

A MARKETING AUTOMATION QUICK START GUIDE

act-on

Learn How to Accelerate Your
Return on Investment

Add Rocket Fuel to Your Marketing Engine

In the modern marketer's quest to accelerate revenue, marketing automation is your most powerful tool – allowing you to reach a larger audience, with a smaller staff, in a more personalized and relevant way.

In fact, Sirius Decisions reports that:

“Savvy marketers no longer see marketing automation as an extra. It’s mission critical to both marketing and sales for a variety of reasons.”¹

Marketers who use marketing automation to accelerate leads see:



But to get this kind of success, you need to lay the groundwork so that your marketing processes are ready to be automated. If you're new to marketing automation, this might look complicated. But it's really not rocket science, and keeping it simple turns out to be the most successful strategy.

In this guide, we'll give you a simple roadmap that will help you prepare your organization to adopt marketing automation. **With a little preparation, you'll see results right away and accelerate your return on investment.**

Let's Get Started

1. Get Organized

For small and mid-size marketing departments, a few days are all it takes to get your house in order so that you can leverage the power of marketing automation.

In the beginning, there is one secret that will put you on the fast track for success.

Simplicity.

As Steve Jobs said: *"You have to work hard to get your thinking clean to make it simple. But it's worth it in the end because once you get there, you can move mountains."*⁵

Get the essentials in place so you can take immediate action, and then expand and optimize your efforts over time.



The Three “Must Dos” To Get Started



1

Assemble Your Data

As you collect your data, consider indexing your lists for ease of reference. Also think about the completeness and hygiene of your data.



2

Gather Your Content

Get your eBooks, whitepapers, sell sheets, webinar recordings, etc. into one place. Place them all in a folder or create a simple spreadsheet inventory so you can easily access your assets as you build out new automated programs. Many choose to do a full content audit at this point, which is great if you have the time, but is by no means required.



3

Look for Strengths

As you gather your assets and lists, keep your eyes open for opportunities. Where is your data and content strong? Are there segments ripe for the picking? While you needn't segment your first campaigns, you will likely want to later. Now is the time to think about opportunities

Remember - start simple.

Once you have the basics in place, you'll be ready to start sending emails. You don't need to spend a lot of time creating new content. Build the best campaign you can, with the assets and the list you have now. You can build your programs up and out as you learn by doing.

We'll show you how to harness the power of automation and segmentation in the upcoming section, *"Implement a Pilot Automated Program."*

2. Sync with Sales

Once you harness the power of marketing automation, you'll deliver a larger volume of high quality, sales-ready leads. It's a result that is sure to make both your sales team, and executives, smile. To keep them smiling over the long term, take time now to put follow-up processes in place with the sales team. It's this open dialogue that will ensure sales gets the leads they want, and that they are promptly attended to.

In the beginning, you don't need to be perfect; you just need to be proactive.

In fact, organizations with just "average processes" versus "no processes" see a 400% lift in won business.⁶

Start simple with a pilot program and then tweak and optimize over time.



SYNC WITH SALES

Set Up Your Pilot Lead Management Program

1

Connect Your Marketing Automation & CRM Systems

This connection will allow you to notify sales when they have new leads to follow up with. Your Act-On Customer Success Manager can help you set this up.

2

Meet with Sales to Explain the Benefits

Show them the new insights they'll be able to glean with the platform – such as what content prospects have viewed, or how many times they've visited your website.

3

Learn Who Sales Really Wants to Speak With

Have an open dialog with sales about lead criteria. Find out what they consider to be a sales-ready lead. Work with sales to agree on which contacts are handed over as sales leads, and which need more nurturing. By involving sales early, you pave the way for a long-term working relationship where both teams have input into your lead definitions.

4

Agree on a Handover Process

Define how qualified leads will be distributed to reps, and make sure everyone on the team knows exactly what to expect when they receive a new lead.

5

Define a Sales Follow-up Process

In the beginning, your definition should be simple and loose. For example, after a prospect views product-related content, sales will give them a call within 48 hours.

You'll refine all these definitions as time passes and both teams get a chance to see what's working. See the resources in the section, *"Turn on the Afterburners"* for help optimizing your processes.

3. Assemble Your High-Performance Team

Getting the most out of your marketing automation system means getting the right team members involved in the deployment. When done right, you will be able to deliver the results of a large marketing department with just a small staff.

Consider Johnathan Cordeau, Director of Marketing for Response Mail Express (RME). Thanks to marketing automation, he was able to produce a 49% increase in monthly lead flow and a 68% decrease in cost-per-lead, all without having to add staff.

[Read RME's story](#)

To achieve similar success, look for team members in your organization that might be good candidates for managing programs.



