

A
Practical Guide
to
Getting Started
with

MARKETING AUTOMATION

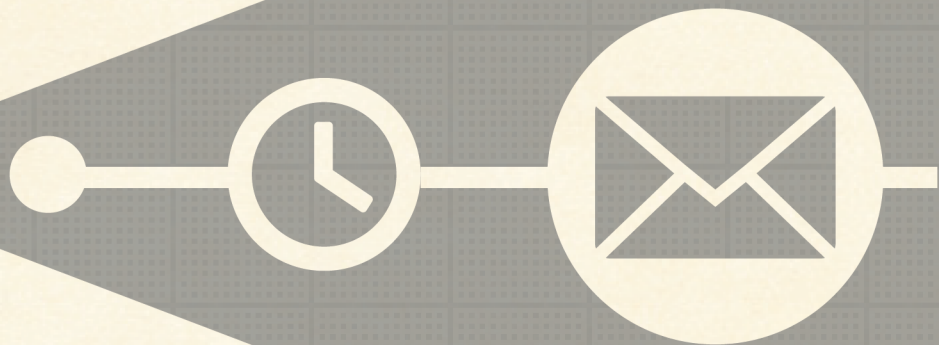
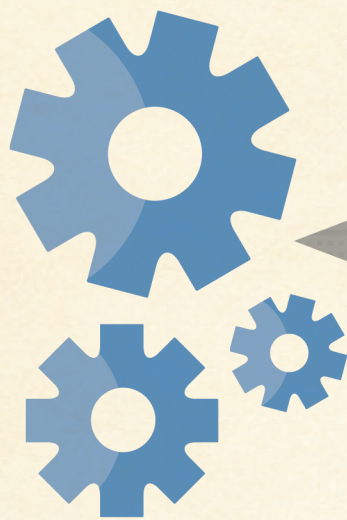


TABLE OF CONTENTS

Is Marketing Automation Right for You? | 2

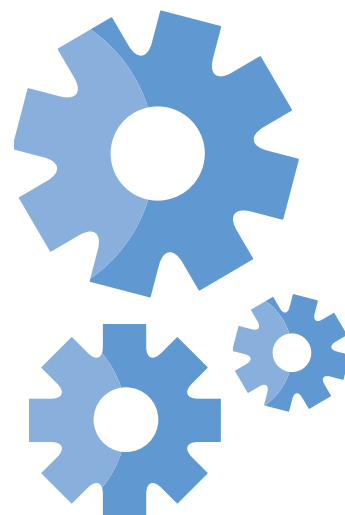
List Segmentation: The Key to Automation Success | 3

Digging Deeper: Buyer Personas & Lifecycle Stages | 4

The Limitations of Legacy Marketing Automation Tools | 6

Workflows: A Four-Step Approach to Automation | 8

The Bigger Picture | 10



Choosing a marketing automation system isn't easy. You need to wade through the jargon, features, and options to answer that one important question – which system will actually help you meet your marketing goals?

In our Practical Guide to Getting Started With Marketing Automation, we'll help you build a plan for how you'll actually use marketing automation to nurture your leads with relevant, targeted messages that get results.

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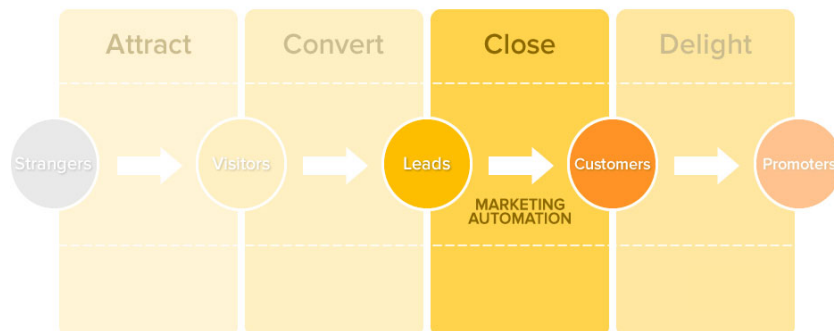
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IS MARKETING AUTOMATION RIGHT FOR YOU?

