Building & optimising an automation strategy to take your sales & marketing to the next level

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@stickyeyes

Who am I..?

![Stickyeyes logo]

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Role: Director of Demand Generation

Company: Stickyeyes - Full Service Digital Agency and Part of IPG Mediabrands

Todays Topic:
Building & optimising an automation strategy to take your sales & marketing to the next level.

Who will benefit:
Those looking to implement a new solution or are looking to optimize of their existing solution.

What will you take away:
I'm going to show you practical best practice blue print / architecture for set-up and deployment.

Three Key Areas

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Best Practice Marketing Automation

Best Practice Sales Automation

Email & Pipeline Campaign Management

Marketing & Sales Automation

Marketing & Sales Automation

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Marketing Automation

Automated management of lead capture, campaign deployment & lead nurture process

Sales Automation

Management of the lead & sales lifecycle process
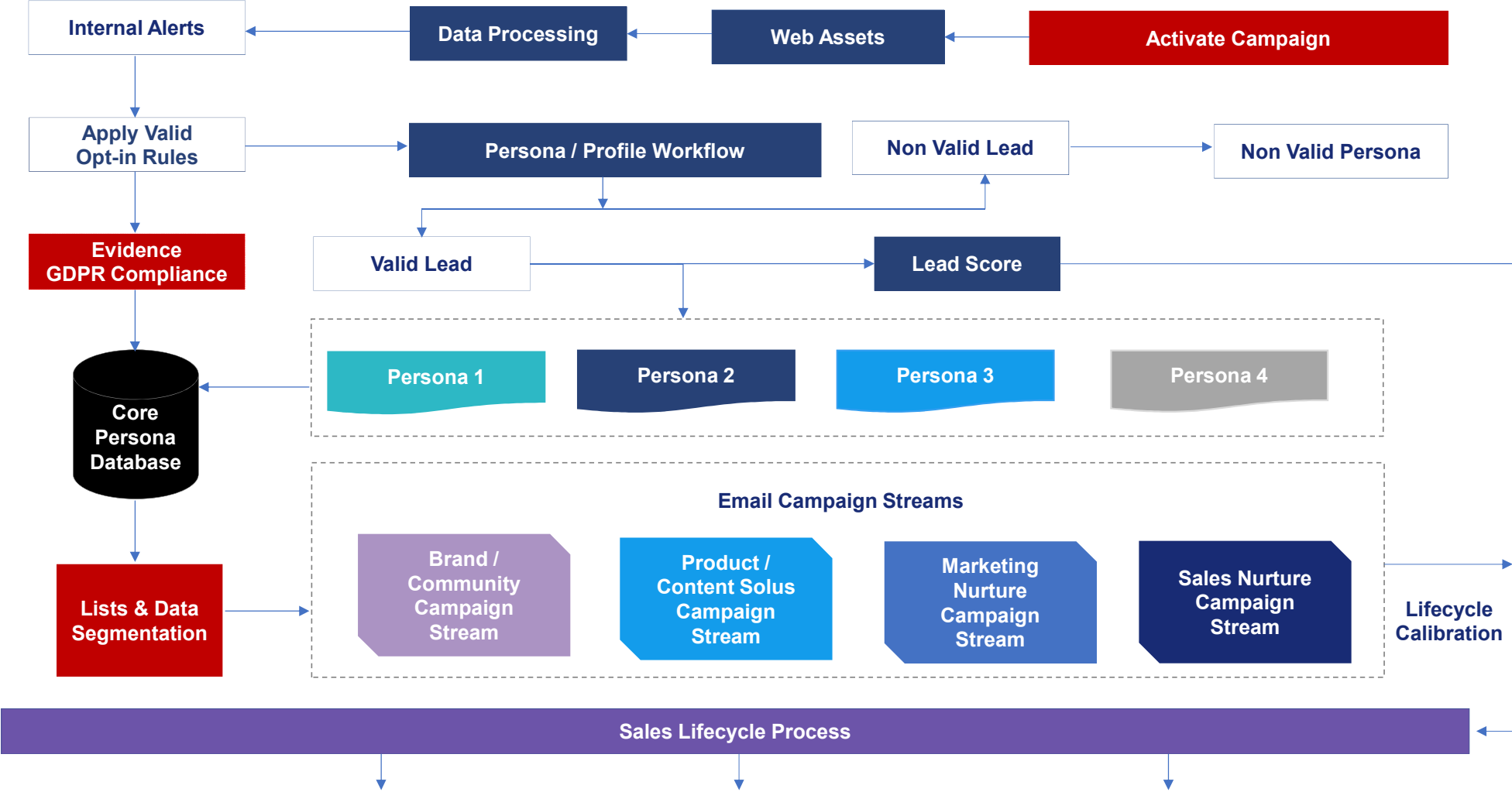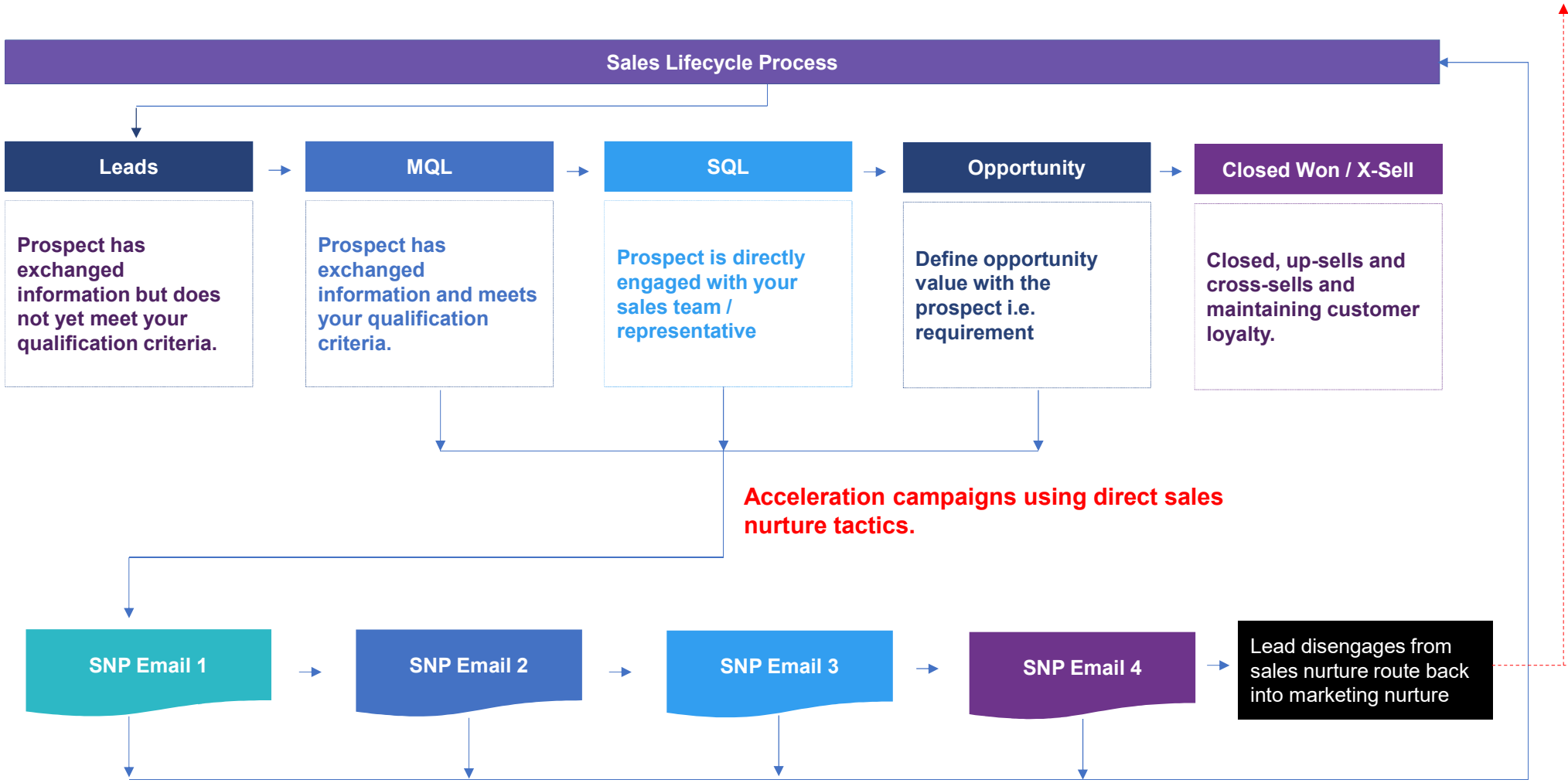
Best Practice 10 Point Deployment Plan

