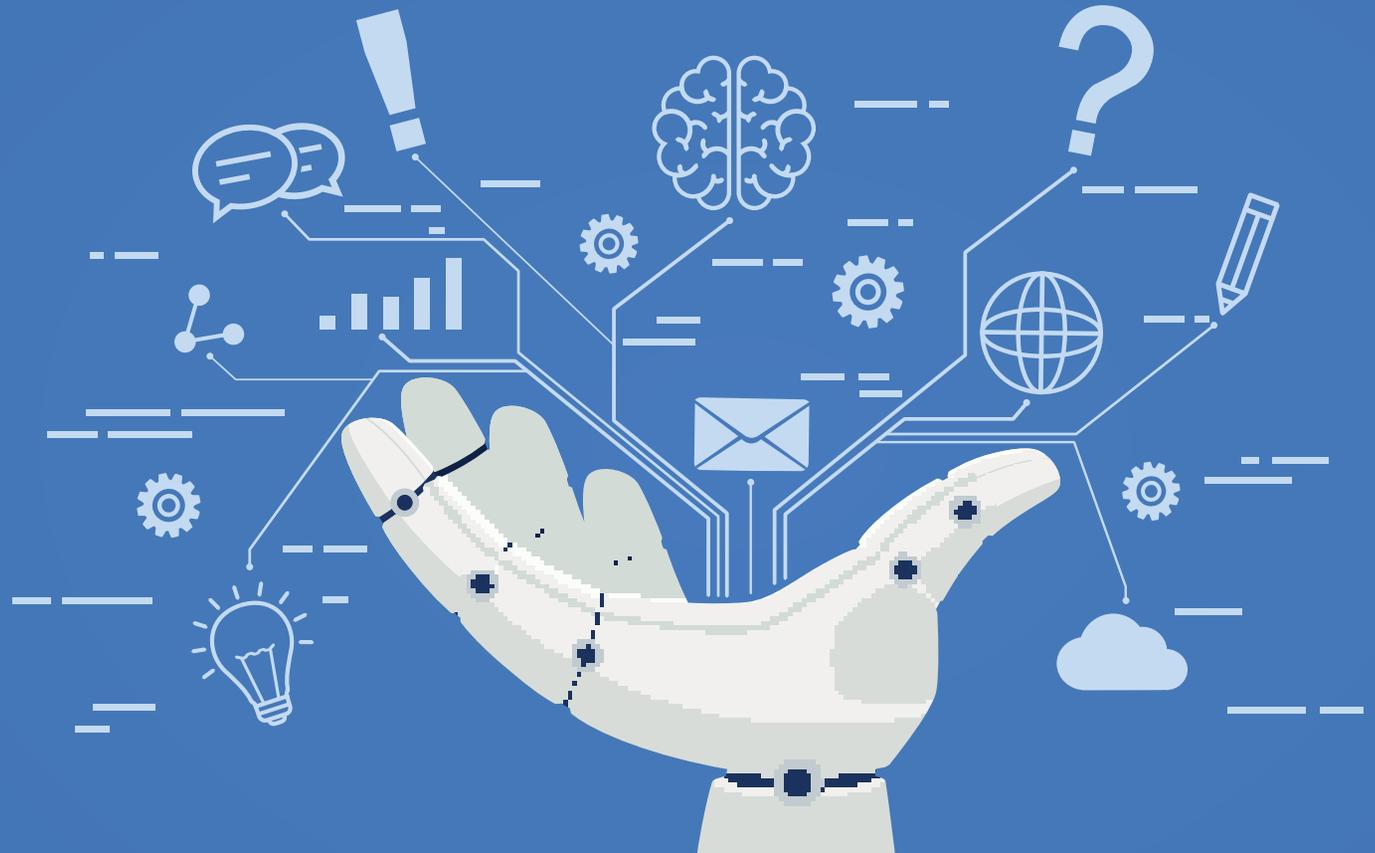




**LOOK
INSIDE!**



Marketing Automation Management: What It Is, Why You Need It, and Where It's Headed



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AT A GLANCE

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WHAT'S MARKETING AUTOMATION?

In using marketing automation platforms, organizations can design, manage, and automate everything from the corporate website to multichannel campaigns. And because marketing automation can be integrated with your CRM solution, your content management system, and your email systems, these platforms offer a measurable, end-to-end view of myriad marketing activities.

The potential of these systems is undeniably appealing, yet it leaves most marketers with questions:

- Is this for real?
- How much will it cost?
- Does the IT department have to get involved?
- Do I need the whole thing, or can I start with a piece of it?
- How do I know if this is even right for my organization?