Before getting started, let's take a minute to confirm that marketing automation is the right tool to help you improve your marketing results.

Marketing automation systems are designed to help you convert existing leads into customers, so it's important that you already have an established lead generation funnel and a steady flow of new leads before going down the road of marketing automation. Without those new leads, you'll quickly run out of people to nurture as your database expires over time.

Even a large database grows stale at the rate of ~25% per year as leads change jobs and email addresses, or unsubscribe. This makes it critically important to consider how you'll continue to renew and grow your database.



If you don't yet have an established pipeline of new leads, you may want to start by learning more about **inbound marketing**. Inbound marketing can help you attract visitors to your website and convert them into the leads you need to do marketing automation effectively.

Yes! I have a steady stream of new leads to nurture.

Read on. This guide is for you.

No - I haven't yet established a steady source of new leads.

Read more about inbound marketing >>

LIST SEGMENTATION: THE KEY TO AUTOMATION SUCCESS

One of the toughest challenges that marketers face is understanding who is in your database, how your contacts are different, and then deciding how to best market to them. The best place to start is by grouping your contacts by similar characteristics, and then building a strategy for each group.

Defining these different groups is the art of segmentation, and getting it right is no small feat. You need both a framework to do it properly, and the tools to actually put your segments to use.



As a term that gets tossed around a lot, you probably have an idea of what segmentation means: breaking your audience into groups of like people. But it's good to take a step back and acknowledge all of the things that segmentation helps you do better. Your segments should be used to:

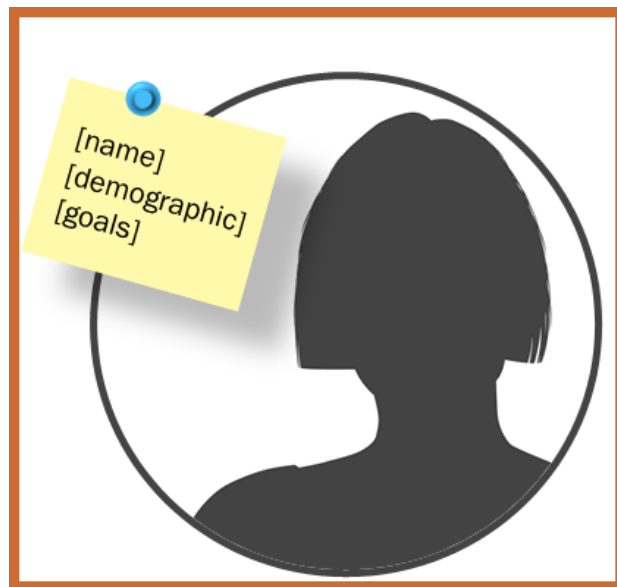
- **Define the topics and tone of the emails you send.** (Example: if you segment your database based on industry, the way you talk to your leads in different industries can be significantly different.)
- **Plan your content strategy.** (Example: if one valuable segment is under-represented in your existing database, you might create more blog content that appeals to that segment to attract more of those people to your website.)
- **Hone the messaging that appears on your website.** (Example: Why not show the most appealing call-to-action to each particular segment.)

These are just a few examples that marketers should think about. There are a lot more ways that you can apply segmentation to drive better results.

DIGGING DEEPER: BUYER PERSONAS & LIFECYCLE STAGES

The First Dimension of Segmentation: Buyer Persona

Buyer personas are groups that you define to represent the different buyers you commonly come across in your marketing and sales process. Your buyer persona might be defined by things like industry, company size, location, and other details. It's up to you to figure out what is most important.



