Marketing Automation Strategy Guide

THE BASICS OF A MARKETING AUTOMATION STRATEGY

IN THIS GUIDE

Work towards the end goal!

Why do we invest in marketing automation technology?

This question is the core of everything in the methodology and philosophy discussed in this document. Sending emails, creating forms, deploying landing pages are the tools and assets we will use in our strategy, but with Act-On, you will soon discover that these are simply advantages of having all of your tools in one place.

The value of Act-On is in the visibility and insight it gives into the behavior of our audience. By understanding who specifically has engaged with our content, we gain the ability to target and nurture this interest. By targeting interest, we put the right people in front of sales when their energy is high resulting in shorter sales cycles and increased revenue!

Identification, Segmentation, and Nurturing are proven methodologies, the business results of which have been thoroughly studied by reputable research firms that consistently agree that **Marketing Automation technology, when effectively deployed, is the most powerful revenue contributor in top performing organizations.**

The key to understanding how this will affect the goals of your company is knowing how this has worked for others. Here are some interesting statistics that provide benchmarks for the possibility:

Among top-performing marketers who reported exceeding their annual revenue goals, email marketing was cited as the #1 most effective tactic for B2B lead nurturing. (Forrester, Nov 2013)

85% of marketers cite email as the most effective lead-generation tactic. (B2B Technology Marketing Community, Sept 2013)

Companies actively using lead nurturing and lead scoring generate 50% more sales-ready leads at 33% lower cost per lead. (Forrester Research, Aug 2012)

With the right plan and the right tools, we want to help you deploy an effective marketing automation strategy - resulting in measurable increases in lead qualification and sales conversions!

> "50% more sales ready leads at 33% lower cost."

Contents

Define your Targets

Though we work in a "Business to Business" industry, the reality is we will always engage in "person to person" marketing and sales. As such, defining the audience of your message by role, title, and the specific interests and challenges these individuals face is critical to our process.

A Buyer Persona is a semi-fictional representation of your target buyer that enables effective segmentation, lead qualification, and content creation. Your buyer persona should include a short bio of a typical customer and a description of the person, and includes information on the:

- Buyers Background
- Daily Activities/Behavior
- Current Solutions to the Problem
- What's important to this Buyer

To the right, you will see examples of the buyer persona worksheet and sample buyer process. More information about Buyer Personas is available from this free toolkit!

	Persona 1	Persona 2	Persona 3	Persona 4
Buyer Background				
Daily Activity/Roles				
Goals/Objectives				
Motivations				
Pain Points/Challenges				
Buying Concerns				
Compelling Events				
Industry News/Preferences				

Facility/Operations Manager – Dave

Personal Background	• **Age:** 45-55 • **Personal:** Married with 1 child in High School • **Education:** Undergraduate
Role: Facilities or Operations Manager	• **Job measured:** Space & operations efficiency, employee productivity • **Skills required:** People management, analysis, industry knowledge • **Reports to:** CEO or General Manager
Company Information	• **Industry:** Distribution • **Revenue:** $20M • **Employees:** 100
Goals and Challenges	• **Success means:** Raise & promotion • **Values:** Job security, family, recognition • **Challenges:** New systems, managing people
Shopping and Industry News Preferences	• **Preferred communication:** Email, phone • **Industry news:** Specific industry publication - trade magazine

Buying Process

The uniqueness and creativity of humanity is a beautiful thing. However, in many ways, we behave in predictable fashions. A savvy marketer or sales person knows that, if we anticipate the needs of our audience, we can set the stage now for decisions that will be made in the future.

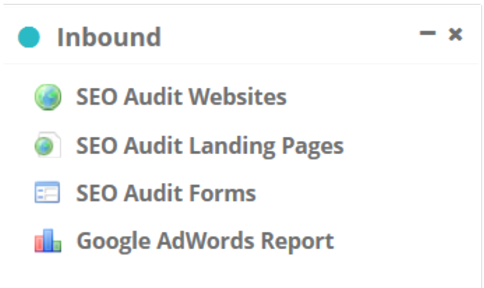
Each persona will have different variables during their buying journey. We recommend detailing the expected process they will experience, including their objections and challenges as it relates to your product.

