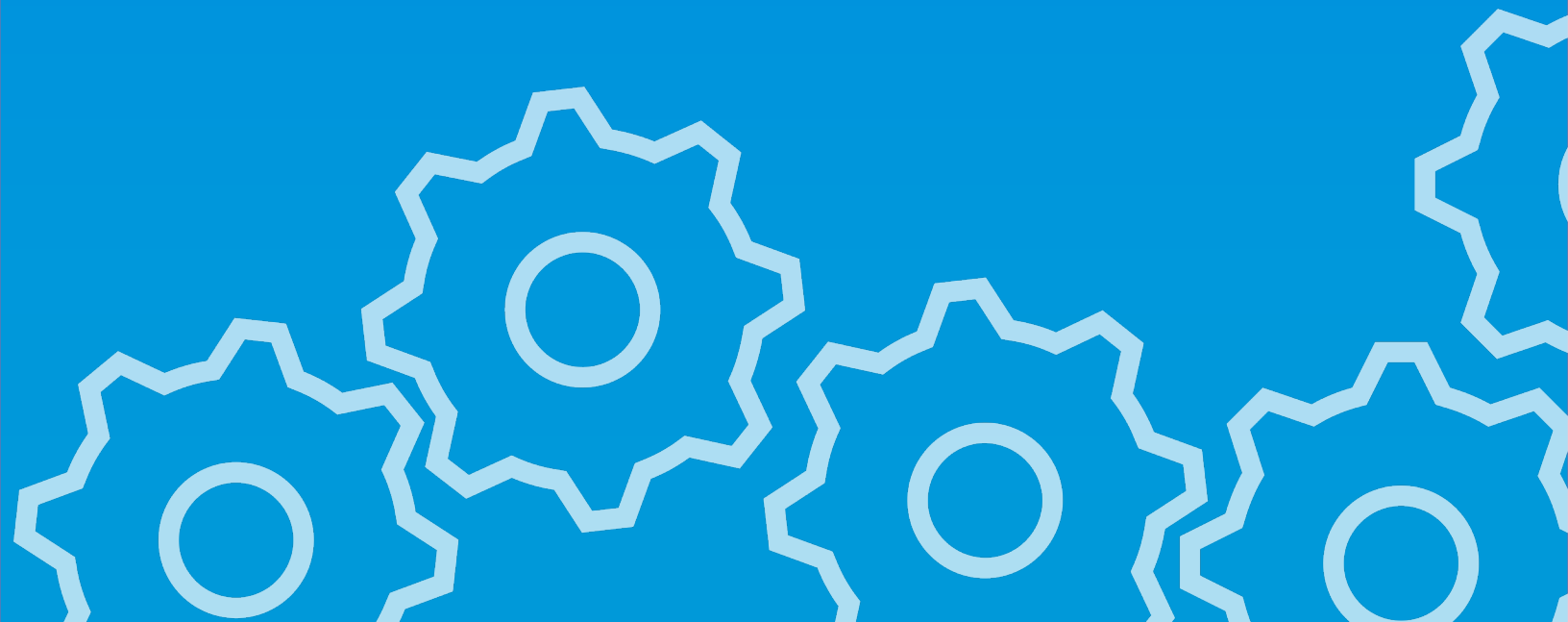




The ultimate marketing automation guide

Grow your business significantly
With marketing automation



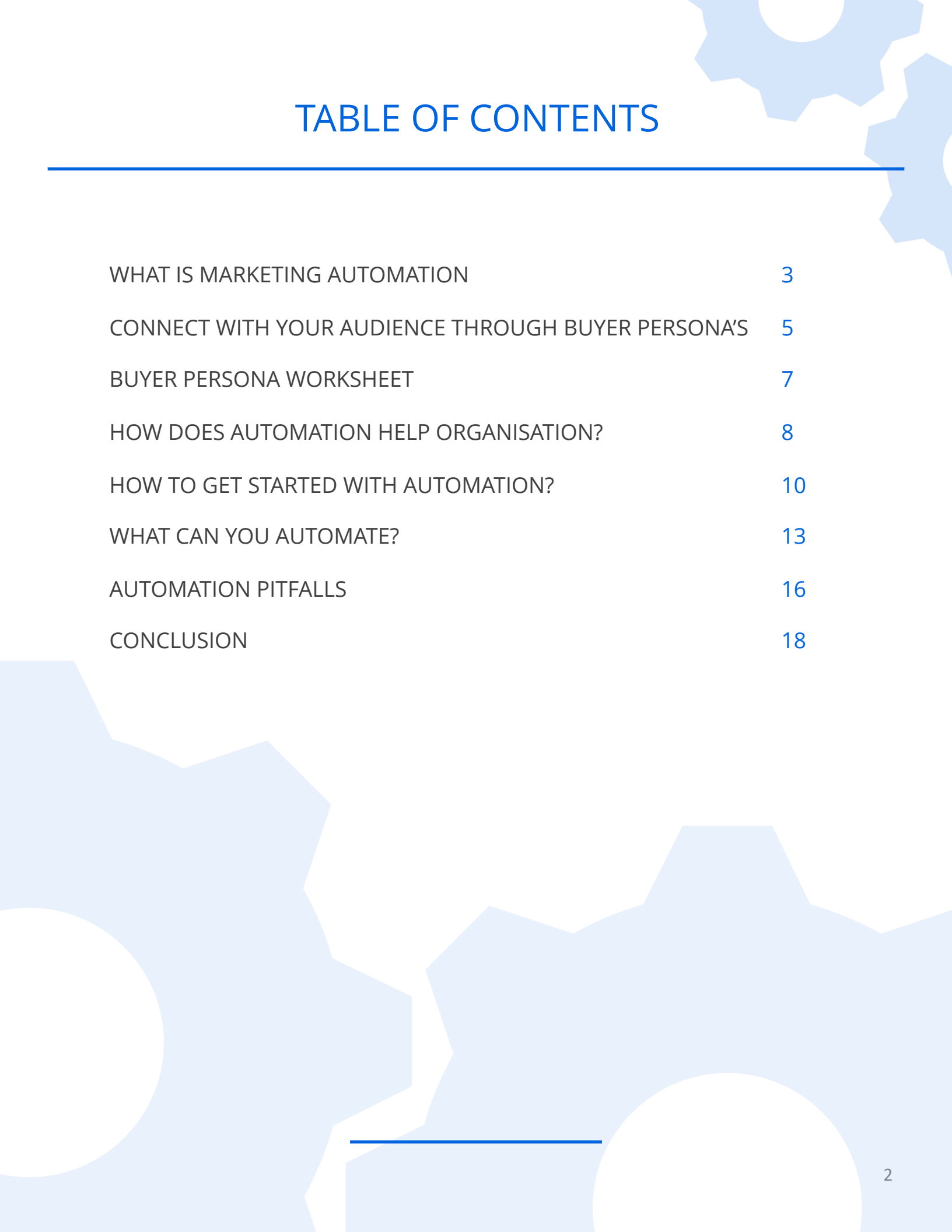


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What is marketing automation?

Marketing automation is often seen as the ‘silver bullet’ that magically generates tons of leads for your organization. But it really isn’t that at all.

Don’t get us wrong: **automation is absolutely amazing** for your company growth.... IF you do it the right way.

The problem is that many marketers see automation as an additional tool to perform a marketing task. This often ends in frustrated marketers that still do a lot of manual jobs, and a bunch of tools that are not aligned at all, and therefore add little or no value.

We are telling you that there is another way. It’s not easy but very straightforward and it can really help your business grow. But before we get into the nitty gritty, let’s start with a definition of what marketing automation really is.

Definition

Marketing automation is the use of **automated systems** to **engage leads/prospects** and **help them through the buyer journey**, by **sending them the right content** at the right time through the right channel (for example via e-mail). The ultimate goal is to **convert those leads into happy customers**.

Connect with your audience through buyer personas

A buyer persona is a blueprint of your ideal customer. Knowing and understanding this persona really well is crucial for the success of your business.

We are convinced that this is not only the task of marketing, but of everyone in your organisation. If your sales and service teams, your logistics and technical people are also closely involved, you make sure you are relevant at every stage of the customer lifecycle and deliver real value to your customer.

If you haven't defined buyer personas yet, or haven't looked at them in a while, we strongly recommend that you take the time to do so now. You can make as many persona's as you want, but we recommend starting with one, possibly two. It's also good to revisit them regularly and update them where necessary.

