

THE BUSINESS CASE FOR

MARKETING AUTOMATION

How to Craft a Compelling Case
the Executive Team Will Approve





Bottom line, you can't realize the benefits of nurture marketing the way top performers do unless you incorporate a technology platform that can preconfigure business rules to manage timely engagement and escalate prioritized leads to sales via integration with CRM.

No amount of hired resources could manually reach out and touch prospects at just the right time with just the right message.

Marketing automation forms the backbone for configuring nurture marketing campaigns across channels and managing communications based on prospect engagement. It's also one of the only ways marketers can actually start to attribute marketing spend to closed sales.

— GLEANSTER,
March 2013

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You're Convinced Marketing Automation Will Help Your Company Leap Forward...

...if you can convince executive management to adopt the technology.

The buyer has evolved. Which means you must, too.

THE SCALES HAVE SHIFTED.

Technology, digital channels, and non-stop connectivity continue to empower today's buyers with at-the-ready information and increased choice, fueling unprecedented global competition.

As a result, marketers must shoulder more responsibility for contributing – measurably – to sales and revenue goals, an expanded role that's less “persuasion” and more “buyer education.”

Success hinges on finding the right mix of inbound and outbound strategies, and the right integrated data that connects the dots.

MARKETING AUTOMATION STRIKES THIS BALANCE.

It's a proven method for managing and optimizing the entire customer experience, measuring what matters, increasing revenue, and tying that revenue to your marketing team's efforts.

This eBook will help you create a compelling business case that can convince executive management to adopt marketing automation.

In it, you'll find the basics of what marketing automation is and what it can do, data and stats to bolster your case, and recommendations that will help you sell marketing automation to key members of your executive team.

1. The Basics of Marketing Automation

- + *What is marketing automation?*
- + *What's the value of marketing automation?*
- + *What's included in marketing automation?*
- + *What do businesses use marketing automation for?*
- + *Marketing automation vs. CRM*

A SCENARIO:

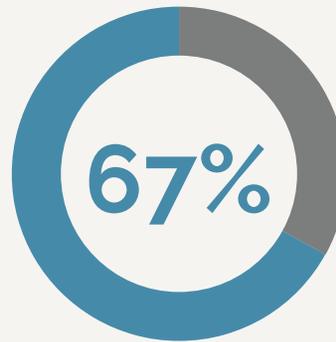
Performance in Action

Companies that have adopted marketing automation are out-performing those that haven't.



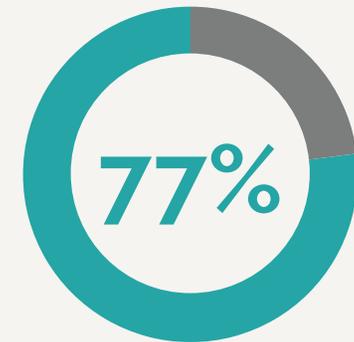
87% of top-performing companies (defined as those where marketing contributes more than half of the sales pipeline) have adopted marketing automation.

(Aberdeen Group, Sep 2014)



67% Best-in-Class companies are 67% more likely to use a marketing automation platform.

(Aberdeen Group, "State of Marketing Automation 2014: Processes that Produce,")



77% Better together: Among organizations that use both marketing automation and CRM as part of an integrated technology stack, 77% met or beat their revenue goals.

(Ascend2, 2015)

1. THE BASICS OF MARKETING AUTOMATION

What is Marketing Automation?

It depends on who you ask. Here's how others define it:

Marketing automation focuses on the definition, scheduling, segmentation, and tracking of marketing campaigns. The use of marketing automation makes processes that would otherwise be performed manually much more efficient, and makes new processes possible.

- MARKETING
AUTOMATION
TIMES

A strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly defined audience – and ultimately drive profitable customer action.

- CONTENT
MARKETING
INSTITUTE

Marketing automation is the use of technology to generate, nurture, score and qualify leads, and drive sales using customized, multi-touch marketing communications that are tailored for each contact's profile, level of interest, behavior, or place in the buying process.

- SALES LEAD
INSIGHTS

Lead-to-Revenue Management (L2RM)

Forrester Research prefers the term “lead-to-revenue management automation solutions” and notes that such systems were developed to “bridge a gap between lead generation activities (e.g., trade shows, direct mail, telemarketing, and email campaigns) and selling activities (e.g., closing the deal) that were managed by a customer relationship management (CRM) system.” The opportunity to calibrate marketing spend to revenue generation was a significant driver of L2RM adoption.

1. THE BASICS OF MARKETING AUTOMATION

What's the Value of Marketing Automation?

Marketing automation creates a digital infrastructure that allows marketing and sales to learn about, understand, and interact with buyers throughout the entire lifecycle – from attraction to conversion to retention – in a well-timed, personalized way.

Consider these facts:

- 80% of marketing automation adopters saw their number of leads increase, and 77% saw the number of conversions increase. (*VentureBeat Insight, "Marketing Automation, How to Make the Right Buying Decision," 2015*)
- Among organizations that use both marketing automation and CRM as part of an integrated technology stack, 74% reported aligned sales and marketing teams. (*DemandGen Benchmark Study, 2015*)
- Marketers say that the biggest benefits of automation are saving time (74%), increased customer engagement (68%), more timely communications (58%), and increased opportunities, including up-selling (58%). (*Adestra, "Marketer vs Machine," 2015*)
- 63% of survey respondents indicate that the ability to set measurable objectives for each of their campaigns is the biggest value driver of marketing automation. (*Gleanster, 2013*)
- Two-thirds of companies (65%) say marketing automation is "very important" to the overall success of their marketing program. Another 33% consider it "somewhat important" and only 2% claim it is "not important" to marketing success. (*Ascend2, 2015*)
- B2B marketers who have implemented marketing automation contribute 10% more of the sales pipeline via marketing programs than do marketers who have not implemented marketing automation (44% versus 34%). (*Forrester Research, Jan 2014*)
- Increasing customer retention rates by 5% increases profits by 25% to 95%. (*Harvard Business Review, 2014*) And how do you increase retention? Try the personalized, consistent relationship marketing that automation excels in.