With Marketing Automation, we will look to our message and content to identify or create pain points that move our audience from the **Status Quo**, business as usual mind set, to a state of **Disruption**. From identifying these pain points, we will provide our content to the audience during the **Discussion** and **Research** phase, and provide competitive advantages to our sales teams during the **Deliberation** and **Decision** phase.

Buyer Process Example

- **Status Quo** - Executive and team members are not aware of a business or process challenge.
- **Disruption** - An event causes the executive or team members to become aware of a problem or challenge that needs to be addressed.
- **Discussion** - Internal conversations lead to assignment of new goals or tasks.
- **Research** - Departments research their specialty and report on factors they believe may be contributing. This information is often funneled back to the C-level.
- **Deliberation** - Proposals and recommendations are considered as they relate to the original problem.
- **Decision** - Decision is made at the executive level to purchase.

ACT-ON INBOUND TOOLS



The website prospector gives you visibility into known and anonymous visitors on your website in real time.

SEO Audits

Using Act-On's Inbound tools, you can easily audit your webpages, landing pages, forms, and tie Google AdWords directly to your reporting

	February 2015	March 2015	April 2015
People Visiting	3,715	4,084	4,473
Known	36%	4%	13%
Anonymous	64%	96%	87%
Conversions	233	98	147
Bounces	25%	3%	6%
Companies	886	92	399

Website Prospector Report

The Website Visitor Report compliments conventional analytics by showing you site traffic AND how many known, engaged visitors you have.

FAST FACTS

45%

45% of all visitors to your website will buy from you or a competitor within the next 12 months.

75%

75% of those who buy will buy from whomever they speak with first

BE THERE FIRST!

With Act-On, you can give your sales team the advantage. The companies and individuals visiting your website and content are all visible via your Act-On Inbound tools!

Attract!

Now that we understand who our buyer is, it's time to create content. Content contains messaging that will be distributed in many mediums and across many channels, and should be written for our buyer personas and their buying process stage.

Examples of content "Mediums" are:

- Email Messages
- Web pages
- Landing pages
- Whitepapers
- eBooks
- Case studies
- Videos

Examples of content "Channels" are:

- Emails
- Website
- Blogs
- Social media
- Magazines/Publications
- Syndicated Websites
- YouTube/Video Sites

We encourage our users to deploy the "Rule of Four". Every asset created in your content matrix can (and should) be deployed in four ways. This reduces the need for massive content libraries while still allowing you to maximize the touch points with your audience!

When you deploy assets, don't forget to use the SEO tools to make sure your content has maximum visibility to search engines

Capture!

As you deploy content, you will need to make a determination on how you want this to contribute to your lead generation effort and use forms to capture the names and contact information of your audience.

Remember that no matter how many people read a brilliant eBook, if we don't know who they are, it doesn't help us!

People have become accustomed to trading their contact information for content. As such it is prudent to provide a "Lead Capture" form before people can access particularly valuable information, like strategy books, design guides, and best practices.

These forms should be very light touch, and typically only ask for:

- First Name
- Last Name
- Email Address

Obviously, sales contact forms and other critical conversion points can ask for more information. However, for content gating, it's best to provide minimal obstacles as Act-On gives you the ability to then see these people by name, and visibility into all other research they have done using your digital assets.

Progressive Profiling

As you deploy more content, you can use Act-On "Progressive Profiling" to automatically identify what information has already been collected by lead capture form and present new forms that ask for additional information.

