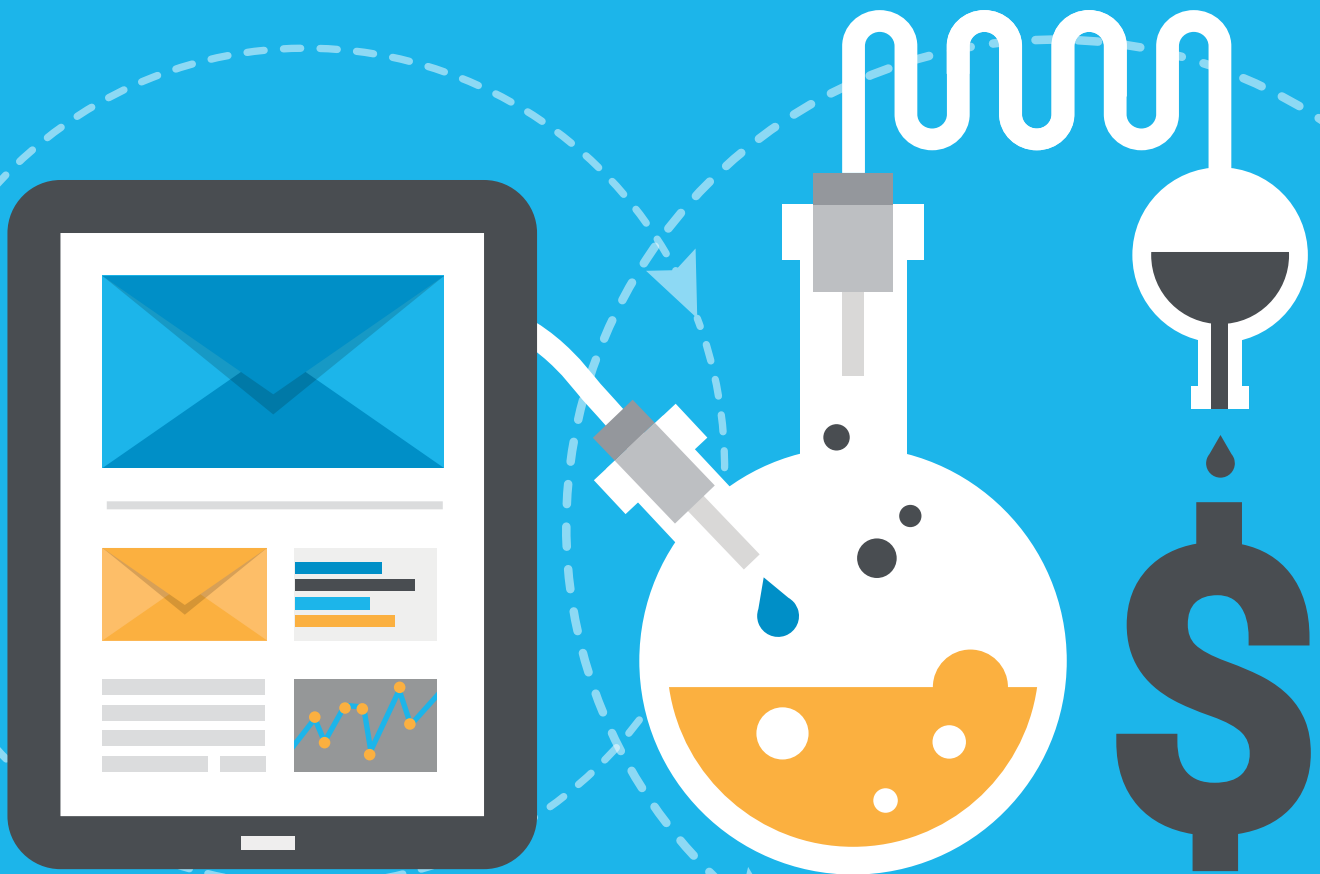


# The Marketing Automation Guide

How to Turn Website Traffic into Qualified Leads





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# Introduction

While you may not be familiar with the term marketing automation, you certainly are familiar with what it does. If you are online, you interact with marketing automation platforms like Pardot, Hubspot, Eloqua and Marketo every day.

