GetResponse

Marketing Automation Basics:
17 Tips for Getting Started

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MARKETING AUTOMATION IS ABOUT DELIVERING THE RIGHT MESSAGE.

Newcomers to marketing automation are often overwhelmed at the starting gate. And it's no wonder. The list of things automation systems can do is long.

Taking a zero-to-sixty approach is likely to make your head spin. Instead, a smooth transition calls for setting reasonable goals for a practical implementation and starting small.

In this ebook, we'll discuss the marketing automation basics beginners need to understand and share useful tips for getting started.

1. Start smart with simple ROI-focused goals.

You might begin with a content offer or welcome campaign. Both are reasonable starting points, but companies will benefit from marketing automation in different ways.

Focus on ROI at the onset of your planning process. Set a simple goal such as save time, reduce labor costs, improve service, boost sales, etc. Time spent upfront on creating goals based on the key drivers of your company's success will increase your ROI immensely.

2. Understand your customer.

Do you know who your ideal customer is? Do you have a firm grasp on their pain points? What information do they seek while making purchase decisions? What channels are they most receptive to? Which devices do they rely on?

You've probably read that digital marketing begins with creating specific buyer personas. Don't forgo this step or you'll be stabbing in the dark with your automation efforts. Marketing automation is largely about delivering the right message to the right person at the right time. It's imperative you're intimately acquainted with "the right person." The mechanics come later.

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KNOW YOUR CUSTOMERS.

3. Map the process.

For each and every automation process you want to put in place, it's imperative to create a diagram of what happens from beginning to end. This is called a workflow.

Here's an example...

a) A new visitor downloads a free guide.

b) The system immediately sends a welcome email.

c) For a day, maybe two or three, there is no activity.

d) Email number two is sent.

e) Activity is paused for some period.

f) Activity resumes: those that clicked on the email are sent a message that goes deeper into the topic.

g) Those that didn't click through, are sent an alternate message with a different offer.

Don't skip the mapping process. Your workflow diagrams enable you to trace any problematic issues to the source. They also make it far easier to repeat, measure and benchmark your automations.

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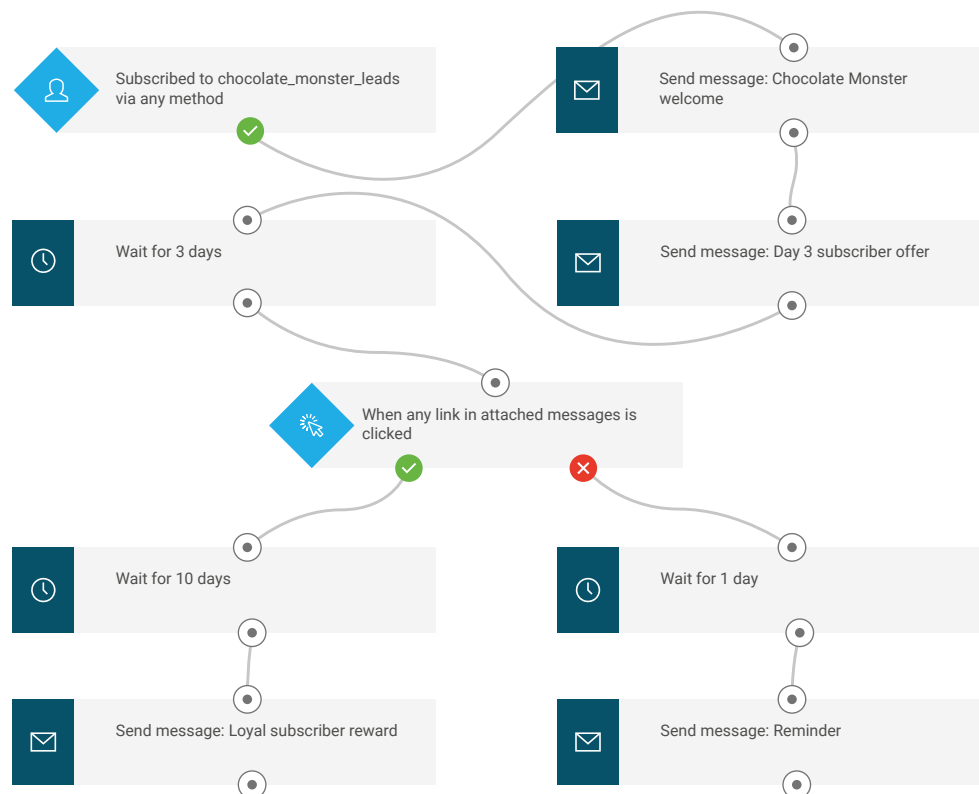
4. Create a lead magnet.

