



THE SUPER AWESOME
TOTALLY WICKED

DEFINITIVE MANUAL OF

**MARKETING
AUTOMATION**

Presented by LeadMD,
Marketo's First (and Best)



We know you've heard it all. Because frankly, so have we.

In reading this manual we hope you get a refreshing change from the typical “How to Do This...” and “Three Ingredients to That” stylings of the rest. Enjoy.

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GRAY'S NOTE

A FOREWORD BY **JUSTIN GRAY**, FOUNDER & CEO OF LEADMD

In today's marketing, success is measured by a single question: How effective are your conversations with your buyers?

Marketing automation, like any tool, can be used for good or bad.

In a good instance, you'll be able to have effective conversations with your buyer through every step of their journey, from content to conversion. Along the way, you'll be able to track the efficiency and ROI of your efforts and adjust as necessary.

In a bad instance, conversation won't even exist. Instead, you'll be hurriedly working to send out email blast after email blast, in a desperate attempt to generate any kind of conversation.

On top of that, you'll be wondering why no new leads are coming in.

At LeadMD, we've seen over **2,600+ instances of Marketo**. In the course of those engagements, we've heard almost every question under the sun about marketing automation.

One of the **most shocking discoveries** we've had is the sheer number of organizations that go into a Marketo purchase without truly knowing what it takes to succeed.

About **85%** of the existing implementations we've seen were totally unprepared for what marketing automation truly needs to thrive and provide solid ROI.

Solid processes built around the buyer's journey, accurate buyer persona data, and the corresponding content—all those areas take a long time to create and can be difficult to grasp. Often, marketers attempt to leap-frog this legwork in favor of grabbing the credit card to purchase what they believe is a do-it-all solution.

Then, only after the software is implemented, they begin the process of filling in blanks. Without proper foundations in place, this is a setup for failure.

It's much more effective to have your team roll up their sleeves and fill in those blanks before attempting to implement marketing automation.

That way you can be sure that you're set up for maximum success. Marketing automation will benefit your business, rather than just another shiny tool relegated to the dust pile of unused tech.

Like many things in the marketing world it comes down to a combination of **skills** and **assets**.

In this eBook, you'll learn how to build processes to measure the success of campaigns, the tactics that live within them, and create actionable insights and repeatable processes.

01. THE BUYER'S JOURNEY MEETS YOUR PROCESSES



To set you and your team up for successful conversations with your buyers, you'll have to look inward and shore up any processes that may be a hindrance.

Doing so will lay the foundation for future success with marketing automation.

The first step is to consider all of the conversations your sales and marketing teams are currently having with prospects and customers. Building successful processes around these conversations, and the associated buyer's journey they represent, can't be produced any other way.

While other elements, like buyer surveys and CRM, can provide some answers, it's vital that you tap the data and resources that are inside of your company. This will shed light on what your buyer's journey looks like, and where the breakdowns are occurring.

Get the gang together

Bring your team to the table. Since they are on the front lines, they will be able to provide first-hand insight into your current processes and the conversations that result, both successful and unsuccessful.

In doing this you'll also get an idea of what the different stages of the buyer's journey look like. Here you'll find out about murkier stages you may otherwise not know much about, such as acquisition, purchase and retention. Knowing and mapping these stages will play a key role in building a successful Marketo instance.

Seek out key members of your team and ask them:

What are customers experiencing, and saying about it?

What are their priorities and deal-breakers?

What pains do they have that you can solve?

How did your solution capture their attention?

What was their experience post-purchase?

From these buyers, what type of characteristics and traits you are running into over and over?

What types of conversations are you having over and over?

If your business is still in its infancy or very young, it's possible you don't have many customers to analyze yet. If that's the case, consider hiring a research firm to supplement your data.



► PRO TIP SOCIAL INSIGHTS

Social media is a great window into how your customers are consuming content, what kinds of conversations are intertwined along the way. It's not a bad idea either to look into what your competitors are doing to gain insight into their processes, and the conversations they initiate.

Go as far as to sign up for competitor newsletters and email updates. See how they are interacting with you, or where they are falling short. Don't be afraid to co-opt tactics that you think would be successful. Everyone does it.

Further defining the buyer's journey

After gathering this valuable feedback from your team, you can start to understand what your current buying experience looks like. **From this feedback**, you'll get an overview of the types of conversations you're having with the people who are a part of them.

Hopefully, you were able to get a better idea of how they come to your business and ultimately buy your product.



Here's where you can begin to dig in

In analyzing these buyer characteristics and the conversations, you'll begin to see patterns and develop stereotypes of each kind of buyer and their associated conversations. You'll also get a clear picture of what the buyer's journey looks like.



With a clearer picture of what these customers experience and ultimately need, you can begin to map your daily workflows to those needs. Maybe it's getting your teams together to collaborate on better handling objections, or an emphasis on checking in more frequently after a purchase.