Marketing automation, in tandem with your Customer Relationship Management (CRM) platform, not only helps generate leads and push them through the sales funnel, but also provides intelligence to your sales team by updating customer and lead data that they can see in the CRM including:

- What the last visit and pages viewed on your website by a lead were
- What emails have been opened and if opened, what links were clicked
- What forms were completed and resources downloaded
- Provide lead scoring and alerts

In short, it makes the marketing team look like a hero to the sales team. It provides the sales team actionable intelligence in the CRM to help them know who to call, when to call and how to close deals mostly quickly. In a world where 35-50% of sales go to the agent who responds first<sup>1</sup>, allowing your sales people to be more efficient and pursue to the most fruitful leads puts commission money in their pocket every month.

Marketing's job is to feed Sales, generate and warm leads, decrease the time it takes to close a deal and increase the size of every sale.



Marketing automation makes the marketing team look like a hero to the sales team.

1 Source: insidesales.com

# What is Marketing Automation?

Wikipedia has a straightforward (if somewhat traditional and limited) definition. “[Marketing automation](#) refers to software platforms and technologies designed for marketing departments and organizations to more effectively market on multiple channels online (such as email, social media, websites, etc.) and automate repetitive tasks.”

Basically, marketing automation software is used by Marketing departments, and sometimes Sales and Customer Service, to automate customer touchpoints and provide business intelligence. In its most basic form, it involves creating rules to automate communications (generally email) and handle online form submissions.

As an example, when you go to [Hubspot’s resource library](#) and request to download an ebook, you are presented with a form. Once you complete and submit the form, you receive an email with your ebook. The embedded form is created and hosted within Hubspot’s own marketing automation service, as is the email that is generated by your submission.

Over time you might receive a series of emails from a friendly robot sales rep (more on this later), asking if you enjoyed the ebook you downloaded and if you’d like to speak further about the topic and how it applies to your business.

## Other Marketing Automation Features

In addition to the emails you receive, a variety of operations are happening in the background. Hubspot is checking to see if you exist in their CRM and if you don’t, adding you as a lead. They are checking online to see if they can verify your email address against any social media profiles (and adding those they can), checking your IP to determine your country, city, state and then providing a lead score in the CRM to show Sales how likely you might be to make a purchase.

As you revisit the site or click on emails, your profile in the CRM is updated and over time, Hubspot gets a better picture about what interests you and what products they offer that may be best suited for you. Then as you take certain actions, like visit a pricing page, a marketing automation platform might signal Sales that you are in “buying mode” and alert them to contact you. After all, only 25% of leads are legitimate and ready to be seen by Sales<sup>2</sup> - imagine being able to let your team know exactly which of those to pursue each morning.



All these marketing and sales actions are “marketing automation”. Sound creepy? Well possibly. But creepy or not, this is occurring on almost every major website you visit (and many smaller ones). Can your business afford not have the marketing and sales intelligence this provides?

2 Source: Gleanster Research



# How Marketing Automation Powers Inbound and Content Marketing

You might be considering a content marketing or inbound marketing strategy for your organization, and that is how you became familiar with the term marketing automation.

Content marketing and marketing automation are the two pillars that support a successful inbound marketing strategy.

Content marketing is the overall concept of using SEO, social media, blogging and other content generation best practices to create great pieces of content that potential leads might find interesting. It is more than just writing and creating imagery though - there is a lot of science that goes into ensuring the content created is likely to appear at a high rank in search, will appeal to the right audience and be shared on social media.

