



Digital
Marketing
Institute

MARKETING AUTOMATION

Study Notes

Marketing Automation

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LESSON 1: KEY CONCEPTS IN MARKETING AUTOMATION

MARKETING AUTOMATION FUNDAMENTALS

What is marketing automation?

Marketing automation used to be known simply as email marketing. This was understood about 10 years ago as gathering many, many, many email addresses and mass sending messages out to these email addresses in the hope that's some people would engage with those emails.

However, marketing automation is now much more sophisticated, and it needs to be. Gartner Research is predicting that by 2020, 85% of people will interact only with technology and not with a real human being. This means the power of marketing will be through tools and not through real interaction with a person.

Beyond email marketing, what does marketing automation involve?

- | | |
|---------------------------|---------------------------------|
| ➤ Blogging | ➤ Lead scoring |
| ➤ Landing pages | ➤ Lead nurturing |
| ➤ Site pages | ➤ Forms |
| ➤ Campaigns | ➤ Data gathering forms |
| ➤ Social media publishing | ➤ Online tracking |
| ➤ Social media monitoring | ➤ Reporting |
| ➤ List management | ➤ Sales and marketing alignment |

What it will and will not do

One of the important things to know about marketing automation is that it's not going to do your marketing for you. It provides you with tools that help you to scale up efficient marketing processes that you already have in place, and give you the data insights in order to improve upon those processes. So it will not do your marketing for you. That is the biggest misconception out there.

Second, it will solve all of your marketing problems for you. It solves a lot with regards to understanding where you're having issues with gathering the results of your marketing campaigns, with understanding how to segment to make it more approachable or appropriate for your contacts. It will also improve your marketing in general through personalization and targeting. You'll learn how to take pieces of information that can be quite generic and replace that information with things that matter most to the segments you've created.

Marketing automation is a powerful tool for mass production. If you think about a car assembly line, first, you break the car into pieces and then you move them along together and assemble it at the end. This is how you can visualize what marketing automation will do. It will break your marketing campaigns into singular pieces that you can double, triple, quadruple and then put together and drive results over and over again for your website.

Uses of marketing automation

There are five primary uses, but you will discover many, many more for your business as you apply it.

Enable sales

Sales enablement means that you're assisting your sales team directly with content or with assets that help them to close a deal. This is the bottom of the funnel. When you are trying to help your sales team out, you need to be able to detect when it is necessary to serve the right piece of content at the right time in order to close a sale. This is how marketing automation can help you out. You can use the properties to detect those moments and deliver the right messages to your sales team and also to the contacting question.

Generate leads

Marketing automation also helps you generate leads by setting up good conversion pathways. A conversion pathway means, from the point a person arrives at your website, and studying all of the steps they take throughout, before they make a purchase or become a customer; what that pathway is, where it is narrowing, or where it is wide, and identifying where to apply improvements.

Without the data that marketing automation can provide for you, it'll be very hard for you to understand where your website is functioning well and where it isn't.

Nurture leads to MQLs

MQL means a marketing qualified lead, which is a much higher qualified lead than just lead. We'll get into this in more detail later. It means taking the first leads you get into your website and identifying the better ones from that group. Within marketing automation, you can create tailored pathways or tailored email series based on information you know about these leads that convert along those conversion pathways much higher than if they were just left to their own devices upon your website.

Manage leads

Marketing automation is also fantastic for sorting and segmenting your leads. Previously, marketing automation was just known as email marketing where you blast a list with generic content and hope for a result. Within marketing automation, you will be able to apply properties to your different contacts, identify which of these properties surface valuable leads, and then segment into different lists and be able to create experiences on your website and through your communications that are appropriate for those contacts.

Drive customer evangelism

Customer evangelism means allowing your customers to promote you, your company and your products throughout their own social networks. You want this to happen more. You want to know when it's happening so you can give them what they need in order for it to happen. It's a very powerful thing because one of the greatest ways of marketing is getting your own users and customers to do it for you. With marketing automation, again, you can identify those actions, behaviors and properties that will result in you being able to know who these evangelists are, what an evangelist looks like digitally, and understand what you can send them and how you can assist them, how you can reach out to them and discuss with them how to do more with you.

Requirements

There are five things that you need to consider before you decide to jump into marketing automation.

Onboarding

First, you must consider how long it's going to take for the onboarding. Marketing automation tools, as in the full suite of marketing automation, are quite complex and require a lot of training and time to really start to understand how powerful they are and get the benefits out of them. This is not something that you should be taking lightly. You should do extensive research into how long it will take and how complex it is to make sure that your team has the skills and has the time to be able to use this tool properly.

Extensive training

Marketing automation is not just learning off a set of tools. It is also understanding a methodology which makes them work best. You want it to be as powerful for your business and your brand as it possibly can because none of them come cheap. You need to be able to commit to deep training, not just the lightweight stuff, in order to really, really get the benefits out of this.

Importing the data

Depending on how large and how complicated your data is, it could be taking quite a while or it could be quick to import it into this new system. Depending on how many integrations are required and how fragmented your data is, it could take some time for the sales engineers to make this happen.

Synchronizing the data

This will also be a sales engineer question. Can you easily synchronize your data between the CRM you're currently using or other tools you are using that are required for your business, and your new marketing automation platform? Usually this can be done with some nifty tweaking, but you should explore when you're in the buying process, is it possible.

Learning correct reporting

One of the biggest mistakes people can make when using marketing automation is not understanding how to correctly dig into all the data they now have at their fingertips and surface information that they need to report on their successes. Marketing automation is strongly tied to delivering ROI or return on investment. Previously, digital marketing has been very difficult to count as a contribution towards business. Marketing Automation is trying to solve for this, but you need to understand how to dig into complex data sets and see where those ROI notes are.

MARKETING AUTOMATION SOFTWARE

Current platform vendors

Current big names in marketing automation include HubSpot, Salesforce Pardot, Eloqua, Marketo, and Act-On.

Every year, you'll find more and more competitors appearing, more and more platforms being built. Each of them will have something slightly different for a different type of business, a different size of business, a different industry, a different vertical and so on, so forth. This makes it quite difficult to research which one is right for you and your business. You should be using services like Trust Radius and G2 Crowd and other independent review sites to select and test which one is best for you. You should do free trials where possible, getting demos, and having extensive conversations with the sales people in these companies before you decide to commit to one. There may be one out there that's not on this slide that's better for you.

Single-function marketing automation tools

What are single-function marketing automation tools? Consider the example of Buffer, which is a social media automating tool. It automates social media through scheduling, through suggested content, and also through a visual imagery system it has called Pablo. This is one of many social media tools out there. It only works in social media. It is a very specific and very high-quality tool.

Another example is MOZ. MOZ started off as just an SEO tool. It has now become a content optimization and localization tool. These are both excellent tools, but the problem with single marketing tools is that, well, they're not connected. They go extremely deep into one part of your marketing, but that's where they're limited. If you only need one, if there is just one part of your marketing that you feel requires a deep dive like just an email marketing tool, this might be a solution for you, but you will have to understand the limitations.

Other samples are Unbounce for landing pages, Campaign Monitor for email marketing, Optimizely for A/B testing personalization, or Mix Panel for conversion funnels. You should spend your time looking into what you really need. Do you need the full suite, or will two to three smaller tools fit better into your budget and your requirements?

Pros and cons

The pros and cons of complete tools and single-function tools are probably becoming clear to you now.

Time

When you are using a complete marketing automation platform, you'll save a lot of time by pulling all of your data together in one place from all of your marketing efforts. You will have all of the channels at your fingertips. You will have a contact profile complete from where they've been active in social, which emails did they engaged with, did they arrive as a source from organic, and so on and so forth. So the amount of time it will take for you to understand the complete picture of this contact history with your business will be very easy. However, a con on that would be it can be very complicated if you've had your properties or your sources set up incorrectly or if there are flaws in the system. Or if you do not understand how some properties, combined, tell you a story. So that's where it gets complicated. However, the time saving element is usually what wins over people.

Money

A positive element of marketing automation platforms is that if it is built off of a rock-solid marketing and sales alignment strategy, you will have an amazingly effective and an efficient marketing and sales funnel. Marketing automation platforms can be expensive. However, in the long run if you look back after implementing it, the amount of work hours that you will put in and the amount of time saved for your team overall will often be a benefit that you will see. The downside is that it's rare to find the complete marketing automation platform for under \$1,000 a month if you have more than 5,000 or 10,000 contacts, which a lot of businesses would. So you need to seriously consider the balance between budget and time saved in your team.

Training

With every marketing automation platform, you're going to have a dedicated customer service rep or an account manager who is deeply knowledgeable in digital marketing strategy related to their

particular tool. They will be at your fingertips to help you out when you need, as much as you need based on the package you've bought. This can be extremely helpful to have someone to lean on while you're setting up. However, the training and onboarding from the tool can take quite some time, sometimes three months, sometimes three weeks. It really depends on the scale of what you were doing with the tool.

Reporting

With a complete tool such as HubSpot, you can easily and quickly report per channel, per campaign, quarterly, annually. It's all right there at your fingertips. One of the downsides of that is sometimes, because all the data is combined together in one single place, you may not be able to always identify exactly what caused a win and what caused a loss.

Transparency

With marketing automation software, your historical marketing data lives right there for you at any time, ready to access, ready to analyze, so that you can create predictive analytics based on your past performance. However, this open and transparent kind of atmosphere may not suit every kind of business and some places would prefer to keep their historical data more private, so permissions will be something you have to discuss.

Integrations

With these large marketing automation platforms, you can have a lot of integrations from a lot of different tools such as the single ones, like Optimizely, like Mix Panel, and so on and so forth. And MailChimp is a popular one, actually. And you can have them integrated into your marketing platforms so the data all lives there together. So if there's a tool outside of it that you prefer to use, perfect. All that data will flow in. However, if you have one of the lesser-known tools, a custom integration may not be possible. The data may not flow well or it just may be not something that the company can provide for you. It's really a case-by-case basis.

Further considerations

Time

While the full marketing platform saves you time by giving you complete overviews of contacts, single-function marketing tools save you time by looking deeply and quickly into a single part of your marketing automation. They can complement your marketing automation platforms by filling in gaps where they may not have a capability that you're looking for. Often, the complete suites will have good general functions, but may not always deep dive into that area that you need particular to your business, so you should really look into that.

A downside of this is the lack of consistency of properties across these different tools that you're using, and different terminologies in different tools. You may have difficulty, particularly when you've got a new person joining the team, training them into all these various different tools and various terminologies, all the different logins, etc., etc. It's very difficult to then pull all that data together to make something sensible for a single campaign.

Money

Single tools are often much more affordable than full marketing suites. However, you may need multiple of those and they can add up to the same price as a full marketing automation suite in the end of the day. So it is important to actually count up the cost of using five separate tools and see, could you actually just buy a single place for them all to live? Single-function tools can actually be much easier, training-wise. They go deep down, but they go into a single channel so it's quite consistent. It's quite easy to focus in and learn these. However, on the down side, your account manager for your single tool may not be able to help you understand your strategy across other tools. They will be able to help you with the one you have with them. They won't necessarily know how it mixes with the rest of your marketing tools.

Reporting

With reporting within each individual tool, you can do reporting on the function of that particular tool and it will be very detailed and very in-depth. However, trying to pull the data from all these different tools, if your email marketing is over here and your social is over here and your SEO is over here, can be quite complex and takes a trained eye to really understand how to bring that together, possibly in Excel or another spreadsheet tool.

Integrations

You may be able to synchronize the data between all of these different singular tools using a service like Zapier or another integration service. However, they could be quite messy to set up, quite technically challenging unless you have someone on your team who can do that, and may not even be possible at all.