Either way, from marketing to account management to sales, the goal will be to create processes that provide great service and inspire loyalty. **Don't assume your current policies and infrastructure already do this, though.**

Where are your processes broken?

It's likely, you'll find disconnects and breakdowns between your processes and the actual needs of your buyers. You're not alone, either. This is frequent in most organizations.

But after any failure, it's essential to take the right next step.

And in this case, the right next step is to determine if these **process breakdowns are occurring in sales or marketing. It might be both.**

Whether in sales or marketing, **technology is likely a culprit of the breakdowns** you'll find. And of course modern technology is always tied together in an ecosystem, so even one breakdown can lead to many.

For example, if your **marketing automation** process isn't ideal, then your sales efforts will suffer because leads can't be tracked efficiently. Likewise, if your sales process is a limiting factor and your **CRM** isn't transparent, then your marketing will suffer because you won't know who you are trying to reach.

CRM

Earlier we mentioned using CRM to look at internal data. But CRM is only as effective as the effort (and data) you put into it. It's imperative that you work to define and segment your audience based on "who" they are. If you don't have a clear definition of who is an actual "lead" instead of a more evolved relationship, like a customer contact, the situation gets worse. Once you have these buckets defined, you'll have the foundation in place for further success.

Your CRM data is the backbone of your marketing efforts. Processes must be in place to reinforce the collection of data at sales touch points.

Ask yourself these critical questions:

- How does your sales team organize their day from a list building perspective?
 - What happens in CRM when a representative engages with a potential buyer?
 - How is activity tracked?
 - What dispositions on the data record take place when the buyer moves through the funnel?
 - What happens to data records when the buyer is not yet ready to purchase?
- Do each of the above steps provide clear visibility to the rest of the organization?

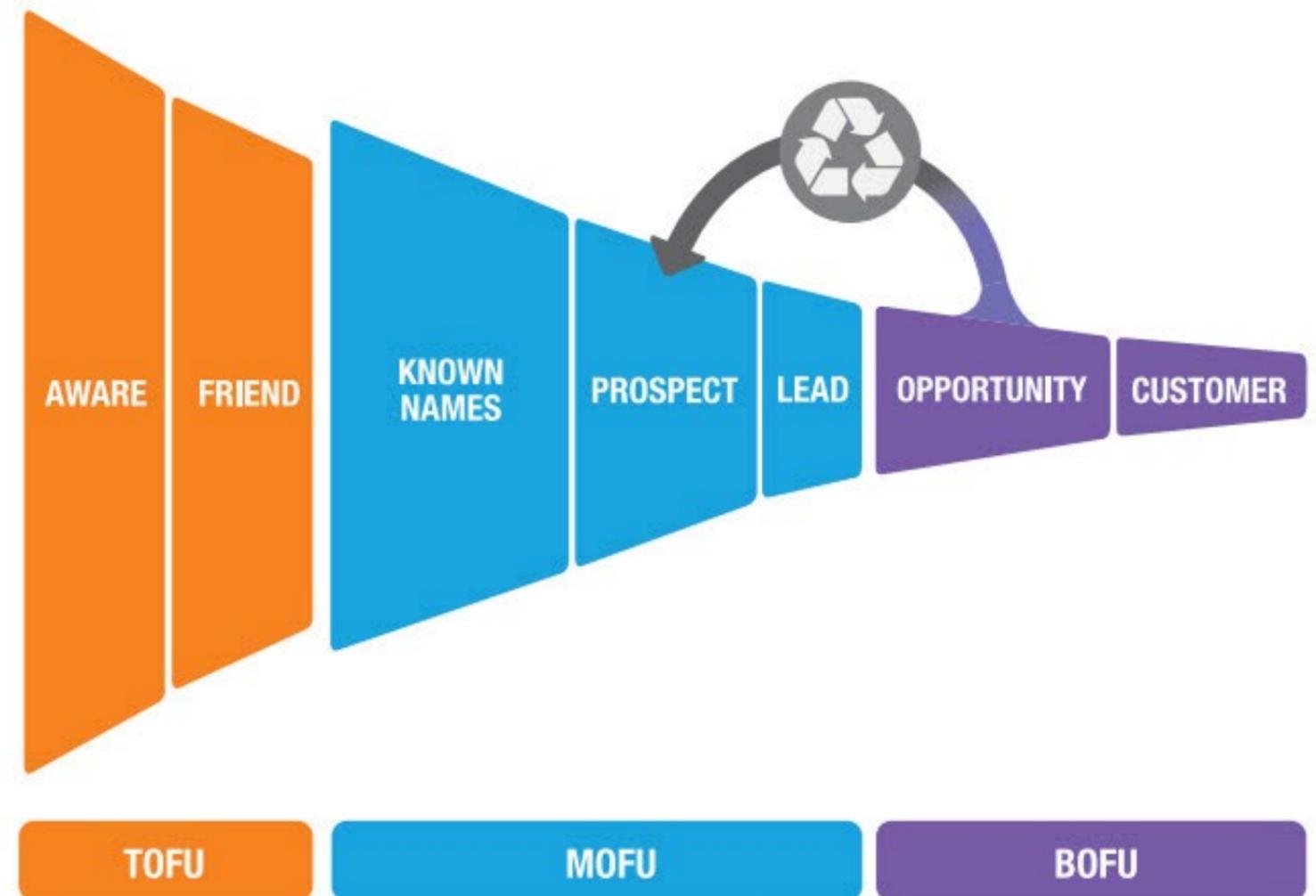


Often, efforts inside of Marketo function as a one-way conversation without measuring or reacting to what's happening inside of CRM. Untargeted batch-and-blasting messaging is common. If that's the case, take a hard look and change that before pursuing into any of these other elements.