It's a compelling value proposition.

Marketing Automation Benefits:

Done well, marketing automation can:

INCREASE
overall sales, both for new and repeat customers

SHORTEN
the sales cycle by 50% or more

INCREASE
deal sizes

INCREASE
sales quota achievement rates

LOWER
the cost per lead

LOWER
overall sales and marketing costs across the company

INCREASE
alignment of sales and marketing teams

DECREASE
churn

1. THE BASICS OF MARKETING AUTOMATION

What's Included in Marketing Automation?

Marketing automation systems offer most or all of the following:

- Email message and campaign creation
- Automated email campaign deployment and measurement (e.g., drip and nurture campaigns)
- Triggered emails
- Lead management and routing
- Automated lead nurturing
- Automated lead scoring
- Creation and hosting of landing pages and forms
- Website visitor tracking
- Social media marketing and sharing, including blog integration
- Inbound marketing, including some SEO capability and account-based marketing
- Database with segmentation capabilities
- CRM integration and automatic data synchronization
- Web events/webinar integration, registration, and management
- Tracking, reports, and analytics
- Third-party app integration
- Data capture of demographic, firmographic, and behavioral information for leads and customers
- Alerts that notify sales and/or marketing when a specific person or company visits a specific page on the website

The Hallmarks of a Marketing Automation Platform

- Data integration, data analytics, list creation, dynamic list-building
- Automated workflows for the development and execution of outbound and inbound marketing
- Ability to create email messages, landing pages, and online forms
- Lead management features for lead scoring, lead distribution, and lead nurturing
- Visibility and access for sales into marketing campaign efforts and individual prospects
- CRM integration (either native or non-native)
- Unique activity reports for each contact (e.g., prospect, lead, customer) showing website behaviors, email clickthroughs, content views, form completions, etc.
- Reporting, analytics, and customizable dashboards
- Account-based marketing support, including account-level profiles, tracking, and scoring

(Adapted from SiriusView: Marketing Automation report)

1. THE BASICS OF MARKETING AUTOMATION

What Do Businesses Use Marketing Automation For?

Virtually everyone who uses marketing automation begins by employing it for email marketing, then scales it in different directions, depending on need.

Here are 20 possibilities:

- 1 Create and manage email marketing campaigns with less time and effort.
- 2 Eliminate cold calling through lead intelligence that lets sales prioritize who to call and what to discuss.
- 3 Segment the database to support targeted, personalized campaigns.
- 4 Nurture leads with relevant content that's timed to help them progress through the sales funnel.
- 5 See and understand lead behavior as prospective buyers move along or drop out of the sales funnel.
- 6 Score leads to indicate sales-readiness.
- 7 Synchronize leads to the CRM system as they qualify.
- 8 Help sales engage more effectively with buyers by using intelligence gathered at multiple touch points.
- 9 Lower costs by reducing and/or integrating disparate point tools.
- 10 Optimize resources to improve operational and time efficiencies.
- 11 Handle increased workloads without additional staff or specialized technical skills.
- 12 Improve sales response times through information sharing between marketing and sales.
- 13 Respond 24/7 with no downtime, no overtime, and no need for training or retraining.
- 14 Create set-it-and-forget-it drip and nurturing campaigns.
- 15 Publish to multiple social accounts with one action.
- 16 Eliminate manual data entry for webinar and event registrations.
- 17 Manage all communications around webinars and events, from initial promotions to final follow-up.
- 18 Get a comprehensive understanding of each lead and customer by integrating marketing automation and CRM systems.
- 19 Build complex campaigns that coordinate multiple channels and messages automatically.
- 20 Demonstrate marketing's contribution to deal quantity, deal size, and overall revenue.



For many customers, size matters. As a small marketing team, I've experienced first-hand how potential clients will quickly reject your company if it appears too small based on company profile or perceived project capabilities.

Our company suddenly appeared bigger because we were (and are) doing the work of a much larger marketing team. That's the power of marketing automation.



- BEN JACKSON
VP of Sales,
voices.com

1. THE BASICS OF MARKETING AUTOMATION

Marketing Automation vs. CRM

A common question:

"If I have a CRM solution in place, do I really need marketing automation?"

The only thing CRM systems do is organize your information. They keep track of your sales and they capture your sales process, but they don't keep track of your sales or execute your efforts.

A good marketing automation system proactively helps you. If set up and managed well, you can sit back and the system will drop interested prospects in your lap ... I don't actually recommend someone choose one or the other. World-class sales and marketing organizations need both to succeed and scale.

- MATT HEINZ
President
Heinz Marketing Inc.

With modern CRM systems, you typically have some ability to broadcast emails to your client list, and the ability to capture leads from websites. But when the customer needs more sophisticated capabilities, that's when we look to marketing automation.

- CHRISTIAN WETTRE
President
W-Systems.

The Takeaway

While marketing automation and CRM have different capabilities, the two systems are complementary. When integrated, they form a powerful sales and marketing toolset that's rich in features and capabilities.

Strategic businesses should invest in both CRM and marketing automation.

