

Marketing Enlightenment



**There's No Such Thing as Tactical
Implementation**

We've gotten spoiled by software in the past decade, led to believe that anything we need is available as plug-and-play. Easy to buy, easy to own has become a mantra of SaaS software. Set up a few elements at the beginning, and you're good to go. One thing down, and you move on to the next thing. It's up and running – what more do you need, right?

This kind of tactical thinking is a marketing illusion, attracting us with shiny bright lights and lulling us into complacency. At LeadMD we liken to success with software to a maze – and one with many attractive detours. At the end of the maze known as marketing automation success lies revenue – it's the reason you made the investment in the first place. It's easy along the way to lose focus however as so many milestones can seem like the end. Everyday we see organizations focused on implementing areas of automation – lead scoring, lead nurturing, sales campaigns. Buzz words.

It doesn't matter what we achieve along the way if you don't see results at the end. It's imperative not to lose sight of the end goal, the reason you started down the path, the elusive ROI.

The analogy of the maze as it relates to marketing automation software is so relevant as we consider that **less than 13% of marketing automation implementations are successful.** Features are in large part quickly implemented and “turned on,” so to speak, but the long game requires strategy and process. It's easy to plug in a few campaigns, see that it all works, and then you think you're done.

But there's so much thought and consideration that should go into the system before you congratulate yourself just for achieving the basics. What's more strategy cannot be decoupled from tactics and execution as one might think. Because the journey through the maze of marketing automation is so complicated, it's easy to veer into a dead-end, but unlike other mazes each wrong turn also bears an intense opportunity cost.

Anyone who works with marketing automation in any capacity will tell you that the setup process is crucial to your ultimate success with the system. Failure to put in the requisite time and effort into upfront strategy can be disastrous down the line as you try to fix tactics that were implemented carelessly.

Yet according to the Annuitas Group, an astounding **64% of CMOs** have either an informal or no process to manage their marketing automation – despite another Annuitas stat showing that businesses that use marketing automation to nurture prospects experience a **451% increase** in qualified leads.



Those who go down the path of a quick, tactical approach instead of a well-thought-out strategic plan find themselves following a path that begins with excitement, progresses into frustration before ultimately the right path is unveiled.

**We call this
Marketing Enlightenment.**

The Rocky Path to Eventual Success

Achieving marketing enlightenment can be a somewhat painful process, fraught with wasted time and resources that could have been avoided by simply tossing out the notion that such a thing as a tactical implementation exists. It doesn't.

This triangle graphic displays how marketers often approach marketing automation implementation. Let's go through the steps:

Self-Assessment – The path starts with self-assessment. You realize you have problems with your marketing, and you want to find a solution.

