

10 Commandments of Marketing Automation

HubSpot

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Part 1: The problem with Marketing Automation today

According to a 2011 Raab Associates Inc. study the B2B marketing automation industry will reach \$325 million in revenue in 2011. This represents a more than 50% increase over the previous year, which had also doubled in revenue from the year before.

But the question remains: is it working?

We are all seeking a way to scale personal attention. The great promise of marketing automation has always been that it enables you to trigger messages based on a visitor's actions on your site, ideally sending messages when they are most relevant rather than spam. The promise of marketing automation has contributed to it having the fastest growth of any CRM related segment in the last five years (Focus Research). But despite its rapid growth, Marketing Automation has not yet achieved that goal.

In fact, in a 2011 Genius survey **more than 50% of respondents said they had not yet realized the value of their investment in marketing automation.** True to its name, it remains a largely robotic function, only reflecting a fraction of the customer's interests and preferences. If marketing automation tools are to remain useful they need to place the customers – their needs and best interests – at the heart of their strategies.

Simplified Diagram of a Marketing Automation Campaign



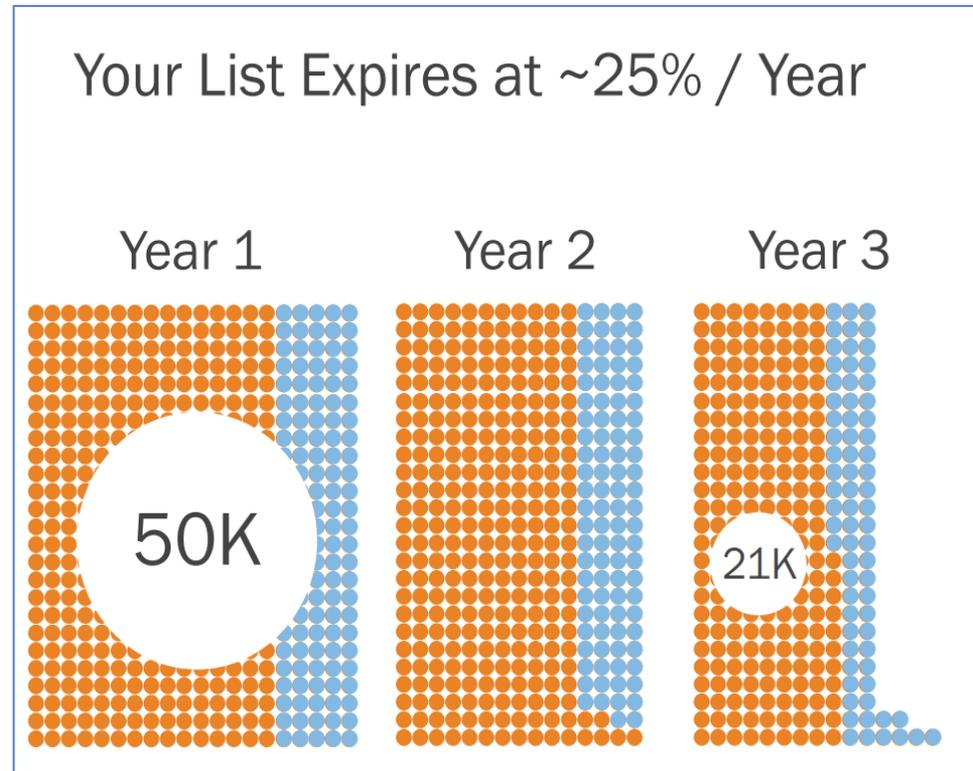
A basic campaign is triggered by an action a visitor takes, like filling out a form or downloading a piece of content.

A series of emails are then kicked-off that ideally reflect the action taken and should result in relevant, useful content being delivered at a reasonable pace over time.

Relying on a limiting channel

Marketing automation doesn't add to your email lists

Each year there is a natural decay that happens in marketing email lists that reduces the effectiveness of email marketing as an influencer. In B2B marketing on average after 1 year, lists only retain 75% of their members due to overturn at companies. Marketing lists have a tendency to expire at a rate of 25% a year. Any email tool which relies too heavily on the quality of lists is limited by this overturn.



Marketing automation doesn't take priority inbox or other filters into account

Email recipients have more tools than ever before to filter out unwanted communications. Auto-filters and priority inboxes each sift out marketing emails and push them out of immediate eyesight. As a result, your deliverability statistics may not change but your emails are indeed getting skipped.