1. THE BASICS OF MARKETING AUTOMATION

The Tale of Two Use Cases

	 A LARGE COMPANY	 A SMALL COMPANY
SITUATION	A global company sells high-end products that typically require a long sales cycle. The company has thousands of sales reps who use a CRM tool to improve sales productivity, including managing the contact database and tracking interactions with prospects, leads, and customers.	A local company has two brick-and-mortar locations and 20 sales reps; some use a CRM tool and some don't. The company also has two marketers who wear multiple hats, including manually collecting, scoring, and transferring leads.
CHALLENGE	The CRM tool does not support the marketing department's productivity, including lead generation, nurturing, and scoring. This hinders marketing's ability to deliver timely and relevant messages and campaigns, and to pass qualified leads to sales.	The company is adding more products and expanding into more sales regions. Lead quantity and diversity are increasing, and the marketing team is struggling to keep up with new demand . Team efficiency, campaign effectiveness, and the ability to pass qualified leads to sales are being adversely impacted.
SOLUTION	The company implemented a marketing automation platform that was integrated with its CRM tool. The result: Both departments benefited. Marketing was able to create, execute, and measure the full range of marketing programs (including automated lead nurturing and scoring), deliver the right message at the right time, and pass more qualified leads to sales. Sales was able to prioritize hot opportunities, reduce cold calling, and close more sales. Both had visibility of the entire lead lifecycle and access to new, real-time customer intelligence.	By implementing a marketing automation platform, the two-person marketing department was able to create multiple campaigns for each buyer type – including engagement tracking and lead scoring – and set them up to run automatically. The result: consistent delivery of relevant messages based on each prospect's demonstrated behaviors and interests, more and more-qualified leads for sales, and more time and budget to focus on marketing strategies and new business opportunities, rather than on manual campaign management.

2. How to Make a Business Case for Marketing Automation

- + *Why invest in marketing automation?*
- + *Specific marketing challenges and how marketing automation helps solve them:*
 - *Lead generation and management*
 - *Campaign optimization*
 - *Sales enablement*
 - *Resource optimization*
 - *Data and analytics*

2. HOW TO MAKE A BUSINESS CASE FOR MARKETING AUTOMATION

Why Invest in Marketing Automation?

Every organization experiencing success with marketing automation has a different answer to this question.

Here are the three that surface most often:

1. REVENUE

Marketing automation positively impacts both the top and bottom lines, with many results seen quickly after implementation:

Top line. Improving the experience and engagement of prospects and customers drives more demand for products and services, generates more high quality leads, and helps close more first-time and repeat sales.

Bottom line. Improving process and operational efficiencies decreases costs (e.g., resources, capital equipment, outsourcing) while increasing profitability.

2. ACHIEVE ORGANIZATIONAL GOALS

Marketing automation helps businesses realize core strategic goals, including:

Brand relevance. Marketers can more easily, quickly, and effectively deliver the right message to the right person at the right time via the right channel. This dramatically increases your brand's relevance in customers' eyes.

Increased efficiency. Launch campaigns in hours or days, with little or no IT support needed and no special coding skills. Automating common tasks allows you to build relationships – at scale – with fewer resources while increasing personalization. Sales can use lead intelligence to shorten the sales cycle.

Data intelligence. Visibility into the performance of campaigns, personas, and buying stages allows organizations to optimize marketing efforts, improve results, increase sales quotas, and measure ROI.

Marketers who have adopted marketing automation suggest that the biggest benefits are:

(36%)

Taking repetitive tasks out of marketers hands, so they can work on other projects

(30%)

Better targeting their prospects and existing customers

(10%)

Improving customer experience

(9%)

Better email marketing

(8%)

Reduction of human error

(4%)

Lead management

(3%)

Multichannel marketing

(Lenskold and Pedowitz, 2013)

Why Invest in Marketing Automation? (continued)

3. IMPROVE INTERNAL COOPERATION

Marketing automation systems provide the infrastructure for sales and marketing to work together.

Sales and marketing cooperation. Many aspects of marketing programs must be calibrated to the sales team's needs. When the teams align, their mutual decisions are implemented via the marketing automation system. This alignment results in nurturing, scoring, and handoff processes tuned to sales requirements, leading to intradepartmental trust and more effective follow-up.

Sales intelligence. The real-time intelligence about a lead's fitness, concerns, and behaviors lets the sales rep begin a warm, targeted conversation and build a relationship more quickly. It also reduces the need for cold calls.

B2B organizations with tightly aligned sales and marketing achieved 24% faster revenue growth and 27% faster profit growth over a three year period.

(Sirius Decisions, 2014)

Companies with aligned sales and marketing departments are 20% more likely to use marketing automation than non-aligned companies.

(Ascend2, 2015)

Minimize Investment Risks:



To minimize investment risk, consider a vendor that offers pricing tied to the number of active contacts you plan to email each month. That way, you're not charged for the size of your database – only the contacts you actively email to.

By starting small and testing the waters, you can learn what works and expand as needs and benefits become more apparent.

Marketing automation's reporting capabilities will help you validate the system's worth and document your return on investment.

2. HOW TO MAKE A BUSINESS CASE FOR MARKETING AUTOMATION

Specific Challenges and How Marketing Automation Helps Solve Them

Marketing automation platforms provide sophisticated, highly choreographed, interoperable technologies that power and support an extensive range of digital marketing opportunities. By design, the benefits are far-reaching and interrelated, woven through multiple teams for multiple uses at multiple times.

We've organized marketing's most common hurdles into five categories. We hope this will help you create a strategic plan to show how marketing automation can answer your own organization's biggest challenges.

1. LEAD GENERATION AND MANAGEMENT
2. CAMPAIGN OPTIMIZATION
3. SALES ENABLEMENT
4. RESOURCE OPTIMIZATION
5. DATA AND ANALYTICS

TRY THIS: USE CASE STUDIES



Show your executives that other companies in your industry or other companies of your size are achieving success with marketing automation. Look for **case studies** that make one of those points, or look for a study that spotlights how someone used marketing automation to solve a problem your own company recognizes as a pain point worth solving. Your goal is to show parity of some kind and reinforce the idea that companies like yours are seeing a return on investment with marketing automation.

Be sure to research whether one or more of your competitors is using marketing automation.

2. HOW TO MAKE A BUSINESS CASE FOR MARKETING AUTOMATION

Lead Generation and Customer Lifecycle Management

Among B2B marketers, the #1 benefit of marketing automation is generating more and better leads.

