



Driving Marketing ROI with Marketing Automation



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I. Introduction

The Shifting Sands of B2B Purchase Patterns

B2B Buyers Today: Well Connected, More Demanding, Better Informed

The B2B marketplace today is more complicated than ever. A fundamental, internet-age shift in power has thoroughly transformed B2B buying behavior.

Prospects used to have very limited information and resources for assessing solution providers. Now, they have much more insight and options at their disposal.

Ineffective sales prospecting techniques like cold calls are getting the cold shoulder.

Most savvy B2B buyers find solutions through online search, social network sharing, subscribing to content that's relevant to them and engaging with brands who provide customised content catered to their needs.



80%

of **B2B purchase decision** is made **before** contacting a sales representative

Source: MarketingSherpa's Business Technology Marketing Benchmark Guide

The result? The average sales cycle has increased **22%** over the past five years¹. You must evolve and look for new avenues to engage your prospects.

If you don't want your marketing message to get ignored, it needs to be more targeted and personal than ever.

Source: ¹Sirius Decisions

This ebook will give you insight on why Marketing Automation is the solution to evolving with the B2B consumer and elevating your business.

It will outline:



Why **Marketing Automation** matters



The **key features** of Marketing Automation

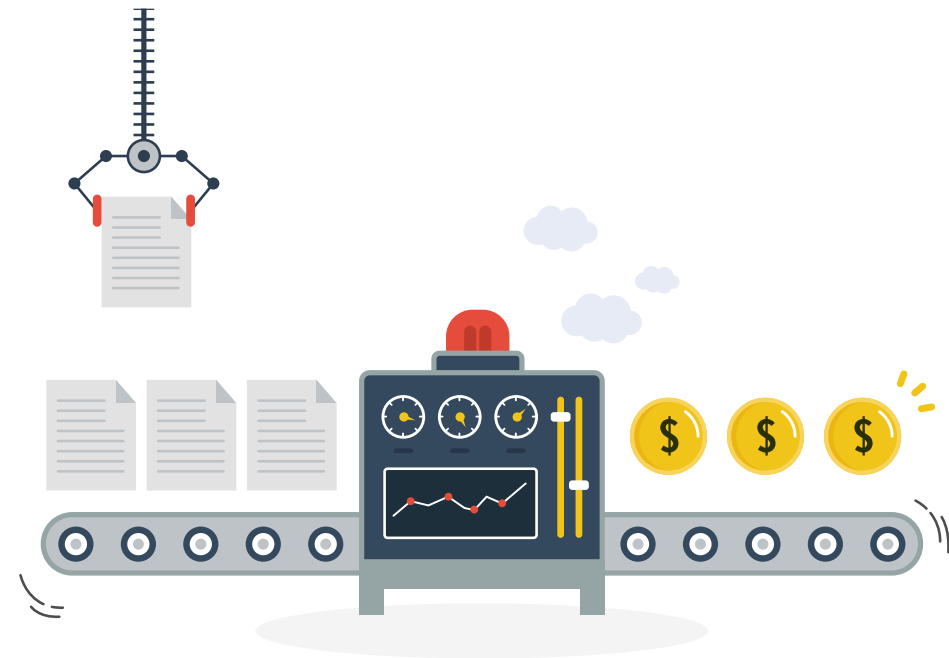
II. Marketing Automation – What’s In It for Me

Traditional marketing workflows cannot handle what it takes to produce suitable, personalised responses to prospects all through the buying process, matching the right content to the right point in time. This is where automation comes in handy.

