A BEGINNERS GUIDE TO MARKETING AUTOMATION

Introduction

Being successful online isn't just about having the right website with the right products and services at an attractive price. In todays eCommerce world, the key to success and competing with the giants is increasingly about analysing the valuable information you have about your customers. You need to understand who they are, what they want and how and when they want it, so you can deliver personalised marketing campaigns to each and every one of them. Doing this will encourage your customers to engage with you and buy from you time and time again. But who has the time to do this for each and every customer? This is where marketing automation comes in.

So what do you need to do to?

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Find out who your customers are

Analyse your data and profile your prospects and customers. Who are they are why do they buy from you? Identifying and creating key personas is a great way of understanding who you are trying to sell to and what it most likely to make them respond.

> "It's critical to have some basic personas established when working with marketing automation. Joe the sales guy, Sandra the marketer, Bob the analyst are just a few examples. Once you have your targeted personas you are able to identify prospective customer segments, and understand and define interactions with these personas."
>
> - Stefani Horton, Marketing Manager, GoodData

Implement a lead management process

Automation won't deliver the kind of results that you want unless you have a well defined process for finding, qualifying, nurturing and managing customers. How are potential buyers handled at each step? Are they channelled to different marketing campaigns, subject to their profile? Capturing and routing qualified prospects effectively is one of the most challenging tasks of automation. Please find below some best practices that can help you do this:-

- Get a single view of customer by integrating your website with your email marketing platform, CRM solution and any other sources of customer data
- Make it easy for customers to opt in and ask them for their preferences
- Give customers an option to be contacted by you
- Provide multiple, strong calls-to-action in your campaigns and on your website

> "This is likely the most single biggest differentiator we see in companies that are successful with marketing automation. They've taken the time to map out the lead management flow, captured all the trigger points that affect lead routing, and have one process for all leads that is used by everybody. What's the alternative? You can't automate a process that doesn't exist."
>
> - Mairi Burns, VP Client Services, Dunthorpe Marketing Group

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Design automated email campaigns

Integrating your website with the right email marketing platform such as Dotmailer or Bronto will allow you to automate email campaigns that are triggered by events, behaviours or complex combinations of conditions for a large number of different scenarios. Well planned email campaigns are cost-effective, easy to measure and often deliver the best returns over all other types of campaigns. Here are some great things you can do with email:-

- welcome new customers
- thank customers for their orders
- provide customers with further information about a product they searched for on your site
- end a list of accessories for a product someone ordered
- or promote a sale, exclusive offer or social media campaign
- Greet your best customers with a birthday greeting
- ask questions about new products

The right email marketing platform provides everything you need to analyse how each campaign is doing and prevent sending duplicate emails.

> "If you were visiting a customer in person, you wouldn't make a sale by shoving data sheets in his or her face the minute you walked through the door. You'd start by talking about the problem you can help solve."
>
> Tehra Peace, Content Director, Lead Lizard

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Keep your list clean

You can have great content offers and compelling email copy, but if you keep sending emails to bad addresses, all of your hard work will end up in the Spam Box, not the Inbox. Reputation and deliverability are tied together and based on factors you can control.

> "I advise my clients to use the deliverability circle. First, choose your audience well—and know that audience. Then create compelling content people will want to continue to receive from you. When you acquire more leads, give them clear subscription management options. And before you repeat the cycle, clean your database so that only opted-in, de-duped, and non-spam trap emails are used."
>
> - Josh Hill, VP of Marketing, Alacra

Personalise the customer's journey

Delivering personalised content based on a visitor's behaviour increases sales conversions dramatically. Personalisation solutions like Nosto and Qubit can respond to key signals such as website behaviour, buying histories and what people do after they leave your website. In addition, with the right ecommerce platform you can customise messages, illustrations, graphics, offers, emails, newsletters and other content to find the best match based on parameters that you set. You can also trigger specific content based on analytics and what got the best results from similar prospects at a particular stage of the sales process.