(Pepper Global, 2013 & 2014)

1. INBOUND AND OUTBOUND FROM ONE PLATFORM

Automation platforms enable marketers to pull prospects “in” (e.g., search engine optimization, social marketing, landing pages, and integration with pay-per-click systems such as Google AdWords) and communicate “out” (e.g., email, online webinars, and virtual events).

2. LEAD CAPTURING

Marketing automation offers several mechanisms for capturing the contact information of prospects who have responded to offers or messages, thereby facilitating moving them into the funnel. Key tactics include:

- **Landing pages and forms**, which can be quickly created in automation platforms and tied directly to the contact/customer database of record.
- **Webinars and online events**, which can effectively expand brand visibility, and create awareness of – and demand for – products and services. Automation platforms offer integrated capabilities that allow marketers to plan and launch web-based events, engage attendees before and during the event, and follow up afterwards.

Did You Know?



According to Aberdeen Group, **60%** of marketing leads are generated **via outbound** marketing channels and **40%** **via inbound** marketing channels.

BUT...

Top Rank Marketing found leads gained through organic searches (which is inbound marketing) have a 14.6% rate of close, while outbound marketing leads have a close rate of only 1.7%!

Lead Generation and Customer Lifecycle Management (continued)

Nurtured leads produce, on average, a 20% increase in sales opportunities versus non-nurtured leads.

(DemandGen Report, 2014)

40% of marketing, sales, and business professionals admit that a lack of an effective strategy is the most challenging obstacle to lead generation success.

(Ascend2, 2015)

3. LEAD SCORING

Lead scoring allows marketers to qualify leads by assigning pre-determined values to their behaviors and profile characteristics. When a buyer-ready lead score threshold is passed, a notification is triggered, allowing marketers to quickly pass the lead to sales. Automated lead scoring benefits marketers by:

- Providing timely information on a lead's progress through the funnel/buyer's journey.
- Taking the guesswork out of a lead's status with automated lead classification based on scores (e.g., Marketing-Qualified, Sales-Accepted, Sales-Qualified).
- Uncovering the content and interactions that drive the highest response.
- Delivering more and better-qualified leads to sales with less time and effort.

4. LEAD NURTURING

With automation, you can implement and manage nurture programs (e.g., multi-touch drip campaigns) that:

- Keep new leads in the funnel – especially important for complex, lengthy, and/or high-value sales cycles.
- Help leads move through the funnel via a mix of educational and other materials sent in a timed cadence.
- Are personalized and customized to the lead's specific areas of interest, which strengthens relationships with potential and existing customers.

5. LEAD SEGMENTATION

Dynamically segment leads that come from any type of campaign or channel, such as social media, email campaigns, form-fills, or paid campaigns. By segmenting leads based on sources, marketers can use the appropriate medium and channel to send out relevant messages and craft effective campaigns. Leads can also be segmented by industry, company size, products already purchased, or any other factor that helps you create more targeted campaigns.

Lead Generation and Customer Lifecycle Management (continued)

6. CUSTOMER EXPERIENCE AND RETENTION

Once you've closed the deal, your most profitable revenue comes with keeping that good customer. Here's how your marketing automation platform will help you reduce churn, improve the customer experience, and increase retention and upsell:

- Onboard new customers with a series of messages and training events.
- Reach out to customers who are under-utilizing your product or service.
- Use customer newsletters, surveys, and email programs to keep customers engaged and deepen relationships.
- Invite customers to become advocates, and make it easy for them with messaging and templates.
- Score existing customers' behavior to gauge interest in new products or an upsell, so you can reach out at just the right time.

7. TARGETING: SENDING THE RIGHT MESSAGE TO THE RIGHT PERSON

From nurturing leads to re-capturing lost sales to managing loyalty programs, automation lets marketers set up targeted messages based on any number of attributes (e.g., age, gender, title, geography, engagement behaviors, products purchased etc.).

This allows marketers to:

- Send the right message at the right time.
- Have visibility into who their most profitable customers are, where they came from, and how to find more like them.
- Cross-sell and upsell to segments.

TRY THIS: USE DATA



Gather your baseline data. Know how many leads are generated and conversion rates at each step, including what percentage of marketing-generated leads become closed deals in contrast to leads generated in other ways. Understand whether your sales team is losing deals to competitors or to no-decision. Review your email statistics, including sends, opens, and clickthroughs; know which campaigns are delivering qualified leads and which are not. Know at what point leads fall out of the funnel. You will use this data to understand how an improvement at any step could affect revenue.

If your current systems don't allow you to measure these factors, then gaining the capability to understand how your marketing is performing becomes a solid business reason for implementing automation.

2. HOW TO MAKE A BUSINESS CASE FOR MARKETING AUTOMATION

Campaign Optimization

1. REDUCE LEAD TIME

Marketing automation efficiently facilitates the quick coordination, scheduling, launching, and measuring of marketing campaigns from simple to complex, across single or multiple channels. What used to take weeks can be implemented in hours or days.

2. TEST & OPTIMIZE CAMPAIGN EFFECTIVENESS

Begin by using A/B testing for campaign elements – e.g., email subject lines, calls to action, landing page and form design, colors, messages, etc. – to increase the odds of success before official launch. The winning version can then be rolled out in the larger campaign. Then, through tracking and monitoring (often in real time), marketers can identify what works and what doesn't, and often change it on the fly. The new knowledge is assessed to find fresh ways of appealing to customers.

3. PERSONALIZE YOUR INTERACTIONS

Personalization is a proven technique to increase conversion. Automation allows marketers to tie behaviors to individuals, thereby opening new doors for dynamically personalizing emails, custom landing pages, and offers.

4. REACH A WIDER AUDIENCE

Combining the full complement of data collection and profiling with outbound and inbound tactics, marketers can significantly expand their visibility and reach, grow their database, and increase lead flow.

