

DEPLOYMENT IS *NOT* THE FINISH LINE

SUCCESS WITH MARKETING
AUTOMATION BEGINS AFTER
IMPLEMENTATION



More and more companies are adopting marketing automation, attracted by the ever-expanding variety of capabilities.

The latest technologies provide features that read like a marketer's wish list, including email marketing, social media tracking, prospect nurturing and marketing analytics, to name a few. There's no doubt that, wielded effectively, marketing automation can improve your data health, suggest new SEO strategies, and drive traffic, brand loyalty and digital revenue.

Automation offers businesses such a drastic competitive advantage, in fact, that marketers who opt out of it are risking brand irrelevance.



Yet while many enterprise companies know marketing automation can deliver benefits, they aren't sure exactly how to produce its magic.

They know that adopting the right automation solutions can drive their marketing initiatives to the next level. But instead of laying the groundwork and devising thoughtful strategies to capitalize on their investment, they become so focused on the results stage of marketing automation that they rush through the deployment stage – a stage critical to determining long-term success. As a result, they fail to implement the right steps and wind up with a system that only delivers a fraction of what it could, leaving them with wasted budget and unmet goals.

THE TRUTH IS...

...intelligent marketing automation is a layered, multi-levelled process with almost unlimited potential – and to fully maximize that potential, marketers must adopt a calculated and patient approach. To reach fiscal goals and build a foundation for long-lasting brand success, marketers must commit to thoroughly completing each stage of implementation.