MARKETING AUTOMATION AND CRM

Customer Relationship Management

Next up, we're going to talk about marketing automation and the CRM. In order to understand marketing automation's place in a business, you need to talk about a CRM, which is Customer Relationship Management software. Over 91% of businesses with 11 employees or more are now using a CRM, so it's more than likely that you are going to be using a CRM alongside your marketing automation. It therefore makes sense to understand how they can work together the best.

Combining marketing automation with CRM

When you are considering marketing automation solutions, one of the most important decisions will be deciding how does this combine with the CRM, because your sales team needs to be aligned with your marketing team. This is one of the core things we're going to be exploring throughout this course. The marketing team cannot live in a silo away from the sales team, especially when it comes to digital marketing. It's good to understand that a CRM cannot do what a marketing automation tool does. A CRM will not cover the tasks you will need. They may look similar, but they are built for different purposes.

A CRM is used to surface high-quality leads from what was generated from the campaigns created and run within the marketing automation tool. The CRM surfaces the information that sales reps need, which is not the same information that marketing people need. After a lead has been generated and qualified by the marketing team, it passes over to the CRM and out of the marketing software. Current leaders in the CRM space are Salesforce, HubSpot, Pipedrive, Sugar, and Zoho.

You can already see that a lot of marketing automation providers are now starting to build their own CRM tools precisely because of this.

Functions

What are the primary functions of a CRM?

Sales focused

A CRM is sales focused, meaning it caters specifically to the needs of a sales and services team. Sales and services need to create direct, one-to-one relationships with the contacts they have. In marketing, you are not dealing with individuals, usually. You are dealing with a group of people who are in your persona. So the software required is a CRM, for the sales team, because you need to know a history of detailed conversations, email conversations, phone conversations, social media interactions, and your own personal notes per account. This is not what you're going to need on the marketing side of things. The sales team need to be able to understand their own properties that they use to identify high-quality and low-quality leads. Their definitions may differ somewhat from marketing.

Alert to churn

They also need to understand behaviors such as when someone's about to churn. Churn means when someone is about to leave, or not make a purchase, or cancel an account, and so on and so forth. They need to understand when a person is about to leave and other data related to direct, one-to-one relationships. This is not what you're going to need in marketing automation.

Mass production of assets

Here you can really see the difference between marketing automation software and CRM software. Marketing automation software assists in the mass production of marketing assets. A marketing asset can be an email, a landing page, a site page, a social media message, and so on and so forth. Something that you can copy or duplicate across many different types.

Identifying segments

Secondly, marketing automation software is used to identify segments and qualify behavior within groups of people in your database, rather than looking at the individual. Then you can build tailored experiences for these groups and push them in those directions on your website. For example, when someone arrives at your website that is male or female, and you're a clothing vendor, you can show male clothes to the male visitors and female clothes to the female visitors, if that is your choice and if that makes sense for your business.

Presenting a general view

It presents a general view of your database, rather than the individual view. You will be looking at your information with regards to lead generation, lead growth, and channel growth, and campaign analysis. This means that you will not need to make the individual notes or document individual conversations like sales people will have to do in the CRM. You are looking to see if, overall, you are attracting the right kind of traffic to your website and converting them at a good rate.

Limitations

To recap on the differences between marketing automation and CRM:

- **Account management:** CRMs facilitate account management. This is for the direct sales process and the post-sales process. It's involved with the onboarding and training notes, the consulting notes. It is a very one-to-one and individual experience.
- **Sales leads and opportunities:** The CRMs are built to identify and track the highest quality of sales leads and opportunities, whereas marketing automation will qualify these up to a point, but it will not take that personalized research approach that the sales tool will have.
- **Content creation and distribution:** CRMs are just not built for content creation and distribution, which is demand generation. They cannot be used to edit your website. They cannot be used to create conversion pathways. They cannot be used to build the kind of email series that you want to build.

Synchronizing data between sales and marketing

Your CRM and your marketing automation tool rely on the information passing correctly from one to the other. This means you're going to have to make sure that the contact property fields, which could be first name, last name, email – it gets very detailed as you go on – but those are the three key identifiers that you all start with. Make sure that those fields are the same in both CRM and the marketing automation software. In this way, you will collect and organize your data effectively so that marketing and sales teams are making the right decisions with the right data. If you do not have the same information synchronizing to both, it's going to cause a lot of problems. It's going to render your sales team inoperable. It's going to make the quality of your marketing really poor.

So you need to make sure that you're capable of maintaining this consistency across the two. You need to understand that sometimes synchronizing can take a couple of minutes or even a couple of hours, depending on the tools you've chosen. That's an important thing to ask your sales engineer when it's being set up. How long does it take for the data to pass from my campaign into the CRM tool?

Before you decide on a marketing automation platform or tool, knowing what you need out of it for CRM will always be the first question at the top of your mind. Tying your efforts closely to sales will result in the greater success for your team. The loss of opportunities will drop and the quality of what you're doing will increase. That is, in a nutshell, why you need to always think about how these two pieces work together.

THE FUNNEL AND THE BUYER'S JOURNEY

Why are they important?

Let's talk about the funnel and the buyer's journey. Why do we need to talk about a funnel and a buyer's journey? Are they the same thing or are they different? We talk about a funnel in digital marketing in terms of the fact that when someone enters your website and becomes a lead, becomes a qualified lead, an opportunity and then a customer, you will not get everyone who visits your website becoming a customer. You will gradually shorten the amount of people that come out the other end.

You have two options:

- Do you drive more people into the top of the funnel?
- Do you widen the conversion rates of that funnel in order to get the same or better results?

So that's why use the metaphor of the funnel.

The buyer's journey is the research process your potential customers undergo leading up to purchase. This is when someone is at the awareness stage of a problem or a challenge, the consideration stage where they're searching for vendors to solve for it, and the decision stage where they decide where they're going to put their money and their time. What you're trying to do is merge these two ideas into a business strategy that works for you, across marketing and sales.

Inbound vs outbound

There are two main philosophies when it comes to generating business online: inbound and outbound.

Inbound

Inbound marketing talks about pull tactics, which means attracting people to your website via data-driven content. This can be blog posts, downloadable ebooks, videos on YouTube, posts on social media, and so on and so forth. It means converting website visitors with tailored website experiences, as in creating an experience for them through a personalization token such as their name or a color scheme or a design that suits them, or serving them up content they haven't seen before, rather than the same thing over and over. It really depends on your business, but it's about making it right for them. It's an informative, educational, and indirect approach. It is not a sale up front.

Outbound

The outbound philosophy of marketing is seen as the more traditional type, using push tactics. So this is a broadcast approach, showing a message wide and far and hoping it gets results. You might see banner ads. Imagine the billboards of the internet, that kind of way. You use very limited data on the buyer's intentions. So that's where the two strategies differ. One works well for some, one will work well for others.

According to Moz, who are experts in online marketing, outbound tactics result in less than 10% of web clicks, while 90% of marketing investment goes to them. So inbound is the new way of doing things, but it is so much more effective from my experience.

It's really up to you which one you decide is more sensible and more ethical for your business, but you should take time to choose which route you will be going down because they do clash in some ways.

The inbound marketing and sales funnel

The inbound marketing sales funnel involves attracting, converting, closing, and delighting. This is the complete circle. We always talk about inbound marketing with regard to resulting it in the sales. We see sales and marketing as being been tightly linked.

Attracting

Attracting means creating persona-based content for publishing on your website and promoting through multiple channels. These channels can be email, social media, promoted social media, and so on. The places they are promoted are chosen very specifically as being appropriate to where these personas live, interact, and deal with every day. Would you promote a guest blog post you've written on a website where none of your customers normally go? It makes no sense. So you use data from your marketing automation tool to understand these things about your ideal buyers.

Converting

Converting means you're offering something of value in your website to get them to voluntarily hand over data in which you qualify them with. Do you need to know more than their name and their email address? Of course, you need to know more information about them to understand if they're going to buy from you. The more information you ask from your website visitor, the more quality you're going to have to be giving back. You can't expect them to fill out a 20-page form with all of the things you need to know such as job role, average income, and so on and so forth, if that's relevant to you, unless you are offering them something so good that they're willing to trade this information to you.

Closing

This means encouraging those leads to become customers. So this involves creating a great website experience for the people visiting, but also surfacing very relevant content that they need in order to be convinced to make that sale. This can be customer testimonials. It might be case studies. They may even want to request a one-to-one discussion with someone in your team. There's all kind of things that could be possible here, but to help as in sales enablement, you need to be able to identify what that is rather than blasting a message to every visitor on your website and hoping that they're going to close.

Delight

This means going beyond the sale and encouraging upselling, cross-selling and brand evangelism. You'll know that it is much, much cheaper to retain a current customer than have to attract and create new costumers. Marketing doesn't end at the delight stage. It continues. You need to always consider the customer as someone who can potentially buy again. They come back to being a lead over and over again. You want them to be able to promote their networks, their friends, their colleagues and so on, your brand, your company, and your products. You should use the data you have at your disposal in order for that to happen.

The outbound marketing in sales funnel

The outbound marketing in sales funnel follows these particular steps.

Getting people's attention

This means broadcasting wide and far and hoping that the message resonates with someone, somewhere, sometime. This can include TV ads, radio ads, banner ads, billboards, all these kinds of message that we would term interruptive because the person wasn't reaching out and necessarily looking for the information, but your brand is broadcasting it nonetheless into parts of their lives. It works a lot for some particular businesses, and for others it's actually harmful.

Attaining a response

This means successfully getting someone to pay attention to your message and take the action that you were hoping they would take. This could be your definition, opening and clicking an email, answering a survey question, stopping by your stall at a trade show, so on and so forth.

Assessing the lead

You'll pass the information about this person onto your sales team – this can mean having actually a direct conversation with this lead, observing the bounce rate of the website after there's traffic surge from a campaign you had running on TV or on radio. You will gather all of this data that has less detailed information, but you will have your own qualification system to see who are valuable to pass on to sales.

Making the sale

This involves convincing this person to make the purchase. You might need to send an email to them. You might need to just surface a call-to-action on your website saying "Buy now" whenever they're there. Maybe a phone call.

Conversion Rate Optimization

Conversion Rate Optimization, or CRO, means identifying points in your marketing and sales funnel where there's difficulty for leads converting into marketing qualified leads and customers. You'll be able to visualize this in a funnel where it pinches inwards if there's somewhere where it is narrowing significantly. For example, if you have a thousand leads resulting in only 50 customers, that is a narrowing point and you might need to find out why that is happening. How to begin a basic CRO on this particular funnel would be: look at where it's quite narrow? You'll see it starts with 3,000, then it drops down to 2,400, which is 80%, then it drops down to 240, which is just 10%. You will look at this 10% conversion and try to understand why is it that when the person is moving from lead to marketing qualified lead that they're only converting at 10%. Is there a problem on your website? Are the calls-to-action unclear? What is going on, and how can you make that percentage wider? Can you increase this 10% to 20%, 30%, 50%?

This is why it's such a useful type of analysis. It will help you to focus in on what is not working on your website or through your campaigns, or within one of your channels and improve upon it. It's always important to take a data-driven approach when you're doing CRO projects. If not, you will end up spending time fixing stuff where there wasn't really a problem to begin with or wasting a lot of time where you're not really getting the return on investment based on the improvement you made.

What you want to do is identify the narrow points in your funnels that are having the most impact business wide. Don't just do the quick fixes and tweaks because they're easy, do the ones that are impactful across your entire sales and marketing funnel first. You can prioritize these with a PIE System: Potential, Important, and Ease. Give points in each column out of 10 and you'll know which one to start with.