Creating personas

If you're going to create buyer personas, the easiest place to start is with your existing customers. Look at the existing customer data you have in your CRM system and see what trends and common elements you can find.

You may also want to talk to your sales and service team: they have personal contact with customers and can give you insights into the questions and concerns of existing customers and prospects. You should also talk to actual customers to further shape your personas.

Once you have done your research thoroughly, you have a lot of data about your (potential) customers. But how do you convert all that data into useful buyer personas?

1 – Fill in demographic data

From your CRM data and your conversations, you get a lot of demographic data, such as age, gender, place of residence or region and so on. You can also add their professional or study background if this is relevant for your organisation. Also note specific characteristics, such as communication preferences or their character.

2 – Challenges and goals

In this step, note what challenges or problems your personas are struggling with, and what goals they have. What do they want to achieve? Who or what do they want to be? It is important to link this to how your business can help them do this.

3 – Interaction with your buyer persona

This is where you prepare interaction with potential customers. What objections do they express? What sort of statements do they make about their job, their goals and challenges? You can get all this from conversations with existing customers and prospects.

Tooltip

hubspot.com/make-my-persona

Een levend geheel

Collecting data around your buyer personas is one thing. Turning that into useful living entity is quite another. That's why you also need to understand the needs, aspirations, challenges, values, expectations, motivations and behaviors of your personas.

People spend time and money on all kinds of things in their free time, or make purchases based on emotions (and that goes for B2B as well). Understanding what really matters to your personas will help you better connect with them.

Now that you understand what a persona is and how they take your marketing and sales to the next level, it's time to work with your stakeholders to develop buyer personas. Use our worksheet on the following pages as a guide. Below is an example of what your buyer persona could look like.

HR Hannah



As an HR professional for a growing SME, Hannah has a lot of contact with applicants and colleagues. She looks for candidates and makes sure the HR administration runs smoothly and colleagues are evaluated on time.

The growth of the company creates pressure, and for some positions it is difficult to find candidates. She also wants to work on the high employee turnover within the company. In addition, Hannah would also like to work on internal training and a new HR policy, but there's not enough time for this.

Buyer persona worksheet

Name : _____

Type : _____

Describe this person: what does a typical day look like, their dreams and aspirations, experiences, etc.

Demographic data

Sex : M / V

Age : _____

Location : _____

Family status : _____

Industry : _____

Number of employees: _____

Values / beliefs

What does this person value?

Value 1 : _____

Value 2 : _____

Value 3 : _____

Motivation / triggers

Why do they do what they do?

Factor 1 : _____

Factor 2 : _____

Factor 3 : _____

Job title

Job title 1 : _____

Job title 2 : _____

Job title 3 : _____

Responsibilities

Resp. 1 : _____

Resp. 2 : _____

Resp. 3 : _____

Resp. 4 : _____

Resp. 5 : _____

Problems / challenges

What problems do they try to solve?

Problem 1 : _____

Problem 2 : _____

Problem 3 : _____

How does automation help your organization?

According to a recent survey by G2Crowd, 91% marketers say that marketing automation is crucial to their marketing success. And they have good reasons for doing so:

More focus on strategy

Automation is implemented to be more efficient. All that manual work can be reduced thanks to automation, freeing up time for other marketing tasks where you can put the talents in your marketing team to even better use. Like strategic work for example.

As you start automating tasks like lead nurturing, social media planning and communication with customers, you can put your team to work on your marketing strategy. Or you can look at your marketing results, try to figure out what works well and what can be improved upon, and then take strategy decisions accordingly.

Budget optimization

When your marketing team becomes more efficient, you can do more marketing with the same people. Or you can do the same marketing tasks with a smaller team. Either way, this means you're going to spend your budget more efficiently.

By automating repetitive work, your marketing people can do more complex tasks that add more value to your organization. This makes your ROI go up. The positive impact of this is bigger than the price you paid for your automation platform.

More interactions with your customers

Efficient communication with your target audience is necessary to convert them. You can automate a large part of that without sacrificing that personal touch that is so important. Depending on certain triggers, automation allows you to respond very quickly, appropriately and personally to visitors and leads.

Moreover, automation also frees up more time for your marketers to deal with individual visitors, leads and customers, so that you also create more value for these individuals, making it a better user experience for them.

Gathering relevant data

Your automation platform collects data for you about leads, customers, sales, campaigns, your website and so on. This can give you valuable insights about your current marketing efforts, which you can use to further optimize your operations.