The Second Dimension of Segmentation: Lifecycle Stage

Lifecycle stage refers to where in the buying process an individual lead or contact currently is. It's a great starting point for segmenting your audience, because how you communicate with different contacts should be largely dependent on their lifecycle stage.

For example, the conversation you should have with a new lead who you know nothing about should be very different from the kind of conversation you might have with an established sales opportunity who is considering a purchase in the near future.

If you are just getting started with segmentation and already have some clues about the lifecycle stages of your leads, using lifecycle stage to segment is a good way to get started. We'll talk about how lifecycle stage fits into the larger picture in just a minute.



Combining Buyer Persona & Lifecycle Stage to Define Your Segments

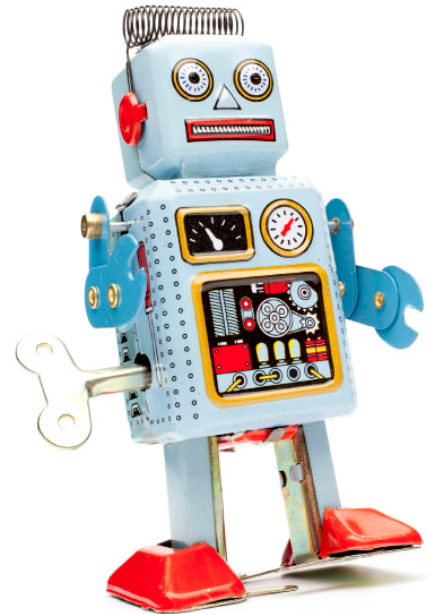
At HubSpot, after trying many different approaches on our own and with our customers, we've found that the most effective way to segment is by looking at these two dimensions together. In other words, we define segments based on lifecycle stage and persona.

This approach looks at who an individual lead or contact is (their goals, interests, demographics) and how they expect to interact with your organization (through lifecycle stage).

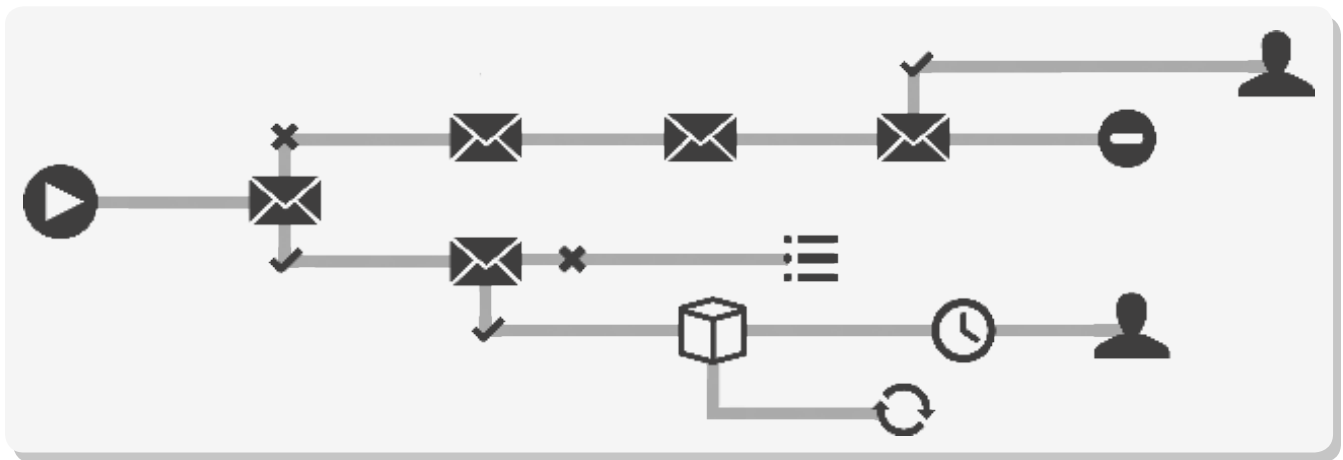
THE LIMITATIONS OF LEGACY MARKETING AUTOMATION TOOLS

Look back at the last five marketing emails in your inbox. How many of them are generic and uninspiring, or way off the mark on who you are and what you care about?

