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The Marketer's Guide to Marketing Automation

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From why you need it to how to choose the right platform to meet your goals, read on to learn more about the ins-and-outs of marketing automation.

If you're in marketing, you've heard of 'marketing automation'.

Marketing automation definitely isn't a passing trend or the next marketing buzzword. As **Neil Patel notes**, experts predict that the industry will be worth over 25 billion dollars by 2023.

While you can use marketing automation to automate your most repetitive and time-consuming marketing tasks, you can also use it to dive deeper into the essential elements of successful marketing.

From smarter personalization to behavior-triggered content that moves prospects further along the customer journey – we're here to show you the power of marketing automation and how you can put it into play.

Let's jump in.



Automated Marketing



The how, what, and why

Marketing automation refers to any technology that can carry out marketing tasks automatically – without the need for human interaction. Many brands use marketing automation to streamline and enhance the efficiency of their marketing tasks and workflows. **Marketing automation technology** can automate and trigger a range of marketing tasks – such as SMS messages, email campaigns, lead scoring, content, and more. Automation frees up marketers' time and reduces workloads, drives revenue growth, provides more accurate analytics, and improves alignment between sales and marketing.

Most importantly, marketing automation can help revolutionize the way you interact with prospects throughout the customer journey.

With marketing automation, you're no longer 'blasting' your list with newsletters that never get read or reaching out to prospects before they're ready to convert. Automation guides the process and provides the data you need to engage prospects at exactly the right times in the customer journey.

As marketer **John McTigue notes**, "Marketing is no longer a one-way conversation. You can't just send your prospects emails and expect them to do anything other than block or filter them."

He adds: "Marketing automation allows you to take a less intrusive, more nurturing approach while maintaining a high level of awareness on changes in lead behavior and sales readiness. Prospects want to learn at their own pace and be reached when they need more information or are ready to buy. A well-constructed marketing automation strategy makes that a reality."

And while there are many automation solutions on the market, from extensions to basic software, many marketing teams rely on a marketing automation platform that's purpose-built to support their marketing campaigns. Let's take a closer look at how to choose the right platform for your needs.



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Pro tip:

If you're looking to convince department higher-ups or your customers to adopt marketing automation software, we recommend highlighting marketing automation's important role in meeting evolving customer expectations.

Without the data-collection and personalization capabilities of marketing automation technology, you won't be able to intuitively understand and meet your **customers' expectations** for agency and personalization. Companies that fail to innovate with the right tech solutions will get left behind.



Using Your Platform



Choosing & using the right one for your goals

Marketing Automation platforms come in all different shapes and sizes. When it comes to choosing the right one for your goals, keep in mind your company's or customer's needs, wants, and plans for future growth.

As HubSpot highlights, one of the most important things to consider is the usability of the platform and whether it can help effectively meet your goals. Sit down and **assess**:

- 1** What is the platform experience like, does it have all you need, is the user interface clear – can you set up and use the platform quickly and easily?
- 2** Does the team offer great and personal onboarding and ongoing customer support? You can verify this by looking at online reviews and testimonials on sites like **Capterra**, **G2** or **GetApp**. In particular, look for reviews from companies similar to yours (e.g., in the same industry, with a similar company size, or B2B vs B2C).
- 3** Does it offer the features you need to hit your marketing goals? For example, if you want to convert more leads into customers, investigate how the platform supports customer acquisition. In contrast, if you'd like to make your team more productive, focus on how quickly you can get your team onboarded, how easy the platform is to use, and how many repetitive, time-consuming everyday tasks can be automated.

- 4** Does the platform provide analytics and reporting in the areas that you track most frequently?
- 5** How easily can you integrate the platform with other technology you use?
- 6** Is your chosen provider interested in a mutual partnership? Do they take onboard feedback from customers when it comes to platform developments and future releases?

After you've selected the solutions that potentially meet your criteria, reach out and discuss your requirements with each company. Be sure to also request case studies. If you're happy to move forward, schedule a demo to see how each platform performs.





