



Whitepaper

SilverTech

Making the Most of Marketing Automation



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From HubSpot's newly published...

[State of Inbound 2017](#), the top 3 marketing priorities over the next 12 months are converting contracts/leads to customers, growing website traffic, and increasing revenue derived from existing customers. These priorities make it clear that, “marketing is now measured against its ability to contribute to the business’s bottom line.” Yet without the right tools, proving ROI on each marketing initiative can remain a difficult task. The new reality is that those marketers who can prove ROI will be successful and those that can’t face a tough road ahead. Enter marketing automation.

Marketing automation is no longer a “nice-to-have.” Quite simply it is “table stakes” for modern marketers - serving as the latest and greatest way to enhance and control the customer experience. Marketing automation is not a passing trend. It is an actionable and useful tool that, when implemented and executed properly, can make measurable impacts to an organization’s bottom line.



Jeff McPherson
Chief Digital Officer

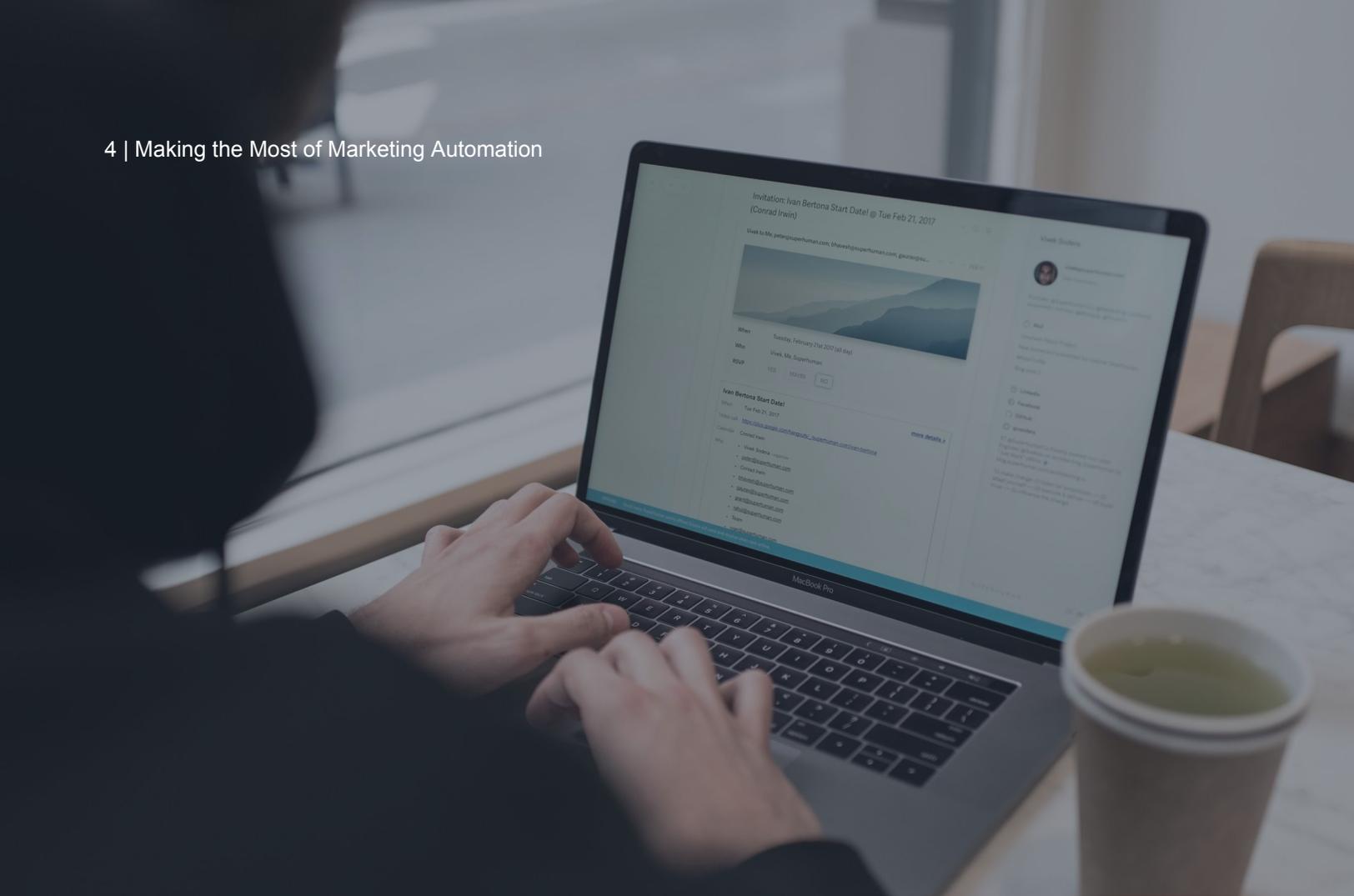




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Email Marketing vs. Marketing Automation