The answer to the first question is, “Yes! The power of marketing automation is very real, and very real companies are using automation to grow and thrive.” (Check out the case studies starting on page 11 for real-life examples.)

However, the process of selecting a vendor that is right for you—not to mention the process of implementing a system both technically and organizationally—can be daunting.

That’s why we’ve created this guide: to help you better understand the capabilities of marketing automation systems and how to make best use of them – plus, we provide resources for learning more. The guide divides marketing automation into the following sections:

1. Lead Management
2. Campaign Management
3. Sales Integration
4. Analytics

After reading those sections, you can read further to learn about which types of marketing

automation functions will be taken over by machine learning (ML), preparing the way for artificial intelligence (AI) to step in. As MarketingProfs speaker Jim Sterne says, “It’s OK to use a calculator as long as you understand what long division is all about.”

To learn how to set up your marketing automation program for success, check out this video tutorial:

[Day One With Marketing Automation, What to Do?](#)

1. LEAD MANAGEMENT

What Is Lead Management?

Lead generation, especially in the B2B space, is frequently cited as the primary goal of many marketing activities. However, lead quality is just as frequently the biggest complaint the sales organization levels at their marketing counterparts. Lead management encompasses the entire process of collecting potential leads, vetting and evaluating them, and then passing them along to the sales organization.

Why It's Important

A primary benefit of marketing automation for marketers is better leads and a more robust pipeline, including such factors as increased lead quality, opportunity-to-pipeline conversion, and deal velocity.

How Does It Work?

The key is effective lead scoring, a process that involves the assignment of scores to relevant actions on the part of the lead, prospect, or site visitor. The actions you score will vary from business to business, but typical actions to consider include:

- Clicks and pageviews from online ads
- E-newsletter and survey responses
- Downloads from your website (whitepapers, case studies, etc.)
- Blog comments
- Telemarketing responses
- Tradeshow visits
- Direct-mail responses
- Webinar attendance
- Online demo views
- Survey participants

Where the Rubber Meets the Road

The vast majority of lead-scoring work has to take place up front. It has to happen prior to automation because it's *what* you are automating!

The key to meaningful lead scoring, however, is collaboration between sales and marketing. If sales thinks of a "qualified lead" as someone intent on purchasing, but marketing thinks of a "qualified lead" as someone who will definitely purchase at some point, there is a major disconnect.

This disconnect can be bridged when sales and marketing work together to establish scoring criteria for different behaviors (website visit, email signup, download, etc.) and then agree on a total score that translates into "qualification."

With the scoring schema in place, the marketing automation system can automatically produce scores based on the behaviors of specific visitors.

What is Lead Scoring?

A standard method of scoring an email campaign is to assign points based on actions taken. For example, if the recipient clicks through to a landing page, that's five points. If she spends more than 10 seconds on the page, that's another five points. If she then views a product page or case study, even more points are assigned.

However, a lead score should also include demographic information, intent information, behavioral and engagement information, and any other information relevant to your buyers, whenever possible. All these aspects combine to give a grade, and you want to focus mostly on the A's.

Why It's Important

Yes, there is much to be gained by the technical integration of marketing and sales systems. Still, there is even more to be gained by integrating your marketing and sales teams. In fact, it is this operational integration that will make your technical integration more effective.

Where the Rubber Meets the Road

Studies have shown that at companies growing faster than their competitors, sales and marketing were more closely aligned than at companies experiencing slower growth. This alignment took several forms, all of which serve as best practices for a more effective implementation of marketing automation:

- 1. Joint planning of lead-generation marketing.** Joint planning ensures both common definitions of "qualified leads" and alignment between marketing activities and the desired results.
- 2. Closed-loop sales tracking of lead performance back to marketing.** Without tracking, there's no way to know whether the lead-scoring methodology is accurate or if the lead-generating activities are actually working.
- 3. Measuring the ROI of lead-generation marketing.** To justify the investment in the systems that make lead-generating activities possible and trackable, you need to demonstrate return.

These two aspects of integration — technical and operational — not only complement each other, they need each other.

Sales and Marketing Alignment: Seven Steps to Collaborative, Right-Time Revenue Optimization

Article by Joe Cordo



Sales and Marketing alignment is not new, but it has acquired a dot-com-era moniker: Sales and Marketing 2.0. One should look past such hyperbole, but marketing and sales departments should not ignore some of the newest best-practices for creating a strong, collaborative revenue engine.