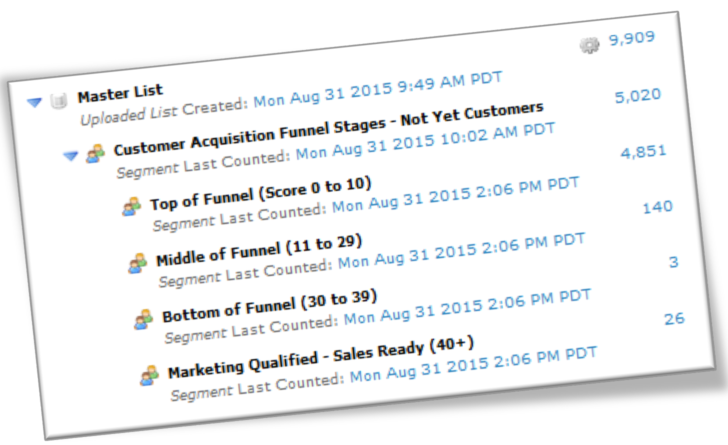
YOUR ACTIONS

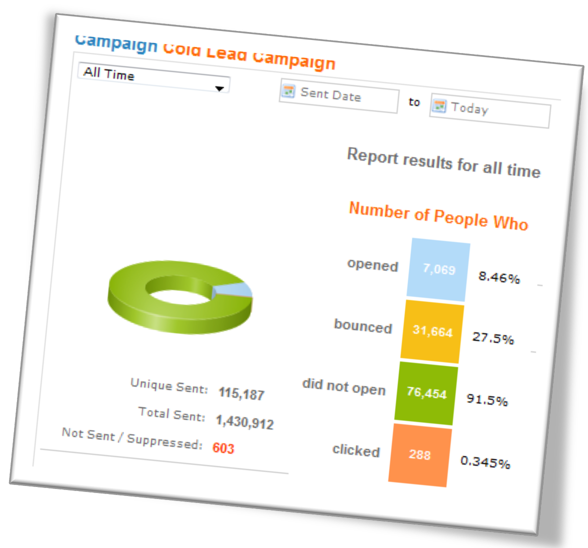
Use big-picture and industry-focused content; social media, advertising, sponsorships, PR and become aware of your company. Goal will be to turn anonymous visitors into known visitors by enticing them to interact with y9our campaigns. This will allow you to start tracking your website visitors and gain a clear picture of typical buyer behavior.

Educate, help prospects evaluate buying criteria. White papers, eBooks, webinars, events, analyst reports, videos, reviews, checklists. Use the buyer behavior you've gathered to target engaged prospects.

Demos, data sheets, trials, pricing, case studies, references, vendor comparisons, and implementation data. Your prospects are evaluating specific products and services and tat this stage become will to engage with sellers.

Nurture!





Now it's time to have some fun! With Act-On forms capturing leads for the top of our funnel, lists acquired and cleaned, and a whole marketplace waiting to buy from you, it's time to nurture that interest and start warming up leads for our sales team.

Through a combination of tools, Act-On can automate the nurturing of your marketing leads in order to guide them through a qualification process.

This is typically done in the three stages outlined in the graphic above. Our Top of Funnel audience will be targeted with "Pain Point" oriented messaging, our Middle of Funnel audience will be targeted with solution and product emails, and our Bottom of the Funnel audience will be targeted with sales oriented calls to actions!

Set Up Lead Scoring!

The Lead Scoring matrix should follow guidelines common to successful Act-On programs. Act-On recommends using a target qualification number of **40**. With this methodology, lead scoring will become a fundamental tool for identifying the qualification of a lead based on their engagement. By deploying Act-On's recommended scoring methodology, leads will generally fall into the categories to the right.

This methodology is demonstrated in the following examples:

LEAD SCORING BY FUNNEL STAGE

Marketing Funnel Stage	Act-On Lead Score
Top of Funnel	0 – 10
Middle of Funnel	11 – 29
Bottom of Funnel	30 – 39
Marketing Qualified	40+

Non-MQL	Sent an Email	Opened an email	Clicked on the email	Visited a landing page	Presented with a form	Abandoned Research
Lead Score	0	0+1 = 1	1+5 =6	6+10 = 16	16+5 = 21	**Final Score = 21**