Marketo is a slave to CRM.

It's a fact. You cannot initiate a buyer conversation based on one-way email messaging. A true buyer's journey is enabled via relevant and consistent communication. After digging into these internal and external conversations, you should have a good idea of the journey your buyers take – and how your systems need to react.

LET'S TAKE A LOOK AT HOW AN EFFECTIVE BUYER JOURNEY LOOKS FROM WITHIN MARKETO



02.

BUILDING BITCHIN' BUYER PERSONAS

**RISING
RITA**BUDGET CONTROL: LOW
AUTHORITY: LOW-MED
NEED/MOTIVATION: HIGH
TIMING: 0-3 MONTHS**ENTRENCHED
EDWARD**BUDGET CONTROL: HIGH
AUTHORITY: MED-HIGH
NEED/MOTIVATION: HIGH
TIMING: 0-3 MONTHS**CHATTY
CHADWICK**BUDGET CONTROL: LOW
AUTHORITY: MED
NEED/MOTIVATION: HIGH
TIMING: 0-3 MONTHS

In the last chapter you began to see the types of conversations your team is having with customers, and got an idea of the types of people they regularly occurred with.

Once you've begun to optimize your processes and orient them to more closely match the buyer's journey, you can begin the work of developing buyer personas from this information.

You might have groaned when you saw the word "persona." Creating buyer personas can be a lot of work, it's not always the fun part of marketing, and often the outcome is simply cast aside.

The key to buyer personas is operationalization. Period.

When you dive into the mind of your buyer, then put those resultant strategies into process, there's no denying that the revenue payload is incredible.

**START UP
SUE**BUDGET CONTROL: HIGH
AUTHORITY: MED-HIGH
NEED/MOTIVATION: HIGH
TIMING: 0-3 MONTHS**POLY PAM
"THE GUARDIAN"**BUDGET CONTROL: HIGH
AUTHORITY: HIGH
NEED/MOTIVATION: HIGH
TIMING: 0-3 MONTHS

**At a high level, personas will be defined by pain.
At a low level, they will be defined by trust.**

You have to ask yourself:

What pains do these buyers have, and how do they develop trust to believe you can solve those pains?

How can you facilitate that trust?

Most organizations really struggle with how to make sure the buyer conversation is mutually interesting and, to borrow a buzzword, engaging. But engagement ultimately comes down to speaking to pain points, then building trust that you can alleviate them. Which also happens to be a key component of a successful conversation with a prospect.

The message must be tailored and tight, otherwise it will get lost in the noise. With a focused message you can more efficiently work to get people in the door who will actually buy your product.

So, roll up your sleeves and prepare for some persona building.

Fortunately, after refining your processes and fixing any breakdowns, you have your buyer persona data right in front of your eyes.



Segment your customer data

So, by now you've taken the first step in creating good, useful, and engaging buyer personas: **aggregating all your customer data.**

From there you have the knowledge to further segment into what makes a great client, and what makes a terrible client and then start bucketing those into stereotypes— into “interest” or “intent” paths.

Once you have that data, build individual profiles of your ideal customers, using as many specifics as possible. While there's no set number of personas you should have, generally between three and five is a good range.

There will be variables for each persona. You'll see someone who wants to engage with you solely online, versus someone who needs in-person engagement as well.

Once your personas start to emerge, and their pain points are developed, you'll be able to develop highly personalized messages that speak to them. This is similar to how Amazon gets you to buy more and more stuff from them. They know who you are and target their marketing accordingly.

Right, so back to pain and trust. It's smart to use tools, like InsightPool, to see where your buyers are consuming their content, and who exactly they are paying attention to, “aka” who they trust. Then, you can make attempts to try to tap into that audience via partnership. We'll cover more of this in the next section.



HOW YOU CAN build trust.

In establishing your personas, figuring out how they build trust is essential for your later content creation efforts. How can you solve for that? Let's say you're a software provider. You've sold a piece of software to an organization and now your customer service team is going to take over and really make that company successful.

After a successful sale, you've already built trust with that company.

They know what you do and they know how you do it. After you've achieved some success for them, there's tons of value in getting their feedback, internalizing it, and ultimately building it into your personas.