Buyer's journey: Awareness

The awareness stage means that a person has become aware that they want something, they need something, and they're beginning to research it online or discuss it with people online. They might not know exactly what it is they're looking for. Imagine one day you wake up, you're not feeling very well, you don't quite know what's up, you've got a slight headache, you're feeling a little bit tired. You start to search online for what this might mean. Are you simply overworked? Are you in need of more

sleep? Are you dehydrated? So you will start this very broad, very generic searching. This awareness could have been started also by a PR effort or an ad they have seen somewhere, so traditional methods can work as well.

There will be very little specifics around what exactly is the problem here. So what you need to do is start developing top of the funnel content, or very, like, educational and broad content that these people can search for and find. You will build your SEO strategy around these pieces of content at the top of the funnel in order to attract people at the awareness stage.

At the awareness stage, they are going to be very low qualified leads because you do not have all the information you have to know, are they likely to buy from you?

Buyer's journey: Consideration

By now this person has extensively researched what they need or want, and they're quite specific about what it is. They are now looking into what solution suits them the best, what fits their budget best. What brand suits that kind of person best? This is where a good social media strategy and good product marketing and a decent customer evaluation strategy will have come into play. When these people arrive at your website, they will have a lot of information about you already, from the various places on the internet that you have been visible to them because you will have researched and found where these places are. You can then work on building a positive website experience for them based on the specific information you know about them.

Buyer's journey: Decision

By now the person is completely clear on what the problem is that they're trying to solve or what the challenge is that they're trying to get to. And they know how they want it, what form they want it in, and they know the budget they're willing to spend. This is when they now start to decide which vendor. Is it going to be you or one of your competitors? By now, with all of the information you've gathered about them and the behavior, as in implicit and explicit data, you will be able to treat them the best way possible and also give your sales team all the information they need to make the best pitch possible.

Consider someone who has a medical issue. For example, this could be a pharmacy or pharmaceutical company: awareness, consideration, and decision.

Merging the funnel and the buyer's journey

Merging the funnel and the buyer's journey is not exactly a linear experience, but it is important to know how to do that for your particular website visitors. You may not always have a linear approach, some people may go back and forth depending on if the timing was wrong, or if the budget wasn't right, or if they forget they wanted it and come back later. It could be seasonality thing. Christmas gifts, or Easter gifts, or birthday gifts, these can vary from time to time. It all depends on what kind of buyer they are, and what kind of lifecycle stage they're at.

On one side you have the funnel: attract, convert, close, and delight. And the other side you have the buyer's journey: awareness, consideration, and decision.

Awareness

When they're at the awareness stage, you want to attract them and you want to convert them. This means, bringing traffic to the website and getting them to convert, which means getting them to take the initial action you want to prove that they are a lead for you.

Consideration

At the consideration stage, you still want to attract and convert them. You want to bring them in more than your competitors. You want to convert them more than your competitors. You want them to convert multiple times to qualify them higher, and to know that they are seriously considering buying from you.

Decision

And then finally at the decision stage, you could be talking about the entire funnel. Sometimes your buying cycle can happen in a single website visit, other times it can take months. Imagine the first thing you want is to buy a book for your friend. You go to Amazon, you sign up, you make an account, you buy the book, you get the book – full cycle complete. So sometimes that entire part can happen in a single visit. It really depends what you're selling.

Developing your marketing automation solution

The final step, after understanding your customer journey and your marketing methodology, is to roll all of that into your marketing automation solution. So this is when the funnel, the buyer's journey, your inbound or outbound marketing methodology, and the capabilities of your marketing automation software, come together.

Remember, marketing automation software is there to generate leads, qualify leads, and organize your database. The way you chose to use it will be informed by either the inbound or the outbound methodology, and it will also be informed by how you deal with the CRM software integration.

BENEFITS OF MARKETING AUTOMATION

Return on investment

In a study by the Lenskold Group, 78% of successful marketers cited marketing automation systems as most responsible for contributing to revenue. This is a very significant statistic because it shows you that despite the time, and effort, and challenges it can take to set a complete system up, the money you will get back from it is 5, 10, 20 fold. This is the full marketing automation suites rather than the single tools. It's quite difficult to measure exactly how using multiple single tools contributes to ROI in a large team.

So, with the marketing automation platform complete, such as HubSpot, you're going to be able to execute campaigns, target leads, qualify leads, and proportion them at a very, very, very fast pace compared to what you could do without it.

Saving time on repetitive tasks

Marketing automation primarily exists to facilitate lead gen and lead qualification, but it's also effective for customer evangelism, and up-selling and cross-selling. One of the most useful features of marketing automation is the clone feature. Clone means copy. It means making a duplicate of a marketing asset.

Landing page

This can be a landing page. A landing page, in case you didn't know, is a single webpage where you have one offer available. It's a focal point. It is not the same as your homepage or any other part of your website. It is singular, it should not have a menu or a footer. It serves a single purpose.

Call to action

Another thing you can clone is a CTA button; CTA means call-to-action. You could have "Buy now" in multiple places across your website. An email, also a very easy to duplicate item, this is something you're going to want to duplicate for different reasons and for different parts. You can have a welcome email for example, that you'd like to send to different segments. There's no need to completely rewrite it, just clone and tweak and so on and so forth. One of the easiest examples to think about for cloning is a weekly email newsletter. You don't need to reinvent the wheel every time, you just need to copy that template, change the offers, change the copy, and send.

Site page

It's the same with a site page. Your website pages should be consistently branded, so you're not going to want create a new one every single time. You're going to clone your core designed one and just make versions of that across the rest of your website. Cloning just means you do not have to start from scratch every single time. So with brand consistency, with template consistency, in all those things, you're going to want that feature.

Testing and optimization

Another great feature of marketing automation is the ability to test and optimize. Testing and optimization is only done by roughly 20% of online marketers at the moment. It is extremely valuable practice; you have created a lot of marketing assets, many marketing campaigns, you have a large and complex website. Why not continuously improve it through testing?

A/B testing means having a core version and another version that has singular change on it, and seeing which one performs better. You can use your marketing automation software to surface one or the other 50/50 over a period of time and then choosing which one is the winner. You might be surprised by what you'll learn. Instead of using assumptions to drive your choice of copy, or choice of image, or choice of coloring, use testing to really answer those questions for you.

One thing to remember about testing and optimization is that 9 out of 10 tests will have inconclusive results. It can take a while to get up and running, and understanding what really needs to be tested and what doesn't. So don't get discouraged when you begin. Stay agile by testing.

IFTTT

IFTTT logic means, "If this then that." The importance of IFTTT is that, when you're using marketing automation you want certain things to happen when your leads take a particular action. For example, if someone goes to your website and clicks "Get a free trial," what you want to happen then is that they get their free trial and they get messaging that helps them to get through to free trial such as a free trial guide. That is an action resulting in a logic response. You don't want them to click on that button and end up getting a completely irrelevant piece of content or not even ending up in the free trial they asked for. You want them to have a consistent experience.

Critical communications

Using IFTTT logic is a great way to get started with marketing automation. Think about the critical communications that need to happen with your website visitors and also with the sales team. For example, if someone clicked on a “Call me back” button, you want a notification to go to the correct sales representative in order to call this person. You want that to happen instantaneously. These are all the little communications that you can set up with marketing automation. It is a logic-based system. You need to put a lot of thought into what happens after an action, so that you are not over complicating it and that you are not sending them down the wrong pathway as well. You need to make sure that whatever you decide to set up with IFTTT make sense, it doesn’t overlap, and doesn’t confuse the website visitor. Focus on the triggers that directly lead to lead generation and lead qualification when you’re starting off.

Reporting and dashboards

Marketing automation is also extremely useful for reporting and creating dashboards. Every day, you’re going to want to login and check the dashboard you have for traffic leads gen and possibly other matrix such as churn or customers; it all depends on what your goals are. Having dashboards at your fingertips that are constantly updating means that every day and throughout the day, the week, the month, and the year, you will know how you are performing against your previous month, your previous year, and so on and so forth.

Goal setting

The dashboard not only helps you to understand how you’re performing against the goals you’ve set; it also helps you to set the goals in the first place.

Goal setting is a critical part of a successful online strategy. On the reporting side of things, it’s very important to know how has each campaign performed, and also to really identify what a campaign is. A campaign can be a single project that you work on to create a piece of content that people access and become leads through. Or a campaign can be something that’s ongoing, such as how many leads does your weekly newsletter generate, or how many customers buy additional products due to your newsletter being successful.

Channels

A campaign definition can be quite vague, but within reports, you will be able to take that campaign and break it out into its different sources and channels and understand how each one performed. This way you will understand which one performs best for you, where you should focus your efforts on, and where you should perhaps dial down the money.

Email might be your worst or best channel; social media, Twitter, Facebook, LinkedIn, which ones are the ones you should be focusing on? These reports will help you, after you’ve decided what they involve, to make these decisions. Because you can do so much in online marketing, finding what to focus on and scaling it is really where these reports and dashboards are powerful. You need to be able to interpret what’s on those dashboards in order to understand where your weak points are, and where your strengths are, and develop things around that.

Reducing manual data entry

As you get to know your marketing automation software better, you can get more creative with what it can do for you and your team. When using marketing automation software, you don't have to spend so much time in spreadsheets anymore, downloading numbers, and trying to make sense of them. You can automatically update contact profiles. You don't need to fill in people's email addresses anymore. You don't need to scrape their information by going to their company website, that's all done for you. You can use API data to backfill other pieces of information about these contacts, and you can also have single updates across the system. If you decide that this entire group of people need to have this particular piece of information attached to them, you can use marketing automation to do that. It's extremely powerful in that respect.

In addition to the information you collect through the form system, which is basically when someone comes to your website, they have to complete a box in order to continue to the stuff they want to get to. You can also explore social media APIs such as Twitter and also services like Datanyze to enrich your existing contact data. Sometimes you will not be able to get everything you need from a form, so you need to think of other ways to do this.

Finally, with marketing automation you can not only just identify parts of contact properties that you want to update across the board but you can also apply changes across all the pages of your website with a single fix. So it is fantastic for updating and reducing the amount of manual labor required.

Maximizing opportunities

Generating leads

You will be able to generate leads in larger quantities than you ever have before by using marketing motivation software. This is through your ability to be able to clone and re-promote stuff that you've already done, or also to grow what you already have. You can use CTAs that encourage spreading a message rather than just lead generation. You have so much flexibility and options in what you're doing here.

Nurturing leads

Marketing automation helps you strike the balance between generating new leads and also nurturing your current leads better. Your sales team will never be able to manually chase up every single lead. You will also have to be able to fill in those places where they're unable to get to and try and find ways for them to go ahead and become a customer when they are unable to reach out in person.

Following up

Forbes states that 71% of leads generated online are wasted due to ineffectual marketing. This could be as simple as a follow-up email to ask someone to complete the purchase on the basket that they never paid for. You've done it yourself. Why not plug this very big hole with a simple triggered action? This is a quick and easy win for you to do. Make sure that you close the loop on your marketing campaigns by noticing through your marketing automation software where these opportunities are falling away. I'll get into more detail on that later.

Less time prospecting

Another way marketing automation software makes your company more efficient is by reducing the amount of time the sales team spends prospecting. Prospecting can take a huge amount of a sales team's time. If you already know what the sales team are looking for, and you can create a contact property based off of that list of information, you can focus your marketing campaigns through the marketing automation software on gathering those specific pieces of data. You'll be able to understand where you need to go to find that data and then develop ways to encourage people to transfer that data to you explicitly, as in actively giving it to you, or implicitly, as in observing them behave on your website, or observing them behave through analyzing their actions on Twitter, or analyzing their followers on another social media platform. And being able to fill in that profile of what the sales team need. You can then hand over a completed profile of who they need and they can just immediately call them up and start working on them.