- Persona / Profile Configuration
- Data Mapping & Integration
- Lead Data Capture Process
- Lead Scoring
- Assets & Template Creation
- Campaign & LCM Reporting
- Email & Pipeline Campaign Management
- eCRM Enablement & Sales Nurturing
- Sales Software Integration
- Sales Lifecycle Management

Marketing & Sales Automation Architecture

Marketing Automation Architecture

Internal Alerts	Data Processing	Web Assets	Activate Campaign

Apply Valid Opt-in Rules	Persona / Profile Workflow	Non Valid Lead	Non Valid Persona

Evidence GDPR Compliance

Valid Lead	Lead Score

Core Persona Database

Persona 1	Persona 2	Persona 3	Persona 4

Email Campaign Streams

Lists & Data Segmentation

Brand / Community Campaign Stream	Product / Content Solus Campaign Stream	Marketing Nurture Campaign Stream	Sales Nurture Campaign Stream

Lifecycle Calibration

Sales Lifecycle Process

Sales Automation Architecture

Sales Lifecycle Process

Leads	MQL	SQL	Opportunity	Closed Won / X-Sell
Prospect has exchanged information but does not yet meet your qualification criteria.	Prospect has exchanged information and meets your qualification criteria.	Prospect is directly engaged with your sales team / representative	Define opportunity value with the prospect i.e. requirement	Closed, up-sells and cross-sells and maintaining customer loyalty.

Acceleration campaigns using direct sales nurture tactics.

SNP Email 1	SNP Email 2	SNP Email 3	SNP Email 4	Lead disengages from sales nurture route back into marketing nurture

Marketing Automation

1: Persona / Profile Configuration

Personas / Profiles are the **backbone to the automation set-up**, allowing you to collect valid leads for lead generation & campaign segmentation.

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What is a Persona / Profile?

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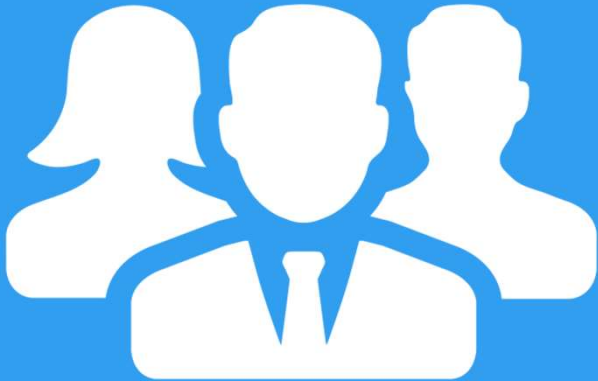
A persona / profile is a composite <u>sketch of your target audience or specific market preference</u>

For example, these can be:

- **Specific Individuals or Groups**
- **Certain Market Characteristics**
- **Sector / Industry Preferences**

Data Consideration

Job Role & Function
Data

Location / Country
Data

Challenges / Needs
Data

Sector / Industry
Data

Product / Services
Data

2. Data Mapping & Integration

This is the process of ensuring that you have the **correct data requirement** for processing your leads within the sales life cycle process.

Data Mapping & Integration

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What is the minimum data requirement for processing leads?

