



Effectively Connect Your Channels

Six Steps to Marketing
Automation Success

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Why Marketing Without Automation Hurts Results

For years, digital marketing professionals have struggled with having to manage many different tools for many different forms of online communication. While one tool may be used for email campaigns, another tool may be used for programmatic advertising or social media management. Some of these tools are probably supported by the business's website, and others probably are not. This disconnect between all the tools marketers have at their disposal can become problematic and is also inefficient.

Reaching out to a customer through any digital channel doesn't happen in a vacuum. An email you send to one user may make sense if that is their first form of communication with your company. However, another department might have targeted that same person for an ad campaign. This could help or hurt the ability to convert and close on that customer.

Furthermore, brands don't just live on a company's website. Anytime a customer interacts with a social media channel, an email, or even an advertisement, that experience is essential to their buyer journey. Marketers have been emulating this cross-channel experience for far too long by managing disparate components of their marketing mix on various platforms. The fact that they do so manually, making the bulk of integrated campaigning a time and labor-intensive process, is a barrier to success. Today, immersive tools that enable marketing automation are crucial to creating an omnichannel presence, which is much more manageable and effective for these companies.

By utilizing marketing automation tools that integrate all these marketing components and streamline the process by removing the need for manual execution of marketing activities, marketers gain time to focus on their customers and conversion rate optimization.

According to eMarketer...

86%

Of marketers said that marketing automation improved nurturing

66%

Of marketers said that marketing automation enhanced targeting and personalization

The Six Steps to Successful Marketing Automation

1. Defining Goals
2. Identifying Users
3. Discovering Opportunities
4. Shaping the Customer Journey
5. Executing Workflows
6. Refining Through Conversion Rate Optimization (CRO)

1. Defining Goals in Your Marketing Strategy

Before you start to design your marketing automation strategy, it is essential to set realistic goals. We like to follow the **S.M.A.R.T. framework**, meaning your goals should be specific, measurable, attainable, relevant, and timely. Understand what key performance indicators (KPIs) are pertinent to your needs and find a way to measure them effectively. In doing so, also select an expected and realistic outcome for growth. Once you know where you are headed, define the tools and timeline needed to get there. It's that easy.

S – Specific. **M** – Measurable. **A** – Attainable. **R** – Relevant. **T** – Time-bound.

For example, if a client values leads obtained through their website's "Contact Us" form, that is a great place to start. Look at the normal progression of leads. Have they been increasing month over month? Have the number of leads generated become stagnant? Depending on the current state, you will need to brainstorm ways to improve traffic and conversions. For this situation, a good S.M.A.R.T. goal would be:

“Obtain 25% more website-originated leads per month within in four months using social media advertising campaigns through Facebook and Instagram.”

This is realistic goal and is very specific to an easily implemented strategy.

2. Define Users Through Personas & Buyer Journeys

If you have a good idea of your buyer persona, then this next step should be easy. However, if you have not conducted formal market research, audience analysis, or persona definition, thinking about your personas in this sense can be important for many of your marketing goals.

Most marketing automation platforms allow for the **ability to observe and track user activity and to capture data about the user when they submit information** to you. These two targeting methods, user observations and self-reported interests, create another dimension to target users.

For example, let's say one of your user personas is a businesswoman (we'll call her "Management Margaret") with little time for personal interests and who is seeking to improve her leadership skills. Targeting women in a professional setting, who are middle-management and higher, is a perfect way to target this type of user.

Learning how to define user personas in a technical setting gives you the ability to segment and categorize your users for website personalization, remarketing, and even email marketing. Optimizing your customer relationship management database is vital in this step.

If defining user personas does not seem valuable to you, creating dynamic lists with conditions for entry can still provide valuable insights. Your sales and marketing team can significantly benefit from automated lists like "contacts who are women," "contacts who abandoned their shopping cart," or even "contacts with April birthdays" types of lists. Additionally, creating files of people who interacted with past digital advertising or viewed a page on your website serves as the foundation for any remarketing campaign.

3. Discover Opportunities for Dynamic Content & Successful Marketing

According to inbound methodology, specific tools lend themselves better to certain stages:

- Attraction: Digital ads, social media, content creation & distribution
- Engagement: Pop-ups, forms, email marketing & conversation management
- Delight: Personalized content, personalized emails & lead nurturing

You will need to curate, re-purpose or create new assets next. Identify blog posts, drip campaigns, landing pages, and other communication touch points that could enhance your customers' experience when coordinated thoughtfully.