When soliciting customer feedback, begin with these questions:

- *Why did you buy from us?*
- *What could we have done better during the marketing and sales process to shorten that sales cycle?*

PRO TIP

FORM A FOCUS GROUP OF YOUR BEST BUYERS



Take them for lunch, drinks, or coffee and pick their brains. It's all about offering them a bit of a return for providing valuable feedback.

If you have a new offering coming out, select some of your better customers for a trial. View the feedback that you get as gold (it is).

Definitely don't ask for money. If it's that great, they will offer money and beg you to keep using it.

bringing your personas TO LIFE



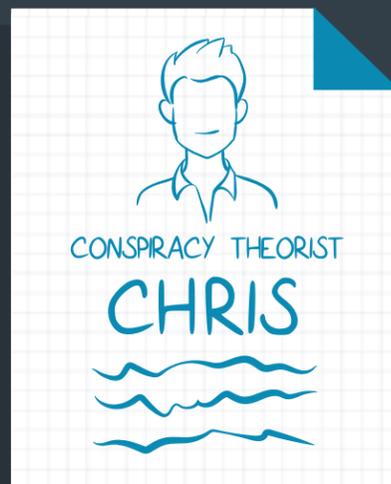
Channel your inner mad scientist:
3 steps to building monster personas

1 CREATE CHARACTER SKETCHES

Now that you've determined what your ideal buyer looks like and have some insight into how you can work to build trust, write a **brief biography sketch** for each of your personas.

These are similar to the character sketches that a novelist would use. Start by writing about who they are as individuals at first. Then, describe a typical day for each buyer.

Once you have a detailed portrait of each buyer, go through your revenue cycle model and look at the different buying stages.



2 PUT YOURSELF IN YOUR BUYERS SHOES

Choose one of your buyer personas and put yourself in that persona's shoes at each stage. **Consider these questions from their point of view:**

- What problem needs to be solved?
- How is this problem affecting the business, and what might be lost because of it?
- What questions are popping up, and where can you go to find the right answers?

Be as reflective as you can as you consider what is motivating this persona, and where their pain points lie, at each step of the way. Then repeat this process for the others. Will it be easy to accurately and insightfully step into a buyer's shoes? Not always. But if it was easy, everyone would do it.

Seeing the world through your buyer's eyes and understanding their motives will lead you to develop the right messaging and conversations that will make their purchase journey and engagement that much more successful.

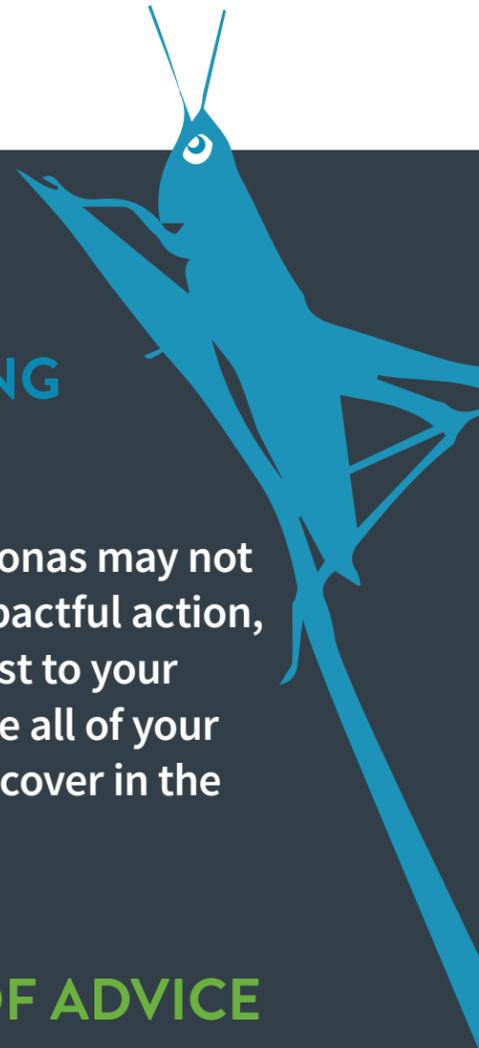


3 PATIENCE YOUNG GRASSHOPPER

While formulating buyer personas may not seem like an immediately impactful action, they provide an in-depth boost to your business that will supercharge all of your content creation, which we'll cover in the next section.

ONE MORE WORD OF ADVICE

Buyer personas are not a "set-it-and-forget-it" type of activity; they will continually evolve, just like your business goals. You'll likely need to revisit your personas from time to time to ensure they still accurately reflect your true target customers.



03.

THE MEGA CONTENT MARKETING COMBO



Get your content aligned with persona objections and the buyer's journey.

Good buyer personas eliminate guesswork and assumptions by injecting clarity and accuracy into your content. You can operate knowing exactly whom you're speaking to, as well as the messaging that will get their attention.

While creating content can seem like an uphill battle at times, keeping your buyer personas in mind when writing will always steer you in the right direction.

