

A woman with her hair in a bun, wearing a light blue button-down shirt with small dark polka dots, is looking down at a tablet computer she is holding with both hands. She is standing in a clothing store. In the background, there are racks of dark-colored clothes, a man in a dark shirt and light pants is looking at a garment, and a large window on the right side of the frame is letting in bright sunlight, creating a lens flare effect. A purple semi-transparent banner is overlaid across the middle of the image, containing the title text.

# 10 Reasons to Consider Marketing Automation



# Introduction

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As a marketer, you face daunting expectations and goals. You are probably expected to generate successful outcomes in less time, and in a digital age where everything can be measured, you probably feel increased pressure to illustrate the impact you are driving.

Without the right tools and processes in place, hitting your goals and demonstrating the results is difficult, time-consuming, and stressful!



As you know—and can probably relate—here are some of the top issues marketers face today:

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- **The Need to Do More:** In a fast-paced digital environment, marketers feel pressure to generate more leads, more revenue, and close deals faster. Once one program is finished, another follows immediately. It never stops!
- **Multiple Programs:** Marketers have a growing number of programs to manage. More channels bring greater need for a variety of different types of campaigns, from email and social marketing, to webinars and in-person events.
- **Preventing a Leaky Sales Funnel:** Complex buying processes mean more room for leaks and lost leads. Now that the majority of the buying process occurs online, the sales cycle is longer, creating more opportunities for marketers to lose track of leads.
- **Gaining Qualified Leads:** Marketers can't focus on just top-of-funnel lead generation and awareness-building strategies. They also need to make sure these leads are a good fit for the company. There's no point in increasing lead generation if the leads have no possibility of converting to sales.

- **Sales and Marketing Alignment:** Sales and marketing alignment continues to be a key issue for many companies. Marketers face the constant struggle of getting sales the most qualified leads at the right time.
- **Demonstrating ROI:** Demonstrating return on investment is crucial for marketers to continue obtaining the budget they need to meet their goals. As marketers demonstrate ROI they are also able to determine which channels and programs work the best. To do this, marketers need to answer a few key questions: What is the top performing channel? Is there a top performing channel within those channels? What would you do if you had more budget? What would you cut?

Marketing automation can help you address many of these challenges. Marketing automation has the capabilities to help you scale your programs, deliver more personalized and targeted communications, align with sales, and measure which channels and programs are the most effective.

Marketing automation allows you to do what you're already doing—but more efficiently. Automation also helps you introduce *new* strategies that can help drive your business.



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**Marketing automation can help you scale your programs, deliver more personalized and targeted communications, align with sales, and measure effectiveness.**



# What Is Marketing Automation?

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You've probably heard a lot about marketing automation—but what is it exactly? Marketing automation is technology that allows companies to streamline, automate, and measure marketing tasks and workflows to increase operational efficiency and grow revenue faster. Marketing automation essentially acts as the following:

- **A Central Marketing Database:**

A place for all your marketing data, including detailed prospect and customer interactions and behaviors. You can segment and target the right message to each customer. Think of this as a “system of record” for all your marketing information.

- **An Engagement Marketing Engine:**

An environment for the creation, management, and automation of marketing processes and conversations across online and offline channels. Think of this as the “orchestra conductor” for your customer interactions.

- **An Analytics Engine:** A way to test, measure, and optimize marketing ROI and impact on revenue. Think of this as the place you go to understand what worked, what didn't, and where you can improve.

If you are doing these tasks manually you are simply at a disadvantage. Marketing automation technology is essential to scale, especially with the increasing number of channels marketers are required to manage.

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**Marketing automation is technology that allows companies to streamline, automate, and measure marketing tasks and workflows to increase operational efficiency and grow revenue faster.**



# Why Buy Marketing Automation Now?

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There are several key reasons to consider marketing automation software. The average decision-maker (buyer) receives 3,000 messages per day. They have a lot of people vying for their attention. Buyers form opinions and draw conclusions long before they interact with your brand. To remain competitive you need to have a strong presence online and make sure you stand out from competitors throughout the entire sales funnel.

