crm online

THERE ARE A LOT OF CHOICES WHEN IT COMES TO

MARKETING AUTOMATION

Understanding the differences between them can
be a challenge at the best of times

WE CAN HELP

What is Marketing Automation?

The primary goal of any marketing automation platform is to generate more qualified leads for your sales team. Let's first take a look at the components that come together to help you generate new leads for your business.

What are the components that make up marketing automation?

Marketing automation combines a number of different tools into a platform designed to help you generate leads. We'll dig into what these tools are, and what we should be looking for in these tools when selecting a marketing automation platform.

Segmentation Database & Integration

The first element that makes up a marketing automation platform is the database. In order to be able to market to your prospects intelligently, your marketing automation platform needs to be able to store and segment your customers and prospects.

You'll find this in every email marketing platform, let alone marketing automation.

So, what should you look for?

If you're looking to provide a solution that connects your marketing and sales teams, it's important that this database integrates with your CRM platform. At a minimum, this should include:

- Two way synchronisation of leads and contacts. New, qualified leads should be pushed to the CRM and routed to reach out to those leads. In addition, leads that are generated by sales reps, should synchronise into the marketing automation platform in order to enable email and SMS marketing, and lead scoring to identify those leads that are strongly engaged.
- A good integration will include activity tracking data that is accessible from the CRM. This enables sales and customer service reps to clearly understand how a prospect or customer is engaging with your website, email marketing and online forms.
- It's important to look at how the integration is achieved. Make sure it will scale - if you're marketing to 50,000 contacts, ensure there are reference clients that work at that scale. Make sure you have the option to define the synchronisation schedule so that you can control the efficiency of the API calls.
- Look for a modern, REST based open API. There are major players in the marketing automation game today that still don't value integration. This is critical if you want to be able to build on your platform and make it work how you need it to work.

Examples of strong CRM to marketing automation integrations are between Act-On & SugarCRM, and also between Pardot & Salesforce.com. Both of these integrations provide key intelligence to the sales and customer service users within the CRM around how end prospects are interacting with your marketing.
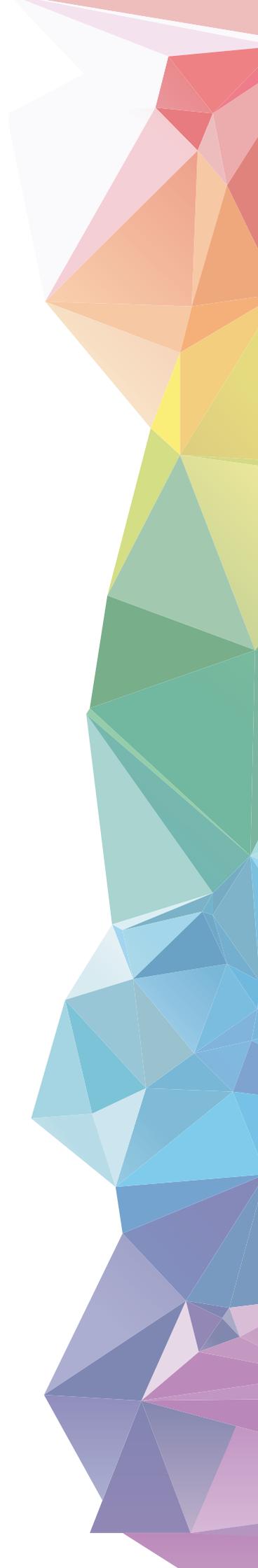
What about segmentation of data within the marketing tool?

This is equally important. Ensure that you can segment your data how you need to - segment based on action dates, dropdown values, checkboxes and tags. A few suggestions:

- Look for the ability to dynamically add prospects to new lists based on marketing interactions (browsing the website, clicking on a link on an email, for example)
- Look for the ability to add prospects to new lists based on a lead scoring mechanism. This means that a "hot" prospect can receive specific messaging focused on helping them convert, as opposed to a prospect that may not be ready to buy at that moment.

If your marketing automation platform ticks these boxes, you'll be well on your way to a targeted marketing campaign.

Inbound Marketing

When it comes to building your database, there are a number of core elements that make up an effective platform.

The most important elements are the ability to build lead capture forms, and build landing pages easily that convert website visits into leads. Your lead capture forms allow you to capture your prospects into a database, which allows you to market to them.

What should I look for?

Every product on the market will allow you to build a lead capture form.

Tip: Look for a platform that supports progressive profiling.

Marketers want to know everything about new prospects, but asking them to fill out 10 fields on a form might scare them off before you get the chance to connect. Progressive profiling helps you gradually learn more about your leads while keeping conversion rates high. It's done through dynamic forms that present questions incrementally over time based on the person's past actions and what's already known about them.

