



# Your Definitive Guide to Marketing Automation

A beginner's guide to marketing automation to help you reach your marketing goals and increase your company's revenue.

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# Introduction

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When done effectively, marketing can transform a company's fortunes because it encourages customers to buy from you, rather than you having to sell to them.

Unfortunately, in many smaller businesses where time and resources are limited, marketing is often haphazard, sporadic and doesn't deliver the results that it could or should.

Because buyers now demand an immediate response and ever higher levels of service, growing numbers of small to medium sized enterprises (SMEs) are turning to marketing automation software to prioritize and perform repetitive marketing tasks that previously might not have been done at all.

With a marketing automation system in place, you can do 'more with less' – sending emails automatically at just the right time, monitoring social media continuously and gathering information from visitors to your website 24/7, without human involvement.

Not only does this claw back time and resources you can use more strategically elsewhere, it also allows smaller businesses to punch above their weight, levelling the playing field so they can compete against larger companies.

That is why 86% of marketers believe that marketing automation improves their lead management and nurturing, while 78% of high-performing marketers identify marketing automation as a key contributor when it comes to improving their revenues.

Marketing automation enables small businesses to deliver messages and content at the right time. [Accenture Interactive found that 38% of companies using just-in-time marketing have grown their annual revenues by more than 25%.](#)



# What exactly is marketing automation?

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MARKETING AUTOMATION

ESSENTIALLY DOES TWO THINGS.

1

It builds ever more detailed profiles about existing and would-be customers by capturing relevant information about them from multiple sources, such as social media, physical and online ads, their phone calls, emails and website visits.

2

It then uses this detailed data to ‘intelligently’ target individuals with appropriate, relevant content and messaging that changes to reflect their responses or behaviours.

This whole process is managed using ‘workflows’. These are set instructions given to the software about who will be contacted and when, the content they will be sent and what the next action will be if they respond in a particular way.

# The benefits of marketing automation

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Because marketing automation enables you to take prospects and customers along a highly personalized path, you can create a much more dynamic and engaging process based on someone's actions and responses at specific 'trigger points' along their sales journey. This is the complete opposite of standardized high-volume email blasts, which not only fail to connect with would-be buyers, but can significantly damage your business reputation.

- ✓ Boosts customer lifetime value
- ✓ Shortens the sales cycle
- ✓ Improves lead qualification process
- ✓ Grows sales conversion rates
- ✓ Encourages subscriber engagement
- ✓ Increases email open rates and click through rates (CTR)
- ✓ Strengthens marketing effectiveness all round
- ✓ Reduces marketing overhead
- ✓ Harmonizes sales and marketing processes
- ✓ Multiplies sales revenues
- ✓ Decreases drop-off rates
- ✓ Delivers superior service levels

## The benefits of marketing automation

(continued)

So, while marketing automation may sound rather impersonal, it is actually one of the most user-friendly marketing techniques around. And, by using a powerful and sophisticated product like Act! Marketing Automation, a smaller business with limited resources can enjoy significant and demonstrable benefits.

**The term marketing automation is often used interchangeably with ‘email marketing’,** but it is much more than this, because it encompasses many different marketing platforms that include CRM and social media.



## **Benefit: More effective lead generation**

Using marketing automation software, you can generate new business leads much more easily and effectively because time-consuming tasks happen rapidly and automatically in the background.

At its simplest, this could involve publishing a piece of content on your website that then encourages opt-ins to your email list. Once set up, this process sits behind the scenes, producing leads on its own without any hands-on intervention.

With Act! Marketing Automation, it is also possible to 'score' these leads to prioritize the most interested and engaged prospects for follow-up at an optimal time by your sales team.

60% of businesses using marketing automation say the quality of their leads improves.

[Lenskold Group "Lead Generation Marketing Effectiveness Study"](#)

80% of marketing automation users saw an increase in the number of leads using marketing automation software, and 77% had an increase of conversions.

[invespcro.com](https://www.invespcro.com) “[The Rise of Marketing Automation](#)”

### **Benefit: Harmonize your sales and marketing**

Some firms may worry that a new marketing automation system won't fully align with their existing sales or CRM system, so that information won't flow smoothly between the two. That could result in sales opportunities being missed and poorer service levels to customers.