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**The average decision-maker receives 3,000 messages per day.**

Additionally, data shows that 79% of marketing leads never convert to sales. Lack of lead nurturing is the common cause of this poor performance. This means that while you are getting leads through the door, you aren't doing anything to keep them engaged. Sales cycles today can be long, so be prepared to work hard to create that trust.

Marketing automation helps you get heard through the noise and create relationships with your buyers over time.



## END-TO-END MARKETING CAMPAIGNS

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It is important for your business to think about your marketing efforts throughout the entire sales funnel—from an inbound lead to a closed deal. With a full-funnel view of your marketing efforts, you can optimize and streamline marketing programs in an effective and efficient way.

Marketing automation helps marketers throughout the entire sales cycle. Here are three key areas where marketing automation can help marketers in this competitive environment:

### 1. Attract

Drive more inbound web traffic and convert web visitors to leads.

### 2. Engage

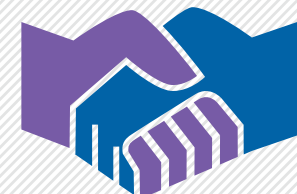
Deliver the right message to the right person at the right time and accelerate the sales cycle.

### 3. Close

Increase quality of leads to sales and help them win more deals.

**Using this framework, we will go through the 10 reasons to consider marketing automation to support you through the sales cycle, from attracting and engaging leads, to closing the deal.**

Attract



Engage

Close





Here are the 10 reasons to consider marketing automation:

1. Increase inbound traffic to your site
2. Personalize the experience for known and anonymous visitors
3. Improve social reach and influence
4. Easily test and decide which emails work best for engagement
5. Replicate success in minutes
6. Trigger workflows based on behavior
7. Send relevant information in real-time based on visitors' activities
8. Provide flexible scoring models so you can define success
9. Prioritize leads for sales
10. Know which programs are effective throughout your sales funnel

Now, let's dive into this in more detail!

# Attract

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Marketing automation includes a number of tools to help your team increase top-of-funnel activity and lead generation.

Lead generation describes the marketing process of stimulating and capturing interest in a product or service for the purpose of developing sales pipeline.

Lead generation often uses digital channels, and has been undergoing substantial changes in recent years from the rise of new online and social techniques. In particular, the abundance of information readily available online has led to the rise of the “self-directed buyer” and the emergence of new techniques to develop and qualify potential leads before passing them to sales.

Lead generation is important because the buying process has changed, and marketers need to find new ways to reach buyers and get heard through the noise. Instead of finding customers with mass advertising and email blasts, marketers must now focus on being found and learn to build continuous relationships with buyers.

Search engine optimization, real-time personalization, and social reach are all crucial tools to increase awareness about your products and services and bring in qualified leads to your site. The following pages will explore a few ways marketing automation helps you to attract these leads.



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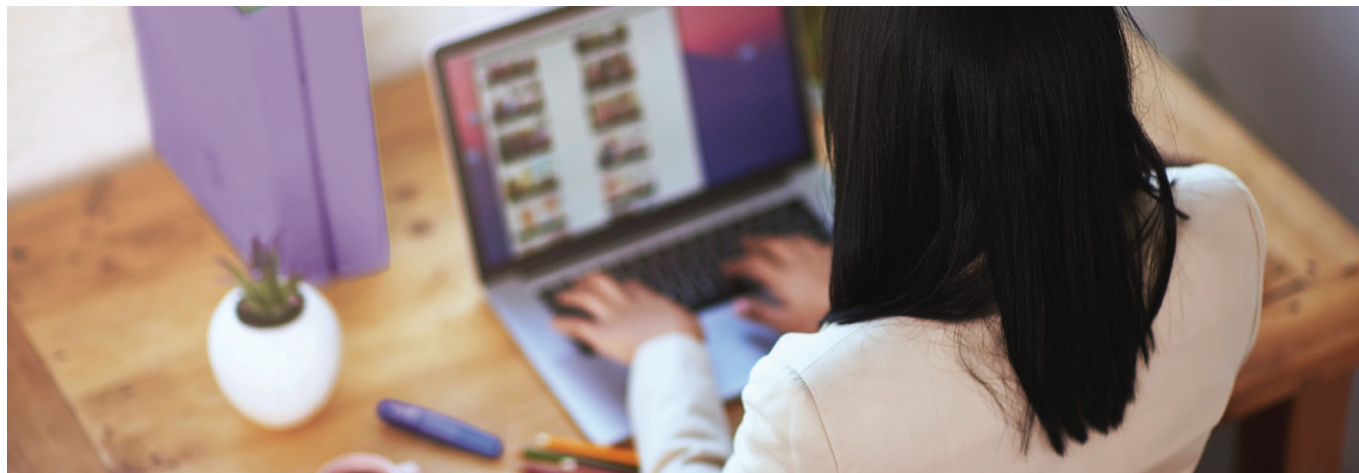
# 1: INCREASE INBOUND TRAFFIC TO GROW TOP-OF-FUNNEL