How it Works

Already know a prospect's name and email address? No need to collect it twice – your marketing automation system allows you to serve new form fields dynamically based on the information you've already collected. Progressive profiling keeps your conversion rates high with shorter forms, and allows you to collect a wealth of information about your prospects as they engage with you.

Empower your marketing team to build landing pages

Being able to build landing pages quickly and easily without writing code, empowers your marketing teams to create their own landing pages, and remain dynamic with the marketing campaign.

Tip: Look for a tool that combines landing page building with A/B testing.

Creating a landing page that is the most effective tool for converting website visits into prospects typically involves some trial and error, or what we call A/B testing, so being able to update those landing pages dynamically can be critical.

Outbound Marketing

When it comes to outbound marketing, look at what fits your target demographic and market. When we think about outbound marketing, we often think about email marketing. This is a part of it of course, though it's important to ask yourself how you can best reach your prospects. Is email communication the best approach, or just one aspect? Are webinars an effective tool to drive new prospects? Or is SMS a better option to communicate with your prospects?

Tip: Look for a platform that supports the media that your prospects prefer to communicate in.
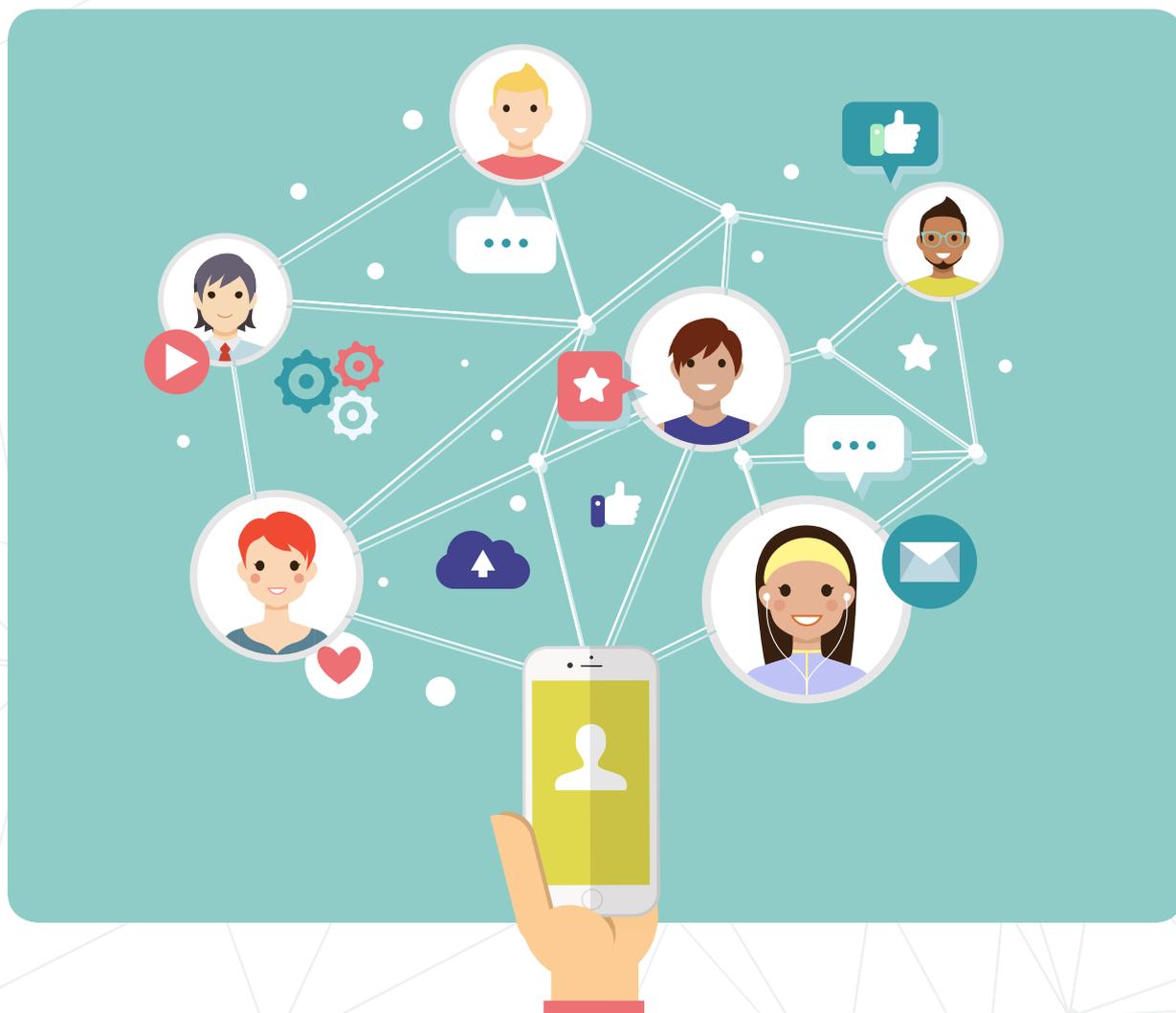
Email Newsletters