Business Data Requirements

Name

Company

Address

Phone Number

Email Address

Job Title

Pre-existing Database

Systems Mapping

New Data Capture

Automation Platforms

Name

Company

Address

Phone Number

Email Address

Job Title
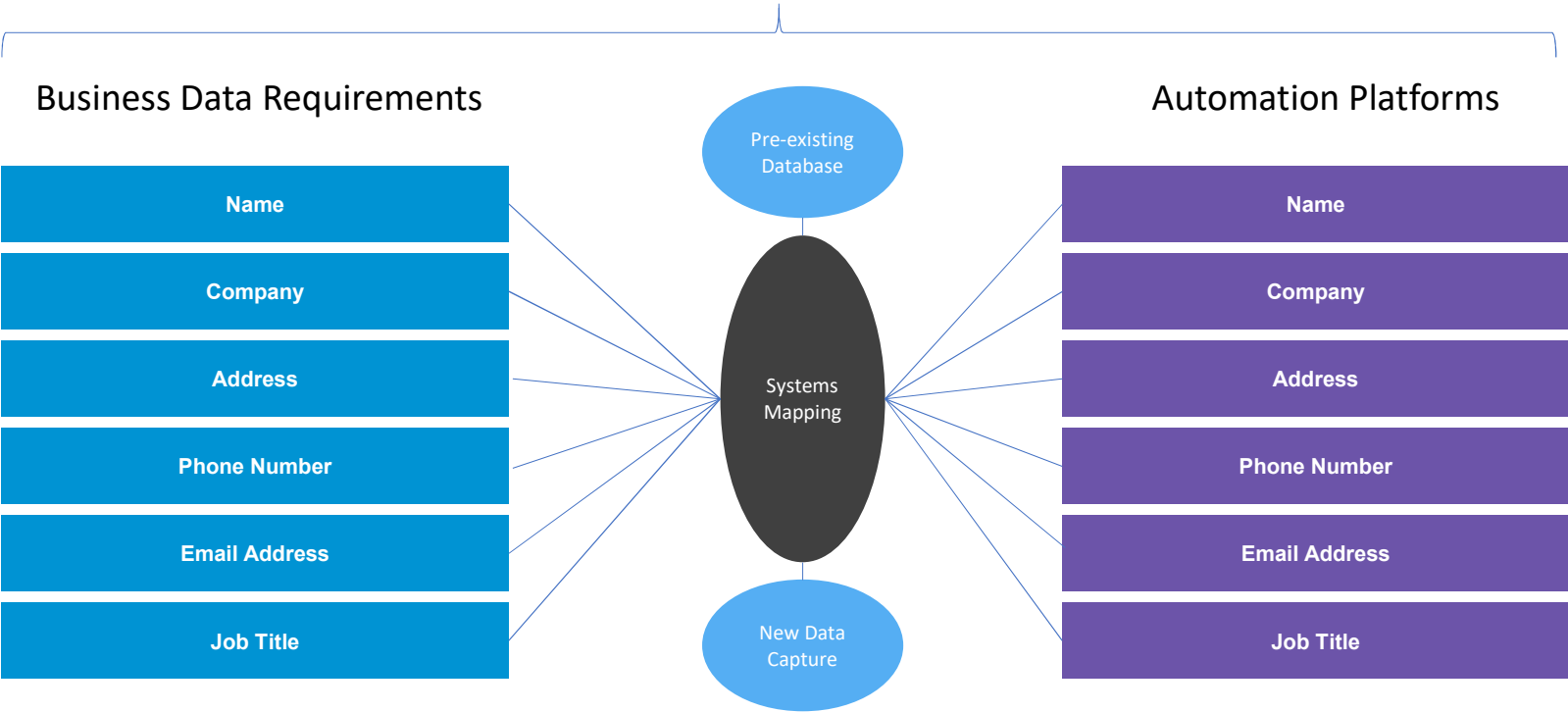
3. Lead Data Capture

Lead data capture is the process of **collecting relevant lead information** that is then validated against your target persona groups and is also used in **lead classification** & **scoring**.

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Lead Capture Forms

Persona Data

Name
Company
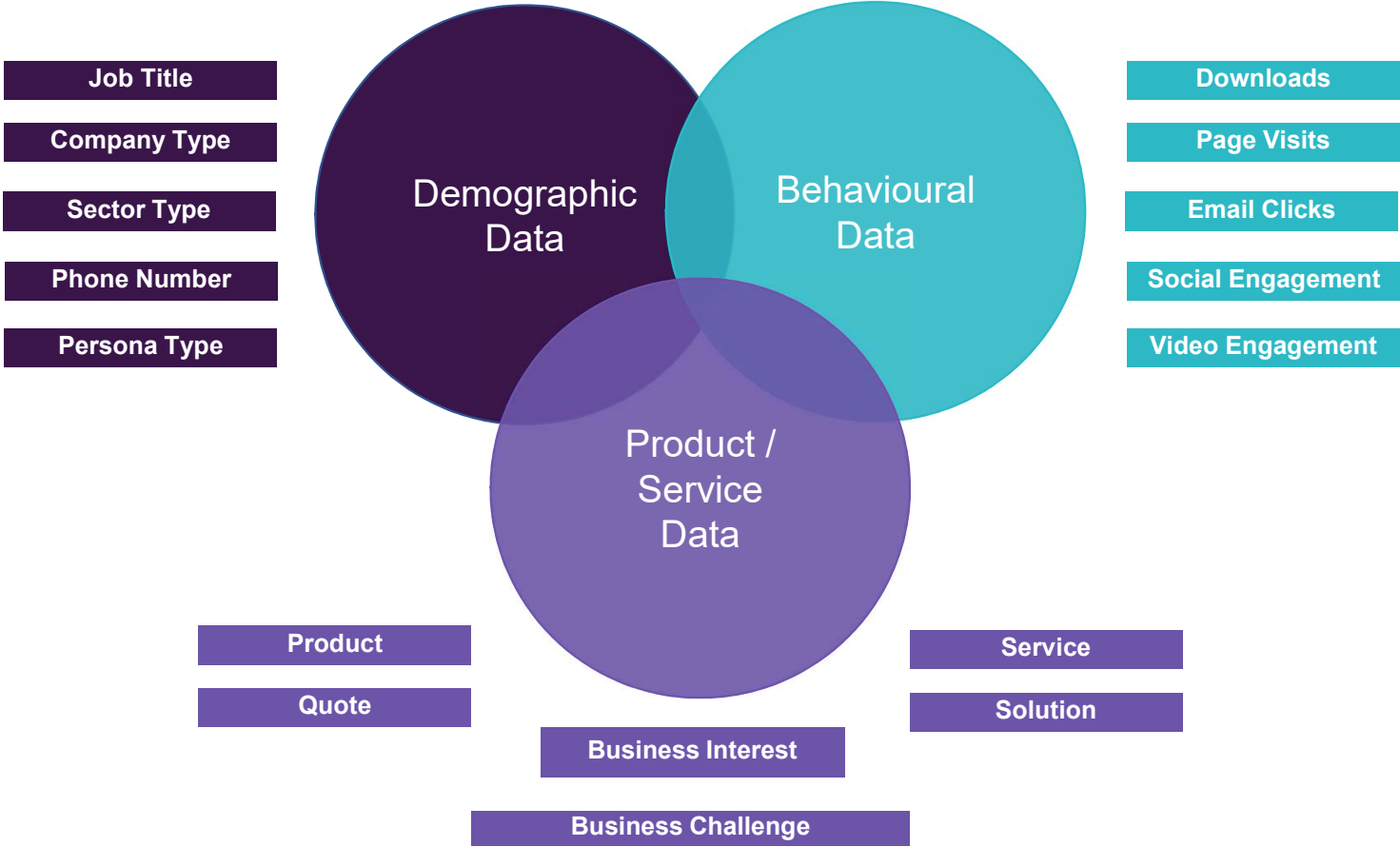Job Role
Function
Product
Services
Challenges
Industry

Rule of thumb - usefulness to the sales process always trumps usability

4. Lead Scoring

Lead scoring is a method of **ranking the quality of your leads** based on demographic, behavioural, product & service engagement criteria.

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Lead Scoring Matrix

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Demographic Data

- Job Title
- Company Type
- Sector Type
- Phone Number
- Persona Type

Behavioural Data

- Downloads
- Page Visits
- Email Clicks
- Social Engagement
- Video Engagement

Product / Service Data

- Product
- Quote
- Service
- Solution
- Business Interest
- Business Challenge

5. Assets & Templates

Email / landing page assets / templates are the **infrastructure** that allows us to deploy a marketing / sales automation solution.