Once that content is created and distributed online, marketing automation tools help ensure that visitors' information is captured via forms and cookies, that emails are delivered and overall that the sales and marketing teams have everything they need to know about their leads and that those leads are being warmed and nurtured through the sales funnel. And if they aren't ready to buy, then marketing automation uses more of the great work that was done by content marketing and delivers them materials to help change that.

Overall, marketing automation and content marketing are what allow an organization to benefit from inbound marketing.





# The ROI of Marketing Automation

The folks at Hubspot have some great stats on the effectiveness of marketing automation (check them out [here](#)). As one example, a MIT Sloan MBA report found that customers using Hubspot software had three times the monthly visitors in just a year and over four times as many leads.

Unlike other marketing tools, marketing automation's links to CRMs like Salesforce, allow for organizations to track their ROI. The cost of a marketing automation platform is explicit, one can easily add costs for staff time and if you are tracking campaigns effectively, you can know at the end of the day exactly how many leads, qualified opportunities and even sales can be attributed to a marketing automation platform. This also allows the marketing team to see what campaigns are most effective at generating profitable sales, instead of just relying on data about what ads get the most clicks.

This end-to-end knowledge of the customer sales cycle is invaluable in justifying your marketing spend and generating the best results from it.

After one year of using Hubspot software:

**3x**   
more monthly visitors

over   
**4x**  
as many sales leads

# Why You Should be Using Marketing Automation

Marketing automation isn't free and it isn't a replacement for advertising. However, leads that are generated from content marketing efforts and then accelerated with marketing automation can improve the effectiveness of marketing dollars and aid your sales team.

## Fingertip Intelligence for Sales and Marketing

Marketing's job is to feed the sales team. Create leads, decrease the time it takes to close deals and increase the size of every sale. One great way of doing this is by providing the sales team more insight about leads and opportunities within the CRM they use each day.

Most marketing automation platforms will allow you to embed information directly in the lead, opportunity, contact and account views of your CRM. This allows sales team members to see what emails have been opened, when the last time a lead visited your site was, what pages they viewed and what resources they've downloaded. A salesperson can then tailor phone calls to what a lead is most interested in and follow up at the right time, resulting in higher margins per sale, higher sales per rep and shorter sales cycles.

Organizations can also take advantage of custom lead scoring. First, the marketing and sales teams work together and determine what indicators (number of visits, emails opened, completions of fields, size of budget, person's title etc) are the best at predicting the quality of a lead. Then, using those criteria, the marketing automation platform will score leads and show sales team members which ones to pursue. Perhaps as importantly, salespeople can leave low-value leads to automated email workflows, freeing up their time to focus on those most likely to turn into revenue. Sales can begin their day by reviewing a hot list of which leads are most likely to convert instead of guessing which ones to invest time in.

Marketing Automation can help to:



nurture and warm leads



increase deal size and numbers of deals per rep



shorten sales cycle



automate repetitive tasks, allowing Sales to focus only on the most valuable leads



make your organization appear bigger than it is



## Why You Shouldn't Use Marketing Automation

Too often organizations are sold on their marketing automation implementation being a straightforward purchase – like buying a chair or a phone. In reality, an organization planning on purchasing a marketing automation platform should consider it to be more of a commitment along the lines of adopting a pet. There should be time and resources allocated for training, feeding, care and regular check-ups to ensure things are going well.

Like a pet, marketing automation platforms change and grow over time. New content needs to be created, new campaigns need to be implemented and overall there will be new features to take advantage of. All activities that are necessary to grow a company's lead base and help nurture existing contacts and opportunities. **Automation can help power a sales team and make marketing look like a rockstar, but it isn't a set and forget purchase. It requires an ongoing investment of staff time and resources.** If your organization is not ready to commit to that ongoing investment, then now may not be the right time to adopt a marketing automation platform.



Purchasing a marketing automation platform is like adopting a pet. There should be resources budgeted for training, feeding, care and regular check-ups.