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So, where do you start? There are a variety of ways that you can drive top-of-funnel activity, from social media to Pay-Per-Click to events, but your website is one of the first areas you want to optimize for lead generation. Search engine optimization (SEO) is a marketing tactic that helps you make sure you, via your website, are found! SEO refers to tactics used to increase traffic to your website by obtaining a high placement in organic search results of a search engine—whether that is Google, Bing, Yahoo!, or others. This is important because having a high ranking in search results increases visibility. High placement also enables you to gain trust and demonstrates that your company is an industry leader.

## Top Tips for SEO

So where do you start if you are looking to build SEO? At its core, SEO is a set of guidelines that check if your website provides an easy and valuable experience for visitors. There are a few key components that can help build your SEO in the eyes of a search engine:



- 1. Keywords:** You want to target particular keyword themes by aligning the broader content of your site to those target keywords. Start by looking at your list of keywords and evaluating their search volume, how difficult it is to rank for that term, how much competition there is, and how long it will take to challenge the competition. This will help you understand how to prioritize your keywords—which should be based on balancing your needs, resources, and expected return.
- 2. Website Performance:** Is your website easy for a visitor to navigate? How easy is it for the search engine to crawl? Things that can affect a visitor's experience include: slow site speed and page load times, server errors, and not being mobile optimized. These elements are also part of search engine algorithms that determine site ranking for search.



- 3. Content:** The content on your site, both the page copy and the content assets that you offer to visitors should satisfy the intent of a user's search—whether that's for information, a service, or a product. Just because you are working toward building your SEO, make sure your content is optimized for people, rather than search engine machines—trying to game the system does not work as most search engines have caught on and will actually penalize your site.

Ultimately building SEO is not a one and done marketing program, it's a continuous and ongoing element of your marketing. It really spans all marketing activities, and requires buy-in across departments and at all levels. Because SEO is never done, it makes sense to leverage tools at your disposal like your marketing automation platform (e.g. Marketo), which allows you to quickly analyze your site and suggests new keywords for you to use. It can give recommendations for webpages and landing pages and help you identify inbound link opportunities.

**Just because you are working toward building your SEO, make sure your content is optimized for people, rather than search engine machines**

## 2: PERSONALIZE THE EXPERIENCE FOR KNOWN AND ANONYMOUS VISITORS

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You have between 0-8 seconds to persuade a visitor with a headline or landing page, so content should be as relevant to visitors as possible. Marketing automation allows you to personalize marketing tactics, even for the people you don't know yet.

### Real-Time Personalization

A personalization tool in your marketing automation platform, like Marketo's Real-Time Personalization, enables you to determine demographic and behavioral data, which you can use to show visitors content that is most relevant to them. Don't have a visitor in your system yet? No problem. Real-Time Personalization allows you to segment anonymous visitors through information gathered by looking up their IP addresses.

For instance, you could see if someone in healthcare is visiting the site and show that person a specific piece of content created for her industry—like a healthcare-specific ebook.

### Personalized Retargeting

Now that we have talked about getting people to your site, what about *bringing them back*? Retargeting occurs when a prospect visits your site, is tracked, leaves the site, sees your ad on other webpages, and then returns. Retargeting is effective when implemented correctly, but retargeting efforts alone are often irrelevant to buyers' needs.

With marketing automation, you can implement *personalized* retargeting with highly targeted ads based on demographics, purchase history, buying intent, lead score, and more, which makes your ads more relevant to unique visitors.