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of companies that implement marketing automation see a return on their investment in the first year.

Total Cost of Ownership



The bigger picture of marketing automation

The implementation of marketing automation solutions ranges from very cheap – think a minor extra feature in a platform that has a completely different core functionality, to highly expensive. The priciest solutions are all-in-one platform that offers a range of capabilities. As a marketer, you don't want to be limited in what you can do – but you also don't want to blow your budget.

So, how do you balance functionality and cost?

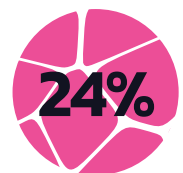
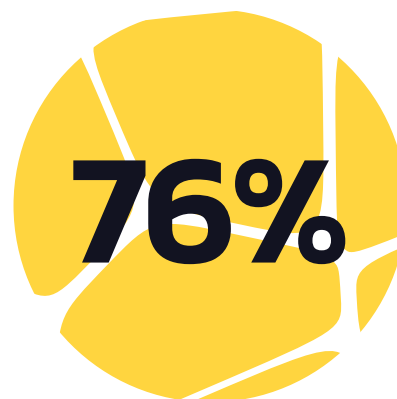
When it comes to researching marketing automation, you always need to consider your budget within the bigger picture. While some solutions may look more affordable up-front, you may get caught out with added costs later. We recommend thinking beyond the cost of annual or monthly use of the platform and consider hidden costs, such as:

- 1 The cost of onboarding and implementation
- 2 Training and consultation fees – look at both initial and ongoing fees
- 3 The costs of integrations and data migrations
- 4 Upgrade or maintenance expenses
- 5 Whether there are any added costs for additional functionality and features

Pro tip:

When you're up against a limited marketing budget, it can be hard to pitch new software to your team or customers – you need to address whether the platform is worth the expense. That's why we recommend coming to the table with figures on your prospective return on investment (ROI). As Marketo report, **76% of companies** that implement marketing automation see a return on their investment in the first year

Beyond ROI – data talks. Share case studies, testimonials and reviews, and statistics on the platform's performance with your team or customers.



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One Size Fits All?



Finding the right approach, channels & chances

No matter the functionality of the platform you choose, an all-in-one marketing automation platform is hardly ever truly all-in-one. Each platform offers different capabilities and advantages. The important thing is to find the marketing automation approach that fits your marketing needs, but still leaves room to explore, experiment, develop new channels, and explore new opportunities.

The right platform should offer versatility and flexibility when it comes to integrations. Does the platform fit with your current tech ecosystem? Will it continue to support it as it evolves?

First and foremost, see if the platform can be integrated with your customer relationship management software (CRM), and possibly your existing customer data platform (CDP). This is key for enabling your marketing automation tool to gather in-depth, valuable data on leads and customers that can be shared with both marketing and sales for greater alignment.

If you're not completely happy with your existing tools, this might be the perfect time to reevaluate and adjust your marketing stack. Same goes for marketing teams that don't have a real strategy in place for their customer data (through a CRM and/or CDP) yet. A good marketing automation supplier is also able to advise and assist you during this process.

By going for a platform that can integrate with multiple channels, from the web CMS to email, you can ensure an omni-channel experience for customers across every channel. Content is data-driven and aligned, providing a seamless brand experience for customers.





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Marketing in Marketing Automation

Where automation and creativity meet

While on the surface you can be juggling a million marketing tasks, much of what you do as a marketer likely falls with a few key areas. These include innovative ways to personalize your content, optimize the customer journey, and create a more powerful marketing funnel. The right marketing automation tool can help you experiment with new, data-driven ways to achieve these goals.

For example, as **ConversionXL note**, you can use behavioral targeting to modify your channels and content to meet each visitor's unique needs and lead them through a custom conversion funnel. For example, you can rely on marketing automation to automate personalized reminders to warm leads or to encourage repeat purchases with time-triggered post-sales emails.