There remains confusion on the difference between email marketing and marketing automation. As email marketing providers such as Constant Contact and MailChimp incorporate sophisticated automation features and list and database management, admittedly, the lines are blurring. However, the main source for this confusion may be that, to-date, marketing automation has been sold incorrectly.

The pitch for a marketing automation platform (MAP) usually centers around getting better leads and personalizing communications. For sure, these are valuable benefits but they center thinking on the acquisition phase of new client relationships. This pitch misleads business owners and decision makers into believing that they can simply implement a marketing automation platform, upload some lists, set some triggers, and immediately see results. The truth is that marketing automation is far from “set it and forget it” and it takes an ongoing strategy to derive its true value: the cultivation of long-term, loyal relationships.





To help more clearly differentiate between an email marketing platform and a marketing automation platform, here's a breakdown of what each can typically do:

Marketing Automation

- Build personalized emails
- Segmentation
- Automated email responses
- A/B testing
- Tracking analytics
- Lead scoring and grading
- Lead nurturing
- Landing pages and forms
- Online behavior tracking
- Social listening and scheduling
- Bi-directional CRM integration

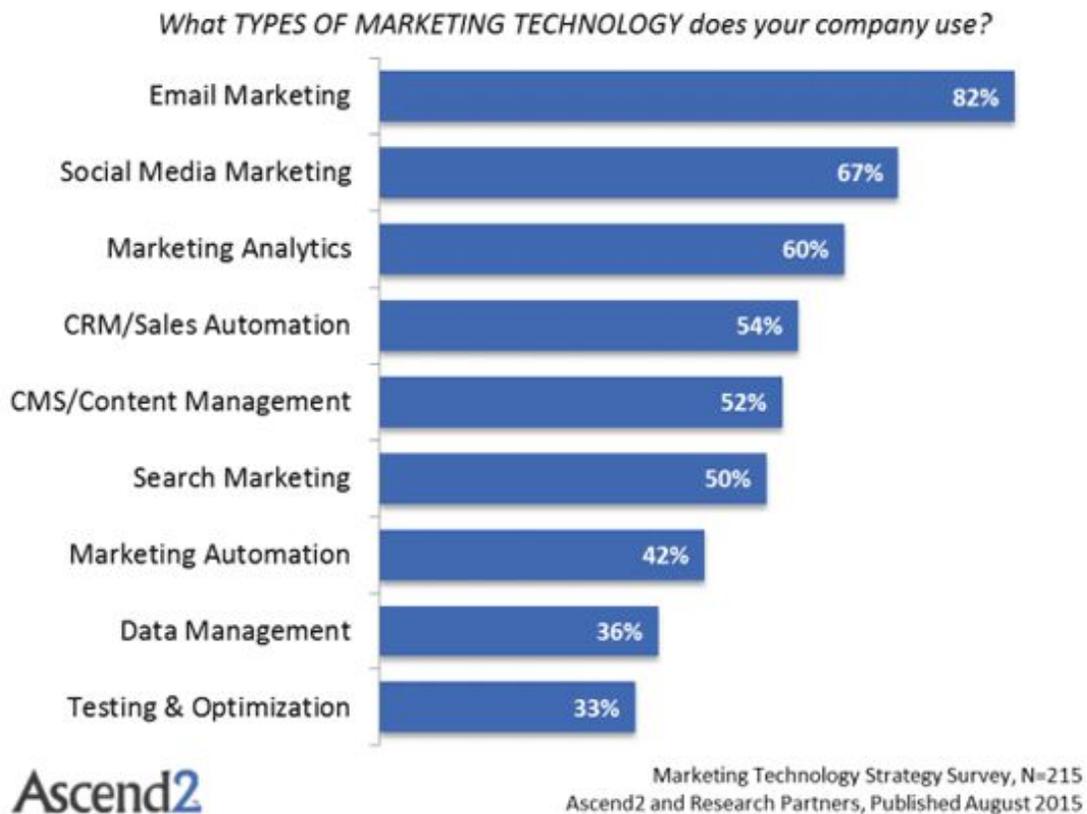
Email Marketing Platform

- Build personalized emails
- Segmentation
- Automated email responses
- A/B testing
- Tracking and analytics