# The Five Building Blocks of Marketing Automation

Marketing automation platforms can seem complex. However, at their heart, every marketing automation tool is powered by workflows. Generally, workflows involve either updating a person's information in a CRM, sending them an email, or both. As an example, if a person fills out an ebook download form on your website, you would use a workflow to send that person an email with a link to their pdf.

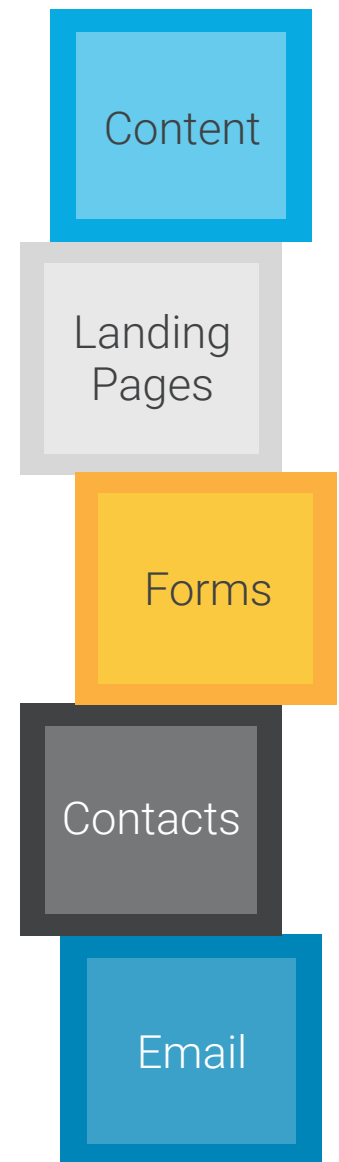
In general, a marketing automation workflow is made up of five components that are tied together with a series of rules; instructions that you have written for your platform to follow. The five main components of marketing automation (and workflows) are content, forms, landing pages, contacts and email. Not every workflow will contain all five components, but most require two or more. Let's examine each more closely.

## 1. Content

Content is the starting point for many workflows. Organizations create content that they use to attract visitors via organic search, social media and advertising. Hopefully these visitors find the page they have landed on so compelling that they want to download the piece of content being featured. This content is often a pdf, like an ebook or case study, as they are easy to form block and later email to leads. However, content can also include infographics, Word or Excel templates, even simple industry-specific calculators.

## 2. Landing Pages

Landing pages promote a piece of content and then traffic is driven to those pages. In some cases, a series of landing pages may feature the same forms and content, but be optimized for different audiences. For example, an ebook titled "*Marketing Automation for Dummies*" might be



featured on a landing pages targeted to people interested in marketing automation for startups, marketing automation for SMB's and marketing automation for non-profits.

### 3. Forms

Forms are how you gather the information about leads for your CRM. They are embedded on landing pages and visitors complete them in order to gain access to content. Some platforms like Hubspot have forms with "smart fields" or "progressive profiling". Smart fields are only displayed if the information in that field is not known about the person viewing the form. For example, if someone had already submitted their name, email, company and title on a previous visit, the next form they view would display a new set of fields, like budget, city or phone number. This allows a company to build a better profile of a lead over time.

### 4. Contacts and Leads

Marketing automation is used to gather leads, then increase the amount of knowledge that an organization has on those leads while nurturing them along the sales funnel. Leads are created or updated in the marketing automation platform (and CRM) when the lead pays for a piece of content by providing their personal information. At its essence, the "cost" for an ebook is their first and last name, email address, company name and perhaps one or two other details.

The content is not free, but it is a transaction that both parties consider to be a fair exchange of value. Leads can be private citizens, for example in the case of an Insurance Broker or Mortgage Broker, or people who work at a particular company, for example in the case of a SaaS startup that sells a B2B service.