DEPLOYMENT

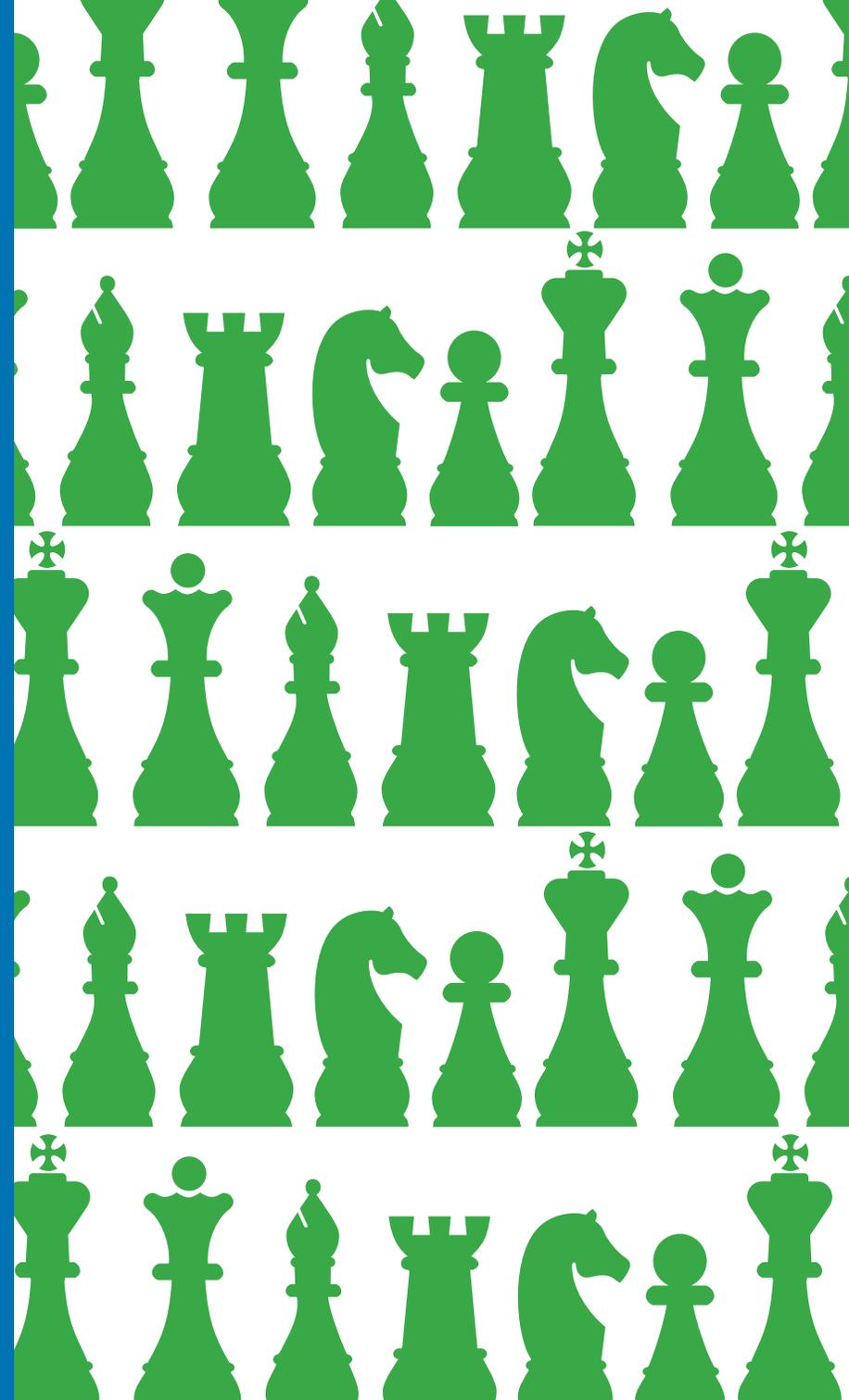
RESULTS

STRATEGY

Given the investment a marketing automation platform represents, most businesses cautiously evaluate the technical features of each solution before taking the plunge.

While that's wise, businesses should first evaluate their own strategies and needs. Today's marketing automation platforms offer so many options that it's easy to wander off-track or invest in features you don't need if you haven't previously drafted a clear and detailed strategy map. Unfortunately many enterprise companies are so eager to launch into their new tools that they plunge ahead without articulating their goals.

The first step is remembering to keep your strategies customer-centric. To select the right platform, you'll need to synchronize your marketing, sales and executive teams and define the goals and expectations for each; staying customer-focused in all of those discussions will keep your agenda on track and avoid short-sighted individual team priorities from running your deliverables off course. Once the teams have reached a consensus on your overarching automation strategy, only then should you move onto researching appropriate platforms.



STRATEGY

With those high-level strategies articulated, it's time to devise specific marketing strategies, upgrade the practices already in play, and rectify any weaknesses.

- To optimize response rates, the marketing team should improve strategies such as social media marketing, permission marketing strategies and progressive profiling. For instance, make sure your scoring model incorporates customer and prospect behaviors and demographics to enhance nurture programs, begin collecting behavioral data, building relationships and initiating conversations.
- The marketing team should also evaluate the health of their data, including current data segmentation and optimizing filters, list build-out recommendations, and marketing reach assessments.
- The sales team should focus their energies on high-quality leads, and discuss ideas with the marketing team for tighter alignment to deliver a steady flow of actionable sales leads.
- The marketing team should think now about the kinds of campaigns they intend to roll out, from the simple to the sophisticated, with strategies mapped out for multi-touch, multi-channel campaigns.

While completing all of these endeavors might sound burdensome, they're essential for delivering two important results.

- 1 They will bestow upon you a clean and optimized marketing infrastructure to roll out with your new system.
- 2 You will know exactly what features to prioritize when selecting a platform.

WHY IS THIS CRITICAL?

Because you will be researching platforms that offer features addressing demand generation, inbound marketing, campaign analysis, competitor tracking, SEO tools, sales effectiveness, social media management/listening and lead management – just to name a few.

Prioritizing specific features in advance will help you choose a platform that offers the maximum reward without wasting money on capabilities you'll never use.

STEP-UP

So now you've selected the right marketing automation platform. **What next?**

Novices often think their system will do the work for them, but savvy marketers understand that their journey is just beginning. Deploying the system is only the first step toward a streamlined automation process. The two most common crimes at this stage are haphazard implementation and assuming that most of the work is done. In fact, smart deployment includes careful planning, a well-managed process change, and a commitment to program overhaul.

Even if you believe you're prepared to navigate a certain amount of culture shock, diving into a sudden transition is not advisable.

Instead it's best to avoid severe disruptions by adopting an incremental approach. Align your marketing automation system with existing programs to whatever extent possible, then get acclimated to your new abilities. While this will involve a slower learning curve, your team will be able to focus on mastering their new skills one at a time and build processes and programs as they need them.

Begin with gateway improvements that will be easy to deploy and measure.

Try changing elements that utilize different features in the system, such as landing pages or segmentation; instead of a generic blast campaign, define two or three segments and create targeted messages for each, or test out enhancements for a drip campaign. Make sure these changes are scheduled at regular intervals and continue them for a long enough period that the data tells a meaningful story.