With Act! Marketing Automation, if you are already using Act!, this won't be a problem, as the two are designed to work perfectly together so data flows between the two without the need for reformatting, or re-entering. Not only does this save time, it also avoids the possibility of introducing errors into information.

With Act! and Act! Marketing Automation, you can feed nurtured leads to your sales team seamlessly, maximising the return on your marketing investment while minimising effort.



## **Benefit: Automate customer on-boarding and retention**

According to Gleanster Research, 50% of your leads are qualified but aren't ready to buy from you on day one, but, according to additional research studies, 80% of these qualified leads will buy from someone during the following 24 months. This underscores the importance of lead nurturing and the importance of connecting to prospects during their buying journey.

Even more so when the Annuitas Group has shown that 'nurtured' leads make purchases that are nearly 50% larger than those who buy immediately!

Act! Marketing Automation's ability to create unique 'conversations' with would-be buyers enables you to stay on their radar, maintaining their interest until the moment they are ready to buy.

79% of leads never turn into sales. Lack of lead nurturing is often the most common reason for this.

MarketingSherpa

35–50% of sales go to the vendor that gets back to a would-be customer first

Insidesales.com

## **Benefit:** Improve customer retention rates by keeping service levels high

A [Harvard Business Review](#) study has found that prospects are seven times more likely to buy from you, *if* you respond to their enquiry within one hour. Yet, over 60% of companies don't do this.

Even when you know the importance of responding in a timely fashion, trying to manually monitor and manage incoming information requests effectively is virtually impossible for most SMEs. Attempting to do so would require someone either having to stop their other work or be dedicated to that task full-time. Neither of these is an option that most small businesses can justify, given time and budget limitations.

This may mean responses might only happen when someone 'gets round to it'. As a result, service levels decline and sales drop off.

Using marketing automation, on the other hand, allows you to stay on top of things because you aren't reliant on someone 'picking up the ball'.

### **Benefit: Understand customer and buyer behaviour better**

Because marketing automation lets you collect data from multiple channels, such as social clicks and page views, you can develop really deep insights into your buyers' behaviour, which you can then use to modify and adapt your products and services, as well as the way you market to them.

So, if you aren't using an appropriate platform like Act! Marketing Automation, you probably lack the data you need to effectively predict your buyers' future needs and what is driving them.

### **Benefit: Measure marketing effectiveness and impact**

When you have accurate metrics, you can construct a comprehensive and detailed 'intelligent' picture of what works in your marketing and, perhaps most importantly, what doesn't. This means you can then base decisions on what your target audience is telling you, rather than just flying blind.

This allows you to target them at a much more personal level at just the right time in their buying journey.

### **Benefit: Improved business all round**

Having a marketing automation system creates a centralized hub of real-time information about prospects and customers.

This has obvious benefits in helping your sales and marketing teams work more effectively – so your team can focus on more strategic activities that move the business forward.

But a marketing automation system has wider benefits too, since it can be used to perform other routine tasks automatically. For instance, you can circumvent many of the time-intensive tasks related to hiring by using marketing automation to nurture potential employees along a personalized recruitment path, thereby improving candidate selection and reducing inefficiencies and hiring costs.

Marketing automation can also be used to improve your PR outreach, by using email templates and journalist databases to promote a product launch, for instance. Or, to reduce your administration burden by automatically sending reminders and project reports, as well as distributing event invitations and collecting registration information from attendees.

Marketing automation on average drives up to a 14.5% increase in sales productivity and a 12.2% reduction in marketing overhead.

Invesp The Rise of Marketing Automation

# Key features of marketing automation software

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THERE ARE CERTAIN CORE COMPONENTS TO MARKETING AUTOMATION SOFTWARE: EMAIL, WEBFORMS, LANDING PAGES AND CRM

**Email** This is often the primary delivery method in any marketing automation system, so much so that 'email marketing' and marketing automation are often used interchangeably.

However, because it is 'channel agnostic' and encompasses many different marketing platforms that include, for instance, CRM and social media, marketing automation is actually much more than a glorified email system.

Given its importance, any marketing automation product must have a robust, but still flexible, email system at its heart.

**Web forms** When people fill out forms on your website, they are starting the process of connection with you that should lead them to become long-term customers. Webforms that aren't clear or fail to collect and pass on data as intended are effectively costing your business sales.