Make no mistake – this can be a laborious process. But it's essential. Tightly-targeted messaging will help weed out those junky, unqualified leads and attract more people who are genuinely interested in what you have to say and offer. Yes, your overall lead numbers may go down, but you can be sure that the quality of those leads – and consequent conversion rates – will go up, which makes both marketing and sales happy.

When you are speaking to your personas, you will notice objections that occur at different stages during the buyer's journey.

Just as you began to see the patterns of buyers that led to your personas, you'll begin to note patterns in the objections they have.

You'll save a lot of time and worry by internalizing this statement: *your content's job is to answer these objections. Document objections meticulously, and work to ensure that your content is aligned with both persona and objections along the buying journey.*

It's important to understand that content is not just **eBooks** and **blog** posts. Content is the entirety of your company's online presence, from your website to your social channels.



So if you keep hearing,
**“Who are you, again?
We’ve never heard of you,”**

over and over then it's time to put up a **“Customers” page** with logos and testimonials to build social proof.

When you're hard at work developing these assets, always think in terms of staying power and how you can use that content down the road, whether it's compiling blog posts into an eBook, or using them as part of a nurture campaign. Video especially is an asset with a very long lifecycle and many uses, because you can go on to write bigger assets around it.

Content partnerships

While planning past campaigns, we've found that you can get much more mileage when you **bring other people into your content creation efforts.**

Partnerships are the best way to create content in a very quick manner, and tap into other audiences that you wouldn't have on your own with any kind of legitimacy. It helps to know where your buyers are congregating and consuming content. Earlier, we mentioned checking out your buyers on social media. This is very valuable, as you can determine who they are engaging with, who's content they are sharing, which will lead you to the thought leaders in a given area.

When seeking out partners, always try to find people who are versatile and can speak to tactics. Make sure they have done enough to have credibility.

It legitimizes the entire campaign when people see that there's not just one person working on it. Be fully aware that you don't have hundreds of buyers swarming your site waiting for new content, and it makes good sense to partner with people who have established a following that can amplify the message.

Most people put too much emphasis on getting access to people, when the real focus should be on relationship-building. Always bring value to the table. For example, if you have an in-house design team, offer to create co-branded assets for the campaign. If you have a crack team of writers, offer to do the heavy lifting on the writing portion.

ABOVE ALL, OFFER VALUE.

Know that these people built their following on providing value and follow suit.

▶ PRO TIP GET A MENTOR

Look for someone who has achieved what you want to in either your industry, or one like it, and see if they can offer insight into what worked for them.



04.

KILLA' FO' RILLA GORILLA'

PERFORMANCE INDICATORS

With your personas and content squared away, you're almost ready to automate.

That's right, we don't start scaling a process until we have it dialed in – this is the biggest mistake us consultants are called in to repair. Building a bird's nest is easy, unraveling it is hard. Once we have a clear plan, we will sprinkle in the right amount of automation.

But before you do automate, it's crucial to understand what you're going to benchmark. Don't get caught up on raw numbers, marketing automation is more about quality than quantity.

If you're a manager or director, make sure you're not measuring your employees against raw numbers either. Marketing should be measured by the value and revenue potential of its results.

An eBook with 5,000 downloads means nothing if not a single lead converts into a customer.

Benchmarks

Take your temperature now:

How efficient is your funnel?

This is where you determine what's getting great results and what's not working. Then, you can make the necessary tweaks and changes.

You'll notice that all the work you put in defining sales and marketing data touch points becomes hyper-relevant. The notion of benchmarking is simple – we have to be able to measure movement. Since marketing is what creates velocity in our buyer journey, establishing a baseline of the funnel's natural, or current, performance is critical.

Now, you may have absolutely no idea just how efficient or inefficient your funnel is. Or you may not be confident in the numbers. We hear this a lot. But it's highly unlikely you're starting from scratch. Never think you can't measure the effectiveness of your funnel.

It may require you to fall back to the simplest of measurements, such as how many people your sales team talks to per week. But you have to start somewhere. It's impossible to measure lift if you don't know where you began.

With properly installed marketing automation, and year-over-year data metrics, pulling these critical points would be easy. But since it's likely that you don't have this in place, here are some elements you can use to extract them.

Want to learn more on the method to our benchmarking madness?

Click the button below to see our 'Dare to Compare' infographic.

DARE 2 COMPARE?

With thousands of other marketers on the scene, there is one crucial way to see how you compare to the crowd: **meaningful benchmarking.**

IT'S AN APPLES TO APPLES SORTA THING

Benchmarking your data allows you to see where your company stands against the competition. It also helps to determine the gaps and leaky parts of your funnel.

STOP THE GUESSING GAME

BENCHMARKING GIVES ANSWERS TO THE QUESTIONS YOU'VE BEEN ASKING, SUCH AS...

- Are we seeing the same benefits as other users of this platform?
- How does our company compare to others of similar size & maturity level?
- Are we performing better in some areas since implementing a new strategy?

By defining the right criteria, you can measure the aspects of marketing automation that actually matter

DATA SPEAKS. START LISTENING.

