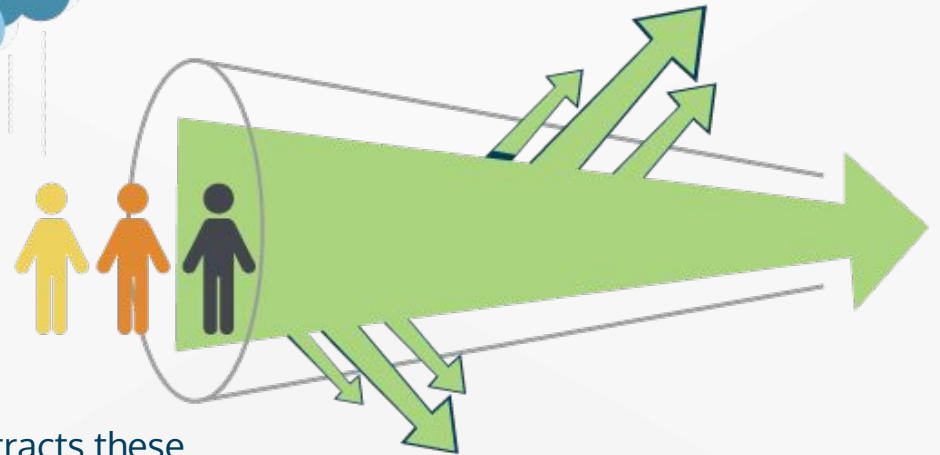
- 79% of B2B marketers aren't using lead scoring
- 65% of B2B marketers aren't using lead nurturing

Source: MarketingSherpa

Problems create a need for a person to find a solution



Pushing to sales early causes disqualification.



Marketing attracts these people to your content.

Poor nurturing loses their attention.

# Developing a Strategy



# Understand Your Audience

Who is our ideal buyer?

Do they make decisions alone or as part of

Decision Maker: C-level

Influencer: Manager, Director

User: Coordinator, Technician

What industries are our buyers in?

What products or services are relevant to them?

	Persona 1	Persona 2
Persona "Name"	Jane	
Personal data	35, BA in English Lit	
Role/Title	Senior Director of Demand Generation	
What is their background?	10 years in software marketing	
What is their day like?	Busy, fragmented. Has a team of 20	
What are their goals?	10k leads this fiscal year; her team contributes significantly to revenue	
What motivates them?	Being respected, seen as a smart leader who contributes to value	
How do they get information?	She subscribes to four newsletters; has an active Slack community	
What are their pain points (Disruptors)?	Lack of ability to track detailed asset/campaign attribution. Sales/marketing alignment challenges	
Why would they object to your product/service?	Expensive, risky, hard to implement	
How would their life be different if they purchase?	She could attribute revenue to her efforts in revealing, accurate charts, proving her team's contribution	
Who influences them?	VP of Marketing, CMO, industry peers	

# Understand the Buyer's Journey

---

- Each prospect is on their own journey
- Prospects go through different stages as they make decisions
- Marketers need to target them content relevant to where they are in their journey



**What would cause someone to need your product or service?**

**How would your product or service help with those problems?**

**Why are you better than their other options: competitors, doing nothing?**

# Start Thinking in Funnels

## Your Buyer



## Your Actions

Use big-picture and industry-focused content; social media, advertising, sponsorships, PR and become aware of your company. Goal will be to turn anonymous visitors into known visitors by enticing them to interact with your campaigns. This will allow you to start tracking your website visitors and gain a clear picture of typical buyer behavior.

Educate, help prospects evaluate buying criteria. White papers, eBooks, webinars, events, analyst reports, videos, reviews, checklists. Use the buyer behavior you've gathered to target engaged prospects.

Demos, data sheets, trials, pricing, case studies, references, vendor comparisons, and implementation data. Your prospects are evaluating specific products and services and at this stage become willing to engage with sellers.