This approach, aligning marketing and sales, helps both teams use their time more wisely. What's the point generating leads the sales team can't or won't go to, and why not focus in on the ones that they need the most?

Improving sales pipeline

This leads up to improving the sales pipeline. A great sales pipeline requires two things for marketing: quality of leads and quantity of leads. Marketing automation will solve both of these issues.

Quality of leads

The quality of leads really depends on how well you're communicating with your sales team, and also how well you are doing your market research via all the online data sources available to you. You need to have a checklist beyond demographic data. You also need to include behavioral and social data.

You can gather behavioral data not only externally on websites they're visiting, but also by having things called heat maps on your website. You can understand how a person interacts with your website and discover ways to encourage them to move along in your sales funnel. You need to know what behaviors precisely determine a good quality lead.

Quantity of leads

With the duplication of campaigns, with the ease of creating branded assets, with the ease of creating calls-to-action across your website, with using lists segmentation and persona-based marketing, you will definitely be able to increase the quantity of your leads as well as focusing in on the quality more.

Service Level Agreements

When you are focusing in on quality leads, you should base all of your strategies around achieving them on KPIs and SLAs, Key Performance Indicators and Service Level Agreements. The Service Level Agreement is your agreement with the sales team on how many qualified leads they require in order to hit the annual company goals, month-on-month. The KPIs are what you in the marketing team know directly result in satisfying that sales level agreement. This is how you will build your strategy. By using KPI and SLAs as your driving force you will most definitely improve your sales pipeline with a higher volume of leads and a good quality of leads.

Let's get into more detail about the Service Level Agreement or the SLA. The successful implementation of marketing automation software and strategy relies on a transparent relationship with the sales team. The marketing team needs to constantly be in conversation with the team in order to understand what is working and what is not. I've often seen places where the teams are very, very separated and that lack of communication results in very slow lead gen, and a very bad quality of lead at the other side. As long as there are conversations happening together and realistic goals set, the amount of benefit that will happen for the company is enormous.

The marketing team can become quite distanced from the leads and customers generated simply because they are looked at as a group of numbers on a dashboard. The sales team will have more one-to-one conversations. In this way, both teams can offer information to the other. Marketing can talk about the traits, behaviors, and personas they're delivering to sales to give them context. Whereas, the sales team can give real-life examples so the marketing team can add a human face to the campaigns they are running. Matching up quantitative and qualitative data from the marketing and the sales team is the best way to go about making the most efficient sales and marketing pipeline that you can get.

Increasing up-selling and cross-selling potential

You'll be able to figure out behavioral triggers that can result in more sales from your already existing customers and users. You can track them as they are dealing with your website and understand what the triggers are that cause them to move on and buy more. What you want to do is identify these experiences and try to cause them to happen again and again. In this way, you're optimizing your sales funnel.

Customizing and personalizing

One of the hot topics in online marketing at the moment is customizing and personalizing your website to your different visitors.

- **Using names:** This can be as simple as using first name and last name in your emails and on your pages, to using the website name or the company name they come from across other communications.
- **Identifying location:** This can also be identifying their location and serving up content or information relevant to where they are.
- **Identifying browser language:** It can be identifying the browser language they're using, if it's German or Spanish, and serving up content in that language.
- **Identifying lifecycle stage:** It can also be about the lifecycle stage they were at, and serving up something appropriate for them. If the person has already done a free trial, already done a demo, already requested a sample, then it's time to remove those calls-to-action and focus on more buyer-centric CTAs such as ready-to-buy, and so on and so forth. Lifecycle stage means, are they a lead, a qualified lead, an opportunity, or a customer?
- **Identifying "already read":** You can also have the "Has already read this content" criteria. For example, if you're on a blog, you might want to surface up a post they have not read before, rather than showing them one they already have read. This gives them a positive experience.

All of these are just suggestions rather than things you must to do. It is actually infinite what you can personalize when it comes to marketing automation software depending on the data you have gathered.

Remember those form fields, the API data and other background data you've gathered? That is what will determine how much you can personalize. So when you're thinking about a customization and personalization strategy, not only do you need to think about the relevant content surfaced, but can you even do it in the first place?

CONTACT PROPERTIES

Why are they so important?

According to Marketo, a 10% increase in lead quality can translate into a 40% increase in sales productivity. That's huge. Why wouldn't you want to chase that?

Contact properties are part of the foundation of the setup of your marketing automation software. Choosing which properties you want to record that are relevant to your business are crucial. They go beyond your name and your email. Those are the two basics that you need to identify account separately in any case.

They can also be life cycle stage:

- Subscriber
- Lead
- Marketing qualified lead
- Sales qualified lead
- Customer

But there's an infinite amount of data that you can collect, that you can identify as a contact property that is right for you. The point about increasing your sales productivity is that you need to understand which pieces of data are related directly to a qualified lead, and focusing your campaigns around gathering that data.

Subscriber

Defining the early stage of the contact property will usually be called just a contact or a subscriber. This is the stage preceding lead. You will have very little information about the unique identifier, which, would be email and name. Name alone would not be sufficient because people can have same name. So email address and name is your critical basic contact subscriber information. They are most probably at the awareness stage of the buyer's journey, and they're what we would describe as TOFU, or top of the funnel, as in top of that funnel we looked at earlier.

Lead

So, depending on what kind of terminology you use, you may call this a lead or a prospect. You've collected some more basic data beyond the prospect/subscriber level. They are also probably at the awareness stage. They have the potential to become sales ready. So they're not sales ready yet. They still must satisfy what marketing and sales have agreed are the characteristics of a lead. This is why the conversations with your sales team are so critical. What you decide is a basic lead is directly informed by what sales works on.

Marketing qualified lead

Next you've got the higher qualified lead, marketing qualified lead, or MQL. This means that the entire checklist of required contact properties, to make them high-value potential to be a customer or user have been satisfied. They're at the consideration stage, as in they've gone past the awareness stage and are now understanding the problem they're having or the challenge they're having and are out to find more information about it.

So to recap, in the marketing automation software, you will mostly deal with the subscriber level, the lead level, and the MQL level.

Sales qualified lead

Next, we have what goes to the sales rep, the SQL, sales qualified lead, or the opportunity. This means that the marketing qualified lead that you transferred from marketing automation software to the CRM is accepted officially by the sales rep owner that it has been assigned to. If your marketing automation has been set up well, with good contact properties, you will probably be generating a lot of these SQLs or opportunities. These people are still within the consideration stage of the buyer's journey.

Customer

Next we're going to talk about the ultimate conversion that we're all looking for, getting the customer. Define your customer as having completed the legally binding contract, such as a purchase. They have transferred money to you to buy something from you, or they've signed an agreement to subscribe to your service. Think about paying for Netflix or paying for Spotify. That is a binding agreement. They are officially a customer. Value has exchanged hands, and this is now your opportunity to create closed-loop marketing after sales. As I'd said before, marketing doesn't stop once they become a customer.

What does the sales team need to know?

So, what does a salesperson actually need to know when you're talking about developing contact properties?

Develop the data

You're going to be responsible, as the marketer running the marketing automation software to develop this data, to understand what data is required, to know what actually can be found out before you hand a lead over to sales. Some requests for information might not be possible at all. You'll need to be able to understand how APIs work, how to scrape social media sites, and how to understand the behavior in your website in order to inform that data. We'll get into more detail on that later.

Evolve the buyer persona

You're going to need to evolve your buyer persona as they develop or create new ones. The buyer persona is the ideal buyer. It is an image of someone that you considered to be the exact, perfect kind of person that will result in being a customer. It not only contains demographic information, but other behavioral and informational data that informs you more about the context of who this ideal buyer is. The sales team are going to need to know this persona in-depth and they're also going to

need to understand the information you can provide on that persona so they can make the most informed decision they can.

Time delay

One of the challenges with marketing automation in CRMs when you're transferring data from the marketing team to the sales team, is the time delay and synchronization. You need to discover how long it takes for that information to transfer over so that the sales team are aware when more information is being transferred and to wait, or how often they should refresh their screen in order to see the data populating. This way they'll know how to reach out to the people at the right time, rather than having this mismatch of data occurring. It's happened before, where someone has actually opted-out of email, the information was not synchronized in the right time, and then they received an email – this is a very negative experience and, in some places, illegal. So understand how long these things take. Refer to your sales engineer and your support teams in order to understand these time lags.

Data problems

The next issue with contact properties are problems with manual data entry and platform permissions.

Manual data entry

Manual data entry is not always a good idea. What you always want is your forms or your APIs pulling in the data rather than someone going in and manually changing data because they may insert information that is not synchronizable across a platform.

Platform permissions

Also, regarding platform permissions, if you have it wide open with everyone being allowed to edit anything at any time, it may result in a lot of problems across the website. So you need to carefully consider who is allowed to have permissions to do email, who's allowed to have permissions to edit the website, who's allowed to post to your social media accounts.

These are important decisions to make to make sure that the system you have set up, based on the methodology you've chosen, is working smoothly. Within my team, to solve for this, we have a dedicated marketing operations team that ensure that the setup of the system and the information that goes in and out of it, synchronizes correctly with the CRM and smooths all of those holes.

SALES ENABLEMENT

How can marketing automation help?

Sales reps can gain visibility into how prospects or leads interact with sales documents they send out. This is just part of the plethora of things marketing automation can do for you. Imagine how powerful it is to understand how far somebody watched a video of your free trial. Imagine how important it is to know where on a page a person stopped scrolling when they're reading about your products available. These are insights that the sales team can find extremely useful when they're reaching out to this lead. They'll have the context required to make a powerful sales pitch.

You need to understand how you can identify when a person is sales ready, the pages that they go to or the pages you should suggest to them, and also the content you should be sending them. And then inform your sales team of the experience they've had, such as an automated email saying, "This contact has visited the pricing page and spent 30 seconds or two minutes or 10 minutes reading through it." The longer they spend could indicate that they're sales ready or not. You need to get into your data and understand what the right triggers are and set those up to automate and scale them.

Knowledge sharing and transparency

Remember that knowledge sharing and transparency between the sales and marketing teams is critical to the success of the technology when used to assist them, the marketing automation platform, and the CRM.

Knowing a lead

Marketing understands leads as personas, as groups of people as data. The sales team understand leads as individuals, one-to-one conversations. It's critical that information from the sales team regarding what helps them make a sale, as in sales enablement, so that you can develop those assets, those properties, whatever it is, in a timely fashion to help them make a sale. These marketing assets can be emails and email sequences, social media posts, social media images, public profile recommendations, or canned responses. You will develop what they need to just copy it, personalize it, and go. It's a huge time saver and it's been written by the marketers, so it's got the right branding and the right tone.

Preparing the sales team with notifications

One way you can prepare the sales team is through notifications. When you're about to launch a campaign, it can be extremely useful to send the context of the campaign to the sales team in advance: 24 hours, 48 hours, an hour, whatever works for them most. This way, they have the context of where the lead is coming from when they arrive in.

Let's say you wrote an eBook about Facebook. When they come in as a lead after downloading this content, completing your form, the sales team then can start the conversation, going, "Oh, I see that you are interested in Facebook. Would you mind telling me more?"

Contextual sales and marketing are where marketing automation can make things very powerful.