ASSEMBLE YOUR HIGH-PERFORMANCE TEAM

Core Competencies You'll Need

1

Strategy & Goal Setting

Identify a resource to put the strategic backbone of your programs in place. Make sure this person can set measurable goals (such as “increase Q2 leads by 10%”) and a strategic plan to achieve the goal. Again, keep it simple. In smaller companies, the CEO or marketing director often drives strategy.

2

Marketing Operations

Designate someone to implement and monitor the programs you build. Look for someone who is naturally tech savvy and learns new systems quickly. Act-On University offers a wealth of live and self-paced training to help them master the platform quickly. Regardless of your subscription level, you'll get ongoing customer success resources for the lifetime of our relationship.

3

Content

You'll need a resource to manage and produce emails, landing pages, images, and supporting content for campaigns. Your internal team can do this, or you can rely on an agency, freelancers, or Act-On Professional Services.

In the beginning, you may need help. So consider supplementing your internal capabilities by outsourcing all (or parts of) the planning process to accelerate success.

In fact, this initial reliance on outside expertise is so common that **79% of marketing leaders supplement internal capabilities by outsourcing all or part of the planning process.**⁷

Outsourcing the initial planning allows your team to focus on learning and adjusting to new processes – while getting much of the set-up work done at the same time. An experienced consultant will also be aware of common mistakes, and can help you avoid them.

Get Help From Marketers Who Have Been There

Accelerate your success with Act-On's Professional Services. [Learn more](#) about how we can help you achieve your goals.

4. Implement a Pilot Automated Program

Once you've put your essential people and processes in place, it's time to start automating your programs.

It's at this stage where you'll truly realize the tremendous power of marketing automation - as it's automation that allows you to customize your messages based on the behavior of your prospects.

The key here, as in all your initial programs, is simplicity. Keep things simple so you can get up and running quickly and learn what works for you.

Here's an example of a proven automated nurturing program, followed by an execution roadmap.