Three Key Asset Areas

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Email Campaign Templates

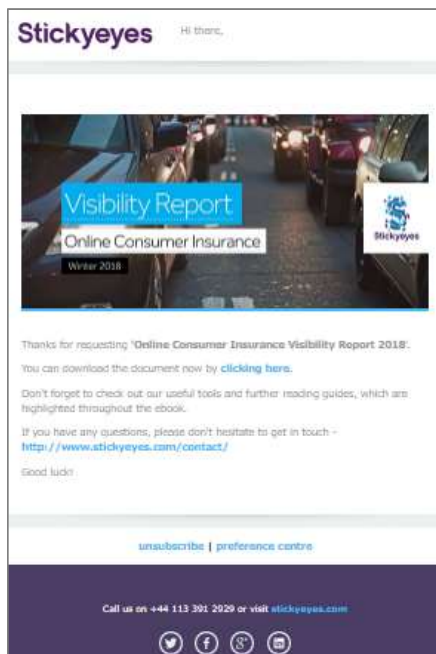Landing Page Templates

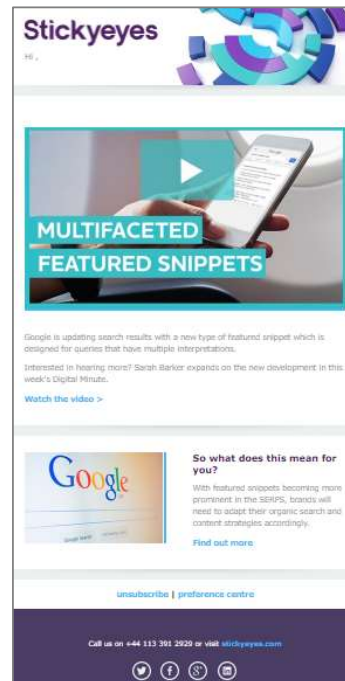Campaign Content

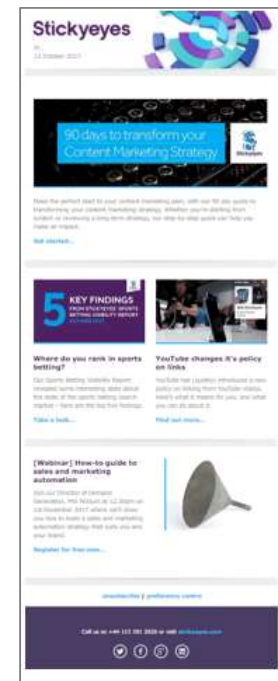# Example
Campaign Assets

Email Templates

Solus Style Email Template for Lead Generation Campaigns

Hybrid Style Email Template for Marketing Nurture Campaigns

Newsletter Style Templates for Brand & Community Campaigns

Landing Pages Template

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90 Days to transform your Content Marketing Strategy

DOWNLOAD YOUR COPY

The first 90 days is the most crucial part of any content marketing strategy, so its important to make sure that you get it right. From the initial analysis and planning, through to execution and review, this guide will help you to get the most from those crucial first weeks and months.

Alongside actionable checklists, our guide will explain:

- Where you should start when it comes to your content, your competition and your audience.
- How to set a strategy with achievable goals that you can measure.
- Where you should focus your efforts when it comes to execution.
- How to analyse your work to measure your successes, and to identify improvements for the future.

Download your copy now

First Name*

Last Name*

Email*

Job Title*

Company Name*

What type of company do you work for?*
- Please Select -

Phone Number*

Reason for Downloading?
- Please Select -

☐ I'm happy to receive email marketing communications from Stickyeyes including free digital resources, industry news and newsletters.

Get your copy

Key Elements

Relevant images

Message / headline

Body content

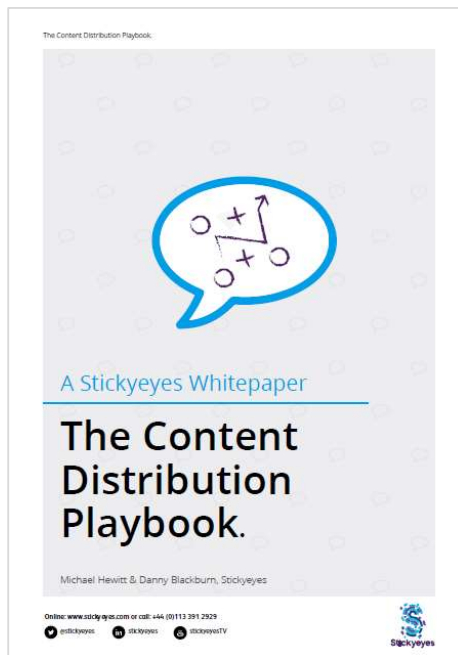Spacing / bullet points

Data capture form

Clear call to action
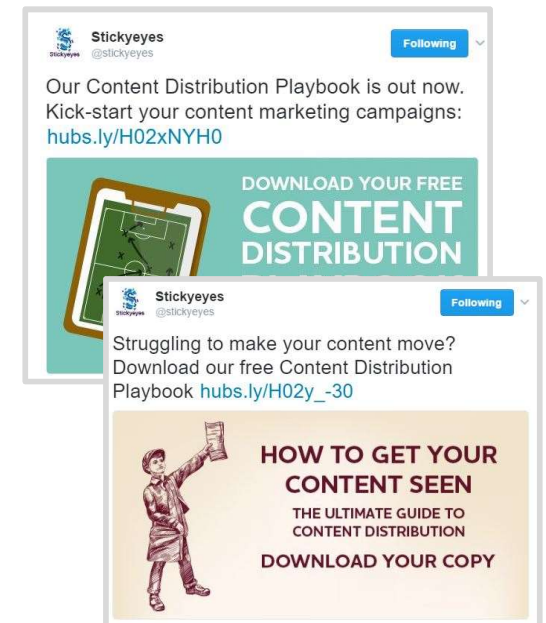
Opt in compliance

Types of Content Assets

Gated-Content for Download / Lead Gen Campaigns

Non-Gated Content for Click Based Campaigns

Off Site Promotional For Lead generation Campaigns

Sales Automation

Sales Automation Framework for Implementation

The below provides the step framework for implementing a sales automaton strategy & processes.