MQL	Sent an Email	Opened an email	Clicked on the email	Visited a landing page	Presented a signup form	Submitted the form	Returned to Home Page	Goes to Contact us page	Stopped Research
Lead Score	0	0+1 = 1	1+5 =6	6+10 = 16	16+5 = 21	21+10 = 31	31+8 = 39	39+8= 47	**Final Score = 47**

Recommended Scoring

Action	Score	Philosophy
Was sent a message	0	I could send you 40 messages today. If you never open these, are you any more sales qualified than the next person?
Opened a message	1	Seeing that a message has been opened, but it doesn't really indicate "buying interest."
Clicked on a message	1 - 5	Clicking on a message, even to view it in a browser, shows we have the prospects attention, but isn't buying behavior. Subtract your "Downloaded Media" score from 11. If this is greater than zero, that should be the point value here. e.g. Downloaded Media = 10 | 11-10 = 1 | Clicked on Message = 1
Viewed a form	0	It's good that a prospect viewed a form, but hesitance may indicate the prospect isn't seriously evaluating yet. The prospect will get points for this assigned from the "Visited a Web Page" score.
Submitted a form	10	Submitting any form means a prospect has become ready to trade information for content. This is a strong indicator.
Downloaded media	5 - 20	Downloading Act-On Media Assets means prospects have now come in contact with content you have designed to guide their buying journey. This is often a very strong indicator, and should reflect this in the score. Typical scoring at this stage is 10.
Visited a landing page	2	This is often a good indicator, and typically weighted more important than a visit to your website. The prospect will get points for this assigned from the "Visited a Web Page" score.
Visited a web page	8	Obviously, we want to score traffic to your site. If you knew a prospect was on your site, how many pages would they need to view for you to want sales to engage with them? (Divide this into 40)
Registered for a webinar	5	Registering for a webinar is a good indication of interest, but also helps you gauge the prospects priority on the topic.
Attended a webinar	35	If the prospect actually registered and attended, we can almost assuredly consider them sales ready and want to make sure we get this information to our team immediately.
Clicked on an organic search listing	5 - 10	This is a very flexible category that can result in accidental visits.
Clicked on a paid search ad	5 -10	PPC is a priority, and weighted heavily.
Unique: Visited Pricing Page	40	Your pricing page should be rated very heavily.
Unique: Submitted Contact Us Form	40	Certain forms are far more indicative of buying interest. Submitting a Contact Us Form will result in a prospect becoming immediately qualified.

Set up Scoring Segments

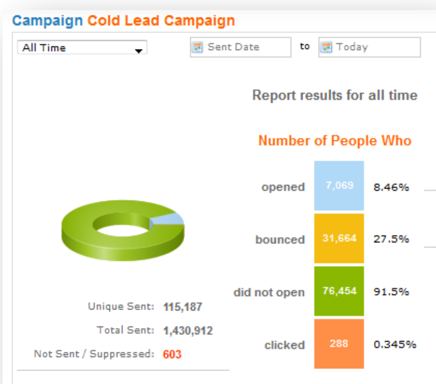
We recommend using one Act-On Master Marketing List for Non-CRM records. This list can be appended to, and if you are seeking to isolate a newly uploaded list, simply create a segment upon upload. This will allow you to easily manage all of your contacts, create robust segments, and target your audience based on behaviors. If you are integrating with CRM, then these segments will need to be created for the lists (e.g. Leads and Contacts) that exist in CRM.

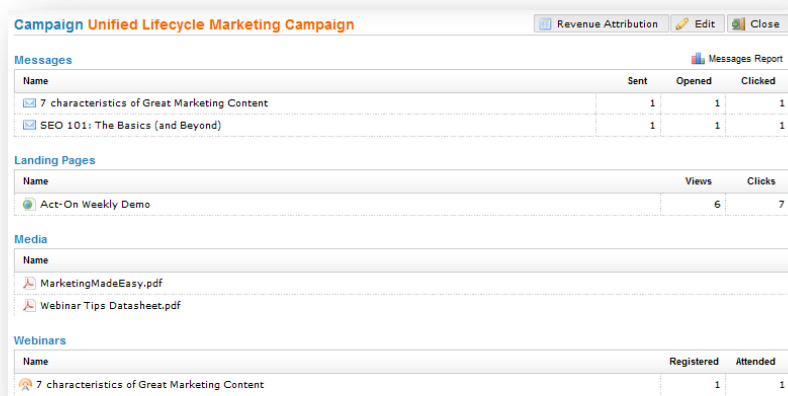
This is a good exercise to review with your Act-On CSM so that you can discuss your roles, personas, and specific scenarios in order to begin your segmentation process. As a critical step, it will be vital to identify your contacts by Lead Score using the segments; this will allow you to quickly identify your list by their position in your marketing funnel, and target those using automated programs.