You can't expect potential customers to invite you into their inboxes out of love for your website. And even if your content is great, asking visitors to subscribe to your newsletter will create a small trickle of leads at best. Recent research predicted in 2017, on average, business people will receive 92 emails each day.

To grow your email list at a much faster rate, you need to offer a lead magnet: free, relevant and valuable content such as an ebook, video, webinar, or mini-course. In addition to expanding your email list, your lead magnet presents an ideal opportunity to demonstrate your expertise and build trust.
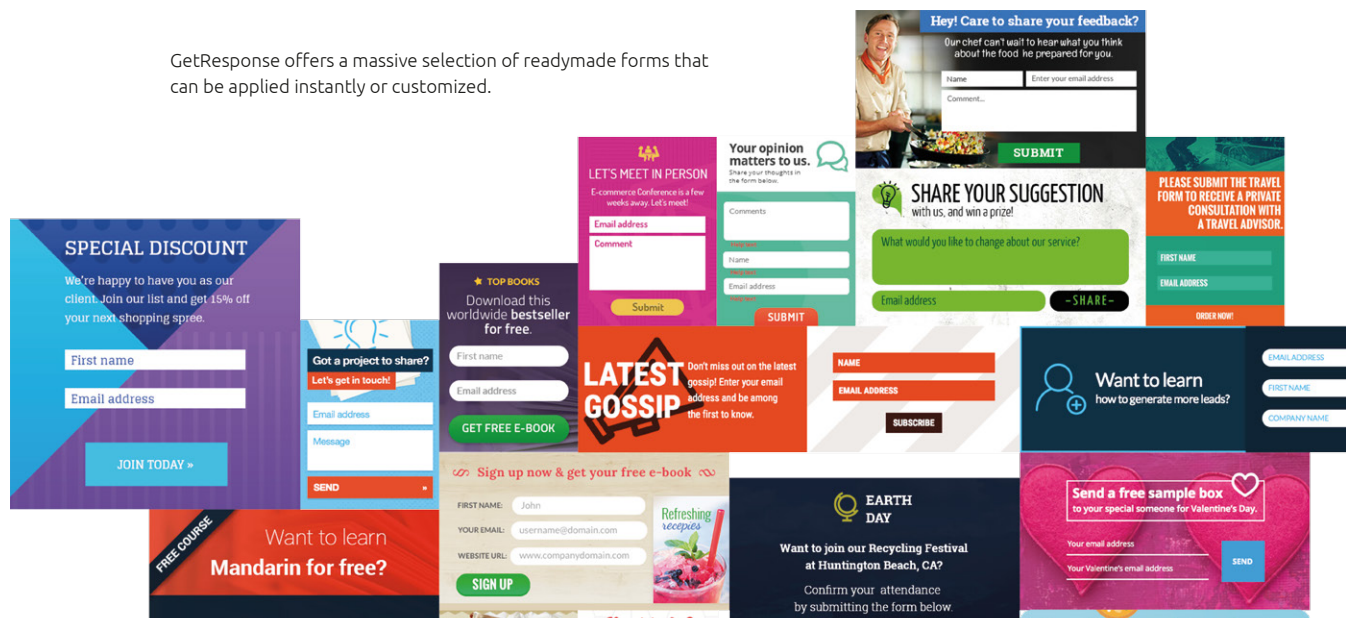
5. Use forms.

More often than not, you'll read that a landing page – a page expressly designed to make an offer – is the proper way to capture leads. In many cases, especially when a new site visitor has clicked through from an ad, a landing page is ideal.