Everyone can relate to receiving bad marketing emails because bad marketing automation is so common. And it often isn't the fault of the marketer - they were set up for failure by flawed tools and a lack of guidance on how to use them. Here are just a few problems with most legacy marketing automation tools.



- **Legacy tools only work with one channel: email.** Their targeted message extends only to the inbox, leaving you with no way to deliver anything but a generic, uninspiring messaging on your website.
- **Legacy tools are designed for situational nurturing, not strategic nurturing.** Legacy tools take a reactive approach to nurturing leads based on their actions, not who they are and what they care about. Nurturing without context or strategy is little more than a sophisticated spamming operation.
- **Legacy tools only pay lip service to social media.** True social media integration isn't just about icons in your emails or publishing to facebook, it's about leveraging timely insights to have more relevant interactions with your prospects.
- **Legacy tools ignore the person on the other end.** Branching campaigns are designed to trigger emails based on actions like clicks on links and email opens. They aren't built on a solid foundation of context about who a lead is and what they are interested in.



What does a click on a link or the open of an email really tell you about a lead?

At the end of the day, legacy marketing automation tools can be useful for situational nurturing, but they fall short in a number of key areas.

In a world of ever shortening attention spans and more power in the hands of the buyer, you need to take a strategic approach to nurturing that leverages context about your leads.

In light of the problems with most marketing automation tools, HubSpot released Workflows in 2012. Workflows was designed from the ground up to leverage the power of automation, but still make it easy to deliver marketing people love. While Workflows is flexible enough to support almost any campaign strategy, let's take a look at a more effective approach to marketing automation using Workflows.

WORKFLOWS:

A 4-STEP APPROACH TO AUTOMATION

1 Step 1: Segment your leads

Marketing automation in HubSpot starts with segmentation. The most effective way to segment your database is often based on where your leads fall in the buying funnel (what we refer to as a lead's "lifecycle stage.") It's up to you to determine how many different stages you'll define; you can always start with just a couple stages and create more as you scale.

<u>Subscribers</u>	<u>Leads</u>
signed up to receive our weekly blog email, nothing more.	May represent a good fit, but hasn't yet expressed a product interest.
Comes from: <ul style="list-style-type: none">- subscription landing page- subscribe form on blog	Comes from: <ul style="list-style-type: none">- ebook landing pages- whitepaper landing pages- webinar sign ups

2 Step 2: Target email content

For each segment, you'll build a workflow that contains email messages that get sent at different intervals. The most effective workflows include a mix of useful, interesting content like relevant blog posts and call-to-action emails. The emails in each segment should gently push leads to move further down your funnel by demonstrating the behavior of the next segment.

<u>Subscribers</u>	<u>Leads</u>
What content would get these people to tell us more about who they are?	What content would get these people interested in our product?
<ul style="list-style-type: none">- A steady stream of blog content they subscribed to- Educational ebook offer- Industry best practices guide	<ul style="list-style-type: none">✉ Popular blog article #1✉ Buyer centric offer✉ Popular blog article #2✉ Popular blog article #3✉ Free consultation request

3 Step 3: Target website content

Targeting your website content might seem far-fetched, but it's easy to do in HubSpot. Our Smart CTA tool recognizes which segment a lead is in when they visit your website, and shows them targeted calls-to-action to help move them on to the next stage.

This gives you the opportunity to reinforce your message on every page of your website, instead of showing leads a generic, uninspiring message or a call-to-action to take a step they've already taken.

<u>Subscribers</u>	<u>Leads</u>
What calls to action should we show these people on our website?	What calls to action should we show these people on our website?
<div>Download Free Helpful Industry Resources</div>	<div>See our product in action or try it yourself!</div>

4 Step 4: Monitor social & website actions

On social media, HubSpot makes it easy to cross-reference the segments you created in step 1 with key terms you want to track. That way, if a lead mentions an industry or product-related term, your brand, or even the name of a competitor, you can be notified by email immediately.