With a platform like Marketo, you have the ability to:

- **Target** the right potential customers
- **Attract** them with personalized ads
- **Engage** them throughout the buying journey



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**You have between 0-8 seconds to persuade a visitor with a headline or landing page.**



### 3:IMPROVE SOCIAL REACH AND INFLUENCE

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Another important channel for top-of-funnel awareness and demand is social. When you already manage typical campaigns and keep track of SEO, it can be difficult to find time to maintain social channels. In addition to helping drive more targeted paid advertising on social channels, marketing automation allows you to quickly and easily give your existing campaigns a social boost.

#### Add Social Sharing Capacity

Quickly give your current campaigns social reach and track them. A marketing automation platform allows you to easily add social buttons to your website, landing pages, ad campaigns, and more. These tools make it easy for readers to share your content with their own professional and personal networks, giving your campaigns a signal boost.

#### Use Polling and Referral Campaigns

Some marketing automation platforms have polling and referral capabilities, like Marketo's Social Marketing. This type of functionality enables you to include polls on Facebook pages and landing pages, which is a quick way to collect lead information.

You can also implement referral campaigns, which encourage customers to share your content. For example, using a referral campaign, Marketo got 322 participants to share our campaign and 365 referred visits to sign up for a roadshow. We also saw a 7.14% increase in visits on the registration page due to sharing.

# Engage

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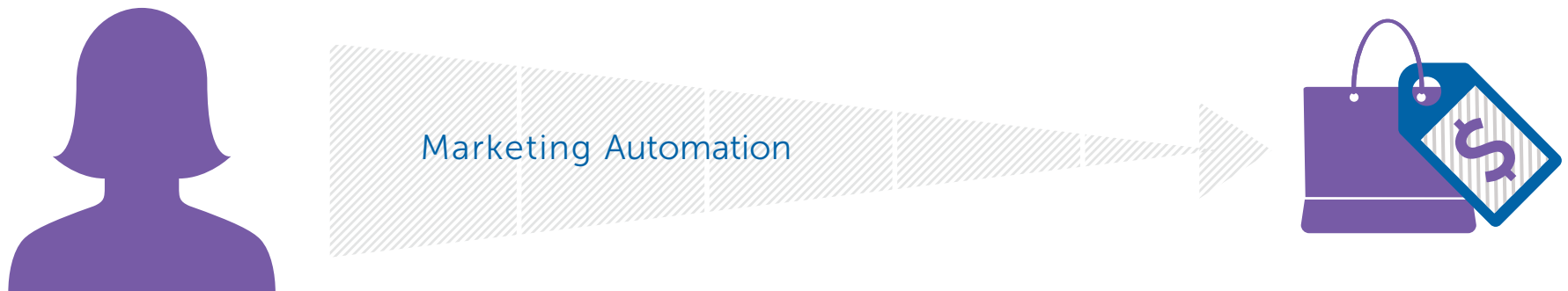
Once you have qualified leads in your database, how do you further engage and create a relationship until they are ready to buy?

The next step is to drive them further down the sales funnel with nurturing. Nurturing is the act of engaging and building relationships with your buyers regardless of their timing to buy. This is a critical step in your full-funnel marketing process. It's one thing to attract potential buyers, but quite another to actually keep them engaged and interested in your company throughout the buying journey.

A marketing automation platform gives you critical functionality to communicate with potential buyers over time, at scale, and in a relevant, personalized way.

Since email is a key element to nurturing your potential buyers, we are going to go into detail on various ways you can optimize that engagement.

**Nurturing is the act of engaging and building relationships with your buyers regardless of their timing to buy.**



## 4: EASILY TEST AND DECIDE WHAT EMAILS ARE BEST

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Marketing automation allows you to quickly test different email elements to find which approach is most effective at engaging readers. Marketers don't always test their campaigns because it's difficult to do without the right tools, but marketing automation makes it easy to adopt this process and continue to measure and improve marketing strategies.

### A/B Testing

With marketing automation, you can easily run tests to ensure you are sending emails to your audience that they are actually interested in. You can perform A/B tests of campaign elements to find the most effective element.

A/B testing compares two versions to see which has a higher conversion rate. For instance, you could test different subject lines for an email campaign or images for a landing page.