The idea here is to take many different forms of communication that exist both on-site and off-site and to apply them efficiently and effectively along a customer's journey. Marketing automation software will be needed to control this journey, but the strategy is what fundamentally influences the user. When applied smartly, these flows will often guide users from awareness to decision.

Opportunities can be organized into pre-conversion, effective decision-making, and post-conversion opportunities. While each medium can reach a buyer at any stage of this cycle, having enough content or touchpoints can ensure balance in a **marketing automation workflow**.

While similar, this is not to be confused with the **buyer's journey**, which follows the buyer through the awareness, consideration, and decision phases of the consumer process. This can certainly be used to inform your decisions surrounding the opportunities needed for your workflow. Additionally, this can also be closely related to **inbound marketing methodology** and content marketing concepts. Inbound methodology centers around attracting, engaging, and delighting users, changing them from unknown visitors to leads.

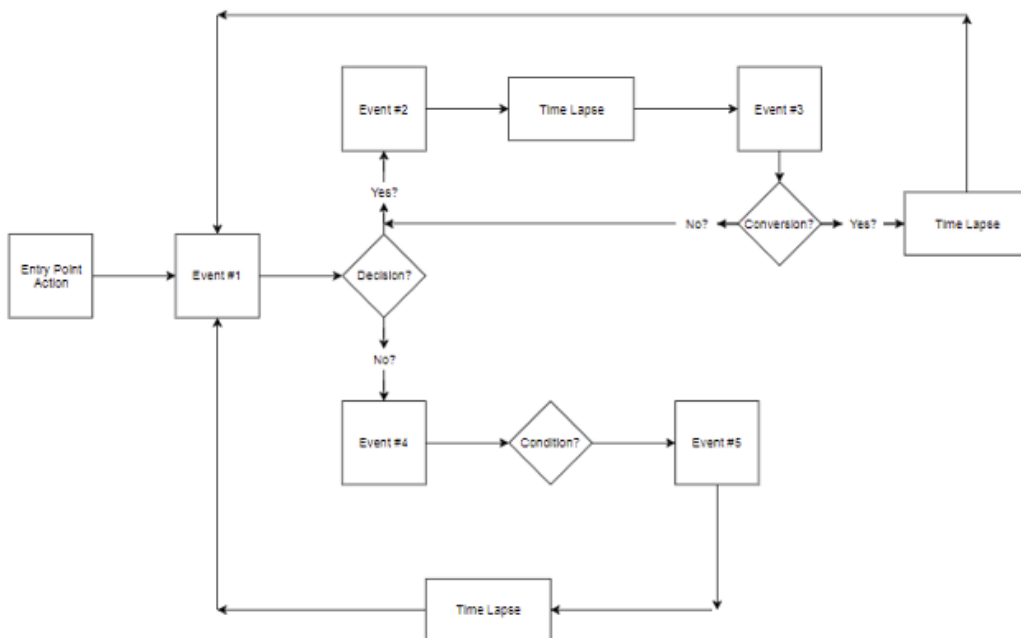
Attraction tools often serve as an entry point for a marketing automation campaign, while tools in the engage and delight stages are implemented during the marketing automation workflow.

For Example...

Let's assume email marketing, landing pages, and social media advertising are the available marketing opportunities. Paid Instagram ads could serve as the attraction piece. The landing page would be the engagement component, which persuades the user to convert by completing a form. After the form is submitted, the user may be entered into a follow-up email drip campaign, which is a tremendous post-conversion opportunity – and would serve as the delight stage. Creating and organizing content assets this way is critical when designing the workflow.

4. Designing the Customer Journey & Creating Your Workflow

This step of the process involves organizing opportunities into strategic phases. How does a user qualify for the marketing automation process? What opportunities move buyers between pre-conversion and post-conversion? Does the pathway create a seamless customer journey? These questions can help situate touch points for the workflow. Consider the following:



While designing an email marketing campaign, for example:

a good entry point would be a gated content download, and a series of onboarding emails would move the customer from awareness to engagement by nurturing the contact with more information. An email campaign-specific landing page can then convert the user to a lead or inquiry, whereas a second email campaign would follow up and cross-sell to the user after a set amount of time. This second email campaign could include dynamic content gathered from the form submissions and other data obtained through on-site behavior and activity.

Specific triggers, such as an email open or clicking a specific link within an email would qualify the user to move through the workflow. In this situation, monitoring the open rate would help identify if this would be significant enough to push someone through pre-conversion to active-decision making, and then onto post-conversion opportunities of your workflow.