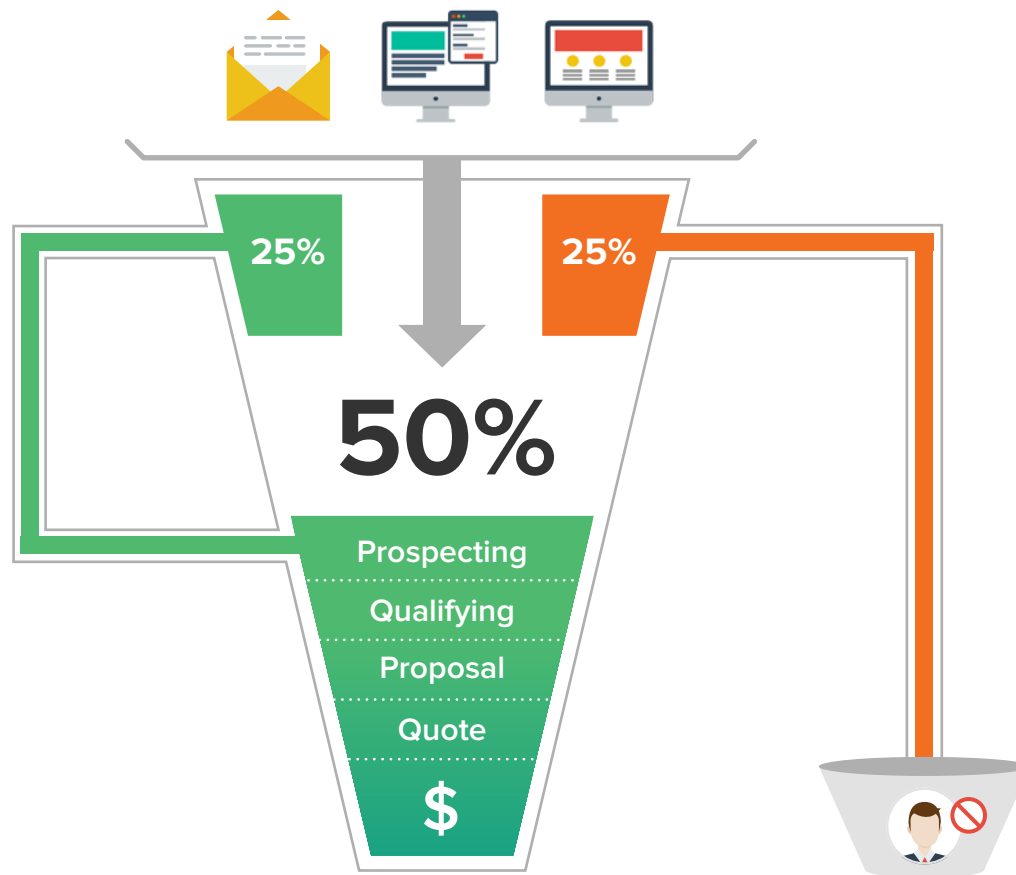
Marketing automation is a platform for conducting a well-tuned and synchronised orchestra of all **inbound** and **outbound, goal-oriented marketing activities**, tailored around personalised user experiences. It allows you to create and handle **customer interactions with more speed and customisation**.

Most Marketing Automation platforms provide solutions for:

- Lead management
- Lead nurturing
- Lead scoring
- Campaign management
- Social marketing
- Landing pages
- Integration with CRM systems
- Messaging (email, SMS, social)
- Multi-channel marketing
- Marketing analytics
- Resource management

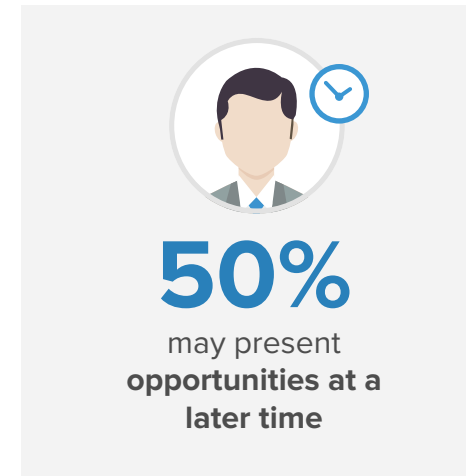
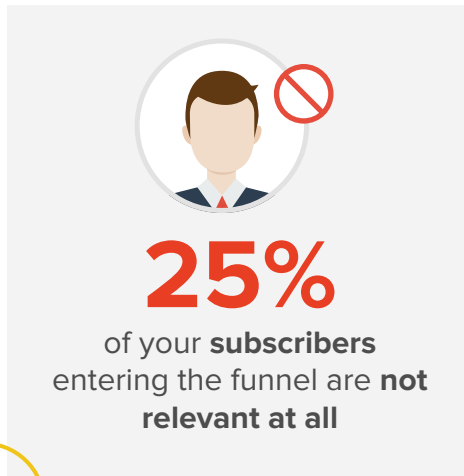


Automation tools use marketing scores to identify and target content to prospects when they need it most. That value translates to engagement and empowerment - and in due time, response and sales. The best marketing greater quality leads, and attain higher ROI.