Act-On Campaign Reports

Your CSM can provide additional training on configuring Act-On Campaigns and the support article can be [found here](). Here is an example of a campaign report that shows the aggregated interactions across all messages in an automated program, as well as the unified view of the emails, end points, and collateral used in a broad sense.

These campaigns also allow you to connect to an integrated CRM for detailed multi-touch revenue attribution reporting!





Automated Programs

Automated Programs are one of the easiest features to use in the entire platform; however it's common for users feel overwhelmed at first. With a few simple best practices and starting points, combined with the one-on-one training provided by your Act-On CSM, you'll have no trouble deploying excellently crafted automated campaigns in no time.

If you would like to review the formal training video, you can [find it here.]()

Things to Remember:

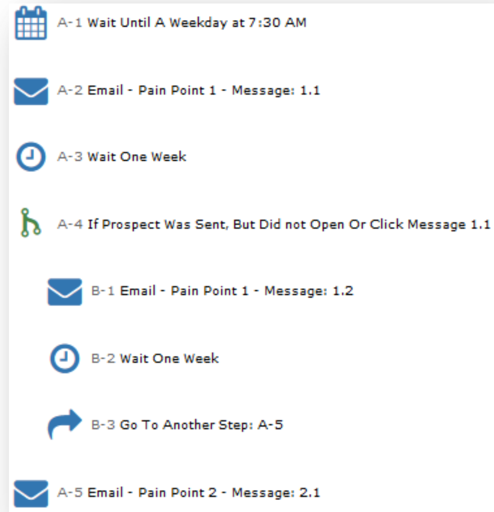
- The Source List is who we are sending to (recipients)
- The ideal path should be the "A" track.
- Branch recipients based on negative conditions (Did NOT take an action) whenever possible
- Don't be afraid to send – if they don't engage within a week, they've probably forgotten they ever received a message
- You don't have to look for clicks! We can branch recipients on any behavior

- Early Exit Conditions are global "remove from program" rules. They are often much easier to use than lots of incremental checks

Program One: Awareness (Top of Funnel)
Audience: (Score 0 – 10)

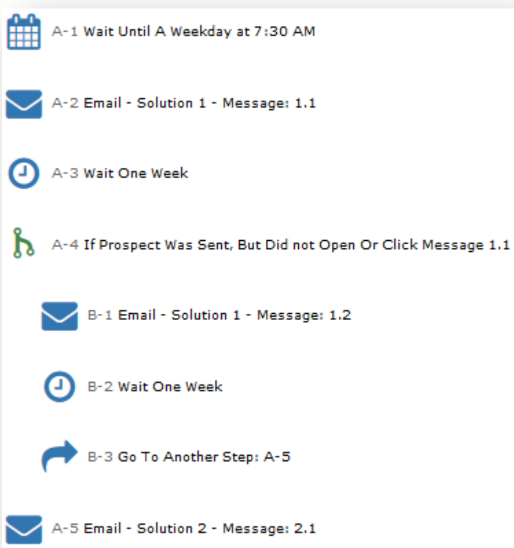
The source list of this program will include your overall demand generation efforts. This includes list acquisitions, social media, lead capture forms, trade shows, etc.

The goal is to send a series of messages that present helpful solutions for no information exchange that are **related to the pain points** which your company addresses. Each of these messages will be presented with Subject Line 1. Opens and clicks will pass to the next message in the nurture stream, whereas un-opens/no clicks will be presented with Subject Line 2, and then routed back into the primary nurture stream.