5. OPTIMIZE FOR SEARCH ENGINES

According to a study by Conductor, organic search drives the most traffic of all channels; it's responsible for nearly half of all website visits (47%). Marketing automation platforms can streamline SEO tasks with on-page evaluation tools to ensure web pages, blogs, and other content are optimized for search engines and aligned with best practices.

6. GO SOCIAL

Automation helps marketers track and manage social publishing and listening across a wide range of popular social media channels. This includes sending notifications when it's time to respond, which allows marketers to learn what's being said and participate in conversations. Some platforms offer social attribution, competitive analysis, and prospecting.

Campaign Optimization (continued)

7. UNDERSTAND YOUR WEB VISITORS

Website visitor tracking can show precisely which products and services each visitor is interested in, helping marketers further target campaigns and promotions to meet their interests. It can also help you identify anonymous visitors and uncover their contact information.

8. SCHEDULE SET-IT-AND-FORGET-IT EMAIL CAMPAIGNS

Marketing automation helps marketers take full advantage of email marketing, including nurture programs and trigger email programs. Pre-determined content, offers, and messages are automatically sent to the right recipients at the right time, working to keep them engaged and progressing through the funnel.

9. CREATE AND EVALUATE LANDING PAGES

How well are your landing pages performing? Do they follow SEO best practices? Do you know the right metrics to watch? Which designs are more effective? Automation software provides the tools to answer those – and many more – questions. Some also have one-click landing page creation from an email message.

TRY THIS:



Be Ready to Answer Questions About Time and Resources

Evaluate everything your team does now and how much time it takes. Estimate conservatively how much time you might save on frequent key tasks, such as email campaign setup and management. Talk to partners and advocates who have implemented marketing automation; ask them to share information with you.

Think about headcount. Consider whether you already have the right resources on your team or whether you'll need to add staff. Some marketing systems require training before you can use them; others are easier to use.

Evaluate how you currently work with, and share information with, sales. Consider how marketing automation will affect what you already do, and whether any processes will need to change.

Campaign Optimization (continued)

10. CREATE AND EVALUATE BLOG POSTS

Marketing automation platforms can be integrated with popular blog platforms such as WordPress or Drupal. Marketers benefit by creating and measuring blog performance from a single platform, as well as optimizing each post for SEO.

11. INTEGRATE WITH PAID SEARCH MARKETING

If you use pay-per-click advertising, ensure that your chosen marketing automation platform can integrate with your PPC service. Many of them can't. (Act-On offers easy integration with Google AdWords, allowing marketers to see how PPC campaigns are performing and the search terms that are bringing impressions, clicks, and conversions.)

12. INCREASE WEB EVENT EFFECTIVENESS

Web events – webinars, webcasts, virtual conferences, demos – offer a multitude of tactics and benefits including lead generation, nurturing, thought leadership, training/education, and brand building. Marketing automation software integrates with popular web event platforms such as WebEx and GoToWebinar, and can dramatically reduce the time spent on organizing the events, while increasing engagement and lead quality.

Marketing automation can even handle registration, which means registrants can go straight into your database as segmented leads.

TRY THIS:



Think about your marketing campaigns and objectives in three broad categories:

BRAND. Here you campaign for awareness, reputation, thought leadership, and market share. Marketing automation helps you control your brand by distributing consistent messaging and tracking response, including influencers and the press, and helping you manage and attribute your social presence.

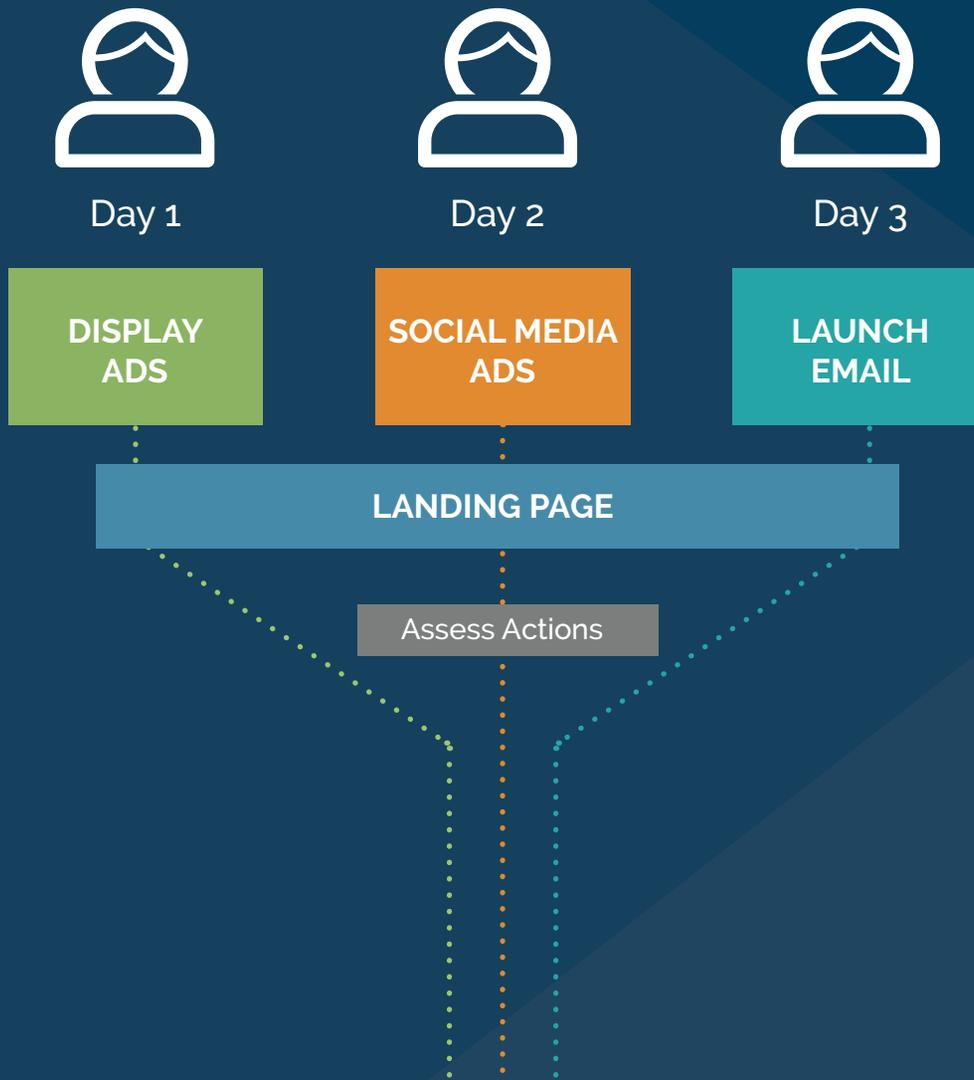
DEMAND. This is the classic demand generation category, which for most of us includes list management, cleaning, and segmentation; email marketing; landing pages and forms; events; website visitor tracking; lead nurturing; account and lead behavior scoring, qualification, and handoff to sales.