At this point, map out the decision-making trees to visualize and construct the pathways in the workflow. Remember, users who enter the workflow will have multiple paths that they can follow, depending on what and how you set up the software. Make sure users have a clear entry point and exit point. Although it's essential to qualify people for the workflow, it is just as necessary to disqualify those who enter the workflow and haven't responded to offers, content or remarketing.

Your workflow should be easily accessible and provide value, rather than act as a distraction to the user journey. Your workflow should also incorporate many off-site and on-site elements to give your brand an omnichannel presence, and maintain a cyclical flow to help grow and nurture your leads.

Depending on your website technology and the third-party software used in sales and marketing, housing your marketing automation efforts in one system may or may not be possible. Tools like HubSpot and Pardot make marketing automation easy, but similar tools also exist in Sitecore, Kentico, and even WordPress that allow for more CMS control. Your CRM (Customer Relationship Management) platform may also be housed off-site or on-site, so depending on that tool and its integrations, you can determine which marketing automation software you should use.

Knowing your technological inventory (and budget) will come in handy when you sketch out the workflow. To do so, you will have to keep any integrations in mind to determine what is or isn't possible. To design the flow, you can use a simple, free tools like Lucidchart for Google Chrome. Designing your workflow and sketching it outside of your marketing automation software is sometimes necessary because the tools we use may not all be visible in one place.

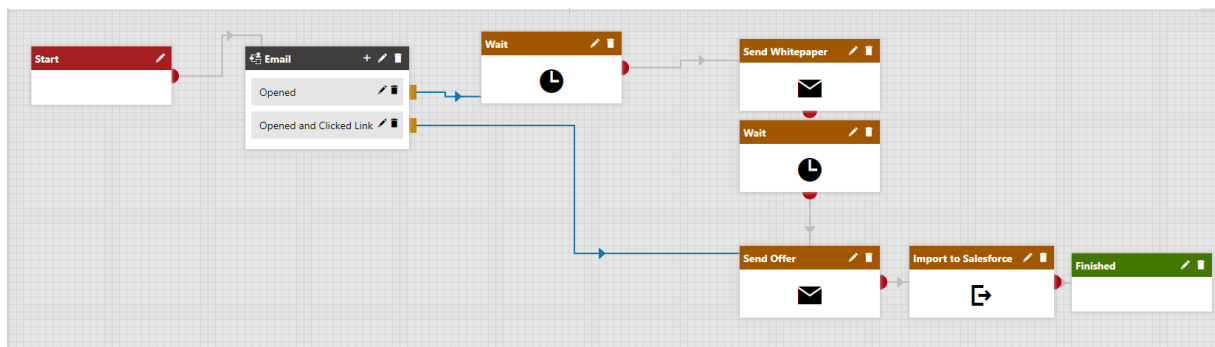
5. Executive Marketing Automation Workflows

Based on your chosen marketing automation platform(s), you will need to set up the designed workflow in the software. This may be possible completely within the CMS or your third-party vendor, or you may have to set up the necessary integrations or scheduled data imports/exports.

Not all communication channels may be available in your marketing automation platform, so there needs to be some technology integration or coordination between systems if one platform lacks a specific feature.

For example, many marketing automation platforms do not integrate well with Google Ads. Thus, remarketing campaigns executed in a workflow may need a technical bridge or common place to export/import data in order to create the omnichannel marketing automation experience.

Some CMS systems – like Kentico, for example – can leverage automated marketing processes through their EMS licenses. This combines the ability to create marketing workflows with email marketing and website personalization, as well as social media and Salesforce integration. The ability to track activity on websites allows for ultimate data collection practices that drive intelligent decision making in the marketing automation space. The following is an example of a workflow constructed in Kentico:

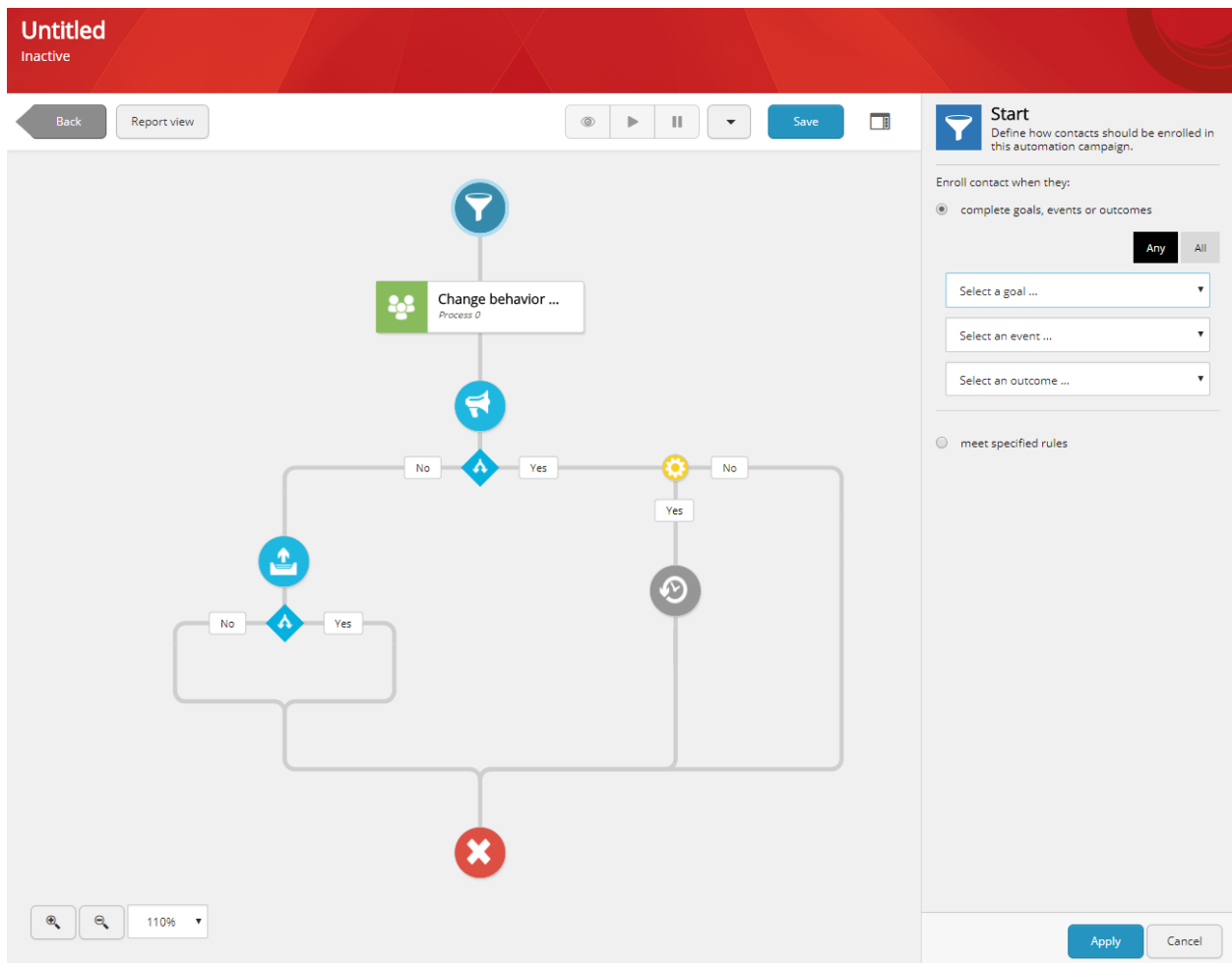


Sitecore is a very powerful platform,

and their Experience Platform facilitates comprehensive omnichannel control. Through Sitecore, many additional components allow for marketing automation. The Federated Experience Manager, part of the Experience Platform, allows for the capturing of visitor behavior and delivery of personalized experiences, both on-site and off-site. Sitecore also has the capability of email marketing and even personalization of mobile applications.

Sitecore can also leverage the capabilities of Microsoft Azure to conduct predictive marketing campaigns used for demand forecasting and ecommerce price optimization, as well as other personalized marketing solutions driven by artificial intelligence engines.