# Attract: Beacon Tracker, Landing Pages, SEO

The screenshot displays the Actomatic Beacon Tracker interface. On the left, a list of contacts is shown, with three entries highlighted in a blue box: Merck And Co. Inc. (4 contacts, 31 minutes ago), Rcs & Rds Business (11 contacts, 34 minutes ago), and Ovh Sas (1 contact, an hour ago). Below this list, a large teal arrow points down to a blue box containing the text "Form Submit OR Email Click". A teal arrow then points from this box to the main dashboard area.

The main dashboard area shows contact details for William Taylor, Director of Marketing at Actomatic Technologies Inc. (53444 Matilda Road, Phoenix, Arizona). Contact information includes email (william.taylor@actomatic.com), mobile, and work phone (602.852.3263). Below this is a navigation menu with tabs for Overview, Website, Search, Mailings, Forms, Webinars, Media, Programs, Custom, All, and Timeline. The Overview tab is active, displaying a grid of performance metrics:

Category	Metric	Value	
Website	Page Views	12	
	Site Visits	2	
Search	Organic	0	
	Paid	2	
Email	Sent	9	
	Opens	4	
	Effective Opens	4	
	Clicked	4	
Forms	Views	2	
	Submits	2	
Webinars	Registered	1	
	Attended	1	
Media	Downloads	2	

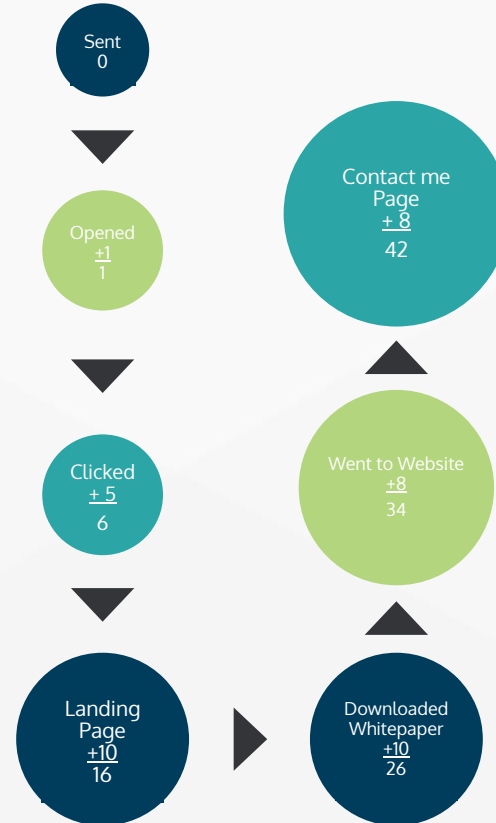
At the bottom of the dashboard, a box displays "Total Score 181 for all time".



# Nurture: Prepare with Lead Scoring

## Lead Scoring Values (Last 90 Days)

Sent a Message	0
Opened a message	1
Clicked on a message	5
*Viewed a form	0
Submitted a form	10
Downloaded media	5 - 20
*Visited a landing page	2
Visited a web page	8
Registered for a webinar	5
Attended a webinar	35
Clicked on an organic search listing	5 - 10
Clicked on a paid search ad	5 - 10



\*Also has "Visited a web page" scoring applied.

# Nurture: Strategize with Funnel Stages

---



# Building in Act-On



# Nurture: Build Foundational Segments

▼ **Training Master List** 11,054  
*Uploaded List Created: Mon May 25 2015 2:24 PM PDT*

▼ **Funnel Stages Based on Lead Score** 11,054  
*Segment Last Counted: Thu May 28 2015 8:09 AM PDT*

- 👤 **Top of Funnel (LS Between 0 and 10)** 8,976  
*Segment Last Counted: Thu May 28 2015 8:09 AM PDT*
- 👤 **Middle of Funnel (LS Between 10 and 30)** 988  
*Segment Last Counted: Thu May 28 2015 8:09 AM PDT*
- 👤 **Bottom of Funnel (LS Between 30 and 40)** 842  
*Segment Last Counted: Thu May 28 2015 8:09 AM PDT*
- ▶ **MQL (LS 40+)** 158  
*Segment Last Counted: Thu May 28 2015 8:09 AM PDT*