EXPAND. This category includes retention, upsell, loyalty, and advocacy programs. From onboarding through active customer nurturing, you can use all the techniques and tactics you use for Brand and Demand activities to refine the customer experience and deepen your customer relationships.

A SCENARIO:

Marketing Automation in Action

Let's say you build a promotional campaign comprised of PPC, targeted email and landing pages, social media sharing, and two pieces of content: an eBook and a video.



With marketing automation, the launch of your campaign elements can be pre-scheduled and precisely calibrated. **For example:**

- Display ads are in place on Day 1.
- Social media ads on Day 2.
- Emails launch on Day 3, targeted to specific database segments.
- When prospects begin to respond by visiting the landing page, the automation system does the work by assessing their actions and then channeling prospects into the campaign track (including messages, cadence, and scoring) that best corresponds with their interests.
- If a prospect fills out a form and downloads the eBook or video, the system will send a triggered thank-you note targeted to whatever action was taken, and personalized to whatever degree possible (e.g., first name).

2. HOW TO MAKE A BUSINESS CASE FOR MARKETING AUTOMATION

Sales Enablement

1. GET MORE – AND BETTER – SALES-QUALIFIED LEADS

Marketing automation changes lead generation 180 degrees by supporting lead capture and lead scoring, which enables sales reps to:

- Optimize their time by using lead scoring to identify and prioritize sales-ready buyers.
- Focus on getting in front of leads that are ready to buy.
- Build trust-based customer relationships by delivering relevant information at the right time.

2. ACCESS IN-DEPTH, UNIFIED INSIGHTS FOR SMARTER SALES CALLS

Automation technology streamlines and aggregates data from multiple channels and sources so it's easy to access and understand. The result is that a lead's interests and status in the sales cycle are clear, which helps sales reps effectively frame their conversations and communications to a prospective buyer's pain points and needs in minimal time.

3. INTEGRATE WITH EXISTING CRM

Sales reps can remain in their CRM system while still accessing all the information and intelligence the automation platform provides; no switching back-and-forth between systems.

This allows reps to have more effective and productive engagements with potential and current buyers.

4. ELIMINATE COLD CALLING

With customer intelligence from lead-tracking data, profile information, engagement history, and CRM integration, sales reps are armed with the essentials before picking up the phone or sending an email.

5. MAKE THE MOST OF EMAIL

Marketing automation systems let sales reps automatically personalize messages for a particular customer or industry and send them at the optimal times. Trigger emails can be customized to inbound actions so buyers receive personalized communications in response. All email communications — automated or otherwise — are captured in your activity history for each lead.

Sales Enablement (continued)

6. IDENTIFY THE BEST LEADS WITH REAL-TIME ALERTS

Sales reps can set up alerts that notify them in real time of important activities and milestones. Examples include when particular leads visit pre-determined web pages or engage with content, when a lead-score threshold has been met, or when a qualified lead has been assigned.

7. SHORTEN THE SALES CYCLE

From inbound and outbound marketing, lead scoring, data collection, and CRM integration, the customized capabilities of marketing automation allow sales reps to convert leads faster and at higher rates.

8. CLOSE BIGGER SALES

According to a 2013 Pedowitz Group study, 28% of marketing teams using marketing automation reported an increase in the average deal size from a marketing-qualified lead that was passed to sales. Given that such leads have been educated and nurtured, and that sales can have a richer, deeper conversation with them, greater deal size is a predictable outcome of relationship building.

TRY THIS:

Get Sales Involved From the Beginning

Know what percentage of leads are ignored by sales and what percentage of leads return to marketing for further nurturing. Talk to sales and see what they think of having complete account histories at their fingertips; ask if prioritized hot-prospect lists would be helpful.

Because sales is so profoundly impacted by a marketing automation system, it's a good idea to make them your ally from the beginning.

Companies with mature lead generation and management practices have a 9.3% higher sales quota achievement rate.

(CSO Insights, 2015)

2. HOW TO MAKE A BUSINESS CASE FOR MARKETING AUTOMATION

Resource Optimization

1. SAVE TIME BY AUTOMATING MANUAL TASKS

Marketing automation saves time, whether you're deploying email campaigns on a staggered schedule, setting up drip campaigns that run by themselves, tallying website visits by visitor, or publishing across multiple social channels with a single click. Many marketers use that time to add new programs or do more analysis; many also enjoy the benefit of increased efficiency without an increase in headcount.

2. REDUCE MARKETING COSTS THROUGH BETTER-TARGETED CAMPAIGNS

Marketing automation plays an important role in reducing the costs of marketing campaigns. The ease of audience segmentation, personalization, and data-driven optimization leads to more targeted and tailored campaigns that can be launched faster and generally perform better.

