

**What is Marketing Automation**

Marketing automation is the use of technology to manage and automate the process of converting prospective customers into actual buyers. By automating the various tasks and workflows involved in demand generation, lead management, and sales and marketing alignment, marketing automation contributes to shorter sales cycles, increased revenue, and better marketing ROI.

**Marketing Automation Includes**

- Lead nurturing
- Landing page creation/optimization
- Lead scoring
- Campaign testing
- Lead generation
- Marketing asset management
- Website monitoring
- ROI/Analytics
- Email marketing

**What Marketing Automation is NOT**

Marketing automation is NOT using a customer relationship management (CRM) system to accomplish marketing objectives nor is it just about executing a single marketing technique in isolation (e.g. automatically sending out an email campaign every month).

Rather, marketing automation is designed to meet the specific needs of marketers and involves a holistic approach to generating, nurturing, and converting leads into customers by automating a variety of marketing techniques (e.g. email, website monitoring, landing page optimization, and more) and ensuring marketing and sales alignment throughout the process.

**Marketing Automation - Analyst Facts**

*"Last year, B2B CMOs were challenged with increasing marketing's impact on revenue, adapting to rapidly changing buyer behaviors, and delivering exceptional customer experiences. In 2012, they will go from experimenting with new tools, devices, and channels to applying them to deliver real customer value."*

– "B2B Marketing Trends And Predictions For 2012," Forrester, 2012

*"Approximately 25% of sales' time is spent on unproductive prospecting, even as 60% to 70% of sales representatives ignore marketing leads."* – Michael Gerard, Research VP, IDC

**Glossary:**

**BANT** – The acronym for Budget, Authority, Need, Timeline – fundamental ways to determine the sales readiness of a lead

**Campaign management** – The process of creating, executing, and measuring marketing programs directed at specific audience segments

**Demand generation** – The act of using marketing to create interest or demand in a company's products or services

**Email marketing** – The use of email communication to increase awareness, generate leads, and build relationships with prospective and existing customers

**Landing page optimization** – The process of obtaining the greatest number of conversions from a landing page by continuously testing and revising various landing page elements

**Lead database** – A system used to collect information on a company's leads such as demographic, BANT, and behavioral data

**Lead management** – The process of generating revenue from leads by collecting, qualifying, and interacting with individuals and/or organizations in relevant ways throughout the buying process

**Lead scoring** – The process of determining the sales readiness of leads using a pre-determined scoring methodology and ranking them accordingly

**Marketing asset** – A piece of marketing content (e.g. whitepapers, videos, newsletters, webinars, etc.) used to educate and generate interest for a company's products or services

**Marketing automation** – The use of technology to manage and automate the process of converting prospective customers into actual buyers

**Revenue cycle** – A new way of looking at the traditional sales cycle, the revenue cycle starts from the day the organization first meets a prospect and continues through the sale and beyond to the customer relationship

**Trigger** – An event based on a change or update in status, demographic information, or user behavior that causes a lead to proceed along a specific workflow branch or new path

**Website monitoring** – The ability to monitor page visits, clickthroughs, form submissions, and other online activities from either known or anonymous visitors

**Workflow** – A pre-determined path of interactions for individuals to experience based on their profile, demographic, and/or behavioral data with the goal of nurturing and building relationships

## Marketing Automation – Basic Techniques

- Identify the areas of your revenue cycle that need the most improvement (lead generation vs. nurturing vs. sales/marketing alignment) and prioritize your goals
- Create marketing assets that will generate interest at every stage of the buying process (educational content at the beginning of the process vs. solution-oriented content for later on)
- Make a list of routine marketing activities in which your company engages (e.g. auto-response emails) and automate these first so you can spend more time on creative strategies
- Evaluate your lead database and create segments based on lead source or profile information for your marketing campaigns
- Develop simple, automated workflows in the beginning (e.g. following up a form submission with an email from a salesperson that sends out content on a related topic)

## Marketing Automation – Advanced Techniques

- Develop new ways to segment your lists by combining demographic information with behavioral data
- Create marketing assets targeted to specific buyer profiles or personas
- Start to explore more complex automated workflows (e.g. incorporating CRM activities and updates as workflow triggers)
- Coordinate the marketing and sales teams to create campaigns targeted at the “hottest” sales leads based on demographic, BANT, and behavioral data

## Top Metrics to Measure ROI with Marketing Automation

- Increased conversion rates from each stage of your revenue cycle to the next stage (inquiry to lead; lead to qualified lead; qualified lead to opportunity; and so on)
- Increased revenue per lead generation campaign
- Increased sales productivity (e.g. speed with which deals are closed, values of these deals, etc.)
- Increased marketing productivity and effectiveness (e.g. ease and speed of creating and deploying campaigns; qualified leads and opportunities created per campaign, etc.)

## Topics to Consider Before Purchasing a Marketing Automation Solution

- SaaS vs. on-premise
- Implementation
- Start up
- Ongoing costs
- Building creative strategies

## Topics to Consider Before Purchasing a Marketing Automation Solution

1. Master Marketing Database
2. Campaign Management
3. Lead Nurturing and Scoring
4. Lead Lifecycle Automation
5. Sales Insight and Action
6. Reporting and Analytics

## Why Was Marketing Automation Created?

B2B lead generation has changed dramatically in recent years. The old days of mass marketing, email blasts, and buying lists don't work in a world where buyers use the web, search, and social media to take control of the buying process. Companies today meet prospective customers earlier in the buying cycle, and those customers want to engage with sales later than ever. As a result, the old model where marketing generates a lead and sends it over to sales doesn't work anymore. Instead, the best marketers are finding ways to bridge the gap between the day marketing first generates a lead and the day that lead is ready for sales.

## Why Do You Need Marketing Automation?

- Raise open and click rates
- Shorten sales cycles
- Build a great relationship with sales
- Get seamless integration with your CRM
- Automate repetitive tasks and analytics
- Create new landing pages in minutes without IT
- Use A/B testing
- Access sophisticated reporting and analytics
- Win more deals and generate higher revenue per deal

## Top Resources

Start with a Lead - [blog.startwithalead.com](http://blog.startwithalead.com)

Modern B2B Marketing Blog - [blog.marketo.com](http://blog.marketo.com)

FOCUS - [www.focus.com](http://www.focus.com)

Funnelholic - [www.funnelholic.com](http://www.funnelholic.com)

Lead Sloth - [www.leadstloth.com](http://www.leadstloth.com)



Information for this B2B Marketing Cheat Sheet was taken from Marketo thought leadership including:

**The Secret Sauce for Demand Generation**  
[www.marketo.com/secret-sauce](http://www.marketo.com/secret-sauce)

**The Big Easy Guidebook to Marketing Automation**  
[www.marketo.com/library/big-easy-guidebook.pdf](http://www.marketo.com/library/big-easy-guidebook.pdf)