Exiting Program One:

Upon taking key actions, interaction with call to actions, web behaviors, or achieving the appropriate lead score, leads will be routed to Program Two.



Program Two – Interest (Middle of Funnel)
Audience: (Score 11-29)

The Source List of this program will include leads that have passed through Program One, as well as forms that capture interest on specific assets on your site, e.g. case studies.

The goal is to send a series of messages that present Products or Services offered by your company with a clear call to action, e.g. "Click here to see a Demo" or "Click here to Contact Us."

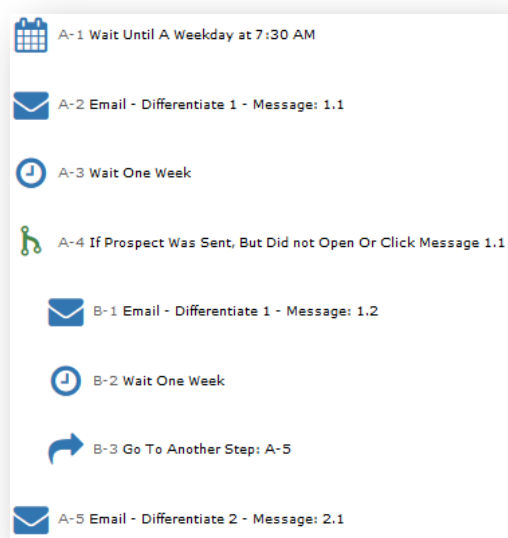
Exiting Program Two

Leads that submit a Contact Us Form, or that are Converted in CRM (or otherwise flagged) will be automatically removed from Program Two. Indirect engagement, such as viewing but NOT submitting a "Contact Us" form will route a lead into Program 3.

Program Three – Consideration (Bottom of Funnel)
Audience: (Score 30 – 39)

The Source List of this program will include leads that have passed through Program Two.

The goal is to send a series of messages that position your Company as a viable solution to the pain points and needs expressed by the digital behaviors in Programs One and Two. The messages in this program should be personalized, simple, and come from a person, not a generic email, e.g. the assigned business development manager.



Content here often includes case studies, customer reviews, and demo invites. Interaction with these calls to action, even if the customer does not reach out to you, indicates a high level of interest and should become the target of outbound sales efforts.

Exiting Program Three

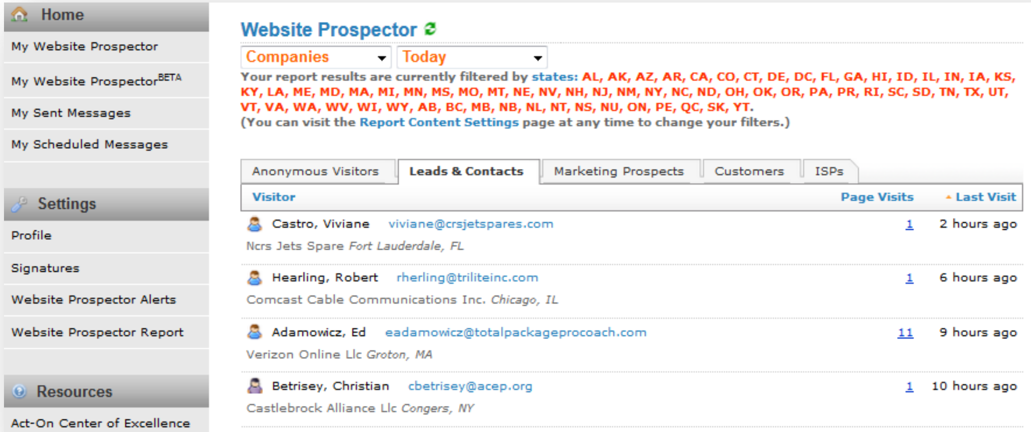
Clicking the Call to Action will trigger an alert and exit the lead. Leads that are converted in CRM should also be removed from Program Three.

Convert!