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One size does not fit all

Build your automated programs to be as dynamic as possible. You need your programs to be responsive to the needs of the individuals in them. Someone looking for pricing information is most probably at a different stage in their journey than someone visiting your website for the first time.

> "Don't force your leads into one or two tracks. Nurture is a framework for your content, not a story with a fixed plot. Each lead chooses his own adventure."
>
> - Josh Thorngren, Marketing Automation Manager, Lead Lizard

Deliver Targeted, relevant content when it counts

It is crucial that you understand your potential customer's buying cycle and that you deliver content which is relevant to where they are in that cycle. Imagine walking into a clothes store and being accosted by an assistant trying to sell you a dress when you were looking for a pair of shoes. Marketing automation processes can deliver powerful results if implemented properly but can also annoy your potential customers if they haven't been properly thought through.

> "The first step is understanding who's involved in the buying cycle. What answers are they searching for as they journey toward a purchase? What is their typical sales cycle? Using that as a foundation, you can then map the conversation—delivering targeted, relevant content when and where it counts most."
>
> - Denise Barnes, President of Babcock & Jenkins
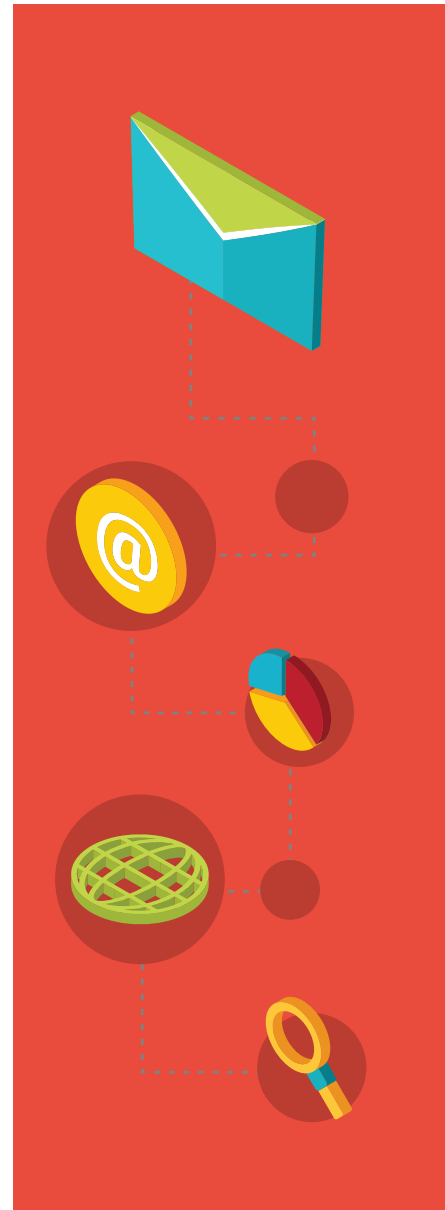
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Keep it simple

Remember, you are trying to capture leads and convert them into loyal buying customers so don't make their lives difficult.

A few tips:-

- Build compelling landing pages with easy-to-fill forms that give prospects a reason to provide their information
- Implement LiveChat or a call back button in case they want to be contacted or want to chat
- Distractions kill conversions, so focus on one call to action like an event registration or whitepaper download

"We recently created a custom contact form for a client. Designed to appear short (and easy to fill out) to prospects, it was still comprehensive enough to capture all the information necessary to nurture the lead. The key is to display fields dynamically if they're only conditionally required, use hidden fields as much as reasonable, and do as much of the processing on the backend as possible."

- Anvi Bui, Marketo Expert, Lead Lizard

Don't forget about customer service

People get frustrated when they feel like they are dealing with impersonal machines. You need to ensure that you monitor multiple contact channels, alert staff when personal assistance is needed and integrate with social media where many consumers now expect to find customer service options for reputable companies.