Sales Goals & Objectives	Sales Cycle & Processes	Sales Data Landscape	Software Configuration	eCRM Enablement	Reporting & Analysis	Sales Nurturing
This step identifies the primary sales goals & objectives for example, lead generation, brand development, sales nurture.	This step maps out the business sales processes & lifecycle management (LCM). It breakdowns team structure and looks to develop a new LCM framework.	This step maps the landscape for managing data between three key areas of the business - marketing, sales and the business.	This step takes the previous steps and then maps the new sales process directly into the software solution like Salesforce	This step develops strategies and processes for managing the day-to-day sales communications.	This step defines which reports you need to generate based on the goals you defined earlier. This looks at three key pipeline areas: TOFU, MOFU & BOFU	This step looks at the automated processes for supporting ongoing day-to-day sales nurturing

Sales Goals & Objectives

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OPERATIONAL:

Lead Volume -
Meetings / Engagements -
Tasks -
Activity -
Team KPIs -
Life Cycle Stage -

Reporting:

Revenue -
Profit -
Clients Growth -

Operational

Strategic

Business

STRATEGIC

- New Business KPIs
- Cross Sells KPIs
- Up-Sells KPIs
- Pipeline Value

BUSINESS:

- Profit Target
- Revenue Target
- Growth Goals
- Market Objectives
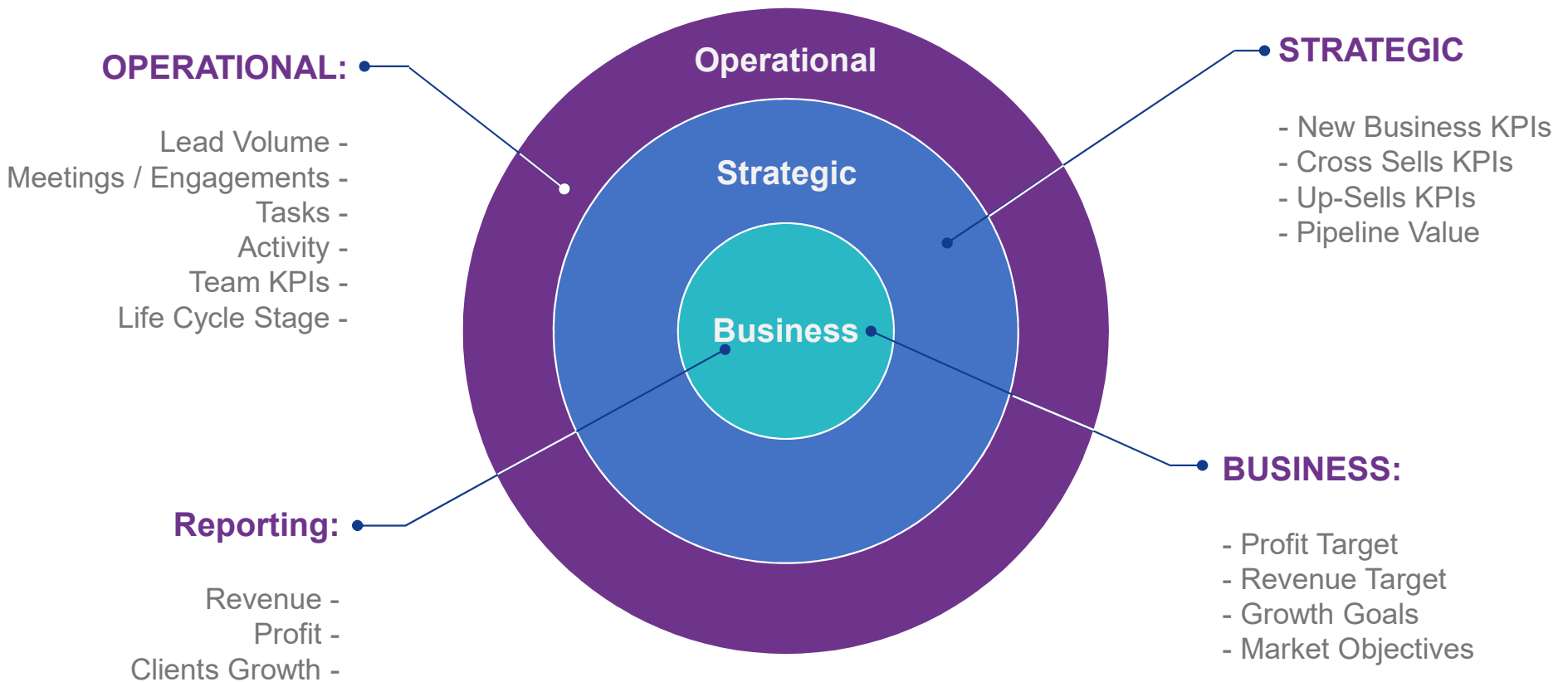
6. Sales Lifecycle Management

Lifecycle management provides a structured process for defining the **status, quality & progress** of your leads.

Objectives of LCM

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PRIORITY / TACTICS

- **Priority:** Ensuring that sales are able to identify the best leads.

- **Tactics:** Provide sales with insights into each stage of the sales process in order to facilitate tactical sales related decision making.

ROUTING / STATUS

- **Routing:** Ensuring that the right leads are delivered to sales teams in a timely fashion.

- **Status:** Alerting sales / the business to changes within the status of leads based on their stage within the pipeline.

QUALITY CONTROL

- **Marketing SLA:** Ensuring marketing are delivering the required lead volume as well as lead quality.

- **Sales SLA:** Ensuring that the team action lead qualification, sales nurturing, follow-up & fulfilment.

Mapping the Sales Cycle

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Marketing Team

Outbound Sales Team

Direct Sales Team

Start of Sales Process

Lead Generation

Qualification

Customer Requirement

Yes

No

Sales Engagement

Meeting / Demo

Request Proposal / Quote

Yes

No

Submit Proposal / Quote

Or

Sales Nurture

Negotiation / Review

No

Marketing Nurture

Relationship Management

End Sales of Process

Start Work / Deliverables

Contract Signed

Proposal / Q Accepted

Yes

Sales Time Frame

Life Cycle Management (LCM)

Top of Funnel   Middle of Funnel   Bottom of Funnel

Leads	→	MQL	→	SQL	→	Opportunity	→	Closed
Prospect has exchanged information but does not meet your qualification criteria.		Prospect has exchanged information and meets your qualification criteria.		Prospect is directly engaged with your sales team / representative		Defined opportunity value with the prospect i.e. requirement		Closed, up-sells and cross-sells and maintaining customer loyalty.

7. Sales Software Integration

This is the implementation of a **sales solution** for managing your sales leads, opportunities and deal values as well as eCRM activities.