It's also easy to monitor the actions your leads take on your website. If a known lead suddenly visits your pricing page, for example, you can automatically notify the lead owner with details on the lead so they can follow up quickly.

Subscribers	Leads
We want to be notified when a known subscriber...	We want to be notified when a lead...
- Mentions our brand or a product term on twitter	- Mentions our brand or a product term on twitter
- Visits our product pages	- Visits our product pages
- Returns to our website after a period of absence	- Returns to our website after a period of absence

Scaling & Improving Over Time

One of the best parts of Workflows is its ability to scale with you over time. When you first get up and running, you might choose to start with just a few different nurturing tracks - one for each of the three different lifecycle stages you use. Over time, you can easily divide your database into more and more targeted segments that deliver more and more relevant content and offers to your leads (at HubSpot, we also use buyer personas to target our campaigns.)

HUBSPOT CASE STUDY: ALPHA SOFTWARE

Prior to using HubSpot, Alpha Software was sending one-size-fits-all email campaigns to all of these segments. Lacking the data and technology needed to segment based on industry or behavior, Alpha became concerned with the potential damage their generic communications could be causing.



"We knew we were missing opportunities . . . the one-size-fits all emails were too basic for long-term customers and way too advanced for people who had just started with us."

David McCormick

Director of Product Marketing, Alpha Software

How HubSpot helped

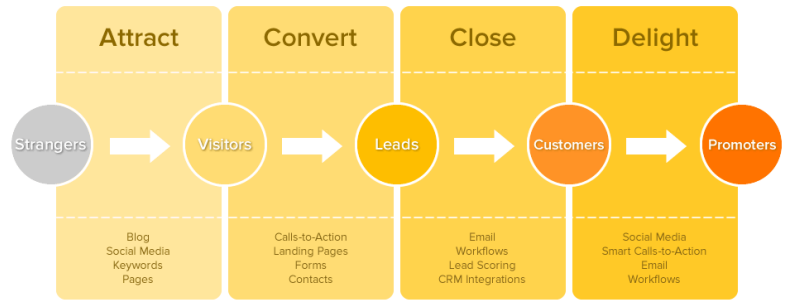
"List segmentation has made an enormous difference for us," said Dave McCormick. "By using HubSpot, we are able to better segment and target our communications. In addition to dividing by industry, we are also now segmenting and targeting communications by behavior."

see more case studies at hubspot.com/customer-case-studies >>

THE BIGGER PICTURE

Marketing automation is only one part of a complete marketing software platform.

Chances are you've come across your fair share of qualifying questionnaires and sample RFPs that cover marketing automation in detail. But it's important to remember that marketing automation is only one part of a complete marketing software stack. This checklist will help you assess which critical components of an end-to-end marketing stack a given solution will cover.



Attract: tools to help you drive new visitors to your website

- ☐ Does your platform make it easy to for multiple stakeholders to create website content like blog posts? What SEO tools does your platform offer to help us optimize this content for search engines (e.g., keyword research & tracking capabilities)?
- ☐ What are your platform's social media capabilities? Does your platform give me the ability to create, schedule, and publish social media posts? What does your platform do to ensure I'm sharing content in the most advantageous way?
- ☐ Does your platform have the ability to track and attribute pageviews and actions to a visitor before they convert on a landing page? How is that information organized? Does your platform have any kind of IP lookup capabilities?
- ☐ Does your platform have any additional SEO capabilities, such as the ability to track link popularity, or offer any kind of website and content optimization auditing?