The first and most common component is the email marketing. A good marketing automation platform should allow your marketing team to design email marketing newsletters without the need for developers to get involved. This last part is critical, and it highlights a key difference between how email marketing has evolved since the mid 2000s. These days, all good platforms have drag and drop email designers that allow non-technical users to design marketing emails.

Should we be using SMS and other media for marketing?

It depends on your market. For example, if you're in some locations in Asia, for example, SMS is a far more prominent form of communication than email. If this is the case, make sure your platform supports sending SMS, or even better, supports making an internal API call to trigger an SMS, or any other outbound message.

Tip: Look for the option to send a message to an external API. This will future proof your platform and allow you to use SMS and any other medium to communicate with your prospects.

Automation & Lead Scoring

Automation & lead scoring is why we invest in marketing automation. It's what ties the other components together and helps us convert activity into leads for our sales team.

What do we mean by automation?

When we talk about automation, we're referring to our outbound communication, and our ability to automate and tailor that communication to each prospect based on their profile and how they interact with us.

When we only send out monthly newsletters, it's very difficult to tailor a newsletter to each specific demographic, and do this every month, or even every 3 months. By creating this messaging once, and then defining a schedule of marketing for those demographics based on key events, we're able to provide automated, targeted messaging for those prospects.

We do this by being able to create programs of messaging that are specific to a prospect based on their profile. For example, if we're in B2B software marketing, and our prospect is from the banking sector, they're going to have quite a different set of challenges to the real estate sector, for example (though there often cross over). In the case of B2C marketing, we may adjust our marketing based on the age range and sex of the prospect - if you're an online clothing company, you would target a mother in her mid 30s quite differently to a teenager, for example.

It's more than just demographics

Being able to properly target your prospects based on their demographics is a clear benefit, but combine that with integration with your CRM and time-based triggers, and you open up a whole new world of business automation.

Consider the scenario of a membership-based organisation that needs to remind their members to renew each year. By integrating marketing automation with a CRM, and storing the member expiry date within the CRM, a series of emails and/or SMS reminders can be sent to the member 60 days, 30 days, 14 days and 7 days from their expiry. This makes the process more reliable, reduces the human resources required to complete that task, and would likely result in an increase in renewal rates from members.

How does lead scoring contribute to my organisation?

Lead scoring is exactly what it sounds like - allocating a score to prospects (and customers) based on how and when they interact with our organisation, whether they view or click on an email newsletter, browse our website or download a whitepaper.

So, what does this give us?

This allows us to understand a number of key factors with our prospects and customers:
It allows us to improve our understanding of our customers. When we're talking to a customer, and we're able to instantly see that they've been browsing our website looking at new products, that can help us identify an upsell opportunity with that client.

It allows us to identify hot prospects based on levels of activity. If someone that we're engaged with in an opportunity goes quiet, then all of a sudden is downloading whitepapers and spending time browsing our website 3 months later, that's a strong indicator that they may be ready to buy. Lead scoring allows us to send an alert to our sales team highlighting this and indicating that they should re-engage before the prospect goes cold again.

It allows us to identify customers at risk. If a customer no longer engages with any of your content, that's a good indicator that either they've changed positions, and we need to re-engage to build a relationship with other stakeholders in that business, or we're at risk of losing that business.

Lead scoring ties together the other components within your marketing automation and makes it more than a marketing tool - it makes it valuable to your sales and customer services teams.

Need further assistance with your marketing automation project?

Get in touch with our Australian or Philippine teams below.

Perth Office

Unit 2, 12 Cowcher Place,
Belmont, WA, 6104
Phone: +61 8 6166 8600

www.crmonline.com.au

Melbourne Office

Level 2, 229 Lennox St. Richmond,
VIC, 3121
Phone: +61 3 9988 0230

www.crmonline.com.au

Philippine Office

11/F Unit 1101 88 Corporate Center
Valero St Corner Sedeno St, Makati City
Phone: +632 987 8707 or +632 987 8693

www.crmonline.com.ph

crm online