6 | Making the Most of Marketing Automation

According to [Ascend2](#), “marketing automation is used by 42% of companies...while email marketing technology is used by 82% of companies.” Here’s a breakdown of marketing technology implementation based on Ascend2’s survey:



Scanning up the list from where marketing automation lands in the survey we see marketing analytics, social media marketing, and email marketing. A modern marketing automation platform is capable of analytics, social media marketing, and email marketing. And, as traditional marketing automation providers, such as HubSpot, evolve to incorporate customer relationship management (CRM) and content management (CMS) it becomes clear that marketing automation is the most essential marketing technology.



Rethinking Marketing Automation

The more time you spend with a sophisticated marketing automation platform, HubSpot, Marketo, or Pardot, the more you realize that automation is only a minor benefit and far from a key selling point. In fact, a modern marketer whose day-to-day tasks necessitate they spend a great deal of their time in their MAP will undoubtedly tell you that very little of what they do is automated.

I would go as far as to propose dropping “automation” and renaming marketing automation platforms, Intelligent Marketing Platforms. If we look to the future for a moment, one of the most talked about disruptors is artificial intelligence (AI). Letting our imaginations wander, it is easy to think of a near future where AI is incorporated into marketing. An AI powered blog could write its own posts based on how visitors interact with content, the search queries that got them there, and the probable next steps after the visit. Today, of course, a content/data-savvy human must undertake this research and labor. Tomorrow, we’ll be able to teach our machines to do this for us. Marketing automation in its current form presupposes this future, simultaneously preparing your organization for the next evolution of digital transformation while getting you as close to AI as you possibly can with today’s tools. Marketing automation is a bridge to the future.

To further illustrate: recently, hardware chain, [Lowes](#), rolled out experimental exoskeletons to help employees lift and move heavy objects. The exoskeletons are worn like a harness and store energy as the wearer bends to pick up an object. Then, as they lift that stored energy is distributed evenly to make the lift as light as possible. The workers are able to lift much more and have reported that it makes their jobs easier. Marketing automation is to the modern marketer what these exoskeletons are to the hardware store employee. Imagine if you, as a marketer, only had one client relationship to manage. It would be easy to write the content that attracts them to your site, tailor recommendations, follow-up after purchase with timely communications, and respond in real-time to any queries. Marketing automation imbues marketers with superhuman powers and the ability to scale the personal management of a single relationship to your organization's entire database of contacts whether they are leads, partners, or loyal customers and regardless of where they are on the knowledge/interest spectrum of interacting with your brand.

If thinking of automation in this way puts the fear of your career in marketing becoming obsolete fret not. It is quite the contrary. This automation is akin to how Ford’s assembly lines reduced the time to build a car from 12 hours to 2 ½ and created a booming industry. As marketing becomes more demonstrably valuable to businesses, the case for hiring more content creators, strategists, and operations professionals will be much easier to make.

Marketing automation is a bridge to the future.





10 Tips to Make the Most of Marketing Automation

Transforming everyone on your marketing team into future-powered super heroes certainly takes a great deal of forethought and strategy. To help you get the most out of your intelligent marketing platform, here are 10 tips:

1. [Develop Personas](#)

Personas are the foundation of personalized, one-to-one communication. They are fictitious representations of your audiences - who they are, what they like, and most important, what they don't like. By identifying your persona's ideal online experience, your business can create targeted content, navigate an ever-shifting digital landscape and surpass marketing goals. Many platforms will allow you to input and even segment lists by your personas.