▲ The sales conversion funnel

As a rule of thumb, in the sales conversion funnel:




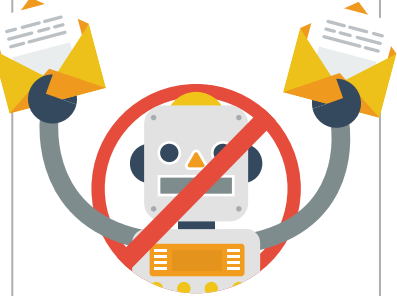
The vast majority of your prospective customers **will not convert on your first message**. For maximum conversion, this **50% needs to be nurtured** down the funnel with stage-appropriate, individualised content presented through marketing automation.

Instead of sporadic and disconnected campaigns, with marketing automation you can nurture leads and guide prospects through the sales conversion funnel. The ultimate marketing automation strategy is to become more efficient and effective at moving people/companies from lead to customer, in other words, **improve revenue funnel conversions**.

III. Separating Fact from Myth

You may hear marketing automation and email marketing being used interchangeably. The fact is that email marketing is a component of marketing automation, but not quite the same. Marketing automation connects multiple touch points and marketing channels including social media, email marketing, and content marketing. Here are **two more myth busters**.

| Myth ❌ | Fact ✅ |
|--|---|
| <p data-bbox="488 754 651 874">Marketing automation is spam.</p>  An icon showing a yellow envelope with a white letter inside, crossed out by a red circle with a diagonal slash, symbolizing that marketing automation is not spam. | <p data-bbox="801 746 1742 914">No way. Marketing automation is one of the most user-friendly marketing channels out there because it's tailored around personalised user experiences. You're not blasting audiences with an advertising messages.</p> <p data-bbox="801 970 1720 1042">Imagine instead that you're nurturing leads and guiding prospects through the sales conversion funnel.</p> |

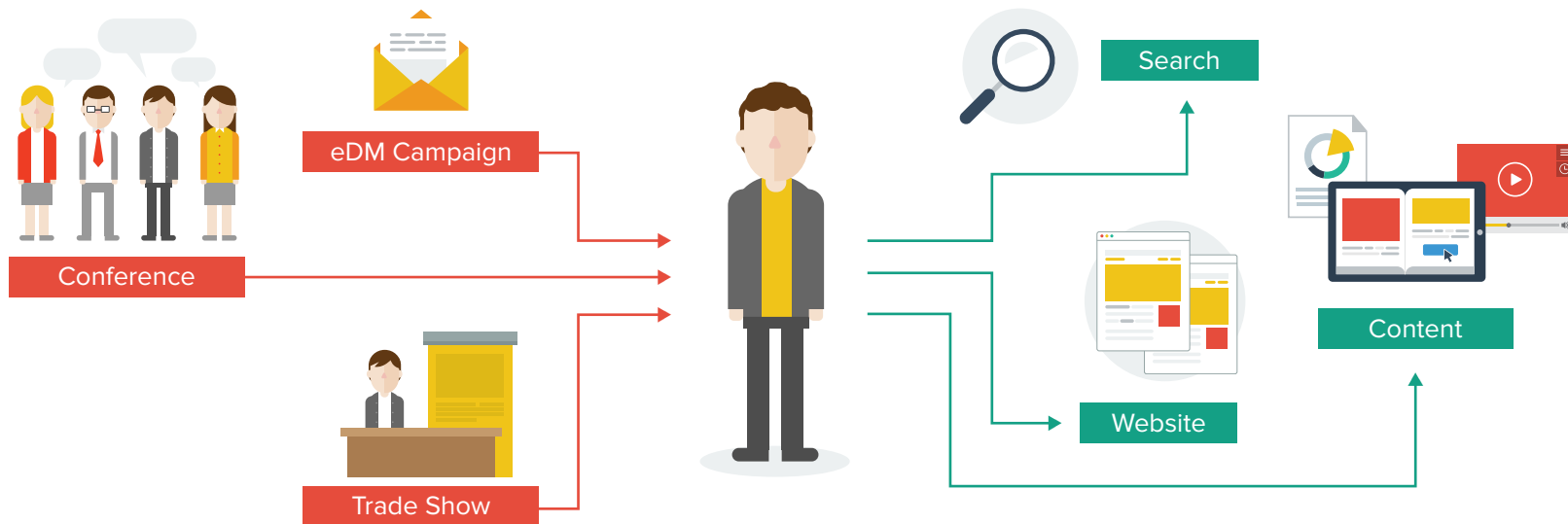
| Myth ❌ | Fact ✅ |
|--|--|
| <p>Marketing automation is cold, inhuman, and impersonal. “Automation” is just another way of saying that we’re spamming people.</p>  | <p>Marketing automation makes it easier to send personalized, 1:1 targeted messages. In other words, marketing automation makes communication stronger. When you automate your marketing, you can focus more heavily on the quality of your campaigns and messaging.</p> <p>Marketing automation gives your team the ability to add more personal touches to your campaign – by collecting data on a prospect’s interests and goals, you can custom-tailor future offers so that they are more relevant.</p> <p>In fact, marketing automation will empower your organization to do the following:</p> <ol style="list-style-type: none">1. Add dynamic content based on an individual’s specific user profile. For instance, you can send targeted offers based on website patterns.2. Categorise customers and prospects by common behaviors, interests, and demographic details. These will be dimensions for segmenting your customers.3. Develop optimal marketing patterns. Marketing automation can help your company test different variables like email send times, subject headings, and ideas for personalisation.4. Integrate marketing channels to deliver a comprehensive, cross-platform user experience. Make sure that every touch point is carefully planned for optimal conversion optimisation. |