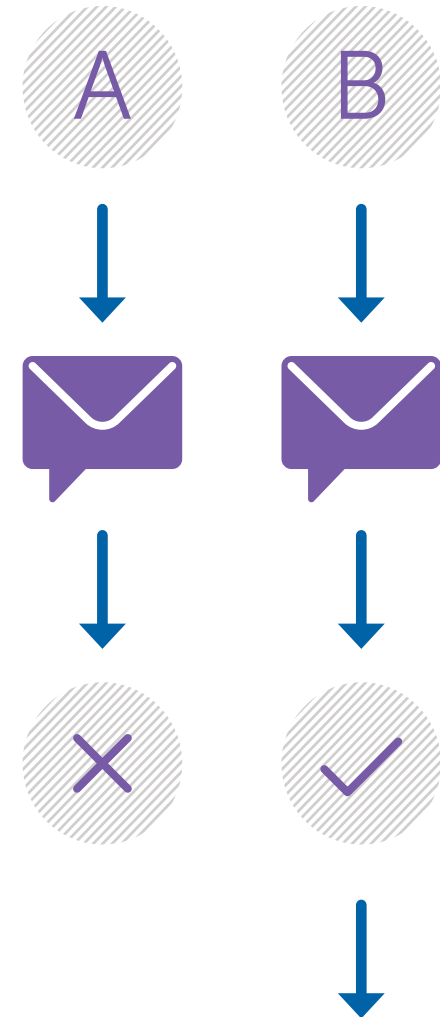
This way, you always optimize your campaigns as you go. Consistently experimenting helps you hone your strategies to achieve the best results.

Making small adjustments yields significant results. For instance, 5,000 additional opens over 100 email campaigns equals 500,000 more opened emails. This makes a huge difference in your marketing campaigns!

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**Consistently experimenting helps you hone your strategies to achieve the best results.**

### A/B Testing





## 5: REPLICATE SUCCESS IN MINUTES

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If you run a lot of marketing programs, being able to replicate your programs quickly is a huge asset. If you replicate your campaigns you can create new programs based on previously successful campaigns and save time. Recreating campaigns is a time-consuming process, but marketing automation allows you to duplicate program elements with just a few short steps. Small marketing teams can use this feature to accelerate their marketing programs.

For instance, a normal webinar program could require 22 steps to create, which might take two hours of your time. You would have to copy and edit each email template and workflow, as well as create additional steps. Marketing automation allows you to clone an entire program automatically, which takes about three minutes. You can use the extra time to work on improving campaigns and come up with new strategies to engage customers.

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**Recreating campaigns is a time-consuming process, but marketing automation allows you to duplicate program elements with just a few short steps.**

## 6: TRIGGER WORKFLOWS BASED ON BEHAVIOR

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To trigger a workflow means to automate communications based on actions prospects take on your website or other channels.

Listen to what people are doing on channels and send appropriate messages based on what you know about those people. Marketing automation allows you to track real-time behavior across channels, such as web, email, social, customer relationship management software (CRM), campaign history, transactions, and mobile. Using this information, you can trigger automatic messages in real time.

For instance, you can set up a specific email flow if someone downloads an ebook from your website or interacts with you on Twitter. The workflow might be set to change the lead score, add to a specific lead nurture track, or send out an email.



## 7: SEND RELEVANT INFORMATION IN REAL TIME BASED ON VISITORS' ACTIVITIES

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Use the behavioral information your marketing automation platform collects to send more relevant messages. You can automate workflows to send appropriate messages to leads. Real-time behavioral information, or your marketing automation platform's ability to "listen", allows you to segment and re-categorize your audience in real-time—in addition to trigger-based marketing that was described earlier. For example, if someone downloads a specific piece of content, in addition to triggering a chain of content offers or promotions across channels, you can put her on a track that pertains to her; for example, adding her to a specific segment depending on the asset she downloaded.



## 8: PROVIDE A FLEXIBLE SCORING MODEL TO DEFINE SUCCESS

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Marketing automation includes lead scoring capabilities to help marketers make sure they give sales only leads who have a strong chance of becoming customers. Lead scoring helps sales teams know where to focus their energy and is generally based on three basic factors:

### 1. Fit

Based on demographics or firmographics like location, company size, and industry, does the lead seem like a good candidate to be a customer?