2. [Map the Customer Journey](#)

Though it may go by different names - customer, user, or buyer's journey - the goal is the same: to better understand the myriad interactions your potential customers and customers have with your brand. Once you've mapped the customer journey you will be able to solve problems for your customers at every point that they interact with your brand.

3. [Document Your Content Marketing Strategy](#)

A content marketing strategy establishes brand standards and editorial direction for all content including web, email, blog, and social channels while always addressing your customer's unique pain points, challenges, and motivations. Before getting started with marketing automation it's necessary to not only have a content marketing strategy, it must be documented!

4. [Keep It Simple](#)

With your personas, journey map, and strategy in place you'll have a solid baseline for understanding how, where, when and why your audience are interacting with your brand online. Now it's time to get started with your first campaign. We recommend starting simple. Many platforms allow for campaign workflows of infinite complexity, which is great for when you become an advanced user. Right out of the gate, it is a good idea to segment a small section of your database and test a simple "top-of-mind" campaign. Send an email with a popular recent blog post, followed by a check-in email 5-7 days later. Assign points for click-throughs in the email and if the recipient interacts with both of your emails, set-up a trigger to alert a sales representative. As your skills advance, you could then move the engaged members of the original list into a new drip campaign.

5. [Nurture Before Attracting](#)

Once you've built out your first campaign, it will feel natural enough to incorporate new triggers and develop the complexity of your workflows. As you build out your next set of campaigns stay focused on nurturing your current database or those recently added. Though the ultimate goal is to grow your customer base, there are many advantages to having a fully engaged existing database.

We've written recently about how [marketing automation can be used to create an onboarding program in banking](#). The same principles could be applied in higher ed to welcome new students or at a hospital to welcome new patients.





5. Coordinate with Sales

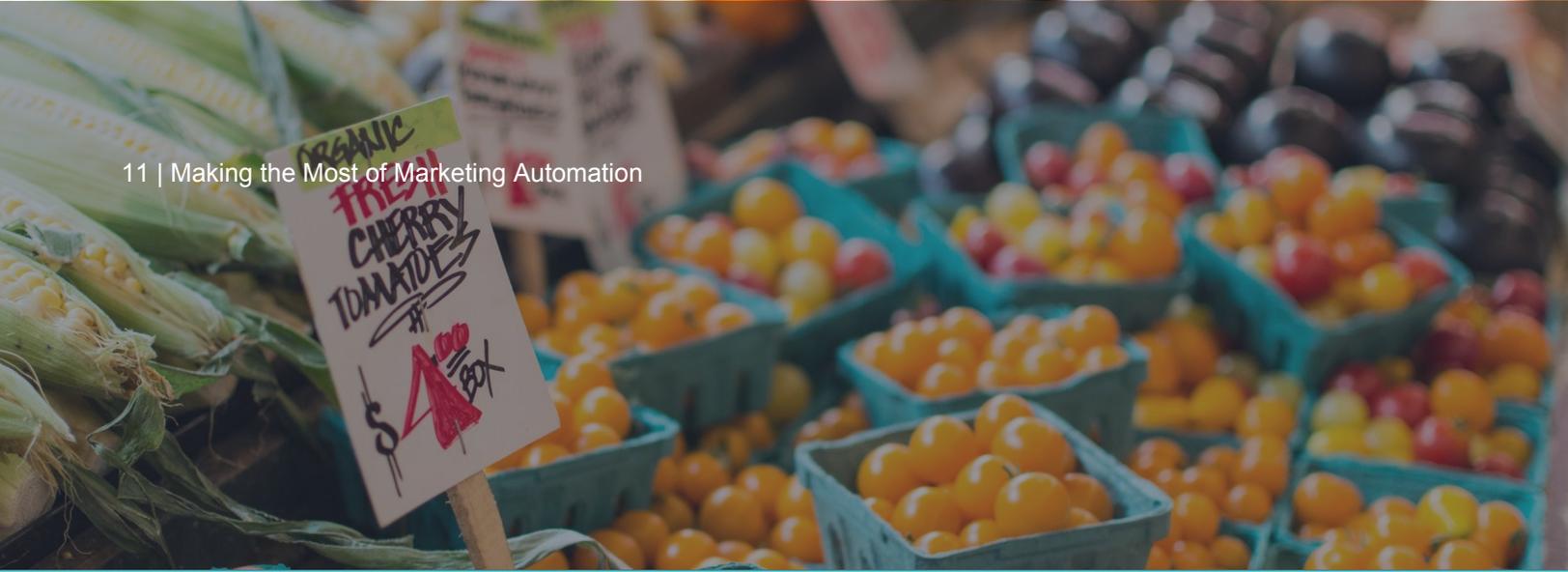
One of the key benefits of a fully integrated marketing automation platform is the transparency which it gives your sales team into how, when, where, and why their prospects have engaged with marketing. However, to fully achieve the promised nirvana of sales and marketing alignment, it is critical to communicate campaign plans with your sales team ahead of time. A monthly campaign meeting may be sufficient just to give your team a heads up so as to avoid over-communication or essentially resetting your communications with a client that has been fully nurtured and vetted.