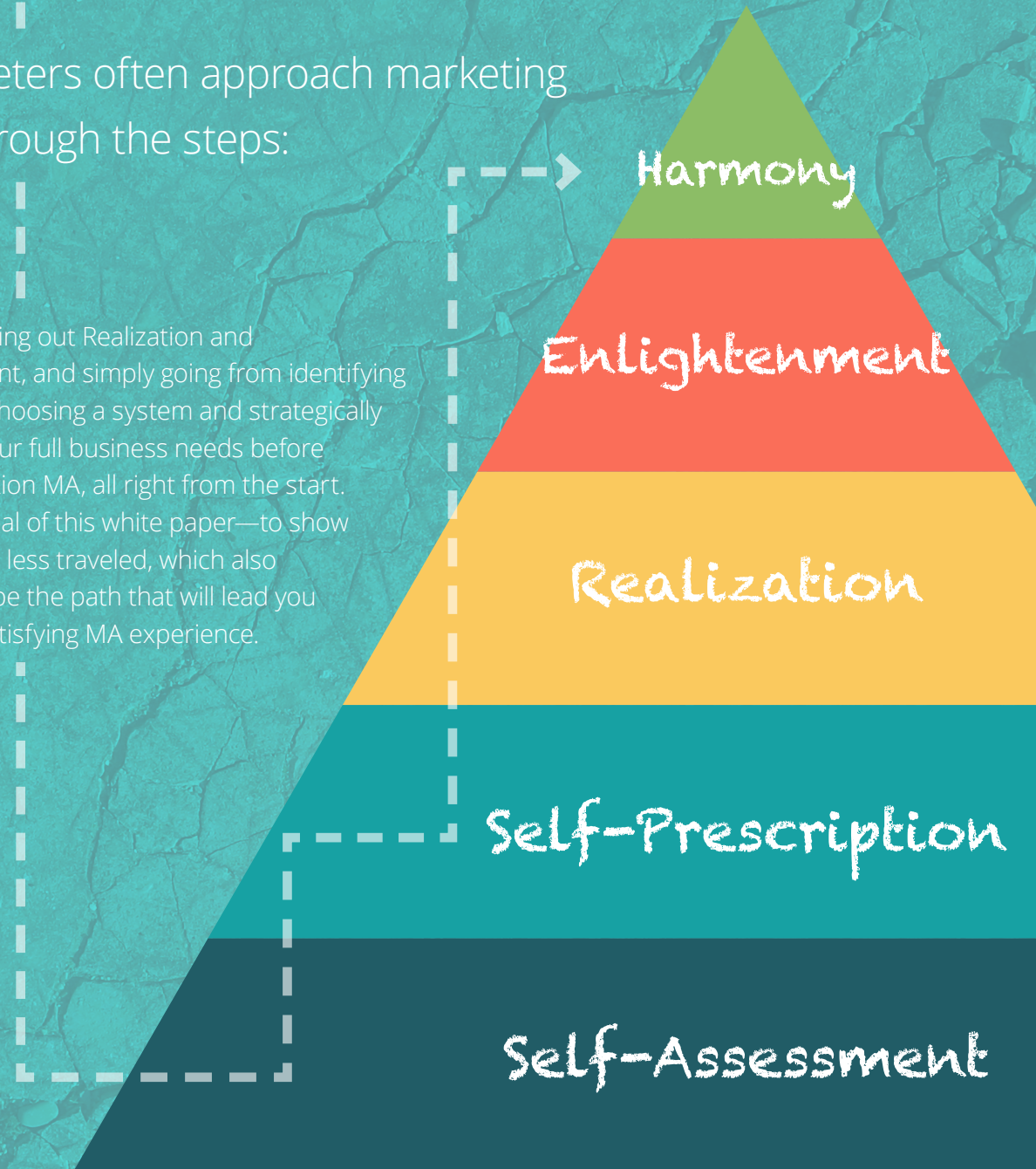
Self-Prescription – You decide that marketing automation is the way to go. There are tons of features, you can get things up and running quickly, and voila, problem solved.

Realization – Your genius idea to implement marketing automation isn't quite providing the lift and results you had hoped to see. You realize that something is amiss and things need to change. Fast.

Enlightenment – After some evaluation, it's apparent that you didn't come up with a strategy and adjust your plans to match your new engagement goals before you jumped right into setting up campaigns and features.

Harmony – Following a deep planning period where you take a fresh look at your business, strengths, weaknesses, message and platforms, you then create repeatable strategy focused on engagement and revenue. And with this strategy in hand, you turn to the tactics you'll use within your marketing automation software to accomplish your newly set goals.

Imagine cutting out Realization and Enlightenment, and simply going from identifying a problem, choosing a system and strategically assessing your full business needs before implementation MA, all right from the start. That's the goal of this white paper—to show you the path less traveled, which also happens to be the path that will lead you to a more satisfying MA experience.





A Better Way to Travel

What we need to do is redefine the steps, and change their focus from “how can I fix things once there’s a problem” to “how can I ensure I’m approaching this whole problem/process smartly from the start.” The new path to marketing enlightenment is not a reactive one, but a proactive one marketers can follow to ensure a smoother, more productive experience with marketing automation.

From Self-Assessment to Holistic Assessment

Think outside the marketing box. If you have a sales team, it's vital to loop them into this process. Marketing isn't just about marketing, and sales isn't just about sales. Successful lead management is all about creating a cohesive experience for leads and a smooth transition from marketing to sales.