[START COMPARING](#)

Funnel stages overview

So, what exactly is a benchmark? To tell you the truth, whatever you call it, it's just a way to provide a relative measure of performance. We all know how marketers love to talk "funnels" and therefore, that's exactly where we will start. Let's run through the typical funnel buckets we measure in a B2B use case.

MARKETING ACCEPTED LEAD (MAL)

Definition: A prospect that fits your definition of a buyer with one or more characteristics.

What it is: There are the people in your database. They are taking up space for a reason, because they look like people who use your product/solution. This is one of the most misunderstood buckets in marketing – because of an old bad habit where all "leads" in the database were treated equally: as buyers. In most business cases, this is your largest bucket for good reason: this is where the opportunity lies. Treat this group with respect, and you'll get it back ten-fold.

What to count: How many do you add each month, from lists, downloads or forms, etc.?

MARKETING QUALIFIED LEADS (MQL) & AUTOMATION QUALIFIED LEADS (AQL)

Definition: A lead judged more likely to become a customer compared to other leads based on lead performance, intelligence, and often informed by closed-loop analytics.

What it is: AQL is an emerging metric that has come from the rise of predictive analytics and automation. This metric is based on fit and engagement scores only, meaning that there was no hand-raise where someone yelled into the digital or physical universe that they wanted to talk. Rather, they are scored to be a good fit based on those that have come before them. In short, they look and behave like your best customers.

An MQL is similar, but different from an AQL. An MQL should be a unified definition between sales and marketing where it's agreed that someone has interest and wants to talk to you based on fit, engagement and intent. The notion of intent is often expressed by filling out a "Get Started" form or similar. These guys are educated, informed and ready to go to the next level. If done right, this metric is gold to both the marketer and the sales professional. That's a big if.

SALES ACCEPTED LEAD (SAL)

Definition: This is where the magic happens. Sales Accepted Leads are just that: leads that have been reviewed by the sales team, and potential is seen.

It means an opportunity is likely on the horizon, and the sales team deems them worthy of pursuing. Here is where the sales process gets underway.

What it is: SAL is a huge check and balance in the B2B world as it lets marketing know that actual viable opportunities/leads have been generated or influenced by marketing activities. Ultimately, it means that the conversation that began in marketing is relevant when money is placed on the table. For example, if someone from marketing hands you a stack of business cards they got at a trade show, and you set aside those that are potential buyers, these folks are in that stack.

SALES QUALIFIED LEAD (SQL)

What it is: This is a lead where, after several conversations, the sales team believes they have the intention to buy.

Once you have those elements fleshed out, you can move on to pipeline management.

Pipeline management

This is one of the trickiest areas where problems arise. All too often, teams are not on the same page when it comes to actually managing the pipeline causing mistakes, like leads being converted into opportunities before they're ready.

Also common are extraneous categories like **“not qualified”** or **“pre-qualified”** that simply don't belong in the opportunity stage.

Opportunity is just that: the belief that you're going to sell to this person within the time frame that's set for the close. Anything that causes them to fall outside of a sales cycle should be looked upon as a detour and, therefore, a cause needs to be determined.

Bottom line, you shouldn't have one of these statuses you shouldn't. And if you insist on having it, it should be happening before opportunity creation.

PRO TIP REFERRALS

At LeadMD over 60% of our revenue comes from repeat or referral business – which means by focusing on that bucket we can almost guarantee a higher return than net new initiatives.

Customer marketing.

Fact is, very few businesses plan for success.

Thousands of hours go into planning for demand generation and pipeline management, but we often forget that the revenue path leads somewhere. That sacred end is the customer lifecycle. Customers are just buyers in disguise and all too often the messaging, profiling and management of their data is an afterthought. When creating a scalable pipeline model, don't forget to put your attention on how to actively engage your existing customers.

The customer lifecycle has completely different nuances than the new business pipeline, but the same thinking can still be applied to this path as outlined previously in this book. Determine the questions your buyer has and the problems they want to solve and present them with relevant messaging. Once they express interest or start to look like a (repeat) buyer, it's time to start moving them through a sales process.

At the heart of the issue, is what we call the “Christmas Card” problem.

Most organizations have a really hard time sending holiday cards or gifts to relevant parties within their client base. Now, think about the ramifications of poor data on trying to disseminate a system down notification or support fix.

Make sure you have a customer lifecycle process in place for both CRM and marketing automation, and make sure you can measure it with discrete and accurate data. If you need help uncovering this process, no worries – we've already outlined the buyer persona process in Chapter 2. Remember: no one knows more about how your customers behave and what they want – than your customers themselves. Ask them!



Track any detour steps that occur along the way. Get in the habit of asking “why?” each time a lead swerves off true journey.

Detours are not a bad thing as long as information is collected that you can use in the remarketing effort. How, you may ask? Well, a great place to start is through the use of surveys. Have an unqualified lead? Ask the rep who disqualified them what happened.