For example, you can run A/B tests, test new campaigns, improve your website and ultimately increase your sales.

*“ 76% of surveyed marketers sees the ROI
from marketing automation within the first year. ”*

How to get started with automation

There are great reasons to automate your marketing, but setting it up effectively is another challenge altogether. How to get started?

Know your target audience

First and foremost: get to know your target audience really well. If you don't, your marketing efforts in general aren't going to have a lot of impact. That includes your automation.

We already shared our buyer persona worksheet. Use this, or an online tool if you want. It will truly help you figure out how your target audience thinks, what they want and so on. This will be the basis for your lists or segments in your automation platform. You keep your data in your CRM, the beating heart of your organization that also powers your automation.

Map out your processes

Imagine for a moment that you are traveling with the whole family on your next vacation. Most likely you will book accommodation at your final destination in advance, plan your route by car, or book tickets if you are going by boat or plane. In short: you decide when and how you will get to your destination and then back home. If you don't, you could be in for some ugly surprises.

That is exactly what you should be doing with your marketing efforts. Map out what goals you want to achieve and how you want to get there. You should also document your campaigns while you're at it.

To get all this perfectly clear, you can ask the following questions:

- How long should your campaign run? How complex is the campaign?
- What steps do you foresee? A simple welcome campaign may consist of a few simple emails.
- What is the goal of your campaign? Do you want to send information to (a part of) your target audience, or do you want to achieve a specific percentage of cross sales for example?
- What metrics will determine the success of your campaign? For example, is it 50 registrations for your newsletter? 200 registrations for your webinar? Be sure to look beyond the standard vanity metrics.

You should get an answer to these questions before you set up your campaign. This way, it will be easier running good campaigns.

Know the buyer journey

You need to know what steps your target audience is taking. Every campaign has a unique set of components. For example, think carefully about your message, the tone of voice, content, the number of steps your target audience needs to take. Ask yourself what exactly your target audience expects from you. What value do you add? If you know how your target audience communicates with you and what information they want from you, you can devise better, more efficient campaigns.

Big tip: Map out your buyer journey visually as well, with for example Powerpoint, Canva or just on a big piece of paper. It helps to build better campaigns and use your buyer journey in a better way.

Create relevant content

Your campaign consists of a number of contact moments with your target audience: content triggered by certain events, or programmed at a specific time. Automation allows you to schedule all of these in advance, and to analyze how your campaign is running. Naturally, you want to use the most relevant content possible. While creating content, keep in mind exactly where your target audience is in the buyer journey, and what they need at that moment. Always be unique and provide value to the reader.

For example, if you are doing a welcome campaign, you can present a new feature of your product or service in each email, or an additional benefit. Provide information that helps them on their buyer journey. In any case, make sure your message varies each time so you don't repeat yourself needlessly.

Determine your requirements

If you have a concrete idea of your campaigns and the needs of your organization, you can make a list of all the features you need in your automation software. Think for example of all the possible triggers you want to use. You will quickly have a shortlist of possible tools. Ask for demos and trials to see which tool suits your organization best. You will also discover features you didn't think of yourself.

Keep your focus

Gradually you will get the urge to make it complex anyway and add lots of extra elements. Resist that urge: it will make your campaigns needlessly complex, and less effective.

Analyse and adjust

Automating doesn't mean you don't have to do anything anymore. Don't fall into that trap. You need to be actively engaged in your campaigns, even if they are automated. Analyze the results they produce and adjust where necessary. Be sure to check whether the open rates are good, whether enough people are clicking on the links you provide, and whether your campaign is achieving its objective. If it isn't, it's time to make some adjustments.

What can you automate?

Once you know what you want to achieve as a company, you can also determine what to automate. A lot is possible, but it is best to weigh up whether it is worth the effort before you start automating. Because as we already indicated: automation is not about sitting back, it takes some work. Common sense is a good guide here.

Having said that, we give you some examples of campaigns that you can automate starting today. But above all, know that there are many many many more possibilities.

Welcome campaigns

By far one of the most popular options, and unfortunately most companies don't ever go beyond this. But it's a really good place to start with your automation efforts.

As soon as someone signs up for your newsletter, your blog or a demo, sending them a confirmation is a must.