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Measure, measure, measure

One you have set up your automated marketing programmes, don't forget to measure the results. Market conditions can change fast in eCommerce and what works today may not work tomorrow. The following can have a huge impact:-

- Changes in customer behaviour
- Evolving customer preferences
- Market trends and conditions
- Changes in company capabilities
- Regulatory changess

Decide what they key performance indicators are and use the tools you have available to monitor how you are doing.
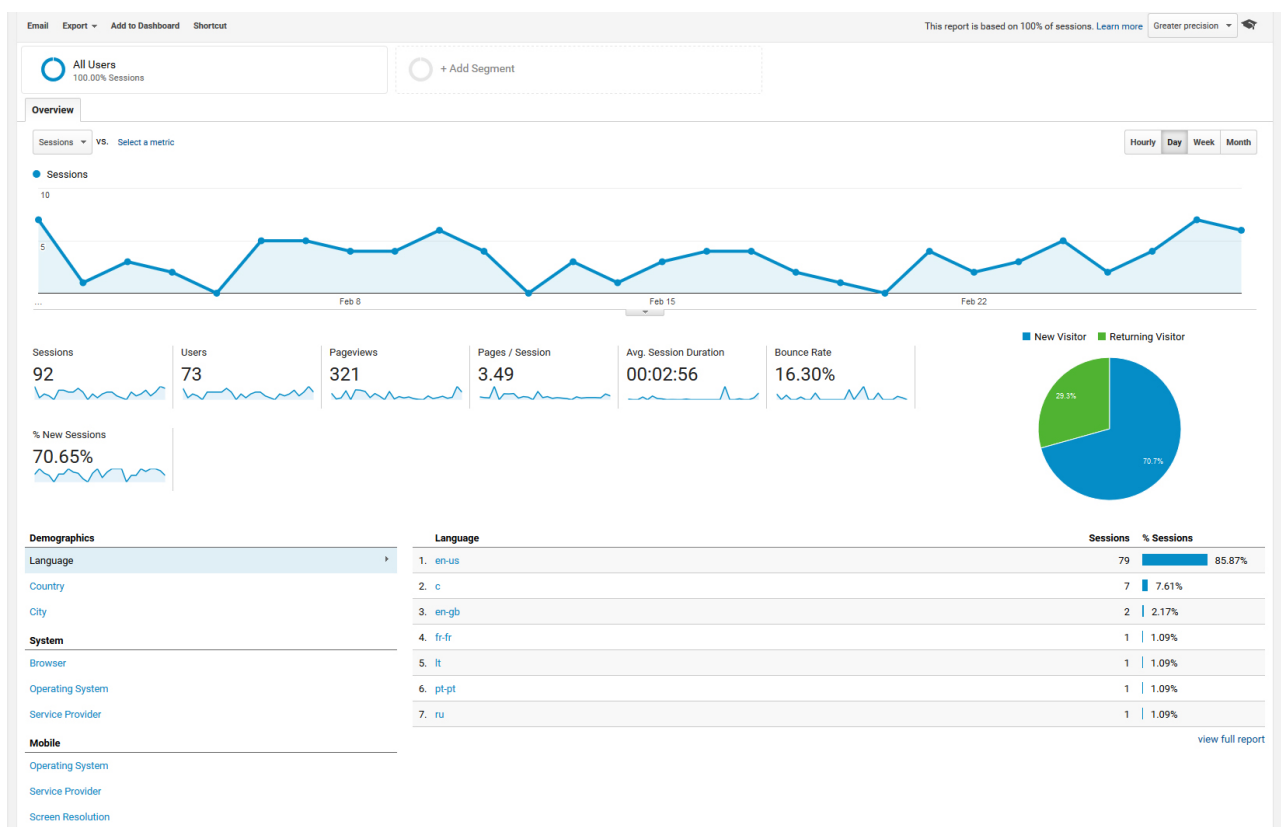
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