Marketers say that the **biggest benefits of Automation are Saving time (74%), Increased customer engagement (68%), More timely communications (58%) and Increased opportunities including up-selling (58%)**

(Adestra, Marketer vs. Machine, 2015)

3. INTEGRATE WITH EXISTING SYSTEMS AND TOOLS

Most marketing automation systems can be *integrated* with a wide range of systems and tools, often accomplished with minimal clicks. This saves time by allowing teams to keep the tools they're used to, and reduces costs by more efficiently supporting marketing campaigns and communications. Examples include:

- CRM platforms
- Web event management systems
- Blogging platforms
- AdWords

4. IMPLEMENT WITH MINIMAL (OR NO) IT SUPPORT

Many marketing automation systems are designed for ease of use, including intuitive user interfaces that facilitate all phases of implementation and campaign development. This dramatically reduces reliance on IT resources and allows marketers to more fully manage their own activities.

Resource Optimization (continued)

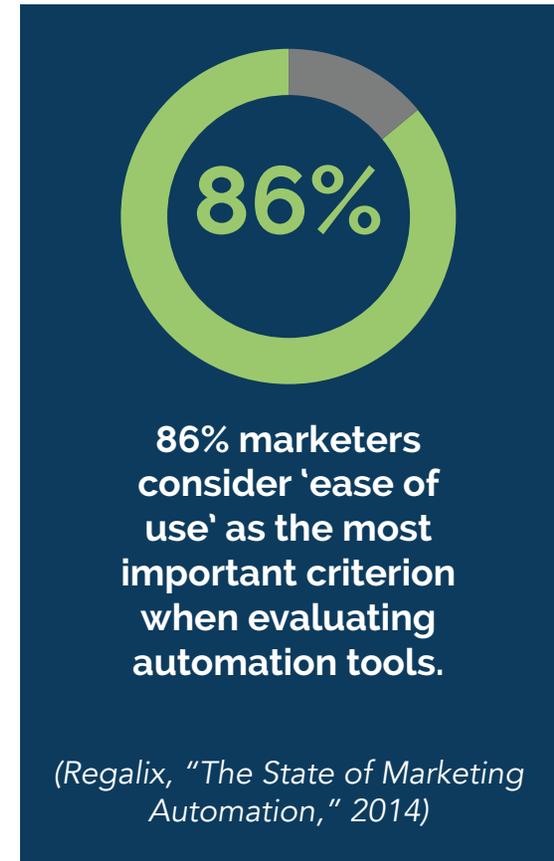
5. DEPLOY CAMPAIGNS WITHOUT SPECIALIZED SKILLS

Most of today's automation software gives marketers full freedom to develop and deploy campaigns without needing specialized coding skills or technical savvy. WYSIWYG editors and intuitive drag-and-drop functionality significantly reduce the time and effort needed to create professional-looking campaigns and execute complex marketing tasks. This also reduces costs associated with hiring specialists.

6. IMPROVE SALES AND MARKETING ALIGNMENT

Better cooperation and collaboration between sales and marketing is a big win for businesses that implement marketing automation; by design, the integrated platform tends to reduce (or eliminate) much of the struggle between the two teams. The reason: Automation improves lead quality, increases revenue, automates tedious tasks, and delivers actionable intelligence. Sales has input into determining lead quality, scoring, and timing, so they have increased trust in the leads that marketing delivers, and are more likely to follow up. Marketing learns what sales encounters on the front lines, and can use the knowledge to create more relevant content and campaigns.

Sales and marketing alignment delivers, on average, a **36% improvement in customer retention and 38% higher sales-win rates** – and it accomplishes this feat by improving only half of the end-to-end customer lifecycle. (*Act-On/Gleanster, "The New Stewards Of The Customer Relationship," 2015*)



2. HOW TO MAKE A BUSINESS CASE FOR MARKETING AUTOMATION

Data and Analytics

1. GAIN FULL-SPECTRUM INSIGHTS

Marketing automation delivers real-time results across channels and campaigns, enabling marketers to quickly gauge campaign performance, optimize efforts, and allocate resources to the most effective strategies.

2. CUSTOMIZE ESSENTIAL DATA VIEWS

Integrated dashboards aggregate data from all digital channels and can be customized to provide the information deemed most important to each user. On-demand, drillable views provide deeper insights and inform strategic decisions.

3. TRACK CAMPAIGN ROI

Sales and marketing teams share responsibility for driving revenues, including concretely demonstrating a return on investment. Marketing automation make reporting an integral part of every campaign and activity, allowing sales reps and marketers to stay in tune with short- and long-term ROI numbers.

4. UNDERSTAND CUSTOMERS BETTER

Gut decisions can err on the side of optimism rather than reality. Applying metrics to various parts of the marketing process can uncover where you lose potential customers and what attracts them most. The more you know ... the more you know.

5. VISIBILITY MEANS ACCOUNTABILITY

In many organizations, marketers are seen as a collection of "creatives" who aren't anchored to sales goals or other business metrics. Marketing automation provides the reporting that clearly shows how marketing is performing and concretely ties its contributions to sales goals and revenue. This accountability helps marketing teams make decisions that are in line with company goals and receive credit for its accomplishments.

TRY THIS:

Understand Your Current Analytics

As you build your case for marketing automation, review what your company is already measuring, then make recommendations that will complement those measurements and/or bridge critical gaps.

Keep the total number small. In most cases, it's far better to track a few key metrics than to keep watch over many.

3. What the Executive Suite Needs to Know

Want to convince your decision makers that adopting marketing automation is the right thing to do for your company?

To be successful, you need to make the case that your plan serves the company's – and management's – best interests.

Emphasize results, not features, and be ready to make your business case with numbers and support from your counterparts in sales, customer success, and other stakeholders. On the next page, you'll find a checklist to help you cover the bases.

And if you'd like help in understanding and appealing to specific executive roles – for example, what does the CFO care about that's much less important to the VP of Sales? – read our eBook: [Selling Marketing Automation to Your Executive Team](#).