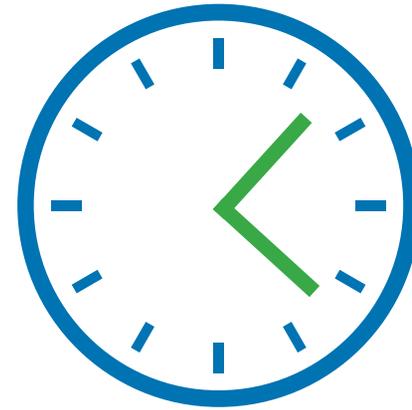
Once your first tests are complete and you feel comfortable with the basics, move on to the more challenging tasks that provide the true rewards of marketing automation, such as **lead scoring, lifecycle mapping, nurture programs, and revenue analysis.**

Once again, begin with simpler and smaller steps that are controlled within the marketing department, such as process improvements and nurture programs. Once you feel confident with those, try branching out to processes that involve other departments.

SERVICES

So far we've discussed mostly systemic changes. Yet one of the most critical ingredients in implementing a marketing automation system is training.

Just as rushing in without adequate forethought and strategy can be disastrous, laying the groundwork without sufficient training can lead to an expensive overhaul later. Many marketers assume they can dive in and learn their system as they go along, correcting any mistakes later. Often they discover six months down the road that they've implemented it incorrectly or failed to utilize obvious solutions, but cannot return to their original blank slate of a system and are forced to make whatever improvements they can on a flawed foundation. For this reason, it's best to invest in training and tutorials right from the start to build the most successful system possible.



This is the time to consult your original strategies and identify the areas where you require in-depth training.

While you should seek a general education to help you optimize your new system cleanly and efficiently, you should also request training on any skills necessary to reach your original goals.

“Are you looking for ways to accelerate marketing and sales alignment?”

“Do you want to make sure your sales team understands how to capitalize on the integration of your platform with your CRM tool?”

SERVICES

Once you've identified the kind of training and services you need, you can find assistance from multiple resources.

1

The first step is training every team member who will be involved with the system. A common mistake is training only the most senior team members, and assuming they can share that knowledge with everyone else. But because employees will need to understand different functions depending on their specific roles, that kind of generic training will rarely cover everyone. Make sure each team member gets the education they need for their particular piece of marketing automation.

2

The next step is investigating the onboarding resources provided by your marketing automation vendor. Almost all of them provide services and education to help your team use their product. Remember, they want you to achieve the best results possible, so most offer classes, personalized coaching, webinars and more to get your team skilled and up to speed. Take advantage of the customer support agreements in your contract and don't be afraid to ask for help.

3

Another invaluable resource: the platform's user community. Here you can speak to other marketers who are using the same platform you are and have traveled the same learning curve. These community members will share best practices, tips, solutions and training, and help you with any problems that come up.