Marketing automation doesn't leverage other channels

Marketing automation to this point has been limited to the email inbox. Yet leads and customers are more and more looking outside of the inbox to research their purchase decisions. In fact, research from iMedia shows that 93% of B2B buyers use search to begin the buying process and 37% post questions on social networking sites when looking for suggestions. As a result, most marketing automation has little influence when people are actively researching products and services. Peer reviews, social media, and search are all major players in prospects decision process.

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Source: [iMedia Connection](#)

Failing the customer

The one thing that has redefined marketing strategy today more than anything else has been the shift of control to the customer. The proliferation of social media tools and online tools help leads decide on their own schedule and using their own combination resources. In fact, Gartner Research projects that “by 2020 customers will manage 85% of their relationship without talking to a human.”

The primary need that leads and customers have in their research is for useful and timely information. Our role as marketers should be to help customers get all of the information they need and ease their decision process.

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Marketing automation doesn't meet customers' needs as they arise

Over the course of a lead's interactions with your company you learn a lot about their interests, challenges and timing. You should be gathering social, website, blog, purchase history and behavioral information on your leads and prospects- so make sure you put it to good use. Marketing automation programs should reflect that data. If you take the time upfront to understand what your audience wants, then they'll be more receptive to you.

Marketing automation doesn't reflect the complete customer experience

Typically marketing automation triggers communications based on some sort of a form submission. But what about all of the other interactions a lead has with your company on a regular basis? What about exchanges on Twitter or consistent readership of your blog? All of the interactions that make up a lead's experience with your company should inform your marketing communications

Marketing automation often ignores your best customers

Too many marketers stop targeting communications after the lead has converted into a customer, missing opportunities to deepen the customer relationship and drive repeat purchases and upgrades. A comprehensive inbound marketing strategy should continue to personalize communications based on customer experiences.

Losing focus on content

When run well, marketing automation should provide leads and customers with exactly what they need and nothing more. It should be interesting, relevant and useful. One of the biggest errors with marketing automation tools has to do with the content strategy not the tool itself. Without smart, tailored, useful content – marketing automation is just an intelligent spamming tool. Too many marketing automation programs today have neglected this central tenant.

Marketing automation can result in multiple emails with the same content

In an automated email campaign, each email should offer value. Lead nurturing campaigns should not be an excuse for you to deliver the same ask again and again. Make sure every email has distinct content, value and goals. It's fine to have your email campaign build and refer to past emails, but don't reuse.

Marketing automation sends irrelevant content

Make sure that the information provided in your marketing automation campaigns matches the expressed interests of the recipients. If they have converted into a lead because of a particular product or topic area, your content should reflect that. Don't rush your leads or move into another topic area before they've demonstrated interest in it.

More Resources

Free Content Creation Kit

<http://www.hubspot.com/content-creation-kit/>

Part 2: 10 Commandments of Marketing Automation

As much promise as marketing automation has held, the practice of it has fallen short – not just for marketers, but also for the end-recipients. It is that latter shortfall that needs to drive our re-examination of marketing automation.

Calling for a set of commandments is admittedly a bit hyperbolic, but if adoption of marketing automation is going to continue to grow at a break-neck speed we have to address some of the issues inherent to its use. We have to demand better standards from our technology and the marketers who use it.

10 Commandments of Marketing Automation

- 1 Above all else, serve the customer.
- 2 Thou shalt not cause undo sales pressure.
- 3 Remember the internal sale.
- 4 Inbound marketing will show you the way.
- 5 Thou shalt not ignore customers after they have converted.
- 6 Marketing automation should be content-driven
- 7 Thou shalt not worship email over other channels.
- 8 Respond to interest, not just action.
- 9 Make thou marketing accessible to all.
- 10 Do not smite mobile and other platforms.

10 Commandments of Marketing Automation

Many marketing automation systems today have neglected the key principal of good marketing in favor of volume. We think it's a sin. The following is a breakdown of our proposal for Ten New Commandments of Marketing Automation.

#1 Above all else:

Marketing automation should be customer-serving

1. Marketing automation should be customer-serving

One of the central concepts behind inbound marketing strategy is that helpful, valuable content will always win out over sales pitches. Pay attention to which types of content resonate the most with your leads and if possible, after the lead has converted on a form, try to prevent them from having to fill out any more forms for content.