LOSE AN OPPORTUNITY?

Ask the rep, and ... the buyer. You'll be amazed at what you uncover.

HAVE AN UNHAPPY CLIENT WHO IS THREATENING TO LEAVE?

Use customer engagement tools like Net Promoter Score (NPS) to identify those threats early on and remedy the issues.

IT ALL COMES DOWN TO THIS:

Knowing what the critical points within your revenue cycle are, and counting them.

Establish your benchmark.

05.

ACHIEVING TOTAL AUTOMATION DOMINATION

OK, you've done the work of getting those initial benchmarks and KPIs down.

But remember: it's not just about collecting numbers; it's about how you will enforce and collect them going forward.

So in terms of tracking metrics, always think: *What action causes this reaction?*

How is the reaction recorded? This is a complex process reinforced by a really simple practice – making sure you are peppering the record with details that make it easy to identify and segment. This is where marketing automation really excels, as it's basically one big “if, then” statement.

In our organization, when someone moves a lead to “working” it becomes “marketing accepted.” When someone moves them to “qualified” that becomes “sales qualified.” Simple data values that indicate the stage within the marketing funnel.

Those little changes are happening and we know the rep has to do that, but is there any way to get around this that we haven't thought about? Make sure you are “walling off” any deviation from the desired behavior through automation.

The key to automating a process is to make the process invisible. Don't ask your reps to fill out 20+ fields and conduct manual updates when you can use a tool like Marketo to make those changes automatically. Seems simple – but it's often overlooked.

That said, we've arrived at the point where we know what we want to measure and we're ready to automate.

Where your personas gather and consume content

At this point, the conversation is taking place. This is the stage where you are gathering people to talk to with your content and social media effort and letting them consume free information. Previously, your content was probably one-sided, if you had any at all. But with the hard work you did to establish your personas and ensure your content speaks to their pain, you should see more actual conversations taking place. You'll see more interaction and people sharing with their friends. Another huge result of that work is that you're now in a position to score all of those interactions.

REACH AND MEASURE

Of these conversations and interactions, think of what is most useful to measure. Ultimately, it will come down to how effectively you're moving people through the buyer's journey compared to previous efforts, and what channels are performing better than others. This is where you can really streamline your processes.

The thing about marketing is that it's kind of stringing together a ton of different lifecycles: The overall customer lifestyle, the campaign lifestyle, the channel lifecycle, the asset lifecycle. Each one of those statuses has a different lifecycle.

CHANNELS

The asset is the smallest part in the process. It's created, published and consumed. That's the normal process with something like a blog post. You publish and promote it. Did someone consume it? Yes? Good, that's the goal. That asset lifecycle contributes to the overall lead lifecycle.

Then there's the larger element of the channel. Let's say that you have an asset (blog post) that belongs to a given channel (your blog). That channel also has a lifecycle in and of itself – someone visited, someone read, someone subscribed. There's your success, because that was the outcome goal for the blog. Based on these interactions, you can efficiently move leads forward at the macro level, into MAL or MQL. It's all about the interaction of lifecycles.

LEAD SOURCES

Measuring channels and lead sources allow you to ascertain which are performing better than others. To see true success, you have to measure both the individual asset and the overall channel to see how they move in the overall lifecycle.

This is where efforts like social media, PR, article placement, email demand generation and nurture campaigns become more defined and are able to be tracked accurately. You'll be able to see what tactics are performing better than others and adjust your efforts accordingly.

This process is no different than a trade show. If you attend and get no meetings out of it, you're never going to do it again. You're taking that kind of thinking and applying it to your efforts across the entire lead lifecycle.

FORMS & COLLECTION STRATEGIES

When you're measuring each one of these channels you need to know what the conversion point is. Because eventually you're going to ask for information, or for some kind of action like downloading a piece of content or signing up for a demo. Then you'll measure each one of those channels against the collection strategies.

So when you're putting together something like a demand generation blast, you'll be able to see if you're able to get more MQLs (for example) than with another strategy like partnerships, or a list purchase.

It all comes down to ensuring that the conversion points across all the different channels are correctly measured, so you can see just how effective the conversations you're having with your buyers are.

Lists, the dirty secret of marketing.

When you talk to sales and marketing professionals, most who are starting from scratch are looking to build a database. That doesn't happen magically, and unless you're Apple, there's going to be some kind of "cheat" involved, whether you're renting a list from a provider and trying to get people to subscribe to your list, or you're developing co-marketed content with a partner. Or sometimes, PPC or search-based marketing come into play too. Basically, you're trying to attract people to sign up for your list. You're going to need to collect that.

06.

BENCHMARK TO THE MAX & THE CENTER OF ULTIMATE EXCELLENCE

When we first had the idea to put together an all-in-one outline for success with marketing automation, we were concerned that it had been done, again and again and AGAIN. After careful review, it had certainly been attempted, but no one single piece encapsulated all of the necessary pillars for success. We hope we've done so here, from the perspective of the end-user rather than the software provider.