Convert: tools to help you turn visitors into leads

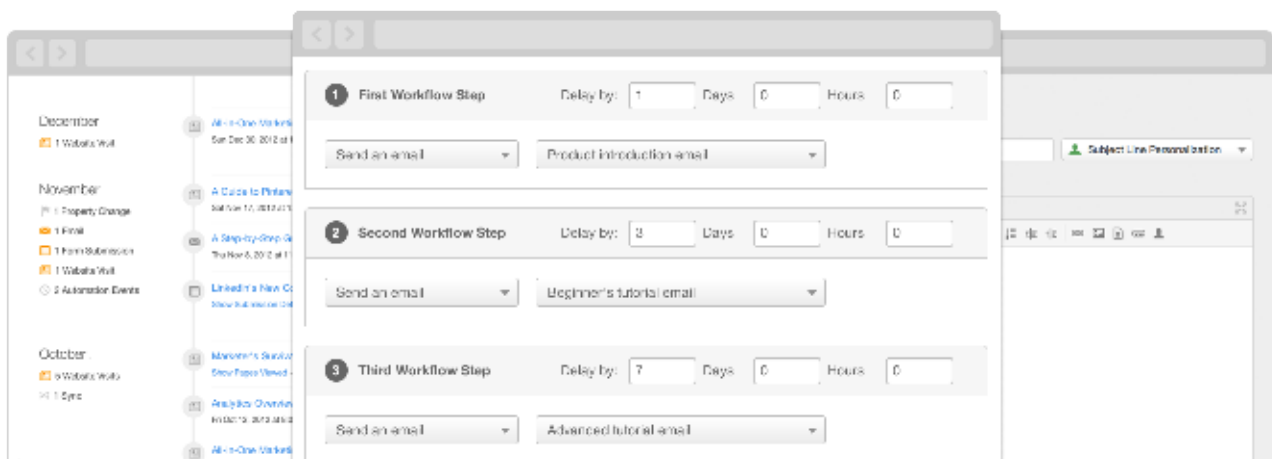
- ☐ How easy is it to create new landing pages within your tool? Does it require any technical or design expertise? To what extent can a non-technical user customize the content of the page, the form, the thank you page, and follow-up process?
- ☐ How many templates does your platform offer? Are they internally built, third party, or a combination of the two? What is your approach to mobile optimization for landing pages (e.g., responsive design?)
- ☐ How easy is it to create new forms for use on landing pages or external website pages? Do your forms feature progressive profiling? How easy is it to set up? Do your forms check / validate against misspellings or common spam email domains?
- ☐ How does your platform accomplish bridging users from our website to our landing pages? Can a non-designer create, export, and AB test call to action buttons that link to landing pages from our website or from email content?

Close: tools to help you turn leads into customers

- ☐ To what extent does your platform allow for deep segmentation of our database? Can we segment based on criteria such as how a particular lead found our company, form or CRM properties, pageviews, analytics events, etc?
- ☐ How easy is it to build email content in your tool? How many templates does your platform offer? Are they internally built, third party, or a combination of the two? Are email templates mobile optimized?
- ☐ Does your platform offer a way for us to maintain targeted messaging across our entire website in addition to in email? Can we personalize website messaging based on where a lead is in relation to our funnel? How easy is this to set up?
- ☐ What are the listening and notification capabilities of your product? Can we receive notifications when leads take key actions in social media or on our website? Can those notifications be triggered only for specific segments or groups of leads?
- ☐ What tools does your marketing platform offer to help us facilitate the hand-off of leads from marketing to sales? Is there an interface that my sales team would have access to? How is it priced, and how easy is it to use?
- ☐ How easy is it for a new, non-technical user to create all of the components necessary for a nurturing campaign (email content, triggers, nurturing flows, landing pages, etc?) What is the average time to implementation of nurturing?

Marketing automation is only one part of HubSpot's inbound marketing software.

HubSpot brings together all of the tools you need to attract, convert, close and delight customers, including marketing automation. See all of our tools, learn more about inbound marketing, or talk to a specialist today.



Learn more about
inbound marketing

See the software

Talk to a specialist