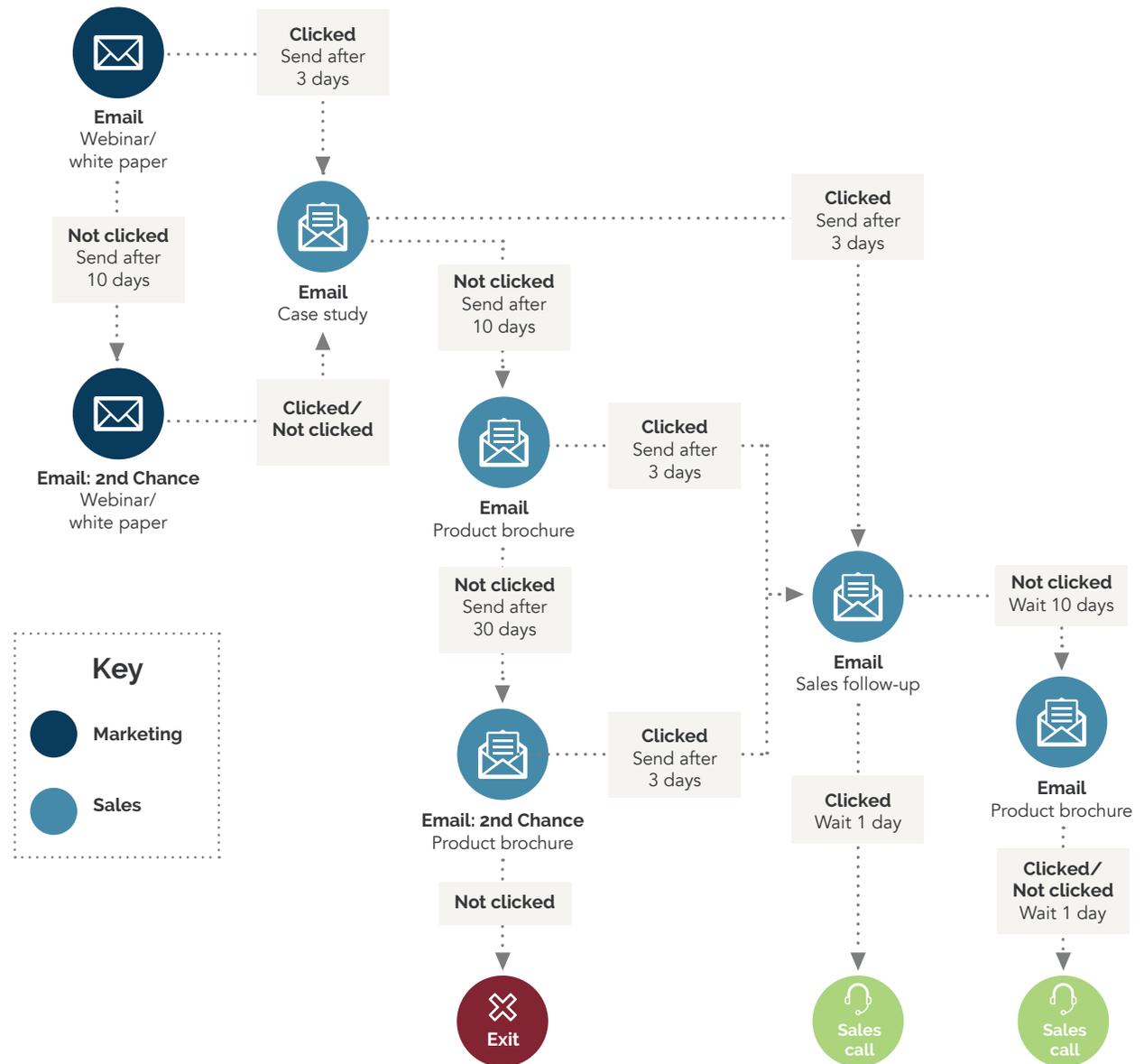
IMPLEMENT A PILOT AUTOMATED PROGRAM

Example Automated Nurturing Program

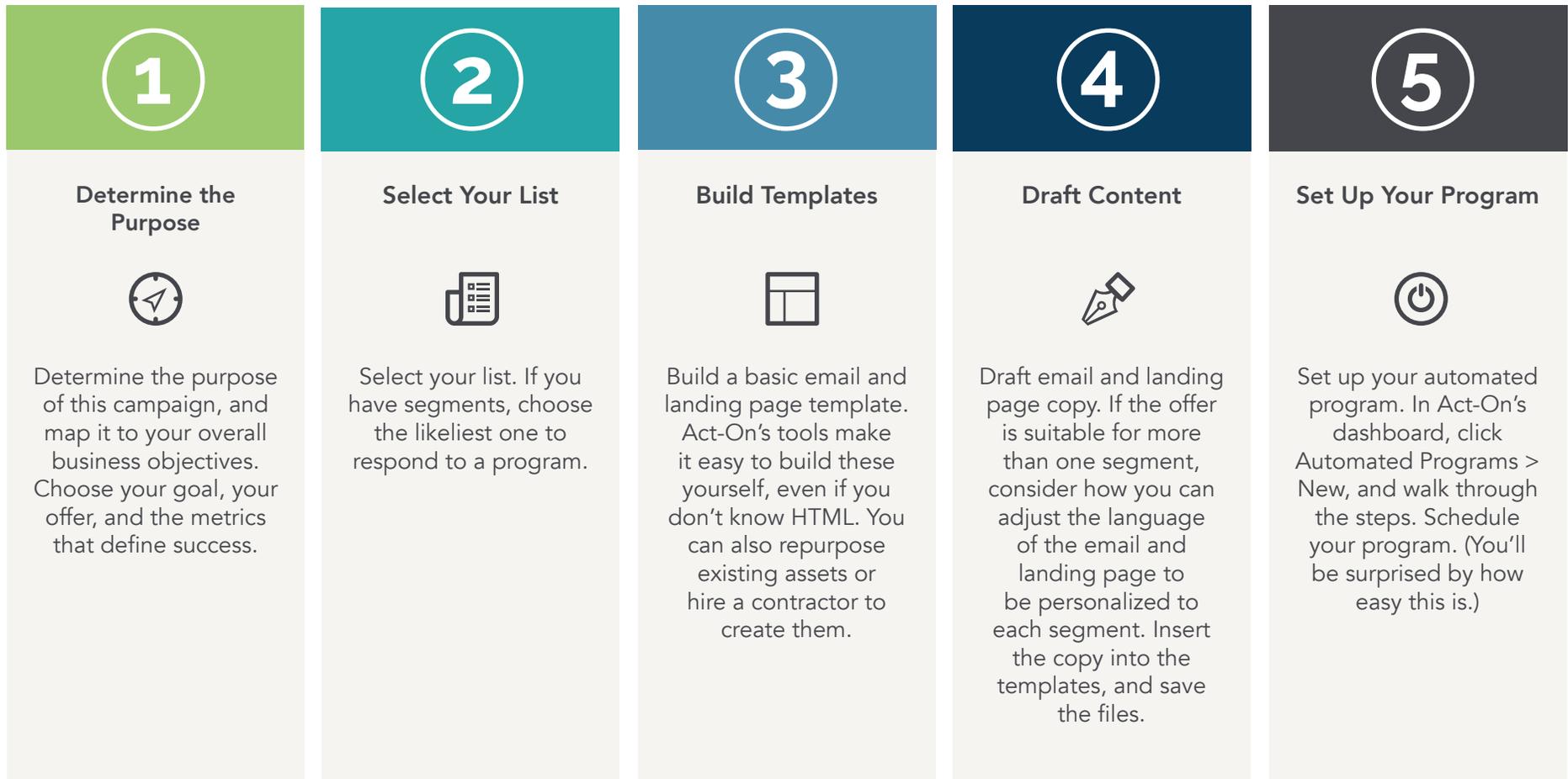
A nurturing program is an automated program that sends a series of emails to a prospect. The series offers a set of progressive messages, which may vary based on the prospect's interactions with your campaign. Each email is intended to educate, inform, or entertain, and entice the prospect to take a next step.