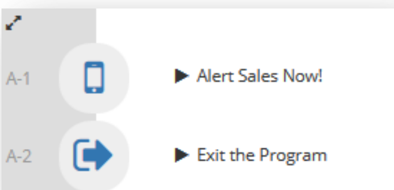
This is it – Game Time!

We have invested the time and energy into an effective marketing automation strategy, now it's time to unleash the "dogs of war", our sales team.

To the right, you will see the dashboard created for your sales team. In this view they can see the leads and contacts that are engaging with your messages, forms, website, and all other tracked assets *in real time!*



Sales views can be configured by individual sales person, territory, or CRM assignment rules!



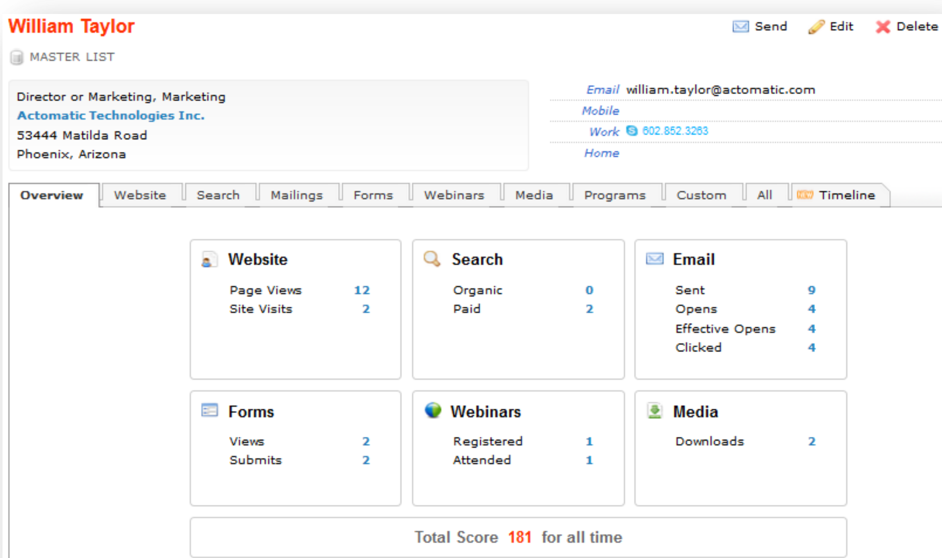
In addition to knowing who has been active today, the date range filter enables prospecting of historic visitors as well. As a salesperson, you can also see what messages you have sent directly, and what messages the marketing team or automated programs have sent on your behalf!

To the left, you seen an example Automated Programs which can be created by the marketing team to send an alert to sales when prospects hit the Marketing Qualified Lead Score.

By knowing who the most engaged leads are, and having visibility into their specific points of engagement in Behavior Profiles sales can expect:

- Quicker engagement
- Shorter sales cycles
- Bigger deals
- Higher close rates
- Improved quota retirement