According to MarketingSherpa, **79%** of marketing leads don't ever make the conversion into a sale, a problem most commonly caused by a lack of lead nurturing. They further report that while **61%** of B2B marketers send all leads directly to sales, only **27%** of those leads will be qualified.

Those statistics clearly show how the [divide between sales and marketing](#) can affect the bottom line. By including all stakeholders in the assessment process, you'll gain a better understand of your company's needs along the entire funnel, from lead generation, nurturing and qualification to pipeline management.

From Self-Prescription to Full Evaluation

It's easy to pick a solution because so-and-so really likes it, or because you know company X and Y use it and seem to be doing well. But there's a reason for the proliferation of marketing automation software providers out there – each offers something unique.

Take your time selecting providers.

Talk to several different ones. Watch their demos.

Ask about training and resources. Question everything. Most importantly, remember the pains you uncovered during your assessment and ask specific questions about how their solution can help you precisely in those areas.

You may be itching to get started, but don't rush this.

Choosing the right vendor is paramount to future success.



From Realization to Understanding

Instead of realizing down the road that you don't have a good understanding of your buyers and how you need to communicate with them, do that research upfront before you implement a single campaign or automation trigger.

1. Know your buyers.

Dive into customer and market research and gain a deep, detailed understanding of who your typical/ideal customer is and what makes them tick. Are they technologically savvy? What are their specific pain points? How do they like to be communicated with? What does their buying journey look like?

2. Identify specific ways your solution addresses their needs.

Don't make your leads work hard to put 2 and 2 together. Look at their needs and their buying process and determine how you can make their lives simpler. It seems obvious, but many marketers focus more on what they want to say instead of what buyers need to hear.

3. Create a content/automation map.

Before you so much as log into your marketing automation system, you need to plan exactly what you want to implement. This way, you won't find yourself with a series of disconnected communications that confuse your leads and make getting a sale difficult.

Consider the customer journey and how they will interact with your company at every point in the funnel, from coming in as a lead, to being nurtured and qualified, to moving to sales, to handing over their credit card number. Map out every communication point along the way, including what messaging should be featured and how the communication moves them along the funnel.

From Realization to Understanding

4. Evaluate, tweak and develop new content.

Now that you know exactly what you need, you can get to work putting it all together. Assess your current content to ensure relevancy. Create new content as needed to fill in the gaps. Always ensure you're hitting on those outlined buyer needs, clearly showing how your solution will solve their pains.

5. Work with sales on lead scoring and qualification.

Your sales team is the ideal experts for helping to decide lead scoring criteria and what makes for a qualified lead. Some of this you can determine from sales data, but anecdotal input is just as important.

6. Document, document, document.

According to the Content Marketing Institute, only **35% of B2B marketers have a documented content strategy**. But of those who do, 60% consider their organization to be effective.

Documenting your strategy and processes is instrumental to the success of marketing automation in your organization. It formalizes the entire strategy, creating solid, consistent guidelines and guidance the entire company can follow. It makes onboarding easier and cuts down on confusion.

From Enlightenment to... Enlightenment

When the other steps go well, enlightenment takes on a whole new meaning.

With your strategy and messaging in place, suddenly you see how the tactics and features of your chosen marketing automation system work seamlessly to create a lead generation and sales engine for your organization. You see how shifting your focus from a quick setup to a thorough planning process – while arduous and time-consuming – has put you in a position to tweak and improve, rather than overhaul and rethink.



Harmony *is* Harmony

At the final stage, you reach a nirvana moment when you see how, from a high-level view, how all of your strategic planning efforts came together to create a thoughtfully crafted plan for using marketing automation to its fullest to accomplish your sales and marketing goals. And it's a beautiful thing.

Solid tactics are certainly vital to your overall marketing efforts. But when disparate tactics are thrown together without an overarching plan, especially in conjunction with a big investment like marketing automation software, the *missing strategy elements become quite clear* pretty quickly. Campaigns sputter. Sales fall. Finger pointing ensues.



Taking the proactive path to marketing enlightenment dispels the murky confusion that's clouding your goals. By changing to a strategic approach where tactics are only determined once the

high-level conversations have been had, marketers will find that it's the path most likely to lead to success.





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 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.



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