**Landing pages** Similarly, a landing page is often one of the first points of contact a prospect has with your company, so it too has an important role to play in capturing prospect information. So, your marketing automation system must be able to set up effective landing pages, designed to capture and handle what could be a flood of information.

**CRM integration** Once your marketing automation system has collected information from and about prospects and customers, this needs to flow seamlessly through to your sales team so they can assess new leads or pursue those ready for follow-up.

If data requires reformatting or changes before it can be used, your lead nurturing process will be slower and less efficient.

# How to choose marketing automation software

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For SMEs, it is imperative that you choose a marketing automation system designed to meet the requirements of the smaller business. Select one that is primarily intended for a larger business and you will probably struggle to set up, learn, manage and administer what is an expensive system, bloated with unnecessary features you'll never use or need. This offers poor value and is likely to be a costly drain on your budget.

On the other hand, if you choose one that doesn't have sufficient power, it can't scale up as you grow. That means you will have to start again, choosing a system that does. To ensure neither happens, Act! Marketing Automation is designed to be powerful enough to meet the immediate and ongoing needs of a growing business, but without all the unhelpful complexity.

## How to choose marketing automation software (continued)

### A cost-effective scalable solution

For smaller companies, Act! Marketing Automation offers a feature-rich yet cost-effective three-tier solution, from the core functionality of 'Select', through to 'Complete', our most popular package, and then our most comprehensive and sophisticated option, 'Advanced'.

This means with Act! Marketing Automation you can add extra functionality as you evolve and grow. You may only have a few hundred people in your database right now, but with Act! Marketing Automation you have the power to handle many thousands as your business expands.

### Customer support when you need it

Even with a user-friendly system like Act! Marketing Automation, we realize there may be times when you need a little help.

For those occasions, our customer support team is there to answer your technical questions and navigate you through any issues.

Our experts also provide a 'concierge service' to help you get up and running sooner.

You can also call on our highly-trained Act! Certified Consultants<sup>1</sup>. As specialists, they can help you get the very best out of Act! Marketing Automation by ensuring it remains tailored to your exact requirements.

### Ease of use

Despite the obvious benefits, some smaller firms worry that marketing automation will be too difficult or complex for them to use. So, perhaps not surprisingly, 86% of marketers say 'ease of use' is the most important criterion when choosing a marketing automation platform.

We have developed Act! Marketing Automation with that in mind – a powerful business tool that can be set up without complication, then used with ease.

## How to choose marketing automation software (continued)

### Effective CRM integration

To be effective, your sales team needs access to up-to-date customer information, particularly when out in the field. So, it is crucial that your marketing automation solution plays nicely with your CRM; information is shared between the two, in real-time and without the need to reformat or change any data.

Because Act! Marketing Automation is a feature in Act!, you get a complete picture and much greater control over your marketing.

23% of leads that go through automated workflows have a shorter sales cycle.

Market2Lead





# Deliverability considerations

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Increasingly tight regulation means every reputable company must pay extra attention to deliverability by ensuring they follow best practice and meet the requirements of CAN-SPAM, CASL and GDPR regulations. The marketing automation platform you use must be regularly updated to reflect any new rules and regulations. With Act! Marketing Automation, you can always be confident that you will remain compliant.

With a comprehensive range of tools for spam analysis and managing opt-outs, as well as access to our expert consultants, you will be able to achieve excellent delivery rates while protecting your sender reputation.

# Conclusion

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Marketing automation is key to the future success of many small businesses because it enables the regular consistent contact with customers that research shows is so vital to converting cold leads into sales.

However, while there are many marketing automation solutions available, few offer the package of cost-effectiveness, scalability, and power without complexity that SMEs require.

Act! Marketing Automation does, enabling them to maximize their marketing opportunities so they can seamlessly grow without compromise.



## What is Act!?

With proven CRM and powerful Marketing Automation, the possibilities are limitless. Act! provides the ultimate toolset to build relationships, maximize engagement, and drive business growth.

CRM & Marketing Automation built for small & midsize business success.

To learn more about Act! visit

[www.act.com](http://www.act.com)

Or call us on

**886-873-2006**

Connect with Act!



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