### 5. Email

When most people think about marketing automation, they think about emails being sent to leads. That is often the case, but emails can also be sent to internal parties. You might use a platform like Hubspot to email a lead with a pdf they've requested or to nurture them after they have done so. However, you might also email a sales person to let them know a lead has revisited the site or a support team member to let them know a customer visited a particular FAQ page and may need help.

A content download is a transaction.



Leads pay for the "cost" of an ebook with their contact information.



## Marketing Automation Workflows

These five basic building blocks of marketing automation are tied together by workflow rules. Without workflows and workflow rules, your marketing automation platform is simply a database of people and content.

It is the ability to easily apply complex, repeatable processes to this database that is at the heart of the value of marketing automation.

Once you understand these five building blocks, workflows are much easier to build and optimize.

Workflows are the basis of all marketing automation platforms - so what are they? From the simple, to most complex, they are formulas, a set of rules that you want the marketing automation platform (or in some cases CRM) to perform.

# How to Build Your First Marketing Automation Workflow: The Content Delivery Workflow

Content delivery workflows are the foundation of the marketing automation world. These workflows are the delivery mechanism for ebook, case study and other lead generation efforts on your website. They are also the easiest workflows to build, because they do not require many steps and rules.

In this example, let's assume the content being delivered to website visitors is an ebook pdf called "*Marketing Automation for Dummies*".

## Step 1 – Write Your Emails

First create two emails using the templates on [page 14](#). The first email should include a link to a pdf of "*Marketing Automation for Dummies*" that you've hosted on your website. The second email should be a slight variation on the first, following up to see if they were able to download the ebook or had any problems.

## Step 2 – Create a Landing Page

Build a landing page promoting "*Marketing Automation for Dummies*" and include a form that people can complete to download it. Ideally the platform you are using will have a progressive profiling or smart fields feature.

### *Marketing Automation for Dummies* Delivery Workflow

#### STEP 1

Write Your Emails

#### STEP 2

Create a Landing Page

#### STEP 3

Build the Workflow

#### STEP 4

End your workflow



### Step 3 – Build the Workflow

- When someone completes the form, add them to a new list you have created in advance, called “Marketing Automation for Dummies Downloaders”
- Everyone who completes the form (and any other content forms) should additionally be added to a second list you have created called “Content Downloaders”
- If you have a list of competitor’s email addresses or domains, you may chose to build a step into the workflow that blocks anyone from those email domains from downloading your hard work
- The next step is for each person who completes the form to be sent your “*Marketing Automation for Dummies*” delivery email. If one is available, ensure you use the option to have them receive this each time they complete the form; many workflows will default to only begin the first time an action is taken by an individual. However, many people will download a resource, browse it and then go back to get it again a few months later.
- Delay the next step for 36 hours
- If the person opened the email and clicked on the ebook link, skip to the last step
- If the person did not click the ebook link in the email after 36 hours, send your follow up email

### Step 4 – End your Workflow



## Email Templates

Here are two email templates that you can use and adapt to your content delivery workflows. Before activating the workflow, be sure to send yourself copies in html and plain text, insert a concise subject line and test the link you have included.

### Sample Delivery Email Template

Hi CONTACT.FIRSTNAME

You can click here (insert the link to your ebook pdf here) to download your "*Marketing Automation for Dummies*" ebook.

In this ebook, we cover everything you need to know about leveraging the power of Marketing Automation at your organization. It is the perfect resource for beginners and intermediate users alike.

We provide advice on how to select a marketing automation vendor, how to successfully implement a new system and how to maximize the ROI you generate for your organization.

If you have any questions about the ebook or Marketing Automation, don't hesitate to contact me.

Sincerely,  
Greg

Greg Poirier  
President  
CloudKettle  
1-800-878-4756 ext 100  
[cloudkettle.com](http://cloudkettle.com)



Email #1



## Sample Follow up Email Template

Hi CONTACT.FIRSTNAME

I just wanted to quickly check in and ensure you received the ebook you recently requested from CloudKettle's website.