In the course of reading this eBook, we hope you walk away with the two key takeaways we believe to be fundamentals of modern-day digital marketing:

- 1. Effective marketing is really hard.**
- 2. Buyer engagement and influence is a moving target**



In the age of hyper-customization, it's natural to expect that solutions are prescribed exactly to individual needs.

We get it. Something to keep in mind, however, is that digital marketing has one very common baseline necessity: it has to be ***interesting***.

Beyond that, it has to be a process. Anything that isn't flexible to accommodate the fluid nature of the modern buyer will fail.

Therefore, we have to tune our instruments with the harmony of a buyer-centric model, one where research is firmly rooted in reality and has actual buyer data to back up decisions. And then we have to live with the uncomfortable notion that it will change – if not tomorrow, today.

So, what does this all mean?

It means that the very term “marketing automation” although powerful, with a macro view, is an impossibility.

There is no magical lead machine.

Things do not get lighter over time. Things will only accumulate.

With each and every new technology we wedge into our stack, time waits to topple our tower in this enterprise game of Jenga.

Change is coming. And when you react, the systems and processes you built will either come crashing down around you, or enable your success. We know what it takes to avoid the fall – if for no other reason than we've simply found the land mines by stepping on them previously.

Implementing a marketing automation solution is just the beginning.

We've all heard the rallying cry of people, process, and technology. What isn't as popular is answering the question it begs, which is, “what if our people and process aren't there yet?”

The answer is one that VCs, PEs, CEOs and anyone who has ever sat in front of a sales forecast or budget projection don't often want to hear: ***Slow down.***

Three out of five engagements at LeadMD involve a system that the marketing team feels was implemented poorly, or does not otherwise facilitate their true process.

The reporting they rely on is often inaccurate or incomplete, and the overall sentiment is that the entire system needs to be rebuilt or heavily redesigned. Marketing automation is a hard tool to change midstream.

If we could distill this book down to ONE critical tactic that you can use to get better today, it would be the very same tactic we've given to **2,600+ CUSTOMERS**: **If you don't know where you're at right now, you can't map out where you're going.**



We've been using this simple and free tool to provide a baseline to customers ever since we first began. By collecting these simple inputs, we can get incredibly prescriptive based on your organization's marketing maturity and your results in comparison to your peers. Then, we can determine which of the pillars described in this book that you need to focus on improving the most.

That said, we invite you (if you haven't already done so) to establish your first benchmark. If you have funnel metrics you measure on a real time basis – congratulations, your value will be realized by contrasting your performance against your peers.

No matter which camp you fit in with, we have a tool that allows you to do just that:

COMPLETE A BENCHMARK

It won't take more than 10 minutes, and you'll be able to get great insights into how you're doing amongst your peers out there in the marketing world.

Using the benchmark tool, you'll also be able to make tactical changes based on the findings, and further map tactics to improve each funnel stage and resolve problem areas.

But it really comes down to this:

Better benchmarks mean better processes.

And better processes ensure that you are set up for success with every conversation you have with a buyer.

The Classic CTRL C + CTRL V

DEVELOPING YOUR CENTER OF EXCELLENCE (COE)

As you dig in with marketing automation using the insight offered in this eBook and begin to build out and optimize all of your programs in Marketo, **you'll get to a point where it simply becomes a matter of cloning them**, because you *already* know they work correctly.

They will become templates, so that anyone on your team who is using Marketo can simply pull a template out the Center of Excellence for an event, and instantly know all the different lifecycles it will contain and how it will interact with your overall lead cycle. Here, you've eliminated all inefficiencies. And with them gone, you'll be on the road to success.



Whew! We made it, and at the same time we just scratched the surface. Digital marketing is a HUGE space. With marketers becoming one of the most budget rich areas of the organization, the temptation to skip the measurements and go right to the cutting is one that marketing pros need to constantly keep at bay.

Software is shiny, but process shines. There are no shortcuts to results, all of the easy problems are taken. Let these six pillars be your reference point and understand that you will refer back to these landmarks often – they’ll keep you pointed toward success. We hope you’ve enjoyed this handy manual. Please let us know about your successes and challenges on the road to your **super awesome, totally wicked definitiveness.**

In Revenue,



WHO IS LEADMD?

LeadMD is a different kind of full service digital marketing agency. As the ultimate extension of your team, we help you optimize and launch full-scale marketing campaigns and initiatives.

Our pack of Marketo Certified Experts is chock full of Salesforce ninjas, Marketo gurus, design superstars, social and content specialists, web developers and more. We are proud to be Marketo’s first Strategic Services Partner. With over 2,600 Marketo instances serviced, LeadMD is well-equipped to help you reach this year’s marketing goals and beyond.

[GET STARTED](#)

CONTINUE THE LEARNING

In addition to the services we offer, LeadMD invites you to learn Marketo, CRM and marketing best practices with our on-demand learning series, leadmd.com/marketplace.

[START LEARNING](#)

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