Sample Behavior Profile

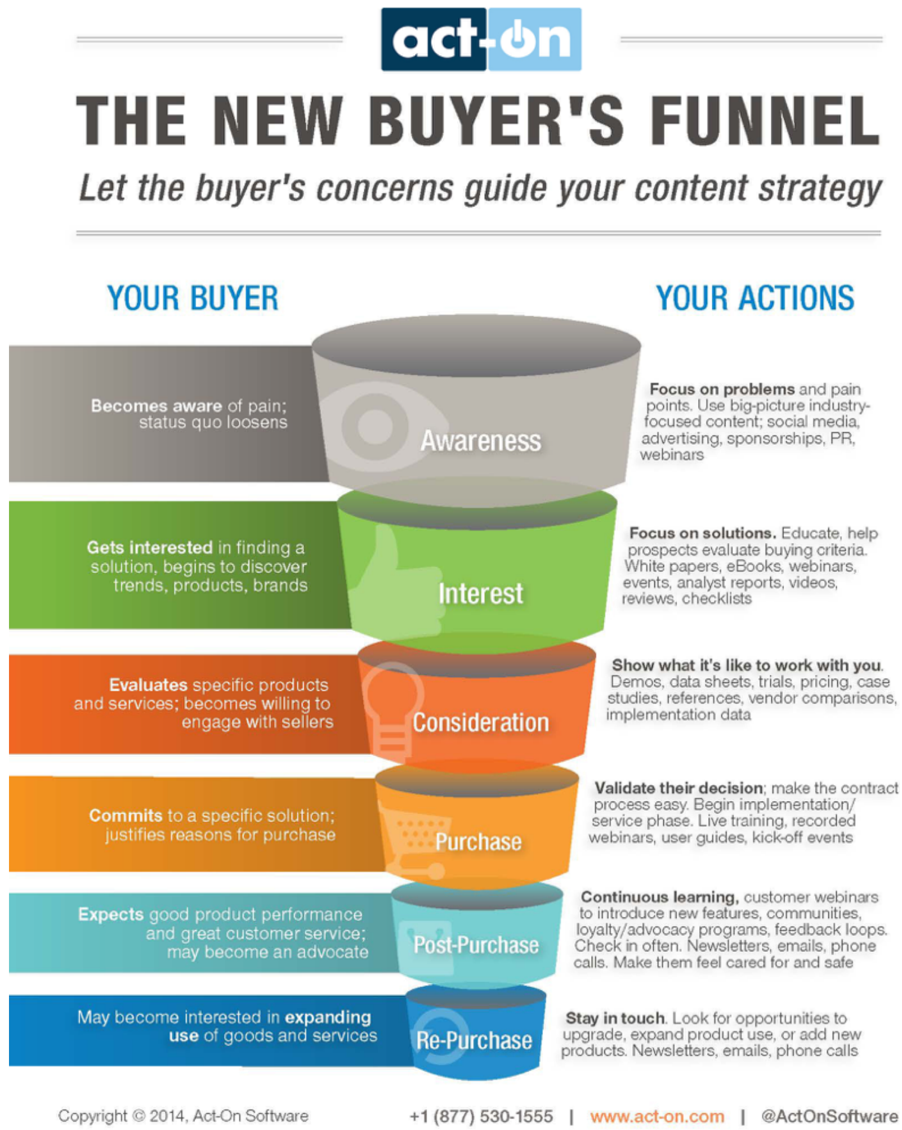


Expand!

You have done it! You've implemented a true marketing automation strategy, but such is life there's always room for improvement. At this point, you know all the best practices, and likely have a very high level of platform comfort. Now it's time to expand.

Here are some common areas you can apply the same methodology to in order to maximize revenue without having to invest large amount of time into new campaign development:

- Customer onboarding
- Customer retention
- Cross selling and upselling
- Lost customer reengagement
- Lost deals returned to marketing
- Long term engagement/nurturing
- Internal marketing
- Ongoing social media efforts
- New product and service offerings
- Tradeshow promotion
- Event marketing
- Sales Enablement
- Product specific programs



Execution Guide

Failing to plan is planning to fail.

In order to accommodate execution of this strategy, please use this easy worksheet to plan out task assignments and due dates for each aspect of this project. The typical user can accomplish execution of this strategy guide in about 40 – 60 working hours.

Task	Assignment	Due Date
Develop Buyer Personas		
Map your Buying Processes		
Update Lead Scoring		
Create Act-On Contact and Sign Up Forms		
Configure Progressive Profile Rules		
Identify and Gate Web Content		
Cleanse and Validate Lists		
Clean Up and Consolidate Lists (Master List)		
Create Lead Scoring Segments		
Build Hot Prospect Alerts		
Build Automated Program 1 Framework		
Generate Content for Automated Program 1		
Launch Automated Program 1		
Build Automated Program 2 Framework		
Generate Content for Automated Program 2		
Launch Automated Program 2		
Build Automated Program 3 Framework		
Generate Content for Automated Program 3		
Launch Automated Program 3		
Create Act-On Campaigns for Funnel Stages		
Sales | Act-On Workshop		