6. Be You, Be Human

As we discussed above, marketing automation does more than automate emails, it is essentially clones you the marketer and enables you to effectively scale up your communications. As you do scale, it is critical that you take the time to ensure that your communications, no matter how small they seem, remain personal.

Thank you pages and follow-up emails after a content download are two areas where communication frequently becomes impersonal. As marketers, we put a great deal of effort upfront into creating content, the email to drive traffic to the content, and the landing page where the content lives, but we often overlook the importance of what happens after the download.





8. Grow Your Lists (Organically)

This almost goes without saying. Your most effective campaigns, for example, will come from lists built around new subscriptions to your blog or shows that you exhibit at. With Marketing Sherpas reporting that [B2B data can decay at a rate of 2.1% per month](#), it can be tempting to consider buying new lists. Try to avoid this temptation as much as possible. Instead of a bought list you could end up with a bot list. Be careful, marketing automation platforms have to abide by the same CAN-SPAM Act that governs email marketing platforms. A violation could prompt your platform to cut off your email capabilities or even warrant a significant fine from the Federal Trade Commission (FTC).

9. Get Social

As your campaigns develop in complexity and your content gets better at attracting new clients, it can be tempting to remain in the inbox. Email remains one of the surest channels in the marketer's toolbox, but increasingly, social is where new clients are won. Utilize your platform's social scheduling and listening tools to truly get to know your database and potential clients. The State of Inbound 2017 identifies social as a constant disruptor. Avoiding social will greatly diminished your reach and negatively impact campaign performance.

10. Always Be Improving

The reporting and attribution capabilities of marketing automation allow marketing departments to see exactly which piece of content, campaign, or email turned a visitor into a lead or a lead into a sales opportunity. This level of detail makes your marketing smarter by showing you exactly what worked and what didn't. Companies that use marketing automation are 3 times more likely to be able to track and attribute content marketing efforts than those who don't. Use the data to improve your content marketing efforts and keep your sales team informed, happy, and busy with a strong pipeline of eager candidates.