Follow-ups

You can also advise the sales team on good follow-ups to have for someone who has just become a lead. This can be an email template again, or it can be a phone call; there's many different things it could be. But you can give a set of three things a salesperson can do. This will mean they don't spend time wondering what to do. You can give everything to them in advance through an automatic notification, pre-populated, where you can edit in the background.

The sales team will also be able to watch if you are working towards your SLA. You can have automatic report notifications sent daily, weekly, or monthly, whatever your sales team prefers. So they can see, are you able to hit your goal? How has it been going? Are you at 150%? It's very important to be honest with your teams so that you can redevelop the goals if they are struggling to be hit, or if you're excessively hitting them week on week.

NOTES

LESSON 2: MANAGING AND NURTURING LEADS

IMPORTING CONTACTS

Lead management

Importing your contacts is an exciting time and it's important to get it right from the get-go. What you need to look at is compliance, eligibility, and engagement level of your current contacts.

Spam laws

One of the first things you will probably use your marketing automation tool for is email marketing. In that case, you need to immediately be reading up on spam laws and opt-in processes. If you do not read up on these laws, you may be breaking them. You need to have an opt-in and opt-out process in place so that people know they're choosing to hear from you. If you do not, there are certain places where this has become an actual offense, and it's only a matter of time before other countries catch up. At the end of your emails, you also need to have subscription types and an unsubscribe option at all times. Make sure that after you've imported your contacts, you've made sure that your email marketing is safe.

Analyzing contacts

After you've imported your contacts, analyzing contacts for sales potential is the next step.

Let's take the example of an airport hotel. What kind of person would they be looking for to market to? The three personas we see here are Chris, Maria, and Frank. You can see that I have marked no, yes, and maybe. Chris has been disqualified because he is unlikely to use an airport hotel any time soon. Maria, on the other hand, is highly likely to use the service, and Frank has the potential and should be kept in the loop. As you've imported your contacts, you will probably then discover that people like Chris may be considered unengaged or ineligible. An ineligible contact is someone who is just never ever, ever going to be a customer and also has no potential to be an evangelist for you. Marketing to these people is pointless. If they will never become a customer or do something useful for you, you should not be forcing your message to them.

Removing unengaged and ineligible contacts

An unengaged contact is slightly different from an ineligible contact because their contact properties actually match your profile of who could be a valuable customer. However, if they just do not engage, you cannot do anything with them. So they should also be wiped from your list. Including unengaged and ineligible contacts on your list for the sake of having a large list is a bad idea. It actually just ends up obscuring your metrics and making your reporting inaccurate.

A clean list is a happy list

Focus your marketing on the people that matter. Don't waste your time attracting the wrong kinds of people. Base your contact properties on the information your sales team are telling you and also the behavior you've seen on your website and the engagement with your brand in public spaces. This will save everybody time and it will keep you within legal boundaries.

Buying email lists

Just to remind you of the downside of buying email lists. Your sender score will suffer incredibly if you continue to do this. When you import a list that you have bought rather than use a list that you have built up through content and through social and through other means of, like, for example, organic traffic, you increase the potential of spam complaints and unsubscribes. When you're sending emails and high numbers of people are marking it as spam, the sender score will start to drop. If your sender score starts to drop and your email deliverability goes down, you will end up on blacklists rather than on whitelists.

Basically, you have no idea if people on paid lists are actually good for your business or not. This is why the best quality leads are driven by inbound practices, such as those you have targeted and earned through providing quality content and pulling their email addresses in optionally rather than forcibly.

ONLINE TRACKING

Why is it important?

Next up we're going to talk about online tracking. What's so important about online tracking? URL tracking is the process of adding unique identifiers to your destination URLs. If you aren't tagging your URLs for tracking in either analytics or another third-tier system, you're losing out on a lot of helpful information.

Tracking URLs

A destination URL is the URL where you want people to go to, the www.company.com or anything else. It's the link you put out there in your tweets, in your Facebook posts and so on. It's the place you want people to go to. However, if you don't add on specific information at the end of that URL, you won't know where the people came from once they arrive at your website.

Now you can do this not only for Twitter, you can do this for organic, for direct, for email, and for referrals. The power is endless. What you need to do is make sure that you have consistent naming conventions across all of your tracking URLs so that you know where everything is coming from and the numbers you've assigned to it. Make sure that you understand how to structure your trackers consistently on a per channel basis.

Tracker link builder

You can use a service like Google's tracker link builder. This makes it completely easy to break out each step that you need to include. It goes from URL to campaign source, campaign medium, campaign term, campaign content, and campaign name. It's extremely detailed. Depending on how granular you want to collect the information, you could fill out of those fields, or two to five of those fields. It really is up to what you need to count in order to report on the success of the campaign at the end.

Event tracking

Event tracking is a little bit different from tracking URLs. This allows you to track when a user performs a specific action on your website. With Google Analytics event tracking, you can see the interactive event and the non-interactive event. The interactive event is something like that click on a

button. They took an action and then something new happened. A non-interactive event could simply be scrolling on a page or watching through a video. This is interesting information to gather, if you want to know how engaged people are or if the page that they are on engages them at all. Where are they clicking away? Where are they dropping off? Why are they not taking that action that you hoped they would take? Event tracking will tell you all about this.

KPIs and SLAs

So, tracking can be applied to so many different things. It applies to the people coming into your website and from where they are, and when they're on the website, what are they doing? You're recording all of these different things, but the question is, do they matter to your key performance indicators and your service level agreement? There's absolutely no point in tracking all of this information if you cannot use it for actionable insights to take steps towards satisfying your agreement with the sales team. Every piece of information that you are gathering needs to have a purpose, so make sure what you decide to track matters.

Customizing the visitor experience

Where online tracking can help you out in your marketing automation is informing the customized visitor experience that you're creating. Consider smart content, where you serve up two different versions of a web page or an asset of some kind with information specific to a particular persona or segment or life cycle stage. Tracking can help you understand what the details are on that asset that will result in the call to action being taken.

Validating high conversion points

You can also use online tracking to record and validate high conversion points. Before, we mentioned about identifying conversion pathways, as in the best places where people are converting into valuable leads or opportunities, or even customers. What you want to do is use tracking to identify those points and be able to multiply them or improve their abilities to convert.

With tracking, you can find out exactly what they are. You can also use online tracking to record and validate high conversion channels. A channel, as we've said before, is email, social, paid, organic referrals, and so on and so forth. It can also be referred to as a source. When you're creating your tracking URLs to identify high converting channels, you need to create those naming conventions mentioned before.

As you analyze the effectiveness of these channels with your tracker links, you can look at it per day, per week, or per month. And analyze the visitors coming to your website from these channels and seeing which ones really do drive the best results and which are lower. Then you can decide to strategize around, will you put more effort into improving the weaker ones or maximize the ones that are high performing already. You can cross reference your data with lead score in life cycle stage in order to make that decision.

LEAD SCORING

Developing a lead scoring model

Lead scoring tells you the value of the leads you are generating based on the criteria you've decided with your sales team. These criteria are what I've referred to earlier as the contact property data. The

information you are trying to gather about your contacts, about your website traffic visitors, about your leads that qualify them to be a potential customer.

Example

Here's an example of a lead scoring model you could follow. You have two axis: fits ideal criteria, and engagement level. Remember when we identified unengaged and ineligible people on your email list? There is no use in having all of the ideal criteria and yet none of the engagement. Equally, there's no point in having all of the engagement and yet none of the criteria. It just doesn't work. What you want is a top right hand square, someone who completely fills your ideal criteria and who is highly engaged.

That's not to mean that someone who is less engaged but fits the criteria or has missing some of the criteria, but is very engaged, cannot also have high potential. But you need to prioritize what you're asking your sales team to focus on, so lead scoring model will help them to do that.

Buyer personas

We'll look at our three personas again, Chris, Maria, and Frank. Remember, the example we were looking at is an airport hotel and how would they be marketing? We're going to give Chris a score of six because he didn't really fit what they were looking for. We're giving Maria a high score because she ticked almost all of the boxes, maybe lacked a little bit engagement. And Frank is given a score of 12 because, whilst he ticked some of the boxes in engagement and ideal criteria, he isn't quite there in terms of priorities because it's not sure whether he will or will not make a sale.

Attribution reports

You can use attribution reports to understand where your buyer persona was touching your website before they led up to a sale. This can mean a list of the pages they visited or blog posts they read, or other pages that you have available on your website before they converted. You need to identify what the conversion is before you visit the support. Is this conversion "became a lead"? Is the conversion "became a marketing qualified lead"? Or is the conversion "became a customer"?

Once you understand the goal of the report, then you can create that report, pull in the data from all your pages and see where are your personas going and what they are doing in order to make a sale.

Social media

You can use social media to improve your lead scoring. API data is available from services such as Twitter, Facebook, LinkedIn, and other social media sites which is publicly available information that you can scrape in order to inform yourself more about your persona. Social media is extremely useful for this because people voluntarily provide information about themselves. It may not all necessarily be true, but will give you good indications due to sample size of what you might be looking for.

Consider how you will extract data from social media and other APIs to match with the data you've already got from your leads directly and see if it helps you improve your lead score.

Sharing the buyer persona

You need to share your buyer persona with your sales team. This means sharing the details of who they are, what they do, and where they go on the internet that create a high scored lead. You can

use a template and share it with your sales team. Populate it with all the information you know so far, so that they always have the contacts current, who they're exactly selling to.

Contextual marketing

Contextual marketing is extremely powerful and adding that context to sales team conversations means a generic conversation suddenly turns into a specific conversation around a person with challenges and problems that you can solve for them. Remember that when you're updating or adjusting the buyer persona to consider it the sales team in these conversations. Equally, they might be the ones that come to you and say. "We need to update this buyer persona, the people who are buying from us have changed."

You need to keep iterating it every six months to one year in order to make sure the target is an exact as it can possibly be. If you keep marketing to something that's far too generic and broad, you will not see the results as you will get from targeting a particular person. It's important to stay agile, use multiple data points, and frequently refresh them.

SEGMENTATION

What is database segmentation?

Segmentation is critical to understanding how to deliver the right content to the right people at the right time. When you have a website with a marketing automation platform behind it, you will be able to create that smart content I mentioned earlier, as in surfacing one version of a web page versus another to the right kind of people in the right way.

This is why correctly segmenting is so important, and segmentation done well is based on contact properties done well.

Gathered data

You can only segment based on data you have gathered. That sounds obvious but it's true. You may have ideas around what you would like to segment around but if you have not actively gathered that data, and if that data's not accurate, you are not going to be able to do good segmentation.

Aim of segmentation

Segmentation will inform how powerful your email marketing will be. It will inform how well your personalization across your website will be. It will even inform how well you perform on paid social media ads.

Try to understand from the beginning that what you aim for needs to be achievable:

- Can you get that data?
- Why do you need to segment it in the first place?
- What will this segment do?
- Why do you need to have that segment?

Again, it's about choosing the right things to gather data on and create, rather than spending time on things that are not related to your goals.

Example

Consider this example of basic segmentation by life cycle stage.

We have three personas but also the three life cycle stages, because each persona can have a different life cycle stage. Your segments basically have data in common. For example, Foodie Frank is on the list because he has chosen from a form that he is interested in researching new ways of cooking food. Gina is in a separate list because she has clicked that she is on the website to understand about gluten-free recipes. And Diabetic Didi is in another list because she has clicked on the drop down that she's interested in the website because it tells her about diabetes. You will not want to serve the same content for someone looking for information on diabetic food, as you would someone looking for gluten-free food – it doesn't make sense. And then Foodie Frank, well, he's just interested in food in general. This is why you need to separate them out and why they make sense.