However, you're going to want to experiment with your lead magnet strategies on a variety of pages, possibly including your home page, product pages and blog posts. While you could create links on these pages that lead to landing pages, you don't need to. You'll create more work for yourself and your prospect.

Instead, take advantage of your marketing automation platform's functionality for building forms. Effective forms are tailored to specific offers (e.g. free downloads, event sign-up, etc.). What's more, you can present your forms to visitors however you choose and wherever you choose. For instance, popular choices today include forms served upon arrival, when scrolling, prior to exit, and of course, embedded on a page.

GetResponse offers a massive selection of readymade forms that can be applied instantly or customized.

USE MARKETING AUTOMATION FOR IMMEDIATE RESPONSE.

6. Fulfill requests immediately.

Customers expect fast responses from digital marketers. If you're slow to respond, you'll lose business to competitors who deliver on-demand. Set up your marketing automation system to respond immediately (the zero hour) to all requests that come in by way of any type of form. If a free resource is requested, prospects can be thanked via a popup, thank you page, email or any combination.

You can also ensure those that make an inquiry via your "contact" form get an immediate response. Your response will be based on a template you create to correspond to the inquiry, but can be set up to sound perfectly warm and personalized. What's more, you can create an alert system to have a salesperson or appropriate staff member respond quickly via phone or SMS.

7. Welcome new prospects.

One of the most important automation tools to set up is a welcome email. When a new contact subscribes to your list, welcome them with an email that sets a friendly tone and encourages newbies to engage with your business.

Welcome emails will likely garner the highest open rates because the relationship is new and your company is fresh on the mind of the prospect that just opted in. Here are a few tips for creating engaging welcome emails:

• Ask questions about the prospect's needs.
• Send a gift, discount or bonus offer.
• Tell recipients where to find valuable content on your website.
• Tell recipients what to expect in future emails.
• Tell recipients what to do next.
• Ask to make new social media connections.
• Consider creating a welcome series instead of a single email.

8. Score leads.

Marketing automation can, and should, prompt a variety of sales and marketing alignment processes within your company. In fact, many vendors (and users too) are wary of the term "marketing automation" because the scope extends beyond marketing and can be especially potent for sales.

Perhaps the best example is lead scoring, an automation routine used to rank and therefore, prioritize prospects, based on the value the lead represents. Each prospect is given points based on his or her engagement with your marketing.

An effective lead scoring system will enable your team to focus on the prospects with the highest potential to convert to customers. Lead scoring will help make the sales people's efforts more prolific and also inform your marketing strategy going forward.

9. Nurture.

Capturing an email address, or additional contact information, is a valuable first step, but hardly ensures you have a ready buyer on the line. As such, you'll want to automate a lead nurturing process to stay on the prospect's radar.

You can set up your system to send new communications at any interval and for any length of time. Your emails shouldn't be pushy, but instead, send resources of value to your prospects attempting to anticipate and fulfill their needs. You can make your nurturing sequence more personalized and increase receptiveness by offering the recipient the option to select the frequency, and/or types, of communications. For example, a reader may indicate she wants to see only monthly newsletters, product update notices, special offers, blog updates, or any combination.

CREATE
A DIALOG
WITH YOUR
CUSTOMERS.

10. Welcome new customers.

You got a sale. Awesome. With your marketing automation platform, it should mark the beginning of the relationship, not the end.

Send a series of welcome emails to new customers making it clear you value their business and will deliver what they need. Set up your system to trigger an email series beginning with a hearty thank you and introduction. Many of the tips offered above for welcoming new prospects can be applied all over again with a bent toward increasing the lifetime value of the customer.

Consider, also:
- Ways to cross-sell or upsell your products and service
- Sharing tips for getting the most from your solutions
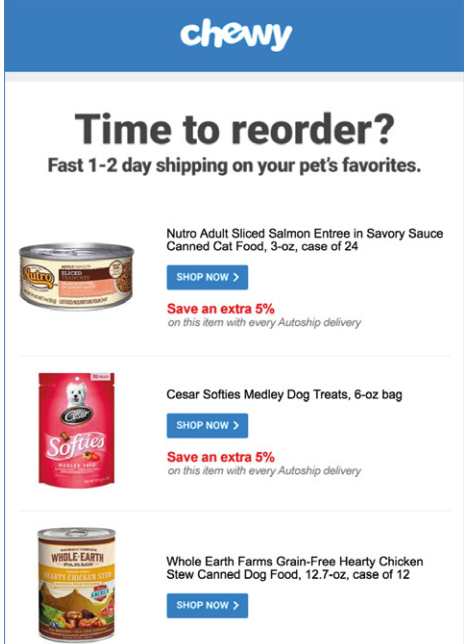- Asking for feedback or reviews
- Asking for referrals (with incentives)

Stay proactive, attempt to create a dialog, and continue being generous and thankful.