### 2. Interest

Using marketing automation, marketers gauge interest by level of activity. If the lead is consistently downloading content, viewing webinars, or asking for a product demo, his interest level in your brand is probably high.



### 3. Buying Stage

It's important to assess what stage of the buyer's cycle the lead has reached. Some companies may not be in the position to make a decision yet. Are they ready to buy or do they still need more time? If they aren't ready to make a decision, the lead will need to cycle back to marketing for nurturing.





## 9: PRIORITIZE LEADS FOR SALES

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Marketing automation integrates seamlessly with CRM, which means your sales team never has to log into your marketing platform. Sales will see lead information natively. To make the transition from marketing to sales even easier on your sales team, you can use marketing automation to highlight the most important information in the CRM.

Marketing automation show reps only what's important to them; for instance in Marketo they can see:

- **Stars and Flames:** The CRM shows the sales team symbols to demonstrate priority (activity) and urgency (how recent, how much). These attributes are symbolized by stars and flames, respectively, within their dashboard.
- **Interesting Moments:** The sales team can also see leads' specific activities, such as if they participated in a webinar or viewed the pricing page. This information is useful in starting conversations with leads.





# Close The Deal

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Marketing automation isn't just for the marketing team; it also helps the sales team close more deals. Automation helps marketing teams prioritize leads based on quality and urgency. Additionally, those leads that aren't ready to buy can be sent back to marketing for nurturing. Lead activity history gives sales insight when they are closing a sale. Using marketing automation makes things a lot easier and more scalable when it comes to sales and marketing alignment.



## 10: UNDERSTAND WHICH PROGRAMS ARE EFFECTIVE

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Marketing automation gives you more sophisticated ways to measure ROI for your campaigns. By understanding what is effective you can iterate your strategy and report out to key stakeholders on your team.

### Measure

The ability to measure the success of marketing campaigns is one of the most important benefits of marketing automation. Measuring all marketing programs helps you determine which campaigns are the most effective so you can continue to improve your strategies. As a marketer today, you need to be able to measure your efforts.

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**Marketing automation shows what brought someone in and all the touches along the way.**

### The Reporting Maturity Curve

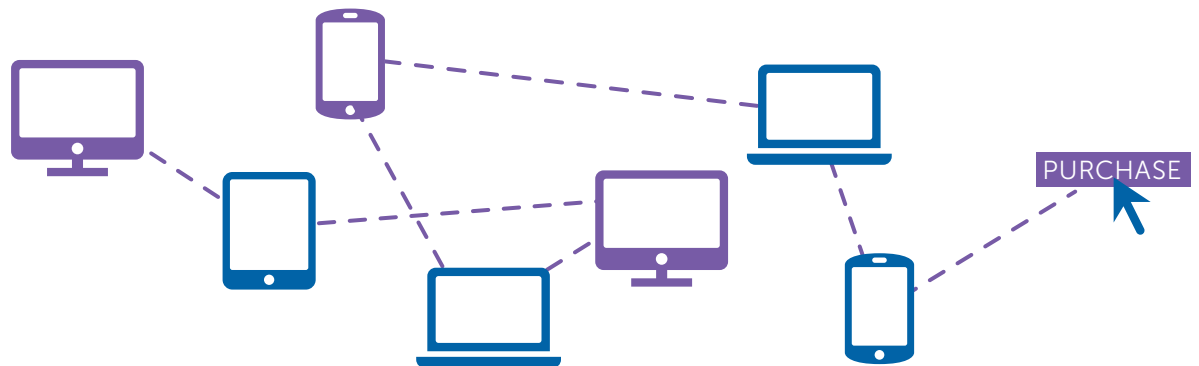
There are a number of stages of reporting, which grow increasingly sophisticated. Many marketers are stuck at the bottom of the maturity curve, which means they aren't able to determine specifically which elements of campaigns worked and which elements didn't.

For instance, conversion-based attribution is better than nothing, but this is the simplest type of reporting. This method of attribution tells marketers only how many people converted on-page, for instance, by filling out a form.

Opportunities-won tells marketers how many sales they eventually gain through their marketing program, but this type of reporting doesn't help you figure out which parts of the campaign were effective.