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Sales Data Landscape

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Marketing Automation

- Contact Data
- Company Data
- Campaign Data
- Lead Scoring Data
- Lifecycle Data
- Campaign Data
- Custom Data

Sales Automation

- Lead Data
- Account Data
- Opportunity Data
- Activity Data
- Task Data
- Lifecycle Data
- Custom Data

Business

Software Configuration

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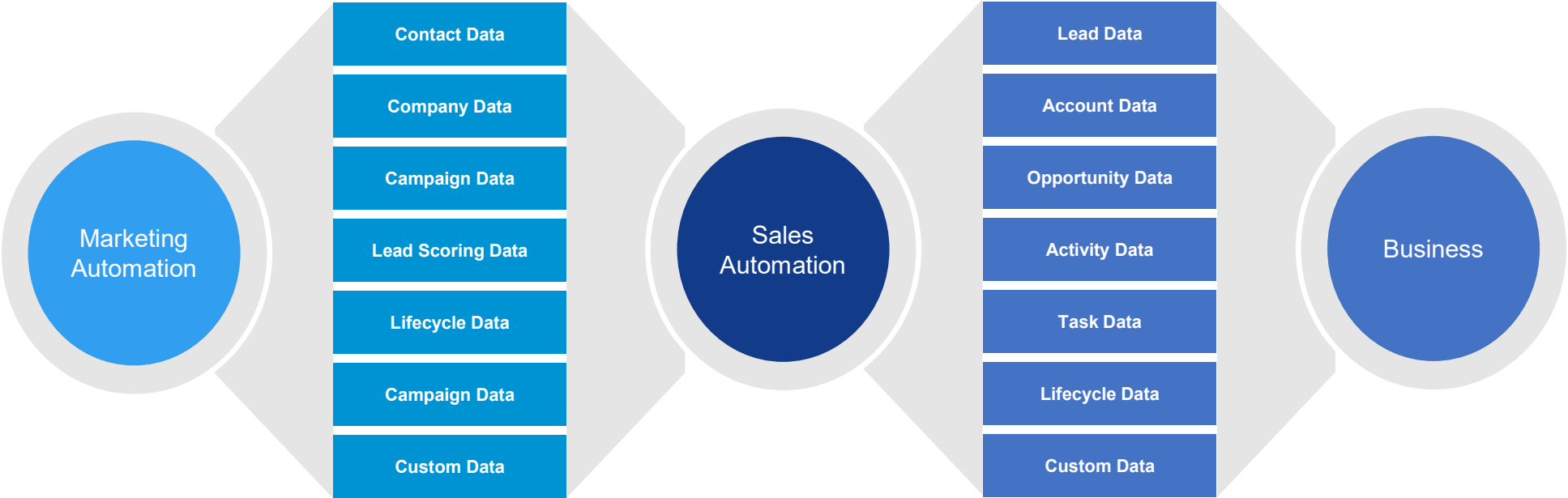
Example: Pardot

Example: Salesforce

Visitors

Prospect

MQL

SQL

Won Deals

Account Object

Lead Object

Convert Lead

Opportunity Object

Activity Object

Contact Object
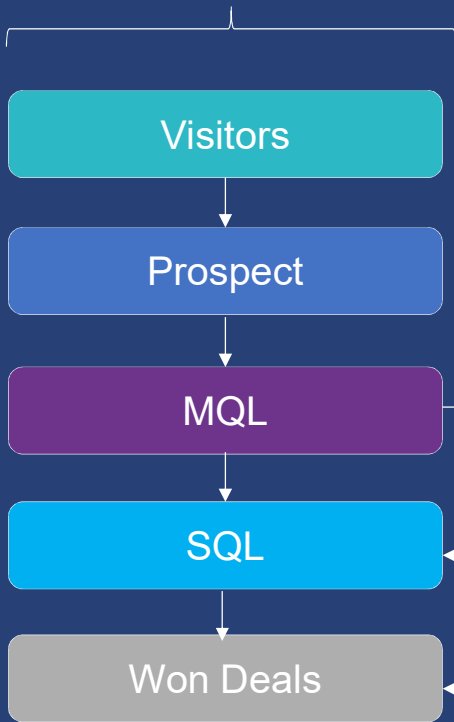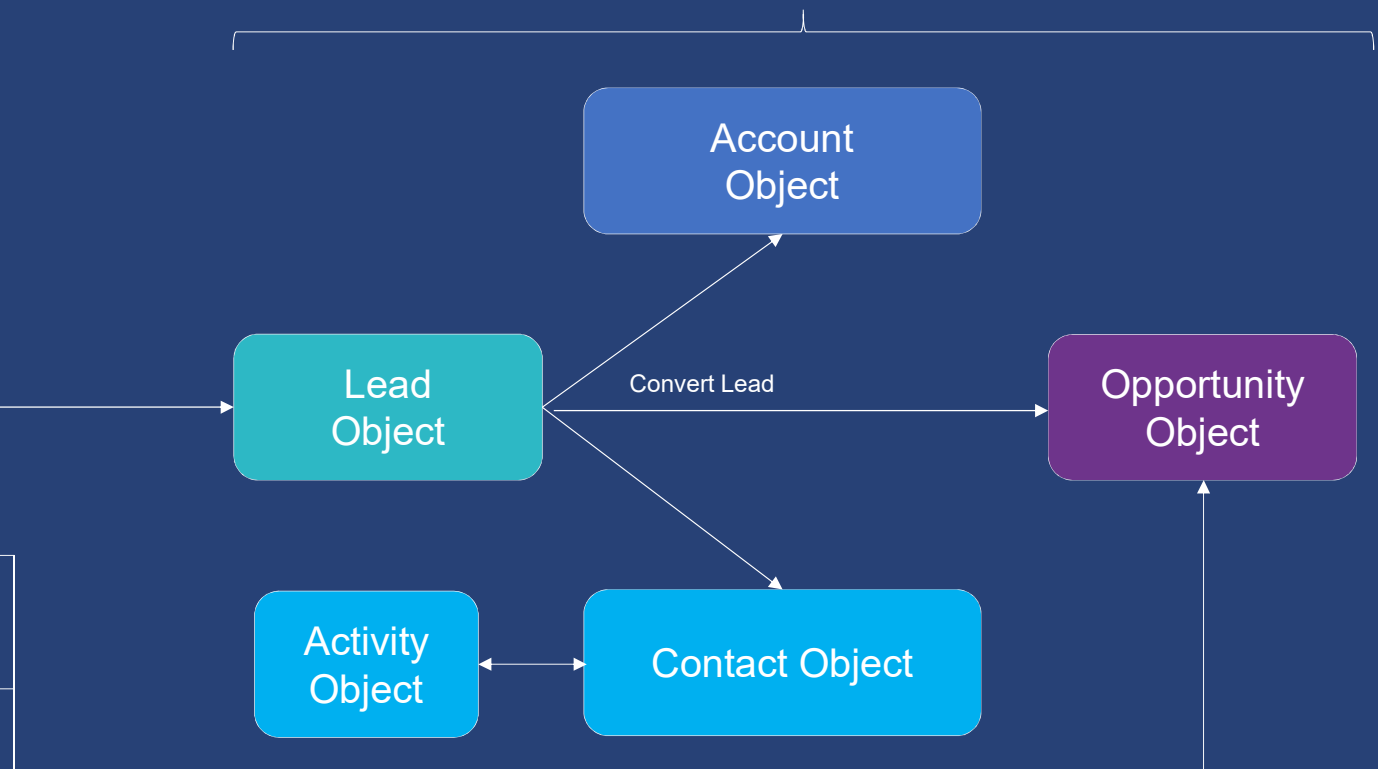
8. eCRM Enablement & Sales Nurturing