2. Marketing automation should be pressure free

Gleanster reports that 50% of qualified leads are not ready to purchase immediately. If you push them through a series of hard-sell emails, you'll likely lose them. Instead, think of yourself as a consultant. Send them resources and useful tips to help them decide.

3. Marketing automation should support the internal sale

For B2B companies, your job is not only to work with your individual lead, but also to provide them with information to help them get internal approval to purchase your product or service. Send them useful tools to help explain the benefit of purchasing your product or service to others.

#4 Marketing automation should be part of an integrated inbound marketing strategy

4. Marketing automation should be part of an integrated inbound marketing strategy

A comprehensive inbound marketing strategy should closely reflect the customer lifecycle. It should enable prospects to control how and when they navigate the buying process and reframe marketing as a source of information and support rather than a pushy sales pitch. Marketing automation is just one tool in this process and shouldn't replace the full strategy.

Attract leads

Instead of attacking prospects with a series of ads and direct mail, attract them by creating useful and interesting content that is relevant to their interests. Then optimize that content for search making it easier for prospects in need to find you.

Tools/Tactics

- Blogs
- Content (eBooks, etc)
- Effective landing pages
- Search Engine Optimization
- Social media

Nurture leads

Once leads have expressed interest, leverage what you know about their interests and needs to send them tailored communications to help them decide about your service or product. Again, these communications should serve the lead not interrupt them.

Email

Marketing Automation

Marketing Analytics

Product Content

Customer Testimonials

5. Marketing automation should support customers and drive repeat purchases, beyond the first point of sale.

Marketers' jobs are not done after the point of purchase. Continue to trigger tailored communications after the point of sale to help the customer get the most out of their purchase, encourage brand advocates and offer help to those struggling with your product.

6. Marketing automation should be content-driven

No matter how strong an individual piece of technology is, the success or failure of a lead nurturing campaign will still rest on the quality of the content you are delivering. Content, therefore, must be the backbone of any marketing automation strategy. Are you providing value? Are you pushing things further? These questions are inherent to good marketing.

#7 Marketing automation should be multichannel

7. Marketing automation should be multichannel

Buyers control how and when they interact with your company, and more and more they are navigating their decision process outside of the confines of your website and your exclusive set of marketing campaigns. To truly be relevant, lead nurturing and email campaigns need to take into account buyers' experiences across multiple channels and platforms. For example, if an individual has downloaded a whitepaper that's one thing, but what about if they tweet about it too? That indicates an additional level of interest.

8. Marketing automation should reflect Interest not just action

Additionally, you should be triggering communications based on all the types of content a lead has viewed and not just the forms he or she has submitted. For example, we want to know that a person has signed up for a free trial, but what if they signed up for a free trial and primarily looked at one content type on your site? That information can help you provide an even more personalized experience to your leads, and should also be available to your sales team so that they know in advance what your lead was looking for. You should consider all of the avenues that someone could use to find your content.

9. Marketing automation should be accessible

Make sure that anyone receiving your communications can view it no matter what browser or application they are using. In order to gain significant traffic, your emails and site need to be compatible with multiple browsers and devices.

10. Marketing automation should be cross-platform

Most marketing automated emails have yet to embrace the fact that there is a large percentage of their population checking email on their phones. Did you know that 86% of C-level executives have a Smartphone and it is their primary communication tool? Many of these automated emails when viewed by mobile devices are either cut off by the browser, too small to read- or block important contextual images. When you fail to optimize for mobile, you are missing out on a huge opportunity to communicate with a vast number of potential customers.

More Resources

Free Mobile Marketing Kit

<http://www.hubspot.com/mobile-marketing-kit/>



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Marketing that doesn't feel like a sin

Too often the pressure of converting leads and driving sales leads marketing departments to take short-cuts or harass their leads into a conversion. Too often tools like marketing automation lead us to communicate using the very same methods that drive us crazy in our lives as customers. It's time to change that. There are two principles that should guide your marketing automation program. Marketing automation should (1) reflect the changing and evolving customer and (2) enable you to run the type of marketing programs that won't make you feel slimy. Marketing automation should enhance personal attention, not replace it.



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Michael Scott

Regional Manager, Dunder Mifflin

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- ✉ Email a special coupon
- 🐦 Send a twitter message

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