The following seven steps will help organizations fuel that engine; these recommendations, based on simple yet powerful best-practices, will help align sales and marketing teams much more effectively.

[Click here to read the full article.](#)

NOW WHAT? HOW TO USE WHAT YOU'VE LEARNED

By now, it should have become clear that, yes, marketing automation systems can improve lead management, automate campaigns, support a wide range of sales activities, and provide valuable and timely insight into diverse marketing activities — but they can't do all this in a vacuum.

On the contrary, the marketing automation solution you select will need different types of organizational support at many levels (marketing, sales, IT, executive, etc.) if it is going to function at all.

For this reason, before considering a particular vendor, you need to be able to answer the following questions.

What do you hope to accomplish via marketing automation? In other words, do the capabilities of marketing automation align with the way your business works?

If your business involves a complex, information-based sale that benefits from ongoing lead nurturing, or if you are an online retailer with a massive email list and numerous multichannel campaigns running simultaneously, marketing automation could be right for you.

If your business is locally based, personally transacted, and strictly word-of-mouth, then ... maybe not.

What resources will you need to implement and use the system?

Obviously, you need the folks in IT to help get the system up and running, but you will also need someone capable of working within the system to create web pages, forms, email templates, etc. Do you have someone on your team who you can cross-train for this, or will you have to hire for this need?

Even more important to consider is whether your marketing team has the skills to design the lead models, campaigns, and dashboards you hope to create. You're going to have to customize the system to meet your needs, and that customization may have to begin with restructuring your team.

Needless to say, you'll want to know if the vendor you choose will be able to supplement and augment your team where there are gaps (and that these services won't cost you an arm and a leg).

Do you truly have support across the organization for this effort?

You're probably going to need executive support to fund this, and you'll definitely need technical support to get it up and running. But is your sales organization ready to work in close collaboration with you to make this system an integral part of how you interact with customers and generate revenue? Are you ready to work with them?

Remember: At the end of the day, you aren't just automating marketing, you're automating your business.

CASE STUDIES AT A GLANCE

Marketing automation tools are helping more and more organizations with lead management, campaign management, and data analysis.

From a best practice standpoint, as we've mentioned, implementations are most effective when:

- There is strong collaboration between sales and marketing before, during, and after the implementation process
- Campaigns are designed for data collection and automated not only for operational efficiency, but in conformity with customer preferences
- The system is integrated with sales both technically and operationally
- The inherent analytic capabilities are leveraged both to grow the business and improve system performance
- The overall effort enjoys support across the enterprise

The tools are powerful, but their ultimate value is determined by your organization's ability to wield them.

Here's a quick glance at two companies that used marketing automation with successful results.

Resource 1: Applications of Artificial Intelligence and Machine Learning in Businesses [Infographic]

This infographic gives an overview of AI and how it can be used in various parts of business, including marketing. [Click here](#) or on the image to see a larger version.



Resource 2: The Marketing Impact of AI and Machine Learning: 3 Predictions by 51 ML Marketing Executives [Article]

This article gives an overview of artificial intelligence and machine learning (ML) and explores how the technologies are changing the marketing world. The author predicts, "At some point, nearly all CRM programs were (or had the option to be) cloud-based. At some point, all cars had antilock brakes... It seems reasonable to believe that if ML is to create efficiencies in targeting, contacting, segmenting, and converting customers, then it, too, will see its day in the form of near-total adoption." [Click here](#) or on the image to read the whole piece.

The Marketing Impact of AI and Machine Learning: 3 Predictions by 51 ML Marketing Executives

by Daniel Faggella | May 16, 2017



In the last two years, the number of machine-learning (ML) startups has skyrocketed, and companies (in truth or in hype) increasingly predicate their value proposition on artificial intelligence (AI).

Although ML and AI in health care and finance have garnered a tremendous amount of venture investment and press, other areas, such as marketing and business intelligence, have the potential to more quickly impact profitability, and are less fettered by regulation.

ABOUT



MarketingProfs is a rich and trusted resource that offers actionable know-how designed to make you a smarter marketer—from social media and content marketing to lead generation and online conversions. Nearly 600,000 MarketingProfs members rely on our free daily publications, virtual conferences, and more to stay up-to-date on the most important trends in marketing—and how to apply them to their businesses. Plus, MarketingProfs delivers enhanced professional development training through online seminars and short webcasts, in-depth how-to reports, research, interactive planning tools, online courses, and in-person events. MarketingProfs helps the smartest marketers worldwide turn even the toughest marketing challenges into success stories.

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