11. Encourage restocking.

Don't wait for customers to realize they need to restock and slowly come around to making the purchase. They may never do so.
If your business sells products or services that have a regular replacement cycle, you'll increase sales by setting up email triggers to automatically remind them to re-order when their supply is likely to become exhausted.

Your campaigns need not be limited to identical replacements, like razors or contact lenses. Triggered emails can encourage customers to shop for new products or services on a cycle designed to match their purchasing habits.

A pet food vendor I rely on, Chewy.com, does a very good job reminding me to re-order and also permits me to create a preset purchase and delivery schedule.

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12. Send surveys.

A great way to develop your relationship with both prospects and customers – and better understand their needs – is to send them surveys occasionally. Some survey strategies you may try include:

• Satisfaction surveys – How do they like your products or services?
• Review requests – How would they rate your solutions, content, website, delivery process, support, etc.?
• Needs and preferences – How could you deliver even higher satisfaction?
• Product requests – How could you improve or expand your product or service?

13. Request referrals.

Referral marketing (or word-of-mouth marketing) is the most powerful driver of buying decisions. Send emails asking your best customers to talk about your brand, share your news, and suggest to their friends to buy from you. Consider approaches such as refer-a-friend promotions and incentives for sharing their ideas, images, testimonials or reviews via social channels.

14. Re-engage and purge.

Building email lists takes time. And the reality is, over time, your list will include a number of inactive contacts. Marketing to these people can be a waste of resources. Therefore, effective marketing automation calls for purging your lists of unengaged contacts.

Before you do it's wise to try to re-engage with readers to ensure sure you don't cut the cord with those that want to remain in the loop. Your marketing automation platform will enable you to identify the "unengaged" based on criteria you set and then send them email offering the option to dropout or stick around.
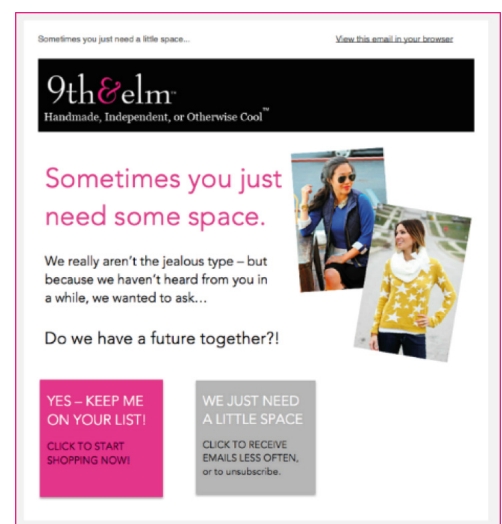
How cool is this re-engagement email?

A study by Return Path reveals 45% of recipients who received "win-back" emails read subsequent messages.

As you can see in the example above, re-engagement emails can be quite charming. Be creative. Be gentle. Attempt writing humorously and, of course, feel free to propose a great offer that's hard to decline.

15. Segmentation.

I want to tread lightly here because this is not for veterans of marketing automation and segmentation can indeed be the key to the most advanced techniques. However, it can also be very fundamental. Just imagine a few simple segments that could lend themselves to your company more finely tuned correspondence...

- Male vs. female
- Buyer vs. non-buyer
- Tennis player vs. golfer (for example)
- Downloaded specific content vs. didn't
- Webinar participant vs. non-participant

The idea is to create marketing your customer is more likely to value by understanding what they value. As you might have gathered from the examples I've listed, preferences can be based on demographics, behavior, buying patterns, and more.