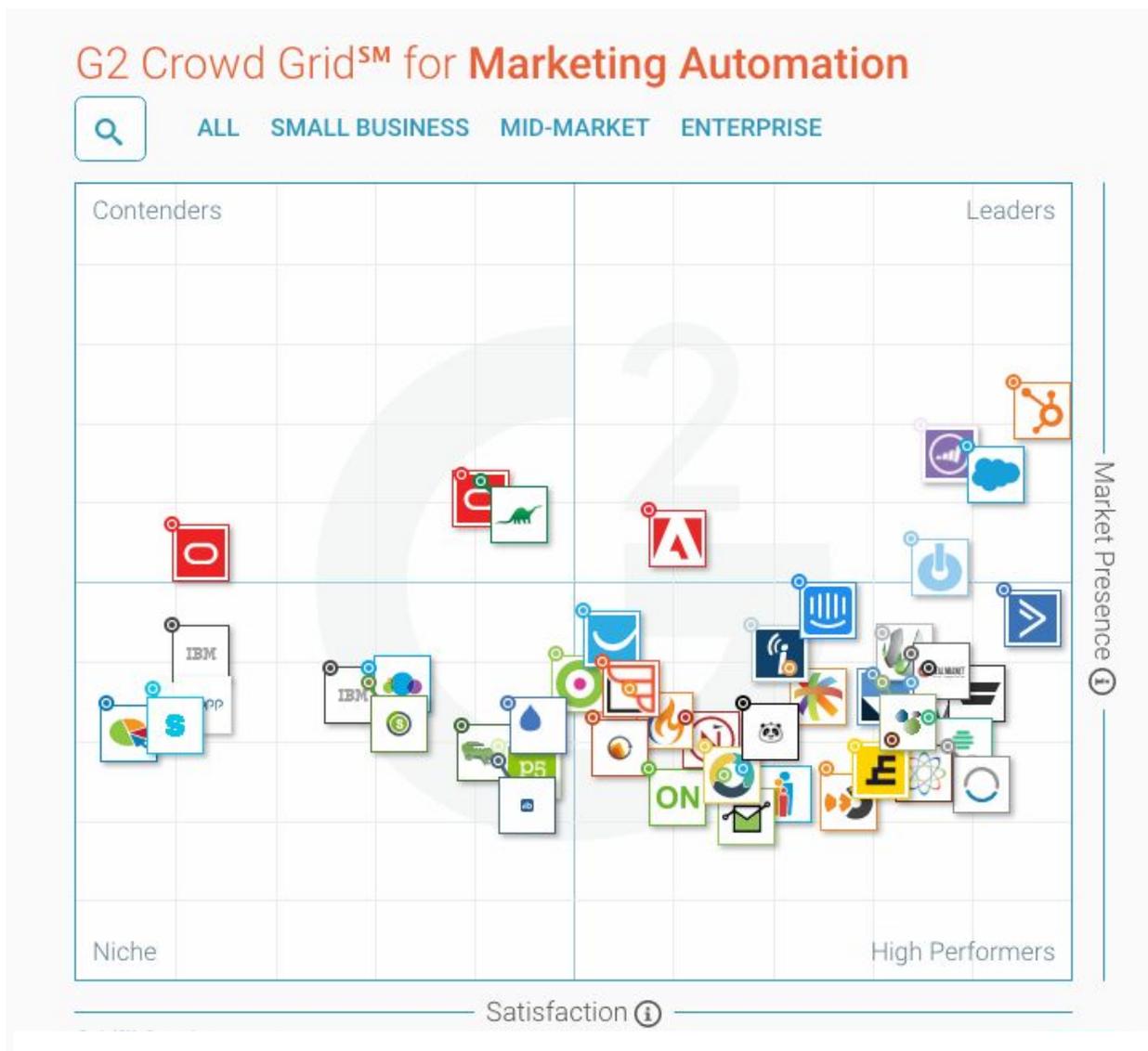
If Sales should “Always be Closing,” then Marketing should “Always be Improving.”



How to Choose the Right Platform

According to [Emailmonday](#), “on average 49% of companies are currently using marketing automation.” If you are among the 51% still evaluating the value of the investment, there are several factors to consider. The same goes for the 19% of current marketing automation users who, according to [The Aberdeen Group](#), have indicated that they “switched Marketing Automation Providers recently or were currently doing so. Marketing automation is relatively young (HubSpot is only 11 years old) as it becomes more ubiquitous and more players enter the field, it is likely that we will see more users make the switch.

The Best Marketing Automation Software (According to research by G2 Crowd)