If you have developed your buyer personas well, you can also continue to send these people relevant information. Some items you can include in your communication:

- Testimonials
- Discounts and other incentives
- Events that you are organizing, such as webinars
- Online resources such as whitepapers
- Case studies
- Anything else that provides value

It is crucial to invest time and energy in new contacts. People who feel engaged and get your attention are more likely to respond to your invitations, and thus eventually become customers.

Event campaigns

If you regularly organize events, then event campaigns can also be very effective. These consist of several steps, starting with awareness creation around your event. After all, you want as many participants as possible.

That could look something like this:

- A 'save the date'
- The official invitation
- A first and maybe a second reminder
- (Maybe a third reminder if it's really necessary)
- Practical information for your participants
- A thank you email afterwards (possibly with a survey)

Don't forget to segment your target audience, so that you always send the right information to the right people. This way you maximize the number of participants and give everyone the best possible experience.

Reactivation campaigns

In every CRM system in the world, sooner or later contacts end up cooling off. But there was once a reason why they ended up in your list. A reactivation campaign can be very useful to warm those contacts up. After all, there was already a certain affinity for your services or products.

When you roll out such a campaign, focus on the value of what you have to offer. Try to show the value and get them back on board. And don't give up after one email: often you have to send multiple messages before they see the value of what you are offering.

Other campaigns

There are many other possibilities, such as onboarding workflows, upsell campaigns and the like. You can find several examples of campaigns online that can serve as an inspiration for your next campaign.

BUT don't take it too far. If you copy paste too much, you risk losing your authenticity and along with it also your credibility.

*“ Marketing automation expenses grow year over year with **14%** , and will **exceed** the **25 billion Dollar** mark in 2023. ”*

Pitfalls

Automation is a great way to grow your business. BUT when you start, it's also best to pay close attention to the following pitfalls.

Don't lean back

Automating does NOT mean that you don't have to do anything anymore. Check if your workflows make sense, if the right people get the right content, if you haven't forgotten anything. Also check if your campaigns are producing the desired results. There is definitely still some work involved.

The part that IS true is that it will save you time on repetitive work, and will help you focus on the things that add value.

Keep it human

A very common argument against automation is that companies prefer the "human approach". But nothing stops you from automating AND at the same time staying human in your communication. If done the right way, automation even helps you to have MORE human contact and to approach your customer more personally: you save time that you can invest in more personal contact.

Not enough content

Automation of course only works if you also have enough content to use in your workflows. And believe us when we say that providing enough content is perfectly possible. For ANY company. You just have to do it or get someone else to do it for you.

Technical know-how

Companies looking to automate often worry about a lack of technical know-how. But the truth is that most automation platforms require little or no technical knowledge at all. You can just get started with them right away, just with some common sense and knowledge of your own business. Many platforms don't require you to code anything.

On the other hand, you can look for a partner that has that knowledge, so you can apply it in your business.

Too many automation tools to choose from

There is an extraordinary number of marketing tools to choose from. Don't rush into picking your tool. Look thoroughly at what you need and what tools offer what you need.

You can also get help from an external specialist. This way you avoid making the wrong choice and sooner or later having to start all over again, with all the unnecessary costs.

Not automating enough

If you're going to automate, don't stop at marketing, or your monthly newsletter. You can also automate many sales processes, usually within the same platform. This way, you achieve a lot more results. Unfortunately, companies too often remain on the surface when it comes to automation, and therefore they get the feeling that all the costs and the work they have put into it don't get them any ROI.

So think further and automate more than those few emails per month. That way, you'll maximize the ROI of the platform you eventually choose.

Conclusion

Take enough time to roll out automation. It can be done quickly if you have a good idea and you have everything in place, but don't take any chances. Connecting tools, setting up workflows and testing things takes quite some time.

Important to mention: please do get some help from a specialist that knows exactly how to deal with automation. All too often, we see companies starting out on their own without any expertise, and then you quickly hit the limits or make mistakes that could have been avoided.

I wish you lots of success with your marketing, sales and/or service automation efforts. If you have any specific questions, we're happy to help.

"Marketing's job is never done. It's about perpetual motion. We must continue to innovate every day."

Beth Comstock, Ex CMO General Electric

Amazing things will happen when you listen to the consumer."

Jonathan Midenhall, CMO Airbnb



QUESTIONS? DEMO?

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