You can use marketing automation tools to better understand your customers and automatically show them the best content for them, on their preferred channels, at just the right time. From previous product purchases to their location, you can use marketing automation to get granular details on your customers and transform this knowledge into automated, personalized content experiences.



Pro tip:

What kind of personalization works best with audience? To find the right messages, A/B test.

If you've been in marketing for a while then you probably regularly use A/B testing in your work, but if you're new to the game – with A/B testing or multi-variant testing, you pit two or more messages against each other to see which performs best.

You can use multi-variant testing to discover which personalized messages are most effective with your audience. As **ConversionXL note**, you can use a rule-based automation tool to target specific segments with different personalized messages.



Audience, Contacts, People



Choosing, segmenting & targeting your audience

The more specific the segmentation, the more effective the campaign. You can use small, specific segments and data-enrichment to create personalized content and communications throughout the customer journey.

To explore this in more detail, let's look at email. Automated sales and nurture email campaigns that target specific subscriber segments far outperform an email blast that lands in the (spam) inboxes of your entire list.

To be a success at converting and continually engaging your leads and customers, you need to go beyond basic personalisation — like using your subscribers' first names.

With email automation, you can send targeted, time-triggered automated emails based on customers' behaviours. When you trigger relevant emails based on customer behavior, you're automatically personalising your content to match where your subscriber is in their customer journey.

Moreover, based on the actions your subscribers take, you can automate segmentation by separating them into more granular categories. For example, subscribers who watch a virtual seminar introducing a new course, but don't go onto buy it, can be tagged and automatically segmented.

While you can automatically tag and segment subscribers who both attend the seminar and buy. That way, people only get the content they are most interested in based on their past behaviors — protecting both your unsubscribe rates and your conversion rates.

For example, those in the 'watched but didn't buy segment' will likely be irritated if they are sent a different sales sequence soon after watching the seminar.

However, you can create a separate segment to check back in and nurture them at a later date. In comparison, the subscribers in the new segment that bought are approximately **93% more likely to buy from you again** and won't be off put by receiving new offers soon after they buy.



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T Training & development



Getting & staying ahead

While marketing automation can seem easy enough at first look, it's something you have to learn to master, and keep learning to stay up to speed. Luckily, there are several ways you can keep developing your skills and knowledge – and they don't have to be expensive.

First and foremost, your entire team can benefit from documenting your experiences and insights. What you learn can be repackaged into in-house trainings and accessible content and guides.

Pro tip:

To keep your skills and knowledge sharp – appoint an Automation Ambassador. Their job is to stay up to date on the best practices and industry developments, in order to keep your team informed and well-trained when it comes to marketing automation.

However, we know that it can be hard to convince your boss or your customers to invest in marketing automation when it feels like the cost of investment is never ending. When trying to pitch a new platform, you may be met with challenges about ongoing costs for training and upkeep.

Thankfully, budgets don't have to stretch to regular course attendance or specialist training. There are a ton of brilliant resources out there on marketing automation. Alex Glenn's podcast **The Marketing Automation Discussion** is a great resource. Past episodes have covered customer retention through automation, how to establish a data-driven organisation, and methodologies for building scalable marketing automation systems.



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There are also several note-worthy books on the topic, including:

- 🌸 **Automate & Grow**, by Michael Devellano – a thorough guide for small-medium businesses and startups.
- 🌸 **Marketing Automation for Dummies**, by Jeanette McMurtry – think marketing automation – without the jargon.
- 🌸 **Marketing Automation Unleashed: The Strategic Path for B2B Growth**, by Casey Cheshire – this book covers a range of tools, strategies and techniques and includes conversations with several industry experts.

(Artificial) Intelligence



Doing more with less

At the core of all automation is artificial intelligence (AI). AI can take on a number of repetitive everyday tasks — allowing you to get back to the creative and enriching aspects of your job as a marketer.

AI-fuelled automation goes beyond basic task fulfilment. It offers you possibilities to personalize content and automate recommendations. This way you can craft highly targeted campaigns that hit your marketing goals, with leaving you time to spare.