Adapted from Definitive Guide to Marketing Automation by Neil Patel and Ritika Puri

IV. Three Tenets of Marketing Automation

1. Fragmented Lead Lifecycle

A lead might interact with your brand at multiple touch-points such as Conferences or Trade Shows, eDM Campaigns, Online search engines, Websites or through coming across Print and Digital content. This could lead to a fragmented lifecycle. For instance, a lead might learn about your brand at a Trade Show, then discover your website through an ad campaign and later subscribe to your newsletter.



How do you track such a fragmented lifecycle of a lead?

Marketing Automation aids you in tracking such a fragmented lifecycle of a lead by allowing for customer-centric, multi-channel, personalised marketing across all stages of the buyer lifecycle.

Marketing Automation gives you a single snapshot of the entire life of a lead.

Through Marketing automation, you can track all the touchpoints and channels (both online and offline) prospects use to connect with you as well as keep track of the progress of the lead and nurture the lead down the funnel. Automated workflows, pre-defined scenarios and customer-driven triggers are set up in a connected and omnichannel way. A single customer view is imperative as is a connected approach.

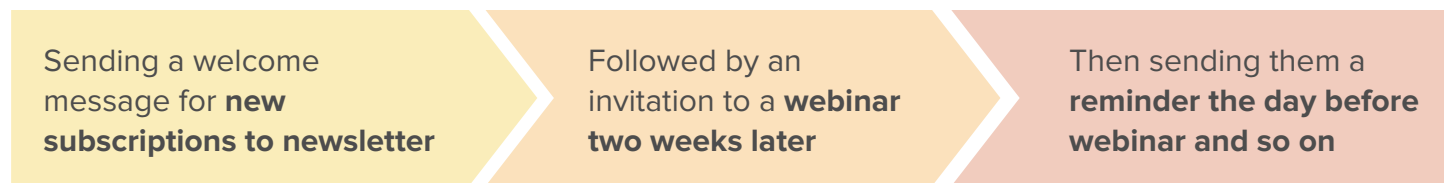
The screenshot shows a CRM interface for a lead named Rohan Chaudhary. At the top, there is a profile picture placeholder, the name 'Rohan Chaudhary', and an 'Options' menu. Below this, there are tabs for 'Overview', 'Life of the Lead' (which is active and shows a count of 8), and 'Memberships' (with a count of 12). The main section is titled 'Timeline' with an 'Event Filter' dropdown. The timeline shows a lead created 6 months ago. A horizontal timeline bar has several icons representing different events. One event is highlighted: 'Email was Opened'. The event details state: 'The email DD Midmarket - Download report acknowledgement was opened. Initially sent August 12, 2015 2:18 PM.' To the left of the text is a circular thumbnail of the email content, which includes the word 'Accelerate' and a bicycle image. The event is timestamped as '10 weeks ago (August 12, 2015 2:18 PM)'.