Marketing automation makes your reporting more sophisticated and gives you a better idea of how each component of a campaign led to an eventual sale. Automation allows marketing teams to:

- **Track All Touches Across People:** You need to be able to see the entire buyer's journey, including each marketing touch, even if multiple people within a buyer's organization access different content at different times.
- **See All Marketing Touchpoints:** Marketing automation shows what brought someone in and all the touches along the way. Marketing automation also visualizes marketing touch-points to show how marketing contributed to the final sale.



## UNDERSTAND WHICH PROGRAMS ARE EFFECTIVE (CONTINUED)

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### Why Is Sophisticated Reporting Important?

The more insight you have into how your marketing campaigns affected the outcome of the sale, the better you can use that information in future campaigns. Here are a few ways to measure campaign success:

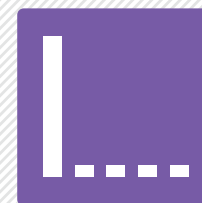
- **Track First-Touch Attribution:** Only gives credit to the first activity, even though the lead also attended a trade show, webinar, etc.
- **Track Multi-Touch Attribution:** Spreads the attribution over all activities. Marketers are able to pick and choose which activities get credit.

- **Optimize Your Campaigns:** When you are able to spread the revenue over multiple activities, you know which marketing activities are effective for the top-of-the-funnel versus the bottom-of-the-funnel. You could determine that trade shows are great for getting leads, while webinars are more effective for pushing leads through the funnel. Without multi-touch attribution, it's hard to learn this information, and your campaigns may not be as successful.

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The more insight you have into how your marketing campaigns affected the outcome of the sale, the better you can use that information in future campaigns.

### Ways to measure campaign success:



First -Touch Attribution



Multi -Touch Attribution





# Conclusion

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Marketing automation helps you attract, engage, and close sales. It should enable marketers to increase lead generation; lead nurture more effectively with targeted, personalized, omni-channel messages; and empower the sales team with high-quality leads and insight that allows them to close deals. Marketing automation helps teams measure all of their campaigns and make changes as they go, to increase their effectiveness. All-in-all, marketing automation expands the capabilities of your team and allows you to use more diverse strategies and move more quickly. It empowers marketers to:

- **Grow Top-of-Funnel:** Gain more inbound leads with SEO capabilities and increase conversion and engagement through real-time personalization and targeting.
- **Engage Potential Buyers:** Listen to buyer behaviors and respond with relevant, multi-channel conversations. Don't just blast leads with marketing communications; send messages that matter to your audience.

- **Test and Scale Programs:** Continue to implement new campaigns and iterate without increasing your teams' workload.
- **Deliver Sales-Ready Leads:** Use lead scoring and nurturing programs to improve the quality of leads that you pass over to the sales team. Your sales team is busy; don't burden them with leads that aren't ready to convert.
- **Measure Channels and Programs:** Determine the effectiveness of campaigns so you can change and course-correct in real time to protect your budget. Illustrate the value of your team.

As you've seen throughout this ebook, marketing automation can make a significant impact on your business, affecting the efficiency and measurability of your marketing efforts and helping you to close deals. Marketing automation technology is no longer a nice-to-have for the modern marketer—now it's a must-have.



Marketo (NASDAQ: MKTO) provides the leading marketing software for companies of all sizes to build and sustain engaging customer relationships. Spanning today's digital, social, mobile and offline channels, Marketo's® customer engagement platform powers a set of breakthrough applications to help marketers tackle all aspects of digital marketing from the planning and orchestration of marketing activities to the delivery of personalized interactions that can be optimized in real-time. Marketo's applications are known for their ease-of-use, and are complemented by the Marketing Nation™, a thriving network of more than 250 third-party solutions through our LaunchPoint™ ecosystem and over 50,000 marketers who share and learn from each other to grow their collective marketing expertise. The result for modern marketers is unprecedented agility and superior results. Headquartered in San Mateo, CA with offices in Europe, Australia and a joint-venture in Japan, Marketo serves as a strategic marketing partner to more than 3,000 large enterprises and fast-growing small companies across a wide variety of industries. For more information, visit **[marketo.com](http://marketo.com)**.