Segmentation is very much web designing and delivering custom content, custom website experiences that work best for your particular visitors at their particular life cycle stage. For example, Frank is a visitor. He'll get general content about what he's looking for. Gina, who's an opportunity, will get more specific things about what you're offering but not a full on sales pitch. And Didi will get items that will help her spread the word about how great your company is.

Life cycle stages

So what differentiates your life cycle stages? Well, this will be very individual to each business. You can't just take what another company is doing and apply it to yours. Throughout your data gathering, your tracking, your reporting, your analysis, looking at historical data, looking at how your companies are performing. All of these things will culminate in telling you exactly how a person arrived at your website, which source was the best, and what were the best things to make them convert down that funnel.

It goes from awareness all the way down to advocacy:

- **Awareness:** PR, TV, and radio
- **Consideration:** Social ads, reviews, and the blog
- **Purchase:** An e-commerce store in a website
- **Retention:** A community forum or a FAQ section
- **Advocacy:** A blog, again, in social networks, and the newsletter

This is not the only way to do it. This is an example of how you can do it, but it shows you all the potential formats of content that can assist in an inbound funnel.

Hyper-targeting

Hyper-targeting segments and using multiple contact properties can be very powerful if you know exactly what you're using them for. They must be built around a very specific goal in order for it to work well. You can combine as many contact properties as you wish to create extremely targeted segments for your specific campaign goals. It's really up to you what those could be but make sure that they're tied to your KPIs and SLA.

Distinct segments

Make sure that your segments are actually segments. Make sure they are actually distinct from one another. Make sure that there is not so much overlap that they may as well be the same list. Your list will be based off the explicit and the implicit data. Again, explicit is the information directly given over by this website visitor, implicit is the behavior you've observed and the information you've gathered externally, which combined, give you the insight into who they are and why they do what they do.

Your segments will be taking those distinct groups of people who are particular leads with particular characteristics that should be built around your persona, or in the very case, help you identify how to improve your persona.

Complex segmentation

As you become more and more accustomed to segmentation, segmenting by life cycle stage and segmenting by persona, when you've understood how that all comes together combined, it is exceptionally powerful to create that very, very efficient funnel from start to end. You will know exactly which channels work best for you. You will know exactly where money is best spent. So this is how it all comes together and improves the revenue of your company, the ROI of your marketing.

Segmentation properties

Your segmentation properties could be:

- **IP location:** For example, if you are a restaurant, location is critical to the success of your business. You need people to actually go there.
- **Browser language:** If you are offering language services, translation services, courses, there's a plethora of things browser language is relevant for. You will need to know that and segment by that in order to have effective marketing.
- **Age and gender:** These are the more traditional demographic data. However, if you are selling toys, you may want to be targeting married couples with young kids instead of single people – it just makes sense.
- **Browser type and version:** This might be important if you are giving interactive data or selling software, because you will need to make sure it's performing well on all supported browsers and versions, so that would be critical segmentation data for you.
- **Device:** Segmenting by device can become very important over the next few years. You need to discover if this is relevant to you in order to serve up the right version of your web page or at the right amount of content per device, per browser. You're going to have to consider screen size, screen resolution, and if some browsers run some scripts and some don't. It's a very important one to explore.
- **Source:** You might find that people coming from email as opposed to people coming from social media requires slightly different kind of marketing, and are more likely to convert if they have a slightly different experience.

Again, you're going to have to experiment with all of these different segmentation possibilities to understand which works for you. This is just a list of some of the most popular ones out there.

WORKFLOWS

What are workflows?

Workflows are a series of actions that you've designed, that you push a list of contacts into. The easiest example of this is a series of emails. This series of emails can be five, ten, however many you want with specific delays of time in between. Let's say you want a delay of one day or a week or whatever amount of time you want, in between each one.

A workflow is built with a specific goal in mind. You should not build a workflow if there's no purpose to it. Again, thinking about your key performance indicators or KPIs at all times.

Example

For example, you would build a workflow to convert your leads into MQLs. You would put in those emails, links to places, and content that I know is very likely to convert the lead to an MQL. Consider your conversion funnel and having used all my data from your online tracking to know which offers, which content, which type of tone and branding work, then push that lead on to being a marketing qualified lead. Your workflows will serve many, many different purposes.

Double opt-in

One of the most common uses for workflows is to set up the double opt-in. Remember how important it is to keep your list clean and to make sure that people have actually opted-in to hearing from you. This is to protect your sender score. The double opt-in means putting people into a workflow. For example, they hit a sign-up button. They entered their email address. You trigger an email from that workflow to them to say, "Are you sure you want to hear from us?" They click yes, and they are doubled opted-in.

Your workflow has achieved a goal for you!

Closed-loop campaign

Another excellent use of workflows is to create the closed-loop campaign. The idea is that you never not contact the contacts in your data base. You always design a purpose and an experience for them, so they are in contact with you in a meaningful way at all times. You don't just drive traffic to your website and then just sit and let them drop off. You can use workflows to make sure they are enrolled in certain communications or experiences at all time, and design those workflows very well to give them a positive experience but with distinct calls-to-action that result in good leads for your sales team.

Campaign reminders and follow-ups

Let's say you're running an event or running a webinar. You want to make sure that in the week before, and the day before, they are reminded to sign-up for this webinar on time. The details of the start time, the day, and also to share it with their network. You want to have an add to calendar link in there.

Moving to next lifecycle stage

Using workflows to make sure that you have timely communications for events such as these, that are time sensitive, is a very handy way to get started with them. You can also use workflows for stamping contact properties. In fact, it's one of the best ways to do it when you have defined the actions that a person takes to form a lead to an MQL. For example, a lead requesting a free trial is an MQL. You need to use that workflow to remove the term lead and replace it with the term MQL. Then your CRM is able to pick up a ping that this is now an MQL, and send it on to a sales rep.

Completing abandoned actions

You can also use the workflow to encourage people to complete an abandoned action. Remember that stat where 71% of people are losing out in business opportunities simply because they don't follow-up? Well, the abandoned basket is one of the most famous ones.

Here, you can basically trigger this email to go off if someone has put items in their cart or they're partially filling out a form, and then they just stop for any reason, they're distracted or they lost their WiFi. There's many, many reasons. It may not be that they've changed their mind. You want to send them a follow-up email to remind them, "Hey, are you sure you want to stop this action?"

This is amazing what it can do for your revenue.

Broadcasting the brand

You can also use workflows to broadcast your brand and message if you need to. For example, someone downloads some of your content or reads your blog; you are able to follow-up with them with a link to say, "Hey, thanks for downloading this. Remember, you can always find it here." That's a good user experience. You want more people to hear about this content so you include a mail-to link, let your colleagues know.

This is a great example of how you can turn a campaign into more than just a dead end.

Re-engaging with the brand

You can use workflows as well to get quality contacts to re-engage with your brand. Again, what you want is people who have stagnated a little bit. They're not entirely unengaged and they're not ineligible, but you want to communicate with them in some way with interesting content or interesting messaging, to see if they are still interested in engaging with you. So you use a workflow to identify, let's say this person has not opened an email in more than one month. Enter them into the specific workflow with the goal of reactivating them. That's another creative use, using workflows to support customers.

Supporting customers

Another great idea is, if your customers require particular information after they have completed their purchase, this is a great way to use them. What you can do is, if someone has bought a complex piece of machinery or they've signed up for a service that requires a lot of steps for set up, you can enter them in a series to receive the guides that they need in order to be successful with their newly acquired product or newly acquired account. This is excellent support that will take away the amount of frustrations customers have when they're trying to call you asking for answers. You will already have delivered everything they need right to their inbox.

Updating contract properties

Remember changing the life cycle stage. You can generally update any contact property by using the workflow, or delete a property, or synchronize a property to a CRM. Basically, make sure that the people you are entering in the workflow are the correct people in the first place. You can also use workflows to clean up your data base.

Cleaning your database

Remember how important it is not to be emailing people that are ineligible or unengaged, or who are constantly marking you as SPAM because it will harm your sender score.

Also, having ineligible people in your data base means that your reporting will be incorrect, because you're reporting on a bunch of people that don't matter to your business. Enter them into a workflow where they are cleaned of the property lead and you will never email them again.

Sending critical sales team notifications

This will help your sales team to be more efficient. So, if a contact satisfies all of the criteria required to be an opportunity, then they can immediately get a notification with a link to that person's contact profile saying, "Hi. This person has just become eligible. You should reach out to them."

NOTES

LESSON 3: GENERATING AND COMMUNICATING WITH LEADS

DATA-DRIVEN MARKETING CAMPAIGNS

Generating leads

You're going to use your marketing automation software to create data-driven marketing campaigns. So how do you generate leads with marketing automation? When you're designing your data-driven marketing campaign, you will go back to the SLA, back to your monthly goal or your weekly goal.

You need to generate 100 marketing qualified leads based in Washington around the Foodie Frank persona by the end of July. The time sensitivity and the location, it's completely up to what your business needs. This is just simply an example of what you might be aiming for.

Example: Checking the conversion funnel

Here's an example of the conversion funnel. You've got 1,000 Foodie Franks arriving on your landing page from a Facebook ad about free passes to a cheese and wine event in Washington, because your campaign is about getting this guy at your event and you need 100 of them. The Facebook ad campaign resulted in 48 Franks filling out the form requesting a pass to this event and 37 requesting a demo of the cooking equipment.

Frank becomes a marketing-qualified lead when he requests a demo of the cooking equipment. You can pass these 37 MQLs onto the sales team to then run the demo and try and convince them to buy. Looking at that number 37, you roughly need to run three more successful Facebook ads to generate 100 marketing-qualified leads.

Because all of this information is tied into your marketing automation software and you can check in on a daily basis at the progress, you'll know that you should probably stop your Twitter and LinkedIn campaign and your email because Facebook is doing pretty good.

Average conversion rates per channel

Remember to check your average conversion rates per channel before you begin a campaign to understand truly where the best conversions are coming from per persona. You might find that Diabetic Dee Dee performs better in social media, but specifically on LinkedIn, as opposed to Frank who performs quite specifically well on Facebook. It's important then to be able to target your messaging to each of those on each of the social networks.

Equally, email might perform particularly well for one type of campaign compared to another. For an actual event in real life, it might perform very well. For a virtual event, it might be weaker. Perhaps you should explore other options.

Understanding conversion rate per channel will help you really refine the kind of promotions you put behind each of your campaigns. It will remind you not to use channels that just don't perform for you, in which case you're going to save a lot of money and a lot of time. This will drive up the ROI of your campaigns.

Improving underperforming pages (and maximizing high-performing ones)

You should also be using campaigns to improve underperforming pages and maximize high-performing pages. A campaign does not always need to be a contained box of a set of assets driven to a persona to generate leads. A campaign can also be an ongoing background thing such as

through email marketing in general or optimization in general and each month you're counting how many improved conversion rates you've got from that resulting in marketing-qualified leads.

Improving underperforming pages

For example, you could design a campaign around improving your underperforming pages. This could be something you will run for three to six months as opposed to a single one-off event. Use your marketing automation software to collect the data required to know if this campaign is successful. Look at the conversion rate of the page before you start and at the end. What actions did you take to improve the performance of that page? If 10 people a month were converting on that page and now 50 are converting a month on that page, that's a massive uplift. That's a great campaign. You didn't have to go and create new stuff, you just improved what was already there.

So that's also an important thing that marketing automation can point out to you, widening the funnel in places where it was quite weak.

Maximizing high-performing pages

Maximizing your high-performing pages, on the other hand, is also a strategy you can apply as a campaign. This means instead of sending people to the underperforming pages, instead, redirect them or focus them more on the ones that do extremely well and see if you can make them perform even better. Analyze the sources of traffic to those high-performing pages and try to understand why is it that people from organic are converting so much better than people coming from referral traffic? What can you do about that? How can you strategize around that?