The more you're willing and able to "filter" or segment your contact lists based on the data you have, the more you'll cash in on the "right message/right person/right time" trifecta that makes the register ring.

16. Test.

Perhaps the idea of testing your digital marketing efforts against each other also sounds like the domain of the advanced automation practitioner. It's not. It's easy and a remarkably valuable way to vastly improve your results.

Your marketing automation system makes it tremendously simple to perform tests such as A/B tests, which pit alternate versions against each other. What might you want to have alternate versions of?

- Email subject lines
- Email designs
- "From" line information
- Delivery schedules

- Copy passages
- Offers
- Forms
- Landing pages
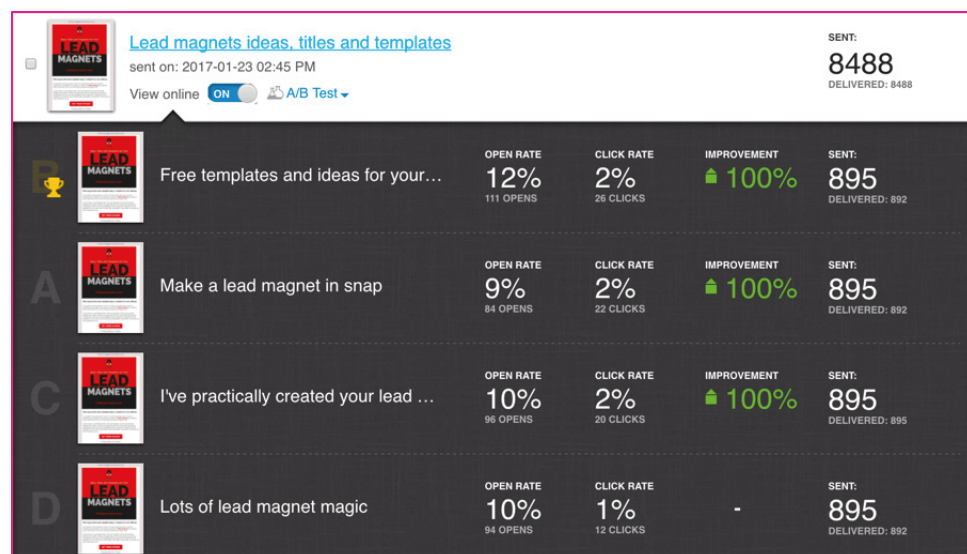
I'm a big fan of testing subject lines.

Here, I A/B/C/D-tested four ideas. Four equal-sized samples of my general list (each represented 7% of the overall list for a total of 28%) received a different subject line. Since the goal is to get readers to click, I measure "click rate" to determine the winner. Subject line B won for both open rate and click rate, so it was sent to the remaining 72% of my list 24-hours later.

(Currently, which is just one day later, the open rate is more than 20% and the click rate is more than 3%.)

17. Let data drive.

Ultimately, marketing automation is about using data to improve your success. Your data gives you insights into your audience as well as what is and isn't working. The more you understand it, the better able you are to optimize your efforts and invest your resources where they will make a difference.

So, think and work full circle here. Re-read the first tip. It says "start smart with ROI-focused goals." Did you establish them? A subsequent action to take is to quantify them. As a practitioner of marketing automation, you want to keep score by measuring everything that matters – consistently.

Your platform should offer both high-level and detailed analytics. Most will enable you to create dashboards to take in the big picture and reports to drill down. Start by keeping tabs on some of the basics:
• Total number of contacts
• Number of contacts in important segments
• Growth rates of the above
• Email open & click-through rates
• Unsubscribe rate
• Website traffic
• Website traffic sources
• Onsite behavior
• Conversion rates

The more you pay attention to these metrics, the better you'll understand how people interact with your brand across various touch points.

• You'll get perpetually better at making your processes more efficient.
• You'll get perpetually better at making both your marketing strategy more targeted.
• You'll get perpetually better at making your marketing communications more persuasive.

More efficient. More targeted. More persuasive. There's a formula for making more money.

Welcome to marketing automation.

Author

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Barry Feldman is the author of "SEO Simplified for Short Attention Spans".
Barry operates Feldman Creative and provides content marketing consulting,
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