4

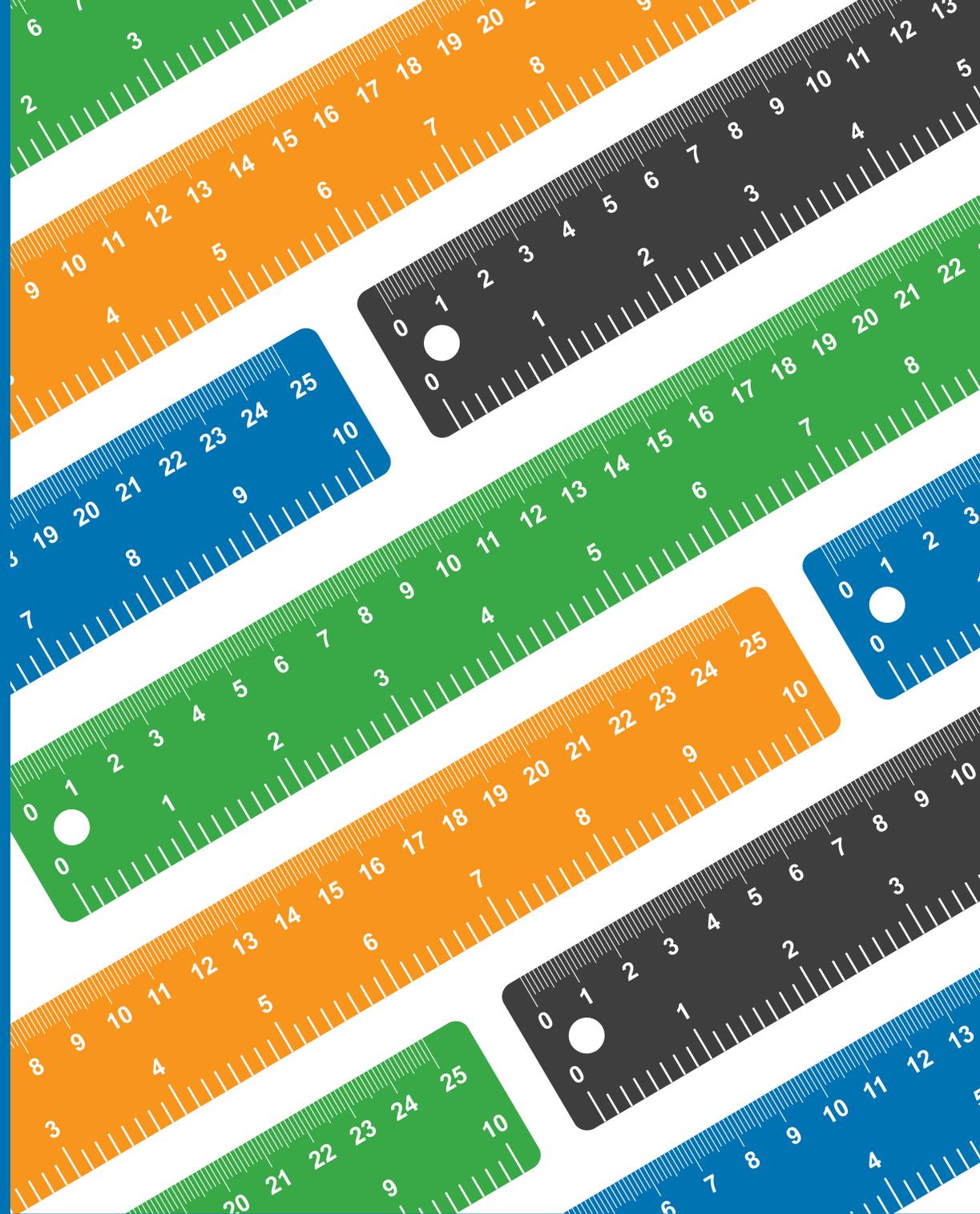
You might also consider employing a consultant who specializes in marketing automation. Because they are focused on helping businesses reach their marketing goals, they may have innovative practices and insights you don't when it comes to using all of your platform's capabilities.

SIZING IT ALL UP

After successfully completing these stages, you will reach a point where your marketing automation program is running smoothly and seems to be delivering positive results for your business.

It's tempting at this point to sit back, become complacent and turn your attention to other deliverables. *That would be a grave mistake.*

This is the time to test your strategies, ensure your efforts are paying off, and make any course corrections necessary. For instance, putting your lead scoring model under the microscope will take guess work out of that equation and help you make any modifications needed to increase your close rate.



SIZING IT ALL UP

All marketers need accurate metrics, both to guide future investments and to illustrate the value of marketing automation. Just remember that when changing course, you should still follow the same game plan of strategy, set-up, service, and assessing success.

1

Begin with a review of your initial strategies and goals.

- Did you meet your initial milestones?
- Which strategies delivered optimal results and which need to be improved?

2

Assess specific areas, such as marketing and sales alignment.

- Are you meeting your benchmarks?
- What changes could tighten that alignment?

3

Institute cross-department check-ins to get a full overview of results.

Talking to members across teams and departments will ensure you're getting a comprehensive analysis of both successes and shortcomings, while providing the data to amplify one and eliminate the other.

4

Take advantage of your system's analytics to study what components are performing and what aren't.

While many marketers are eager to jump into marketing automation, proceeding methodically through the above stages will build a solid foundation for future success.

There's no doubt that automation can deliver spectacular results. But to truly maximize the profit and power of its potential, a thoughtful and orderly approach will craft high-performing strategies and eliminate expensive mistakes down the road. Marketers must remember that these amazing results will be gradual.

Be patient and realistic about your marketing automation journey, and you will put your company on the road to ultimate success.



ABOUT **LeadMD**
marketing automation experts

1.877.77.LEADM

9383 E. Bahia Drive, Suite 225

Scottsdale, Arizona 85260

Fax: 888.294.9854

info@leadmd.com



LeadMD combines the resources of a digital marketing agency with revenue focused sales and marketing alignment strategy, all through the use of on-demand cloud technology. Creating, managing and converting quality leads in higher numbers is how we enable our clients to out perform their competitors and out market their peers.

The most effective way to engage more prospects and convert better leads is through Conversational Marketing. At LeadMD, we will help your team leverage email and online channels to build buyer trust and engagement through cutting edge technology such as Marketing Automation. When your focus is on building a demand generation process that truly drives revenue, it's time to engage LeadMD and fix your funnel.