The objective of the campaign is to help the lead progress along the buyer's journey.

Plan a series of content assets or offers to go with each step. In this example, the first step is the offer of a webinar/whitepaper. The second step is a case study, and from there the message varies based on if/then conditional logic in response to the customer's actions.



Build Your First Automated Program



5. Optimize and Maximize Results

One of marketing automation's biggest benefits is the ability to see and measure your results. You will know whether you hit your goals, and you will have data to guide program optimization over time.

In fact, 50% of marketing leaders say analytics and reporting is the most valuable feature of a marketing automation system.⁸

When you're getting started, focus on tactical metrics so you can optimize things like subject lines and calls to action.

Over time, monitor campaign and program metrics so that you can demonstrate how your efforts are impacting the bottomline. When your marketing automation system shows how your team contributes to revenue, **27%** that's the most meaningful metric of all.

With Act-On, it's easy to **measure what matters.**



OPTIMIZE AND MAXIMIZE RESULTS

Metrics that Matter

TACTICAL METRICS

- ✓ Email Opens
- ✓ Conversion Rates
- ✓ Downloads & Unsubscribes
- ✓ Attendance

CAMPAIGN METRICS

- ✓ Total Lead Volume
- ✓ New Sales-Ready Leads
- ✓ Lead Funnel

PROGRAM METRICS

- ✓ Close Rate
- ✓ Time to Close
- ✓ Cost per Close
- ✓ Revenue per New Customer



Marketing Asset	# Touches	# Deals	Attributed Revenue
Actomatic.com Contact Form	139	77	\$106,275
Actomatic Homepage	166	157	\$84,293
Webinar Series: Spooky Action at a Distance	26	16	\$57,805



6. Reap the Rewards

So how long does it take to deliver a positive return on your investment? About 44% of companies achieve a positive ROI within only six months⁹ - with a whopping 28% average overall return.

But the truth is that it all depends.

Here are a few of the factors that will affect your timeline to ROI:

- Strength of your brand
- Health of your data
- Your relationship with your list
- Relationship with sales
- Length of your sales cycle
- Experience implementing technologies
- Current level of online marketing activity

But even if your sales cycle is long, and experience is short, returns are still within reach. In fact, 74% of companies see ROI within 12 months.¹⁰

The key for success is to start simple. Get organized, and just get going. You'll be surprised how quickly your small efforts can snowball into big successes.

Ready to accelerate your marketing results? [Contact an Act-On representative today.](#)

Just by working that bulk of leads that we had generated that we hadn't done anything with, we realized an immediate ROI. By the fourth week, we actually made back what we were going to spend with Act-On in the whole year because we'd opened up so many of the closed, lost leads.

- SAT SINDHAR
Managing Director,
PeopleHR

Turn on the Afterburners

After you've mastered the basics, you'll want to take things to the next level. [Here are the resources you'll need.](#)

The High-Performance Marketing Plan

A 6-Step Blueprint for Exceeding Your Goals

Attraction 101 – Content Marketing:

Three Essential Ways to Use Content Marketing for Lead Generation

The High-Performance Marketing Department:

A Guide to Staffing, Team, Structures and Budgets

10 Ways to Nurture the Buyers Journey:

Learn to Drive Awareness and Close More Deals

Lead Scoring Workbook:

A 5-Step Guide for Creating a Lead Scoring Program

The Amazingly Effective Email Guide:

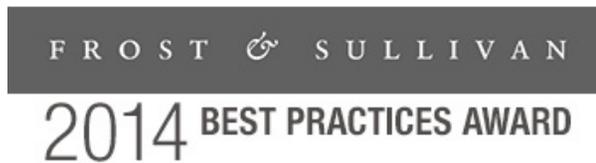
Five Tips for Successful - and More Profitable - Email Campaigns



Sources

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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