You can click here (insert link to your pdf) to download a pdf copy of "*Marketing Automation for Dummies*".

If you have any questions about the ebook or trouble accessing it, don't hesitate to contact me.

Sincerely,  
Greg

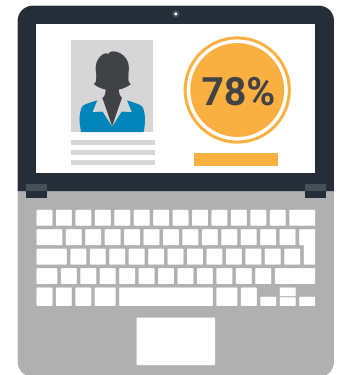
Greg Poirier  
President  
CloudKettle  
1-800-878-4756 ext 100  
[cloudkettle.com](http://cloudkettle.com)



Email #2



# Enable Sales, Not Just Marketing: Custom Lead Scoring



Custom lead scores are one of the most valuable, and underused, features that a marketing automation platform can offer. Once they are implemented, the sales team ignores them. Here's how to ensure that doesn't happen.

## 1. Ensure the lead scores are relevant

Sit down with your sales team. Present the variables you record and measure in the CRM and find out which ones they feel are a good indicator of lead quality. Then run the data. Generate reports of leads that have converted into opportunities and dig deep on what they have in common. Take those factors, and some common sense ones like if they have visited your pricing page or how many of your emails they have opened and customize the lead score algorithm in your marketing automation platform. When you have a large enough data set, don't just look at what leads converted, review what the ones that converted the most quickly and at the highest value have in common. Educate your sales team on this new custom scoring and let them know what an "average" is, so they can get a mental gauge of how to recognize a high scoring lead they should pursue.

## 2. Ensure they get actionable notifications

Your sales team is likely already getting notifications from your CRM on what leads they own. Add to this by setting up workflows that notify sales team members if a lead they own achieves an above average lead score. If your scores float up and down rapidly, make it a one time notification by stipulating in the workflow that it should only be activated the first time the lead joins a list. The fewer notifications the sales team gets, ideally one or two of the hottest leads each day, the more credence they will give them. If they are getting a many notifications each morning, up the value of the lead score required to activate the workflow.

# The Four Things to Consider When Choosing a Marketing Automation Platform



Beginning to leverage marketing automation can be intimidating and vendor selection plays a big part in that. While there are dozens of platforms with varying feature sets, overall there are the four premiere marketing automation tools. They are:

- [Hubspot](#) (Publicly traded)
- [Pardot](#) (Salesforce)
- [Eloqua](#) (Oracle)
- [Marketo](#) (Publicly traded)

There are of course many others; some are very focused on certain industries, while others, like SimplyCast, have a more international appeal. There are also a host of great tools like MailChimp, that compete indirectly with marketing automation vendors.

For most organizations, especially those with a B2B focus, the decision on what marketing automation platform to choose will come down to one of the four options presented above. Which one is best depends on the organization, what other software they use, the type of customer they are pursuing, their budget and staff.

## 1. Integrations with Other Products

Be sure to choose a vendor that provides a fully supported integration with your CRM and that the integration includes (near) real-time syncing. Any vendor that syncs only a few times a day with your CRM should be excluded from the consideration pool. All four platforms outlined above sync with [Salesforce](#) and [Microsoft Dynamics](#) off-the-shelf and all but Eloqua also integrate with [SugarCRM](#) and [NetSuite](#).

Hubspot has its own mini-CRM, but also provides a wide variety of integrations with various marketing, sales and ecommerce tools. Like Hubspot, Marketo is an independent entity, so they also integrate with a wide variety of CRMs, as well as services like WordPress, Magento and Hootsuite.

Pardot is now owned by Salesforce, so naturally they have a very strong integration with that CRM and you can expect it to get even better. Of the major platforms, Eloqua seemingly has the smallest number of integrations, or at least the poorest documentation for them.