▲ Typical view of Life of a Lead

2. Individualised, Segmented Nurturing

Every prospect has different needs, buying cycles and processes. Marketers want to give every lead individual attention. However, a number of tasks in the workflow could be repeated for every lead.

For example



But what if the lead doesn't respond to that welcome message? With marketing automation, you can tailor subsequent action points to the precise activity of the lead, thus guiding them individually through the lead funnel according to their lead characteristics.



Marketing automation automates this workflow and helps save time and resources, without compromising on the personal touch for each lead, thereby providing you with quality leads.

With personalized, segmented lead nurturing, you strengthen the relationship with each prospect over time, interacting in a range of settings, learning more about their needs and capabilities while advancing seamlessly from one interaction to the next. This also gives you insight on when to commit more resources to the relationship as well as when to pull back and give the prospect some space and time.

Movement of Prospects within the Funnel



3. Lead Definition – Lead Scoring

A lead is a qualified prospect that is beginning to display buying behavior. However, not all leads may be equally relevant. Only **27% of leads sent directly to sales are qualified**². The challenge then becomes, how do you set apart the good, quality leads from those who are just beginning to look around? That's where lead management, and specifically, lead scoring comes in.

Lead scoring is an essential component of modern lead management. By tracking your prospect's behaviour and web activity, you can ascertain their level of interest in your solution (engagement) in addition to your interest in them (demographics and firmographics targeting). Only by combining both factors can you deliver legitimately qualified leads to sales.

To label the leads for conversion-readiness, you can attach a score or value to them, **based on three criteria:**

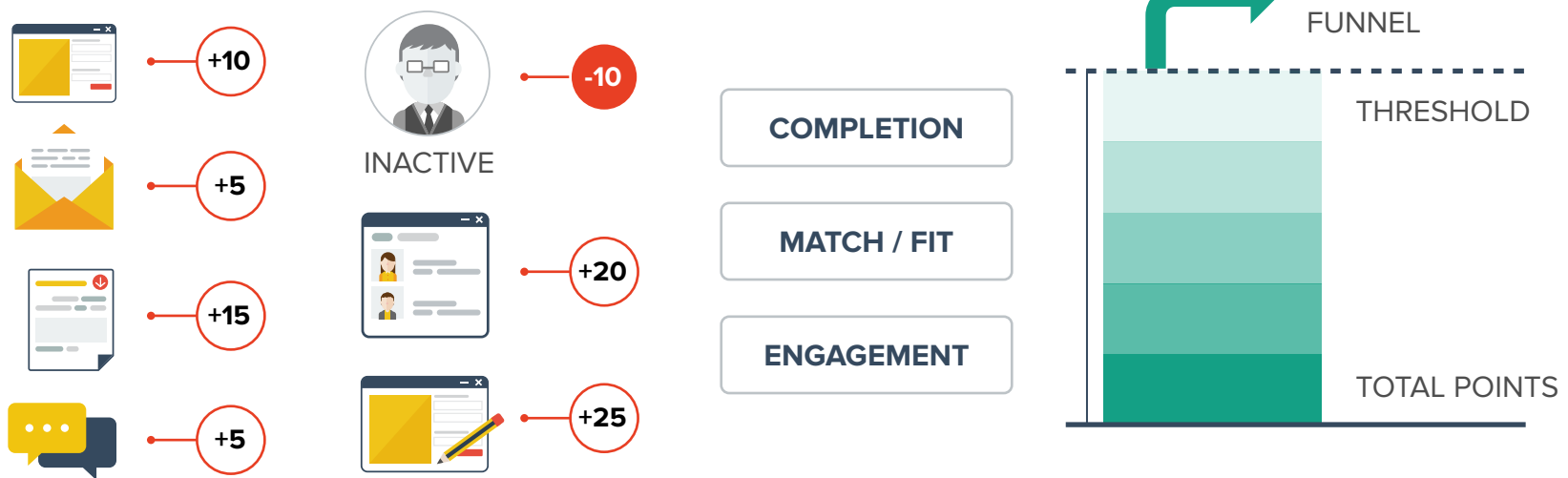
- ▶ **Completion** – do you have the basic minimum information of the lead, i.e. Name and e-mail address?
- ▶ **Match/Fit** – does the lead fit with the persona of your ideal prospect?
- ▶ **Engagement** – how are they interacting with your content and marketing messaging?