With the capacity to collect and analyze data on prospects and customers, AI can use predictive analytics to gain an understanding of customer behaviour. It allows you to engage leads and customers at just the right time — from nudging a high-intent customer to make a purchase to reactivating a repeat customer that has seemingly forgotten about you.

A **Forbes highlights how fitness brand** Under Armour uses AI to collect health data, from sleep to diet choices, via their app and transforms their data into personalized workout and health goal recommendations.

In conclusion, AI can not only help you automate the mind-numbing and time-consuming everyday tasks, but you can also use it to level up your marketing initiatives.





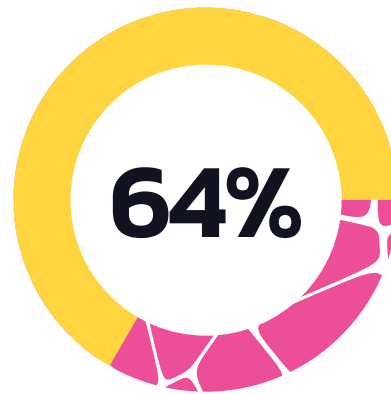
You already know the importance of monitoring and optimizing your marketing processes. Marketing Automation is no different. Therefore, the real work starts when your new platform is up and running, you've selected your audiences, and created your campaigns. How do you optimize and grow from here?

You need to ensure you have a long-term strategy in place. **64% of marketing professionals** reported that creating a successful strategy was a key priority for optimizing marketing automation.

ConversionXL highlight that the best marketing automation strategies are built around three separate focuses:

- 1** Automation sent to prospective customers pre-conversion to boost brand and product awareness. With this group, you may look at how you can use your marketing automation tool to provide helpful or desirable content in exchange for an email address.
- 2** Automation sent to leads and customers who are showing active engagement in the decision-making process. These prospects need a small nudge to make a purchase. An example here would be using email automation to send personalized offers.
- 3** Automation sent post-conversion to show appreciation and encourage repeat purchases. An example of this may be a post-sale email that provides a 15% off discount if the customer decides to purchase the item again.

Beyond creating a strong marketing automation strategy, you need to schedule monthly reviews to ensure everything is running well and you're on track to hit your KPIs. While a measure of your success, you should also look at regular reviews as check-ins to see how well your automation software and strategy are supporting your goals and whether you need to rethink anything.



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Next steps

The future of automations

Where is marketing automation heading? Marketing automation is already growing in popularity throughout a host of industries. Social Media Today reports that **three-quarters of all companies use marketing automation**. And these figures are only set to grow. The market is expected to continue growing at a rate of 8.55% **this year**.

Marketing automation is predicted to continue to prove highly effective at meeting consumer expectations – from personalized content to 24/7, AI-fuelled customer support. Within this context, consider how you'll use marketing automation to your greatest advantage and set ambitious goals for your company's growth.

To achieve everything you set out to, you need to make sure you choose a marketing automation platform that can scale as you do. That's why it's important to not just find a solution for your marketing challenges of today, but also the challenges of tomorrow.

When considering a platform ask about the plans for the future, the planned developments and the direction and way the platform is growing. This way you guarantee a collaboration that is made for the future.

Congrats, you've made it to the end of this guide (or at least you've browsed your way to it)! This is the part where we tell you we would love to help you find the right platform and set-up for your automation challenges. And it's true, we do.

But even more so, we love connecting with likeminded teams, experts and individuals. So, if you want to have a chat about marketing automation, your existing marketing channels and platforms, the role of email, or anything remotely related: **let us know!**

Who are we?

We're Maileon. We build innovative, strong and scalable marketing automation software for businesses of all shapes and sizes. Our platform offers agencies and their customers the flexibility and features they need - without having to break the bank.

Our core is email, placed in the wider context of omnichannel marketing. We make sure all required channels are seamlessly integrated so you can optimize your full marketing potential and build powerful campaigns throughout the entire customer journey.