Additionally, consider if there is a history of your industry using a particular product. As an example, CloudKettle works with several SaaS startups that use Hubspot because of its Jumpstart program for companies in incubators. In a related fashion, many mortgage and insurance brokers are heavy users of the Salesforce CRM, in part because there are plugins specifically designed for their needs.

## 2. Features Set vs Ease of Use

Hubspot has historically focused on the SMB market and while the tool has become increasingly complex over time, they still provide excellent training for new users and pros alike. If ease-of-use is a primary consideration and you do not have an employee who will be a full-time user of the platform, Hubspot may be the best option for you. Pardot also has some easy-to-use features, but their training and on-boarding is arguably not as robust as Hubspot's.

Finally Marketo and Eloqua are two of the most powerful marketing automation tools on the market. They are designed to be adopted and implemented by large organizations that can afford not only outside



expertise, but also to dedicate staff to becoming full-time power users. These are complex, feature rich tools, but are more difficult and time-consuming to use.

### 3. Scalability



All four of the major marketing automation platforms can scale far beyond the needs of the average SMB. Generally though, marketing automation pricing is based heavily on the number of contacts in your platform or CRM. This means that costs can increase rapidly in the wake of successful lead generation campaigns and company growth.

In theory, all four platforms could service a multinational or Fortune 500 company, but at that scale, Eloqua and Marketo are likely best equipped for the job. Pardot and Hubspot have made a lot of headway, but global organizations have security, multilingual, legal and capacity considerations that really should be left to a platform (and staff) that is specialized to cater to them.

### 4. Cost



Cost isn't as simple as just referring to the list price on a website. While most vendors require annual upfront payments and have configuration or training fees, their cost structures vary. Capterra does a good job at comparing options in this [post](#).

Marketo and Eloqua are often considered to be best suited for large scale enterprises and their features, complexity and price reflect that. Pardot tends to be less costly and Hubspot, who historically has serviced the SMB market, tends to be the friendliest on the wallet, especially if one factors in their free CRM. However each has their own pricing idiosyncrasies that may impact the total cost to your organization.

Here are the pricing pages for each:

- Hubspot Pricing: <http://bit.ly/1dHU9tG>
- Pardot Pricing: <http://bit.ly/1G3gzMS>
- Marketo Pricing: <http://bit.ly/1M84lCh>
- Eloqua Pricing: <http://bit.ly/1JJPd61>



A savvy buyer will consider more than just the cost of the software license and set-up fees. There is also staff training, costs for using an outside company to do your implementation, maintenance, migration costs and the hidden costs of implementing (or not implementing) add on services.

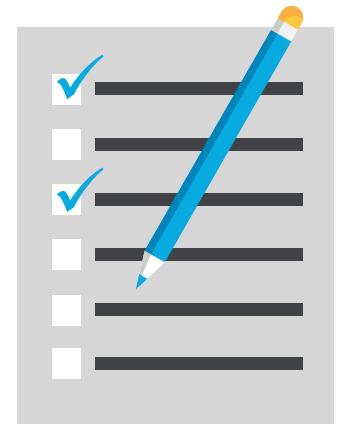
## So which to choose?

There is no “right” choice or “best” marketing automation platform. Organizations have unique needs and while Hubspot, Pardot, Eloqua and Marketo are market leaders, there still may be another option better suited for your company. **Before making a decision, consider speaking with Marketing Automation experts like [CloudKettle](#) to determine what choices might be best for you. We offer free initial consultations - so why not take advantage of one?**



# Checklist:

## What You Need to Have Before Investing in a Marketing Automation Platform



Marketing automation platforms like Hubspot, Pardot, Eloqua and Marketo are serious investments. Unless you are a startup ([more on Hubspot's plan for startups here](#)), you are likely looking at a price tag of over \$10,000 a year to begin leveraging the power of marketing automation. Most providers insist on upfront annual contracts, meaning that you pay a hefty sum upfront, whether you have your house in order or not.