Again, record the conversion rates of the page before you apply changes before and after, and then you'll understand exactly how you've been improving it and what caused that behavior in the first place.

These insights, the explicit and the implicit data will make your marketing much more powerful and within your marketing automation platform, you'll be able to have a history of those results to know where you made the improvements.

SOCIAL MEDIA MONITORING AND SCRAPING

Monitor your brand on social media

This is not simply just logging into your own personal accounts.

- **Observe public discussions:** First, there is observing public discussions of your brand on Twitter through hashtag and conversation keyword searching. You can use a tool like Tweet Tech to do such a thing. It's important to keep tabs on how the public is discussing you and you can automate that by basically red-flagging or pinging yourself whenever any negative comments or troublesome comments appear. This can save from time from scrolling infinitely through Twitter trying to see how the public is feeling about you.
- **Use social media inbox:** One of the features of marketing automation platforms is social media inbox. You can basically observe social media through the lens of your contacts list. As in, when you are looking at social media channels within your marketing automation platform, you will actually be able to see your leads, marketing qualified leads, and customers having conversations online in between all those other conversations that you're monitoring. It's extremely useful to see how they're perceiving you at the different lifecycle stages. What

are the words they're using? What's the language? What's the tone? You can use this to inform your buyer persona.

- **Download conversations:** Next, you can actually download these entire conversations from different platforms to analyze and record. This is a great way to do market research. You don't have to go out and there and take in surveys from the street. You can actually just take those conversations automatically off the internet, populate them into a doc using, "If this, then that," logic. If this happens here, this is the result. If a person talks about you, link it to a spreadsheet. That's just one example of how you can use it.
- **Monitor competitors:** Next, you can monitor conversations about competitors to find opportunities to be helpful. This is a great way to come into a conversation against the competitor, provide helpful answers and content, and attract that person over to becoming a lead for you. Beware of being excessively negative or mean-spirited on social media. Instead, always aim to provide something useful and get involved in a helpful way.

Again, if you been observing these discussions correctly and observing the correct keywords, you will find opportunities to social sell quicker than anyone else.

Listen to your customers

You should absolutely listen to your customers on social media. You can use keyword streams and mentions to follow them and follow the conversations they're having.

- **Increase evangelism:** You will find opportunities to increase evangelism. For example, if you see someone talking about this great blog post or great case study they found in your website, you can jump into the conversation and say, "Hi, here's that link that you might want to share." This will really help with people's perception of you being timely and observant, which is very important on social media, as well as giving them what they need, when they want it, at the right place. It's also a great place to deal with frustrations quickly.
- **Deal with frustrations:** Again, another stream you can have open and automatically aggregating is dealing with any negative comments, or questions, or fears, or frustrations around your brand, your service, or your products. It is very important to answer these promptly. You can have email notifications set up if they're that important to you to make sure that the right people are being pinged to reply to these messages on a timely manner.
- **Sell at the right moment:** You definitely want your salespeople to know when someone's said something on social media that flags them as sales ready. If you see that they are researching your prices or that they're telling their friends that they're seriously considering buying, it's a good time to notify your team or to jump in and take that opportunity.

Build relationship with influencers

One of the great things about using social media monitoring and scraping is to identify industry influencers and then start building a relationship with them slowly over time. You can automatically add them to a list using the system of IFTTT, if this, then that. If a person tweets about this topic, then I want to have them added to my twitter list. This is not an opportunity for you to automatically message everyone with a DM with the same text, with a generic message. This is more about gathering people you have identified as extremely valuable and useful as an influencer.

An influencer is someone that your personas listen to. You want to get in contact with as many of these as possible, build useful, beneficial relationships, so you can leverage those relationships later.

Scraping social media and listening can help you identify them faster and in greater volume. Again, you can monitor keywords and hashtags to find opportunities to interact with these influencers in a meaningful way before your competitors do.

Get alerts for events

If you want to follow a particular event that's happening in your industry, for example, cooking, if that's relevant to you, you can follow the big events going on around in the areas that are relevant to you or around the world, if location isn't an issue, in any language you like, and then use the opportunities coming in to answer questions of people attending that event. You can jump right in there on time and talk to them, solve their problems, give them a solution.

In order to be even more ready, you can have pre-populated messages ready to go. You can track your influencers at the events they're speaking at around the world or wherever they are, webinars they're participating in, and so on and so forth. You'll start to build out a very specific list of the keywords that you should be tracking, the hash words you should be tracking, and the influencers you should be tracking. This will inform your marketing so much and it's extremely powerful and, again, it will all live within social media tool of your marketing automation platform.

And if there's any crossover between these contacts and contacts already existing, well, that's an even more powerful conversation.

Respond quickly

Social media monitoring is exceptionally useful for responding in a timely manner. All companies these days are expected to have some form of social media presence, and on top of that, as well as just having a presence, they're expected to respond quickly and promptly. They're expected to respond on time.

People have very high expectations about what companies should deliver to them in the public spheres online. You should definitely have a game plan in place when nobody is actually available online. Ideally, you would have someone managing this at all times. However, if you cannot, you can do something like pinning a tweet at the top of your timeline automatically at the end of every day when it's past 5pm in your work hours, in your time zone to say, "Hello, we're offline right now and we're going to be online again tomorrow at 9am," or something to that effect.

SOCIAL MEDIA AUTOMATION

Scheduling social media posts

This means strategizing what messages and links do you want to post ahead of time by a day, a week, or even a month, if you're very productive.

- **Research hashtags, mentions, and timings:** You should research what hashtags, mentions, and timings you want. It's important to research the hashtags, first of all, that you want included, then what app mentions you want within them, if it's appropriate to the network, let's say if it's Twitter, and also what time of the day is absolutely the best time for engagement.
- **Post at the right time:** Based on the data you've been gathering, and the tracking URLs that you've been using, you will have a good idea of the time of day and day of the week is best for each social network. You should not assume that posting on a Tuesday at 11am on

LinkedIn will have the same effect as posting on Facebook a Tuesday at 11am. Social media scheduling tools allow you to be consistent with your posting which is absolutely essential for building up a following on social media.

- **Be consistent:** One of the easiest ways to fail at social media is not being consistent. Using a scheduling tool to send out your messages that are researched, exact, and with appropriate hashtags, is very powerful for increasing your reach and engagement on social media.

Post to team's social networks

Another thing you can do is post your entire team's social networks. You can use a service called GaggleAMP. This means you're not just using your company accounts, but also your employees, as advocates of your company.

This won't suit every single company. However, it could be great to see if they even want to opt in, in the first place.

Imagine you've got 1,000 people in your company, or 10,000, or even 500. They all have social media presences and their job and their work is a big part of their life. You could invite them to be part of the GaggleAMP and have conditions in place, where you would agree not to send stuff out to their social networks at all times, once a week, once a month, only for special occasions. It means that you don't have to keep chasing your team or your company to tweet something out that's happening. You can do it for them. You can automate it. It's very powerful stuff if you get it done right.

Respond quickly

When we're talking about responding quickly and in person, never just copy and paste replies. If you simply copy and paste an answer to two different people, this will be perceived negatively. You are not dealing in person with the person who contacted you. You need to be very careful not to do this with automated messaging.

It can be useful to have automated replies to follow people quickly and in person. For example, a good use of that is your vacation responder in your email. You want people to know that you're not available. It makes sense. You can have contact details for someone else that they can call, too. You can have the contact details in the vacation responder of the person they can refer to instead of you.

In general, on social media, you don't really want to post an automated message or a copied and paste message. You don't really want to use the "if this, then that" logic to send messages out there in public.

RETARGETING

What is retargeting?

Retargeting is based on collecting email addresses. The first reason you want to collect the email address is that you need the unique identifier. Name is not enough, because many people can have the same name. However, an email address will be unique. On top of that, email addresses are critical for retargeting.

Paid social media ads

Retargeting means reaching out to people already in your leads database and trying to convert them on paid social media platforms. For example, promoted LinkedIn posts, promoted tweets, promoted Facebook ads. Without this email list, you will not be able to do that. It will result in a better-paid experience because these contacts have already opted into hearing from you.

As you know, the main social media networks are pay-to-play spaces. If you want to effectively target people, no longer is posting on your own company's profile enough. You're going to have to use paid social in some form or another.

Having a good, healthy email address list is the best way to start with that. How retargeting works on Facebook and Twitter, for example, is with custom audiences and then lookalike audiences. Your custom audience is, basically, the email list that you uploaded. Lookalike audiences, on the other hand, are not necessarily in your database, but have characteristics similar to the list that you have uploaded, i.e. your custom audience. This is extremely powerful because it allows you to surface content to people who are not yet in your database that are highly likely to want to be in your database, that want to hear from you, that want to hear about your products and services, that you are solving for.

This shows you just how important not using bought lists are, why generating your own lists through content marketing and through inbound marketing is so important. If you start spending money on ads on Facebook and Twitter that are being directed to people with characteristics completely irrelevant to you, it's going to fail and cost you a lot of money.

Banner ads

Another reason you want you to use retargeting is for banner ads. This is a more outbound technique that can also be effective for some businesses. You need to understand what a pixel and a cookie are. Banner ads run off of pixels. This is a snippet of JavaScript placed on the website browser, resulting in the same thing as a cookie. This means that when the contact is visiting other parts of the web, you can have agreements in place with content vendors to surface particular ads or particular pieces of content when they're arriving.

Match rate

What you need to be careful of with banner ads is the match rate. The match rate means what is the quality of the leads you're getting from people clicking on these ads? This is why custom audiences and lookalike audiences in the pay-to-play platforms are so good because they identify the characteristics so well and so specifically. Banner ads are quite the shot in the dark.

However, based on your analytics, you can decide if it's the right move for you. If you do decide to use that route, remember, ad-blocking software is increasing and it may result in your banner ads rendered entirely useless.

Content syndication

Content syndication is the process of pushing your blog, your website, or your video content out into third-party sites, either as a full article, a snippet, a link, or a thumbnail. You need to have researched a target list of websites in order for this to work well. If you just let the content syndication partner advertise your content anywhere they like, that's not going to be targeting where your persona is.

You need to know where your persona goes and then inform the content syndication partner what you would like them to serve.

Tracking URLs

Use tracking URLs to make sure that you understand which content syndication partners and which websites are working best for you. This way, you can trim off the fat and make sure that you are targeting only the places that work for you. Examples are Outbrain and Taboola.

INSTANT NOTIFICATIONS

Prevent customer churn

There are a lot of useful communications that you can use workflows to automate and make sure that you are plugging all of the holes where your leads may be falling out. It can also be very helpful in making sure that you retain the customers that you have.

Here are a bunch of actions you may wish to automate, as in, send a notification email to the account manager or sales rep in your team that's responsible for this contact.

- The person has not renewed their subscription.
- They have not made a regular purchase that they do with you on monthly.
- They have not shown up at scheduled calls with their account manager.
- They have not asked to schedule a call for a long time.
- They haven't logged into their account in a long time.
- They've not updated their profile recently.

These are all red flags that you need to discover are relevant to a customer leaving or not, or a user leaving, or a qualified lead becoming unengaged. You can make sure that the right people get notified at the right time to prevent this from happening.

Critical sales-ready conversion events

On the other hand, when you're talking about leads not yet customers, you want to talk about critical sales-ready conversion events. These can be checking how many times they have viewed the pricing page. Let's say they've been viewing it 10 times in the last week, well, that might be a strong indicator of interest. Has visited the product page frequently. Do they want to know more? Is this behavior telling you that? Has been asking questions about your company on social media, often engages with your emails, has read your case studies, has added some items to the basket.