**Top of Funnel Nurture Campaign** Revenue Attribution Edit Close

Messages Report

	Sent	Opened	Clicked
ction	0	0	0
ble for 15 minutes this week?	0	0	0
low!	59	0	0
on is accepted for 7 characteristics of Great Marketing Content	1	1	1
r more about Great Marketing Content	1	1	1

	Views	Clicks
Copy of Infotronics Whitepaper Target 1	1	0
Infotronics Whitepaper Target 2	2	0
Infotronics Whitepaper Target 1	37	0
Infotronics 2	0	0
Infotronics 1	34	0

**Forms**

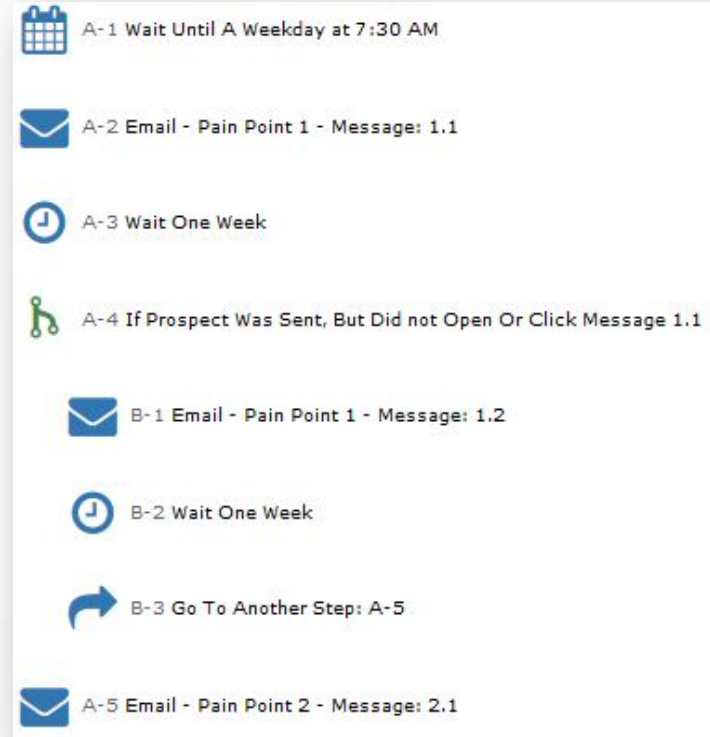
Name	Views	Submits
Infotronics Test Form	30	32
NEW and IMPROVED using TIMEmachine to get your business on track	84	37
New Product Launch	166	77

# Nurture: Automate with Programs

## Top of Funnel: Awareness

Problem oriented messaging  
Engagement campaign  
Start with 5 messages

- 10 Tips
- 5 Ways to improve
- 32% of CEO's say...