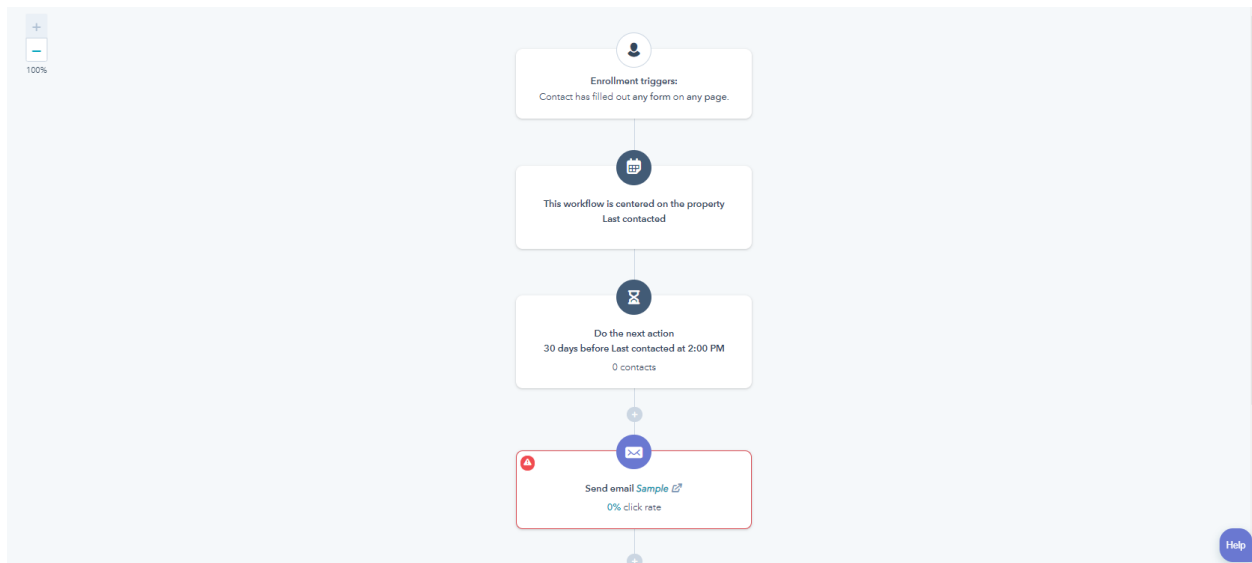
With contextual intelligence and personalized content, the Sitecore Experience Platform is a powerful Marketing Automation engine. Here is an example of a Sitecore workflow:



Working Without a Developer:

Having an on-site marketing automation experience may not be possible given constraints of the website platform. When using WordPress, for example, it may be challenging to integrate multiple plugins to facilitate the marketing automation process. When marketing automation is done off-site, it can be quick and easy for marketers to push live content, edit workflows, and curate content without having to work with a developer. HubSpot is a good platform for this, and while HubSpot does have a CMS available, the service works with any website CMS, not just HubSpot's platform.

HubSpot allows for the creation of new pages, which can contain personalization elements. Activity tracking, form and button creation, email marketing, social media marketing, and programmatic advertising are all supported abilities of this platform, which make it an easy and effective solution. HubSpot also has its own CRM database, making it even more attractive. While services like Kentico and Sitecore contain CRM capabilities, Salesforce is often relied upon for a CRM database. Here is an example of a workflow in HubSpot:



6. Refining Through Conversion Rate Optimization (CRO)

Attracting off-site audiences to your website is only half the equation and is rendered meaningless if your website isn't optimized for conversions. The conversion rate is then the percentage of visitors who complete a desired effect or goal, which are also central to your marketing automation efforts.

Conversion rate optimization is defined as the act of improving the rate of visitors who convert through your marketing efforts and will assist you in obtaining increased ROI. Increasing the rate of conversions signals that your company may, in turn, have more clients/customers. Fine-tuning, tweaking, and optimizing efficiency in your workflows is a crucial component to conversion rate optimization.

The rate of qualified lead generation, the total conversion rate of the workflow, and the average value of the leads acquired are great metrics to evaluate marketing automation success. You can break down the conversion rate optimization of a marketing automation workflow into three types:

- User Journey Measurements: Email, traffic & conversion metrics
- Lead Generation Measurements: Cost per acquisition, MQL/SQL & ROI metrics
- Workflow Efficiency Measurements: Duration between pathways, decision-point testing and entry/exit point metrics

Actively observing, analyzing, and modifying the workflow to improve the user journey flow, the number of leads generated, and the speed of the workflow can significantly enhance and optimize your conversion rate. Furthermore, these statistics will also help determine the overall value of your marketing automation platform, campaigns, and related efforts.

Marketing Automation that **Attracts, Engages** and **Delights**

There you have it: **six steps to conceptualizing and designing a sound marketing automation strategy.**

You can now create, execute and optimize a campaign utilizing the omnichannel experience described. Additionally, this strategy allows you to focus on the kinds of users you want to attract and enhance their customer journey, all while increasing your conversion rate.

If you need marketing automation help, whether it be strategic insights or software/technology solutions or recommendations, Ascedia is here to guide you in the marketing automation process.

To get started on planning your marketing automation strategy, give us a shout:

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