All of these will be tracked in your marketing automation software, in your landing page, and web page tools. Also, you will have your tracking URLs active around places on the web. So you will have all of the information to know that you can build segments around these and then notify your sales team through a workflow that these people are taking these actions. Then your sales team can decide which of these actions are actually meaningful to a sale and focus in on them. As you understand more about what a sales-ready conversion event is, you can, again, trim it down and focus on them or even expand them if you discover more.

Identify high-quality leads

On top of all of the data you gather through forms or through data enrichment services, you may have to identify your high-quality leads beyond the contact properties. The form data is not always accurate. People can lie. People can put in a fake email address.

How do you deal with that? How do you combine initial lead scoring with behavior? Is your lead scoring accurate or not? How do you refine your understanding of a quality lead over time? Well, the qualification of leads doesn't stop with setting up a static definition of an MQL or an opportunity.

Data is not always clean. Sometimes you need to dig further. Sometimes you need to add in more analytics. Sometimes you've been reading it wrong the entire time. You need to be open to the fact that you will constantly be improving and health-checking the data in your database and your definitions of leads, marketing qualified leads, opportunities, and so and so forth. You should regularly analyze your high scoring and high converting leads and determine all of those actions I just mentioned, that result in high-converting events. These will change over time and you should be able to keep looking into which ones are working best for you.

AUTOMATED UPDATES AND REPORTS

Keeping sales team up to date

You know you need to keep the sales team up to date on conversion rate events and customer trend events. Now, you'll also want to keep the sales team up-to-date on relevant marketing activities.

Don't be under the impression that the sales team isn't interested in what you're doing. You should have a very tight relationship with them at this stage. It is critical that you keep them in the loop on how you're progressing towards your goals. This will help both sides understand that the work you're doing is or is not resulting in the right number of leads to match the service level agreement.

Keep conversations alive

Keeping conversations alive will help identify and solve problems and challenges earlier rather than later. Having that transparency is very healthy for the relationship and will result in better communication and, therefore, better working of both teams. Your marketing automation tool will be able to set up generated reports that are sent to a team group whenever you want. It can be daily, weekly or monthly, but it should be sent at some time, so they can see your progress and give them push when it's timely.

Match data

You can match the data you generate from your marketing automation tool with what the sales team are generating in their CRM tool. Is there any discrepancy in the amount of leads you're generating compared to your marketing automation tool, compared to the customers being generated in the CRM? Are they both in line or are there discrepancies? This could indicate a problem in synchronizing of contact properties. It could indicate a problem in your definitions. It could indicate many, many things. The point is to constantly communicate and allow those reports to be sent to the teams.

Follow up on leads

Another area that you want to keep the sales in the loop about is to follow up not only with the hot leads, but also when a lukewarm lead has now become ready. Of all the leads you generate, you will never get 100% buy rate. However, over time, you may find that some leads become ready for sales. You can understand this better by knowing the average buying cycle of your customers. As in how many weeks, how many months, how many days did it take for them from becoming a lead to becoming a customer? If they've got the right criteria and the right engagement, it could be just a question of other criteria you don't know about such as a personal event in their life.

Don't discount them until you're absolutely sure you've qualified them out of buying. Use automated emails or automated notifications to ensure your sales team are reaching out to these in a timely manner and really disqualifying them or not.

Notify team about campaigns

Notify the sales team about campaigns that are upcoming and also that have just happened. This will give the sales team the right context for these leads, so they know exactly how they converted, why, and how recently. It gives them a chance to have their pitch ready and tailored by the time these leads start coming to them.

NOTES

LESSON 4: ANALYZING AND OPTIMIZING LEADS

BUSINESS OPPORTUNITY DETECTION

Brand awareness

One creative way to segment your database is to segment out the brand evangelists and create a brand awareness campaign. The brand evangelists can be your actual customers or simply highly involved leads that are not yet sales ready or will never be sales ready but are just really passionate about what you do and how you do it. It could be that they just simply can't afford what you offer or you can't offer it where they are. There's many, many reasons around it.

However, they're highly positive about what you do and what you sell.

Identifying evangelists

Every engaged contact has a purpose. You need to define your own unique brand evangelists. Again, define means choosing the contact properties and the behaviors that tell you these are evangelists. Assign a metric to your brand awareness campaign. How many leads were generated from this? You're going to use these evangelists as knight pieces, as broadcasters. You know that the evangelists themselves aren't necessarily going to buy or buy more. However, their network might because they listen. In social circles, you are more likely to buy from someone who recommended something to you than seeing an ad.

At the end of your campaign, you'll understand three analytics if quality leads were generated from this type of brand awareness campaign or if you should communicate with your evangelists in some other way.

Contacts about to churn

You want to be able to detect contacts about to churn. Churn means they're going to opt out of email, they're going to stop buying, they're going to stop communicating with you, they're about to leave you in some form or another. Again, start defining through the contact properties, through the data you have about them, the behaviors that determine a contact is about to churn. Have they stopped visiting your website or do they not bother opening your blog post notification emails anymore? There's many, many different things depending on the company you're in.

Create a list of those people, as in create a segment, and decide on what kind of treatment they will receive; as in, how are you going to personalize and customize your website and your content and your art reach around these characteristics and what can you do to prevent them from turning? And then calculate how many leads in sales were saved or generated around this action.

Unengaged contacts

Another campaign you may want to run before assigning an un-engaged contact to permanently removed from your list is to run an un-engaged campaign before completely deciding that they are gone. Do not put your ineligibles into this because ineligible means they shouldn't be there; they haven't opted in. This is for the un-engaged, people that at one time were correct for the company, they fit the criteria, but now are not but you still have the contacts.

You can create a workflow, or anything else that you're re-targeting campaign on social media, to see if you can get them reengaged again. Will they start clicking through? Will they start commenting? Will they reach out to you? Will they buy something?

Make sure that whatever you design for them has a clear goal. What will tell you that they have become engaged again? Is it clicking on the email? Is it tweeting back to you? What is that action they take that you can now say these are no longer un-engaged? They're engaged. And if they remain un-engaged throughout then you should consider removing them from your data base entirely.

Closed-loop marketing

Remember that you should never stop contacting the people that are actively engaged in your database, the high-quality leads, the customers, all of those. There should never be an end to your communications. There should always be something in place.

Always have an action to take. That means always have a call-to-action that brings them to somewhere else, and on that place, have something for them to do and just keep it going, keep them on your website, keep them in your content as long as you possibly can. This will help you to maximize your lead generation capabilities. You always have a purpose and it's all automated so it is working for you. If you have a 'click to Tweet' in every automated email you send out, not that you should, you should find out if that is worthwhile, this means that tweeting will be happening at all times, you'll be mentioned, hashtags that are correctly tied on are there, it's very powerful.

REPORTING METRICS

Your homepage dashboard

What is it you should be reporting on monthly and annually to your company to determine have you been successful in your marketing or not?

When you log in every day, your primary dashboard will show traffic, leads, and customers. This serves as a high-level overview to see am I trending down or trending up or stagnating at any point this month. You should overlay this on your previous month to see are you beating it, are you actually growing, or are you staying the same, or are you dropping off?

Monthly reporting metrics

Monthly reporting metrics that you should be looking at will be: total marketing reach grew by X%; overall website visits are up by X%; I generated X new leads, up by X%; marketing brought in X customers, up by X%. And you base that on previous month and the comparable month from the previous year. For example, seasonality may affect how you compare December to November or how you compare September to August. For example, a challenge I have in Europe is that many people take vacation throughout August, so comparing my September to my August is not a very good idea. However, I can compare my September to previous September on my leads, traffic, and customer generation and I'll know am I doing better or am I doing worse.

Quarterly metrics

Next you have your quarterly reporting metrics. These will look quite similar to what your monthly reporting metrics are. However, you'll be comparing them against your annual service level agreement, rather than just growth on previous month. What you want to see is in an entire quarter, what is really happening deep down that wasn't affected by just a blip in a month; what is the real trend going on here, what are the big projects you can do to make sure that these trends continue to rise?

The month-on-month reports will tell you campaigns you need to run that are on a daily basis that are more reactive. The quarterly reports will inform you more on what are the things that really need to change in our marketing to bring it up to the next level.

As well as reporting in the actual numbers, don't forget to also report the best performing campaigns, what the types were, what was different about them, and also notable projects by team members.

Stay agile

The point of reporting so regularly, for checking your dashboard every day, for telling people your achievements and accomplishments, is to stay agile. This means being light on your feet, being willing to change, and being willing to see the data for what it is. If it's telling you that you need to change direction, you need to propose changing direction.

- **Monitor the dashboards:** Watch those dashboards carefully. Talk to your sales team when they have concerns about the reports that you're sending them, if they're going down instead of up, if they're serving some personas but not another. Be willing to know that you

might need to do something different, experiment on a new marketing channel, or even to stop doing things that are actually harming your marketing.

- **Reflect with sales team:** Discuss how your marketing goals are set. Do you feel they are fair? Have you been able to achieve them? Are you excessively achieving them and do you need to raise them or are they too difficult and you need to reevaluate what you're doing?
- **Think long term:** Always have long-term optimization projects in the works. Everything in digital marketing changes quickly; how people use websites changes quickly, devices are new every single year, different screen sizes, different screen resolutions, different possibilities, new ad blockers. If you don't have constant optimization projects in the works, such as for SEO, search engine optimization, or CRO, conversion rate optimization, you're going to fall behind on your competitors and lose out on easy wins.

Check both quantity and quality

When you're doing your monthly, quarterly, and annual reporting, keep an eye on the quality as well as the quantity of leads being generated. It's quite easy to only talk about sheer volume, but per channel, you should also look at the quality. This will be the lead score in model you have. Are you generating a lot of people with +15 points or are you generating a lot that are 0 to 5 points? It's very important on a per-channel-basis to understand the lead quality, what the benchmark is, and making sure that you're meeting or surpassing it. If you start to have your quality of your leads dropping, that's a big concern and you need to address it.

Report by page

Your website may have a handful of critical pages, such as the home page, the buy page, the sign-up page; it depends on what your website involves. You can narrow down to the home page or others that are key to your business and report on the metrics at a page level.

This can be:

- How much traffic did that page get this month?
- How much of that traffic converted to lead or customer or MQL?
- What was the quality of those?

That page should have A/B testing running on it constantly to make sure you're always running the better performing variation. Remember, an A/B test is an original version and a version with a change to see which one performs better.

Monitor search rankings

On a quarterly basis, you should also be looking at your search rankings, as well as your competitors, to see how your SEO efforts are comparing and also to make sure that you didn't get hit with a search engine penalty. Record the keywords you were aiming for, monitor your position for these keywords, do competitor analysis, develop your competitor strategy, and finally, check for Google penalty if you suddenly see a severe drop in rankings. You can use a tool like SEMrush for analyzing if this has happened.

Record CPC

Another extremely important thing to record is your cost-per-click on ads. Ideally, what you'll be developing is a cost-per-lead model, but initially, you may start with cost-per-click. Strictly control

your paid ad spend and stay within your budget limits. Not every platform has a spending limit and also using a metrics for just cost-per-click is not the best. How do you know that your money is generating actual leads, as opposed to just clicks?

Make sure you're able to calculate the difference between a cost-per-click and a cost-per-lead so that you're staying within your budget and getting quality leads out of it, and not just quantity. You can optimize your ads using a service like AdEspresso for Facebook to serve the best performing ad at all times in a bunch of variations. This will also reduce your cost-per-lead.

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