Need Help Crafting Your Strategic Plan?

We can help you build a proposal that meets the specific needs of your business and executive team. [Contact us today](#)



3. WHAT THE EXECUTIVE SUITE NEEDS TO KNOW

What Your Business Case Should Include

To improve your chances for getting executive management's buy-in, here's a checklist of key items to address as you craft your business case:

- Clear objectives for implementing marketing automation.
- Specific benefits of marketing automation adoption and how they map to company objectives.
- Technological components and benefits. For example, are you recommending email, website visitor tracking, social integration? If so, why? What about CRM integration? SEO auditing?
- Data sources, including integrations with your CRM systems, other prospect and customer data, and campaign data.
- Budget and milestones – i.e., the real-world schedule and costs for implementation. This includes phases, technologies, and reasonable times/milestones for learning, evolving, and refining to the point where ROI can be achieved.
- Analytics and reporting.
- ROI projections, including:
 - Outline the volume of activity required to meet lead, quota, and revenue goals. Base this on historic data in your target market.
 - Calculate what sales and marketing activities cost now (without marketing automation).
 - Calculate potential improvement in costs and results after implementing marketing automation.
 - Calculate current and projected profit improvements.
 - Define the results of sales and marketing alignment in terms of lead generation, qualification, and enhanced cooperation.
- Risk management; include risks associated with adopting and not adopting marketing automation.
- Timelines and target dates.



Be wary of offering generic benefits like “increased marketing ROI” or “shorter selling cycles.” Those benefits may be legitimate possibilities, but they carry less weight when they could apply to any organization. Instead, identify the most pressing sales and marketing challenges at your company, and speak to those specific issues.



- HOWARD SEWELL
President
Spears Marketing Group

4. Closing Thoughts & Resources



4. CLOSING THOUGHTS AND RESOURCES

Make Your Case

*The business value of **marketing automation** varies according to how an organization applies the technology.*

- **For the small marketing team**, it might be time savings.
- For the marketer with **lead generation** quotas, it might be the ability to customize and coordinate cross-channel marketing campaigns.
- For the marketer focused on **sales enablement**, it could be the ability to use automated programs such as lead nurturing and lead scoring.
- **For the sales team**, it might be more and better-qualified leads, nuanced intelligence about a lead's needs, a shorter sales cycle, or a real-time list of hot prospects.

Much of buying and selling – and most of the buyer's journey – is conducted online. Marketing automation gives organizations the infrastructure and tools to take full advantage of cross-channel digital marketing, and do it at scale to match changes in business growth, budgets, resources, and skillsets.

Taken as a whole, marketing automation offers impressive upside that's hard to match: The simplicity of a single platform, extensive cross-funnel capabilities, native and non-native integrations with many business-critical tools, low/no need for IT resources or technical skills, quick implementation, and cloud-based economics.

The benefits are numerous, including the ability to understand your prospects and customers, have well-timed and personal interactions with them, and empirically tie marketing efforts to revenue.

If your organization hasn't yet embraced marketing automation, we hope this eBook provides a compelling argument to get the conversation started.

TRY THIS: **Know Your Goals**

BEFORE YOU SEEK EXECUTIVE SUPPORT:

- Know which business goals are worth pursuing and also attainable with marketing automation.
- Know the company objectives marketing automation can support.
- Know what internal support you have. Is the marketing staff willing? Does sales see this as an avenue for more/better leads and a more collaborative working relationship?
- Know how you plan to measure success.

4. CLOSING THOUGHTS AND RESOURCES

Make Your Marketing Life Easier and More Effective

CASE STUDIES

- **Manufacturing company's** web traffic has doubled, sales revenue has climbed 15%, and sales leads have grown year-over-year by 33 percent with marketing automation implementation. [Learn how](#)
- **IT company** automates sophisticated nurture programs and streamline the collaboration between marketing and sales – reducing frustration and saving hundreds of hours of work in the process. [Learn how](#)
- **Marketing agency** uses marketing automation to extend the overall lifetime value (LTV) of its customer relationships to nearly twice the length of the typical agency-client relationship. They tripled one client's audience, saw an average email click-through rate of 16%, and a boost in landing page click-through rates as high as 80%. [Learn how](#)
- **University** can now see and manage the lead flow throughout the funnel seeing how leads "convert", or apply for programs. This insight from marketing automation has improved the recruitment process and management of resources. [Learn how](#)

[Read more case studies](#)

REVIEWS, REPORTS, & BLOGS

- [Customer Experience Matrix](#)
Analyst David Raab's blog
- [Gleanster Research](#)
- [Forrester Research](#) (*no subscription needed to read blog posts*)
- [Software Advice](#) (*no subscription needed to read blog posts*)
- [B2B Marketing Automation Platforms 2014: A Buyer's Guide](#)
- [Marketing Action Blog](#)

TOOLS

- The [Buyer's Checklist](#) for Marketing Automation
- See how marketing automation can improve your business with Act-On's free, interactive [ROI Calculator](#)
- Use our free [A/B Test tool](#) to identify the webpage that converts best
- Get a free [SEO Assessment](#) of your website's home page
- More information about marketing automation is available in the [Act-On Center of Excellence](#)
- Considering adding marketing automation to your technology stack? [Take this assessment](#) to see if you have the right resources in place to make the most out of your investment.



Acclaim for Act-On

Deloitte.
Technology Fast500
2013, 2014, 2015

Inc. 2013, 2014, & 2015
500 FASTEST
GROWING
COMPANIES

A LEADER in Forrester Research, Inc. report, The
FORRESTER WAVE
Lead-To-Revenue Management Platform Vendors, Q1 2014

Forbes 2013
AMERICA'S MOST
PROMISING COMPANIES

FROST & SULLIVAN
2014 BEST PRACTICES AWARD

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About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.

Connect with us to learn more

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