Source: <https://www.g2crowd.com/categories/marketing-automation>



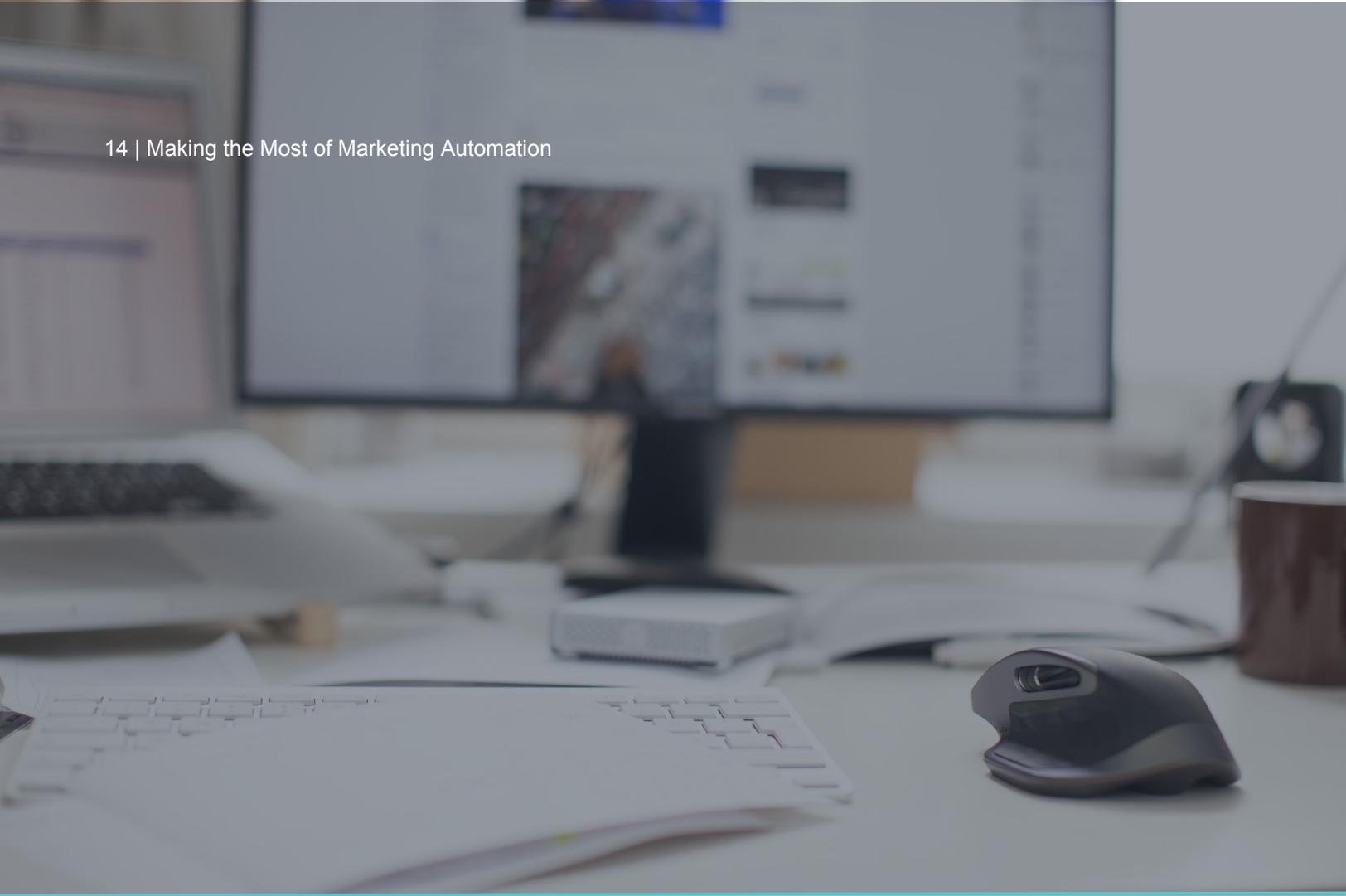


Before making decisions regarding marketing automation, it's important to factor in your specific needs, resources and goals. The differences between leading platforms are vast, and understanding your requirements and the application's functionality is key before making big decisions. Consider your business' specific goals before deciding on a system.

Also, having a clear content marketing strategy is vital before initiating automated campaigns, as well as having a strong lead generation plan to continue to get prospects and referrals into your funnel. Understanding the resources needed to implement and optimize your marketing optimization software are integral for long-term success, as well as having the resources to continually monitor and manage your database. Remember that the initial set up for your MA software can be cumbersome, as is planning for complex, overlapping, long-term marketing campaigns.

Consider your business' specific goals before deciding on a system.