Based on this scoring, you can set a threshold to filter leads more likely to go into the sales funnel. Once the score hits the lead threshold you have set, the sales teams can intelligently follow up on qualified leads for sales conversion.

Source: ²Marketing Sherpa B2B Marketing Benchmark Survey, 2011

For instance, you would probably rank a vice CXO-level lead who has spent time on both your products and pricing page higher than an executive- or intern-level lead with the same behaviour. You may also rank one Director over another if the first Director has displayed a greater level of engagement on your website. Assuming engagement as a proxy for interest and intent, each of these scores go into a profile of your lead to aid you in ascertaining when they're ready to speak with a sales person.

Lead Scoring



Lead Score Rules

Lead Scores are built nightly on all new or recently updated leads.

Lead Score Ranges

Specify the lead score ranges you would like to highlight. This is useful when you can only get to a limited set of leads a day.

Mark leads importance with the following ranges. Total Leads: 2,362

Completeness

Rules to measure a lead's information (e.g. address, phone, email).

- Add 1 point if a **First and/or Last Name** is provided.
- Add 5 points if a **Company Name** is provided.
- Add 10 points if a **Title** is provided.
- Add 1 point if a **Street** is provided.
- Add 10 points if a **City** is provided.
- Add 1 point if a **State** is provided.
- Add 1 point if a **Zip Code** is provided.
- Add 1 point if a **Website** is provided.
- Add 10 points if a **Phone Number** is provided.
- Add 5 points if an **Email** is provided.

▼ **Setting up Lead Scoring**

Engagement

Rules to measure a lead's actions (e.g. visits, form submissions).

- Add 5 points for each **page visit** (excluding bounces).
- Add 10 points if a **Landing Page** for a campaign is visited.
- Add 15 points if a **form** is completed.
- Add 5 points for each **email click**.
- Add 1 point for each **media view**.

Tracking

+ New Page Rule

You can assign lead scores for certain page visits on your site. Using our [wildcard system](#), you can even match on URL extensions, which is useful for pages that have UTM codes or other dynamic elements.

- Add 5 points if a lead visits the page
- Add 5 points if a lead visits the page
- Add 5 points if a lead visits the page
- Add 10 points if a lead visits the page

When a Lead Scoring Model is effective, the key benefits are:

Increased sales efficiency and effectiveness

Lead scoring focuses sales attention on most important leads, ensuring that leads that are unqualified or have low perceived value are not delivered to sales for engagement. Through this prioritization process, sales obtains higher-quality leads, which elevates conversion rates.

Increased marketing effectiveness

A lead scoring model quantifies what types of leads or lead attributes matter most. This allows you to more productively target its inbound and outbound programs and send more high-quality leads to sales.

Tighter Marketing and Sales alignment

Lead scoring prevents the Marketing and Sales departments from being at loggerheads over which lead is more qualified by establishing a common definition for which lead types are ready for teleprospecting or field sales attention. It provides a common language with which the marketing and sales team can discuss the quality and quantity of leads generated.



Wrapping Up

The Revenue Per Sales transaction (RPU) of the average B2B organization validates the comparably small spend on marketing automation.

Marketing automation generates more qualified leads and collects valuable sales intelligence to boost closing rates.

These efficiencies are exceptionally invaluable to your B2B customers.

Whether your organisation's yearly revenue is \$300 billion or \$6 million—or less— marketing automation is the platform that will drive your enterprise into the new age of relationship-based marketing with tangible results.



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