# Nurture: Automate with Programs

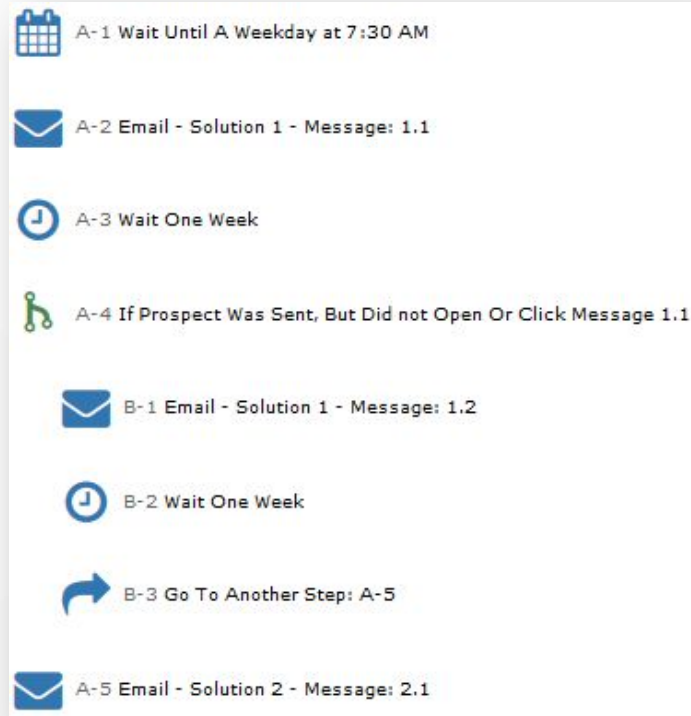
## Middle of Funnel: Interest

Solution oriented messaging

Nurture Campaign

Start with 5 messages

- Solutions to pain
- You have ABC problem
- We have XYZ solution

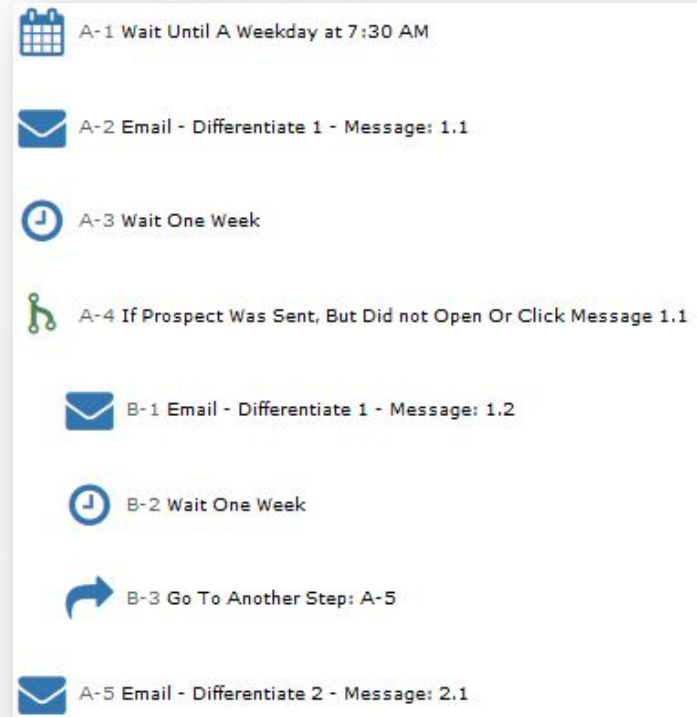


# Nurture: Automate with Programs

## Bottom of Funnel: Consideration

Differentiator oriented messaging  
Typically 3 – 5 messages

- Why choose us?
- Customer references
- Product offering
- Demo request



# Convert: Automate with Programs

---

## Marketing Qualified: Send to Sales

### Admin Program Steps

- Create alerts
- Email to a specific person
- Create in CRM
- Assign CRM Task



A-1 Send Alert to a Specific Person by email



A-2 Create record or task in CRM



A-3 Exit the Program





Demo time!



Questions?

# Additional Training Options

Regional New User Boot Camp	Virtual New User Boot Camp	Act-On Certification	Act-On Connect
<ul style="list-style-type: none"><li>• 3-Day in-person training</li><li>• Instructor led training</li><li>• Foundational Training for New and Returning User</li><li>• \$900 per seat</li><li>• Private options available</li><li>• <a href="#">Reserve your seat Today!</a></li></ul>	<ul style="list-style-type: none"><li>• 5-Day live webinar training</li><li>• Instructor led training</li><li>• Foundational Training for New and Returning Users</li><li>• \$450 per seat</li><li>• Private options available</li><li>• <a href="#">Reserve your seat Today!</a></li></ul>	<ul style="list-style-type: none"><li>• Become Act-On Certified!</li><li>• Self-paced on-demand videos</li><li>• 4 Different Certification Tracks</li><li>• \$300 per user</li><li>• <a href="#">Sign-Up for Certification here!</a></li></ul>	<ul style="list-style-type: none"><li>• Self-paced on-demand video training at no cost.</li><li>• Progress tracked by individual user</li><li>• Written articles covering all Act-On features</li><li>• Act-On Community</li><li>• Campaign Playbooks</li></ul>

[Click to register to additional Weekly Power Up webinars in Act-On Connect!](#)



# Weekly Power Up: Marketing Automation Strategy & Automating the Nurture Process

Thank You!