These are the processes for **managing your day-to-day sales processes and tactics** for engaging & accelerating leads across the pipeline

eCRM Proceses / Tactics

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Relationship Management

Outbound Communication

CRM

Task Management

Activity Management

Document Management

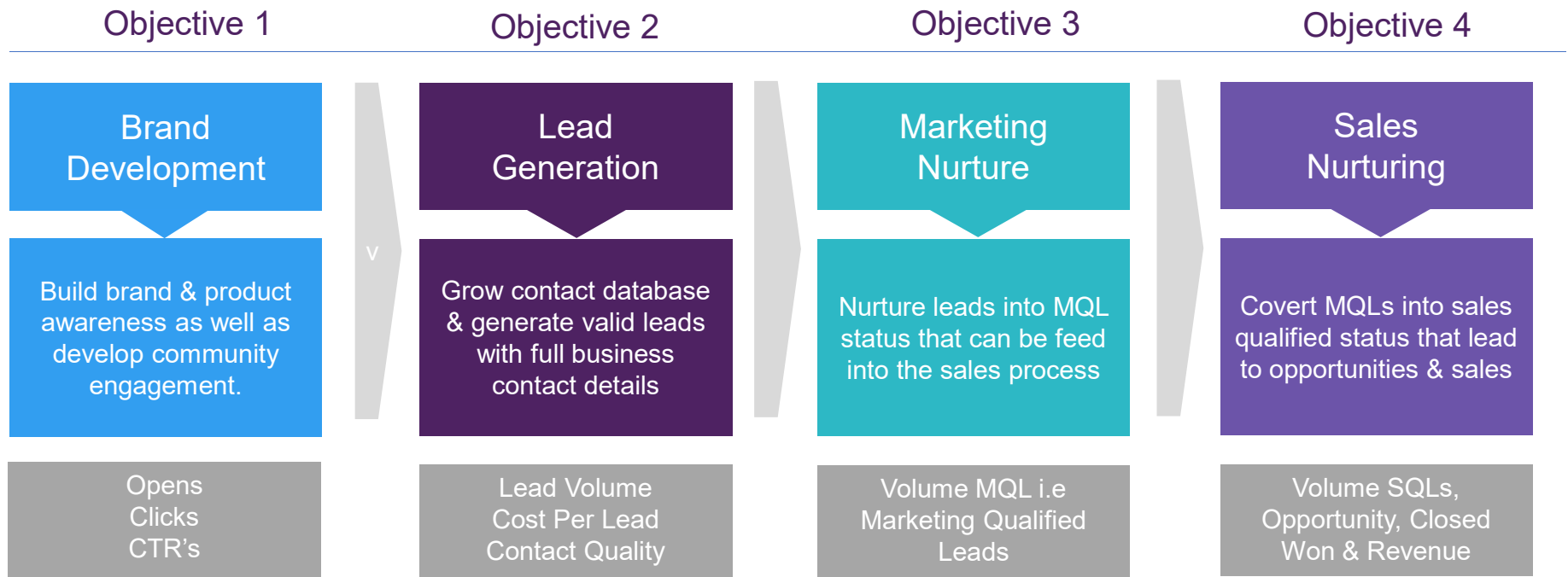# 9. Email & Pipeline Campaign Management

These are the processes & techniques for **creating and deploying a range of email campaign** strategies across the full length of the sales pipeline.

Campaign Management Framework

The below provides the step framework for developing email campaigns and then deploying it through an automation solution.
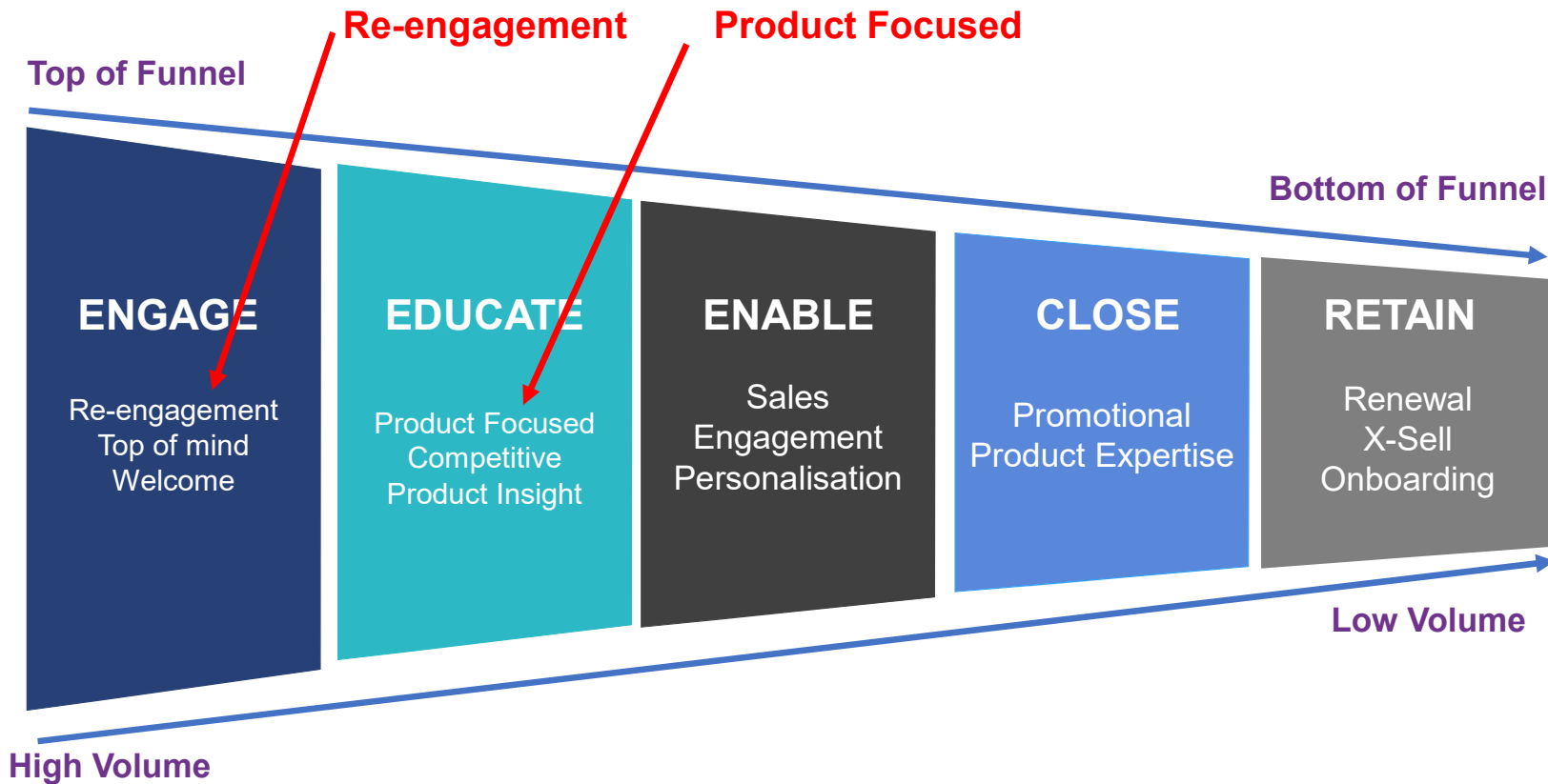
Campaign Objectives	Content Strategy	Content Creation	Content Mapping	Campaign Delivery Method	Campaign Sequencing	Campaign Deployment
This step identifies the primary campaign objectives for example, lead generation, brand development, sales nurture.	This step defines the overall strategy; for example are we looking to deploy a drip nurture programme or is the focused more on a quick solus strategy.	This stage we conduct an audit of existing creative content in order to determine what campaign content is required & how it's going to be used.	This stage we will map the new / re-purposed content on to the agreed sequencing framework. Here we also determine engagement outcomes.	This stage we select the campaign delivery method i.e. templates and formats that are used to distribute the email content.	This stage we fuse the campaign strategy & content ideas into a sequencing process for executing the campaign.	This is the final stage, where we set the broadcast schedule, test and then deploy.