Overall, we are biased at CloudKettle. We help companies implement and improve marketing automation, content marketing and inbound marketing strategies and technology. We're pretty passionate about why companies should be using marketing automation. But often we surprise companies that get in touch with us when we tell them they aren't ready yet. As much as we'd like to work with them and help them get value out of a Hubspot or Pardot implementation, they don't have the prerequisites in place to see an ROI from marketing automation and over time they'll waste money on it.

Generally, when we first speak with organizations considering purchasing a marketing automation platform (or pursuing an inbound marketing or content marketing strategy), we ask them about their culture, goals and dig in on the questions below to determine their Marketing Automation Readiness. That is, the current state of their organization and likelihood that they can obtain a desirable ROI from the investment they are considering.

**Use the checklist on the following page to determine how ready your organization is to adopt a Marketing Automation platform.**

# Marketing Automation Readiness Checklist

## ☐ Dedicate Staff Time

Marketing automation is powered by two things, a technology platform (which you can easily purchase) and great content marketing. But someone still has to manage that platform. Some companies choose to completely outsource their marketing automation, but we recommend against this. You'll never send as many emails, think up as many creative ROI generating workflows or automate as many tasks if a third party is doing it for you. Getting an interested internal party to "own" your marketing automation platform is a must.

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## ☐ Start a Blog

Generating content like weekly blog posts and promoting them on social media takes time. And in our experience, if it isn't part of someone's job, it becomes a failed side of desk project. You know – the projects sitting on the side of your desk that you will get to...but never do. Regularly blogging drives content generation that can be distributed via email, social media and even turned into long form content. It is a core component of content and inbound marketing.

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## ☐ Create a Newsletter

If you don't already have plans for a newsletter, start now. Sending regular, segmented emails is one of the easiest and sure fire ways to generate traffic to your site. Marketing automation gives you a dead simple way to do this, so take advantage of it.

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## ☐ Integrate with a CRM

A big part of marketing automation's job is to empower the sales team with intelligence on leads and opportunities. For example, what pages on the site a lead looked at, when they returned to the site, what emails they opened etc. None of that is effective without a CRM. So whether using a built-in CRM or syncing to an external one like Salesforce, be sure you make this part of your plan.

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## ☐ Publish Long Form Content

Form blocked content like ebooks, videos, case studies and white papers are a pillar of any marketing automation strategy. You need to create content that is of enough value that people are willing to pay for it with their personal information.

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## ☐ Learn Photoshop

Writing compelling content is just the first step. That content needs imagery to make it exciting. You need feature images for blog posts, embedded images, ad units, email headers and many other pieces of creative to get the most out of your marketing automation and content marketing efforts. Get a good designer to create some easy to use, layered .psd templates for you and an Adobe Cloud account to update a new piece of creative for each post. You'll save a lot of money this way and your product will look a lot more refined.

# Conclusion

Marketing automation is how you convert your website visitors into leads, your leads into customers and your customers into loyal brand advocates who spend more.

It is more than just an email platform – if used properly it accelerates your sales team’s efforts. More leads that convert faster for your best sellers.

It is a key component to any inbound marketing or content marketing strategy and one of the most efficient ways to leverage an investment in technology to improve the ROI of a marketing and sales team’s efforts.



Interested in knowing more about how organizations are using marketing automation and CRM's to acquire more qualified leads and close sales more quickly?

**Call us or check us out online:**



**CloudKettle**

Call us at 1-800-878-4756 ext 100

Find us on the web [cloudkettle.com](http://cloudkettle.com)

Follow us on Twitter [@cloudkettle](https://twitter.com/cloudkettle)

Read the Blog [cloudkettle.com/blog](http://cloudkettle.com/blog)

Check us out on LinkedIn

[www.linkedin.com/company/cloudkettle](http://www.linkedin.com/company/cloudkettle)