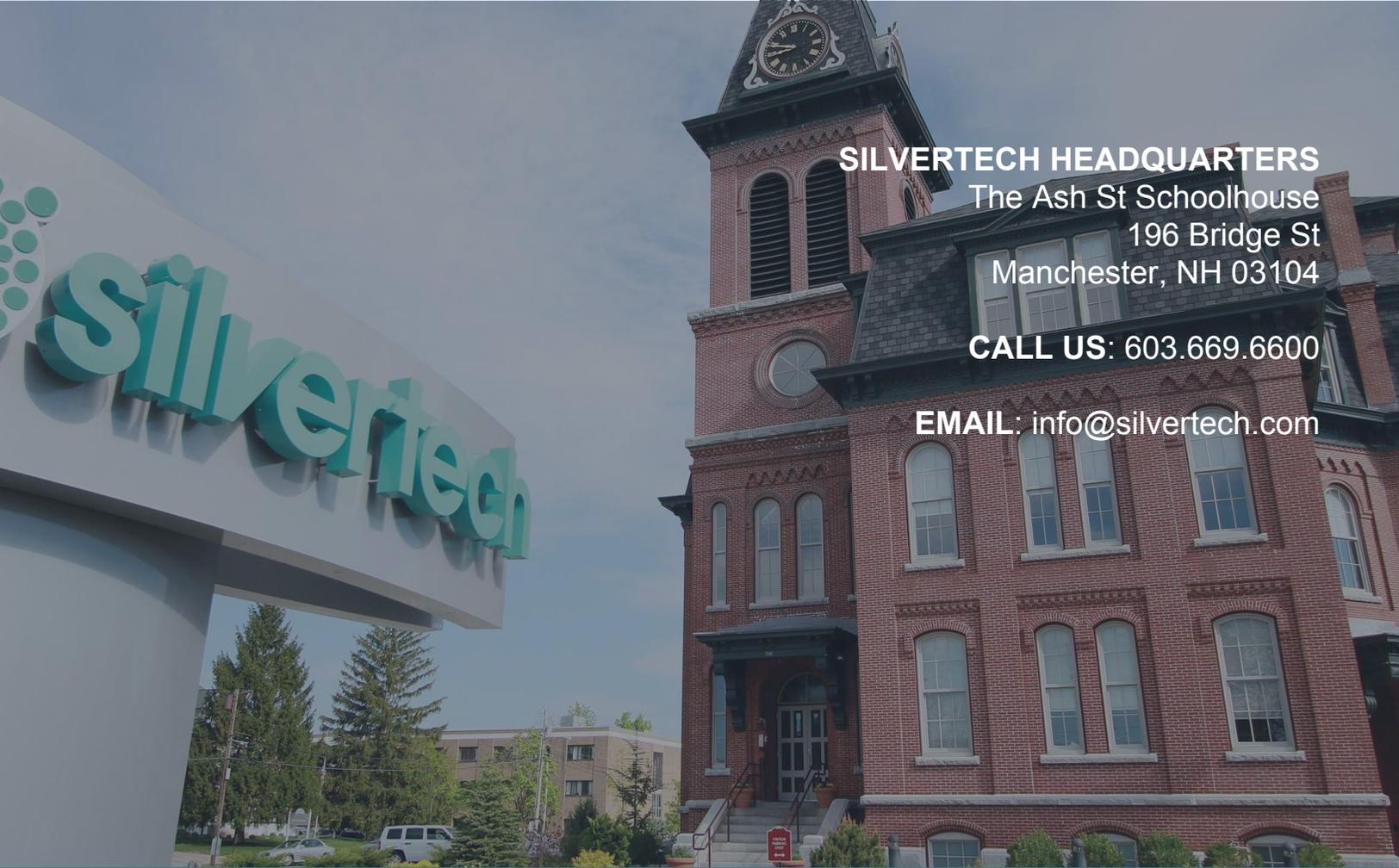
Conclusion

Incorporating many, if not all, of the elements of email marketing platforms, social media publishing and monitoring platforms, search marketing, analytics, content management, and relationship management, increasingly marketers are managing, monitoring, and planning all of their digital marketing efforts through their marketing automation platforms.

According to [Marketo](#), marketing automation helps, “scale marketing initiatives, deliver more personalized and targeted communications, align with sales, and measure which channels and programs are the most effective.” Further, and more importantly, marketing automation helps marketers demonstrate and improve ROI for each initiative across every channel.

There are many marketing automation options available, but finding the one that works best for your organization’s individual needs can be challenging. You need to understand what makes automated campaigns succeed, and get to know the analytics behind making the most of your automation software. Understanding what lead generation processes and marketing campaign efforts work best with your new MA software is important as you start to explore your options.





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“...Through their approach, SilverTech has proven they understand that the best marketing strategies are those that enhance experiences throughout the entire customer journey.”

Brian Halligan, CEO HubSpot



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