Campaign Objectives

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Objective 1	Objective 2	Objective 3	Objective 4

Brand Development	Lead Generation	Marketing Nurture	Sales Nurturing
Build brand & product awareness as well as develop community engagement.	Grow contact database & generate valid leads with full business contact details	Nurture leads into MQL status that can be feed into the sales process	Covert MQLs into sales qualified status that lead to opportunities & sales
Opens Clicks CTR's	Lead Volume Cost Per Lead Contact Quality	Volume MQL i.e Marketing Qualified Leads	Volume SQLs, Opportunity, Closed Won & Revenue

A through-the-funnel content strategy requires content to deliver against a wide range of different objectives

Campaign Content Strategies

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Re-engagement **Product Focused**

Top of Funnel

Bottom of Funnel

ENGAGE

Re-engagement
Top of mind
Welcome

EDUCATE

Product Focused
Competitive
Product Insight

ENABLE

Sales
Engagement
Personalisation

CLOSE

Promotional
Product Expertise

RETAIN

Renewal
X-Sell
Onboarding

Low Volume

High Volume

Content Creation Process

Our goal is to leverage / recycle existing content as well as creating new content.

Comntent Strategy	Content Auditing	Content Creation	Template Mapping	Engagement Criteria
This stages look at the different types of campaign content strategies that are going to be deployed at various stages within the sales process .	This stage we will need to conduct an audit of existing content in order to determine what new content is required, as well as existing content & what can be recycled.	This stage we will look create new content as well as re-purposing existing. We will also create content for standalone solus programmes.	This stage maps the content onto the email templates, it breaks down primary, secondary and tertiary content areas with in the campaign. .	Here we determine the scoring criteria for engaging with the content, i.e thought leadership vis-à-vis product and service content

Campaign Delivery Methods

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Campaign Template Aligned to Objectives

Brand Development Campaign Stream

i.e. Newsletter

Lead Gen or Product Campaign Stream

i.e Solus

Lead / Marketing Nurture Campaign Stream

i.e. Hybrid

Sales / Customer Nurture Campaign

i.e. Personalised Text / Hydrid or Solus

Weekly email communicating a range of industry & brand news

Campaigns that communicate stand-alone content or specific product promotion

Marketing led drip-campaigns i.e. using email sequencing to nurture contacts from a soft message into a product led message

Sales led drip-campaigns i.e. using email sequencing to encourage customers through call to actions

Automation Environment

Example Nurture Campaign.

90 Day Content Marketing Plan

90 Day Content Marketing Plan

The 90 Day Content Marketing Plan

This whitepaper is a **high value asset** that provides marketers with detailed insights into how they can create and deploy a content marketing plan.

Nurture Campaign Goals

The goal is to **breakdown the main themes** of the report and use a drip campaign to showcase each topic in detail.

By covering these key themes this allows Stickyeyes to capitalise on the reports **content width & depth in order to maximise audience reach, & interest**.

Content Chunking

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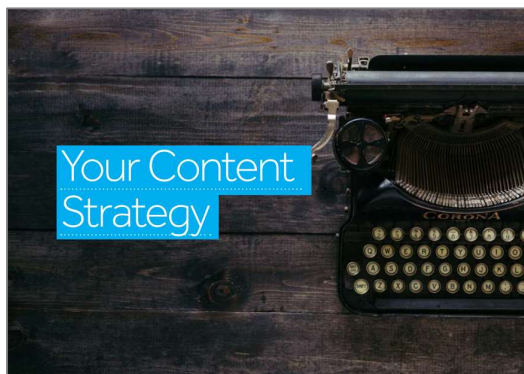
Benefits of chunking

- Severing multiple messages
- Maximising audience reach
- Offering complementary content
- Maximising content shelf life
- Tracking engagement type
- Provide follow-up content

Day 1-15: Assess & Understand

Day 80-90: Measure & Review

Day 16-35: Strategise & Plan

Day 36-80: Build & Execute

Day 1-15
Assess & Understand

Day 16 - 35
Strategies & Plan

Day 36 – 80
Build & Execute

Day 80 - 90
Measure & Review

Primary Campaign Nurturing

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X days cadence

X days cadence

X days cadence

Day 1-15
Assess & Understand

Day 16 - 35
Strategies & Plan

Day 36 – 80
Build & Execute

Day 80 - 90
Measure & Review

Day 1-15:
Assess & Understand

Day 16-35:
Strategise & Plan

Day 36-80:
Build & Execute

Day 80-90:
Measure & Review

Primary Email Campaign Content

Follow-up Nurture Content

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Engagement Based Follow-up Content

The Content Distribution Playbook

If so many brands are producing so much great content, what determines what works, what succeeds, and what doesn't? The answer lies in content distribution.

The Ultimate Content Marketing Toolkit

Make sure that you have the right tools in your content marketing armoury, and build a strategy that succeeds in reaching your audiences, inspiring, and delivering a return on investment.

How to create content for your sales pipeline

Download our latest eBook and discover how you can generate ROI by implementing an integrated content marketing strategy.

Get serious with your Content Marketing

Our latest whitepaper will provide you with key insight to help you develop, deploy and refine your content marketing strategy.

Useful Resources

Aligning your content with your customer personas and sales pipeline

The Ultimate Guide to B2B Content Marketing

100 days to revolutionise your digital strategy

https://www.stickyeyes.com/resources/

Download every Stickyeyes B2B Expo presentation at: www.stickyeyes.com/b2bexpo