



DRIVING GROWTH WITH MARKETING AUTOMATION

Ledgeview
partners

SALES MARKETING CUSTOMER SERVICE AND CRM CONSULTING

HOW DOES MARKETING AUTOMATION RELATE TO YOUR SUCCESS?



“Organizations with tightly aligned sales and marketing functions enjoy 36% higher customer retention rates.”

MARKETING PROFS

The cost of misalignment between marketing and sales teams can be enormous for organizations across industries and among different business sizes.

Marketing Automation is an important and strategic tool that can create efficiencies in alignment efforts. What exactly is Marketing Automation, you may wonder?

In this eBook, Ledgerview examines key components of Marketing Automation and the value it provides to organizations in guiding target buyers through the customer journey, while helping you provide them the experience you want them to have.

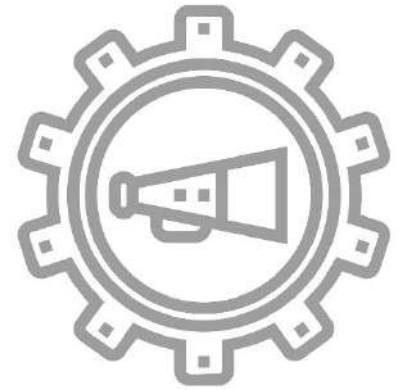
In some cases, organizations feel it is good enough to have a marketing automation solution, but don't spend the time necessary to create a strategy to use it effectively. This is one common mistake we see too often.

Within this eBook, you will get key strategies for growth and hone in on how to use Marketing Automation functionalities like Lead Scoring and Nurturing to solidify your marketing strategy.

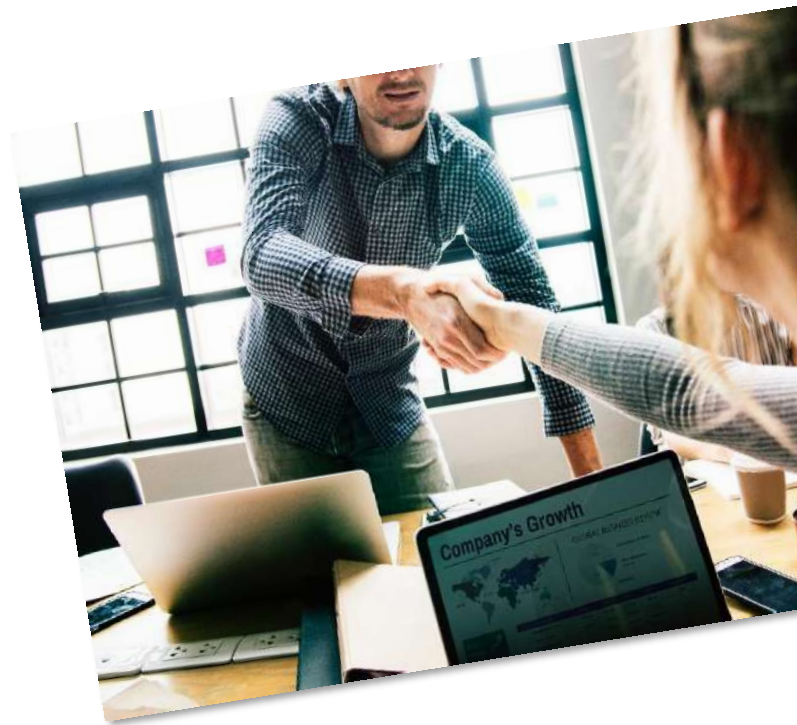
You will discover expert insight and additional resources that help tie your marketing automation strategy all together, and, at the end of this eBook, your sales & marketing teams will be set up to achieve ultimate alignment success & collaboration with your efforts.

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MARKETING
AUTOMATION



THE COST OF SALES & MARKETING MISALIGNMENT

At some point in your professional history, whether in your current role or a past role, you've likely encountered sales & marketing misalignment.

When sales & marketing can't seem to collaborate on the end-results they are trying to achieve, the organization typically fails to live up to its potential with Marketing Automation and CRM.



Technology is one aspect of your business' success, but true collaboration and a well-defined process is another. Culture and collaboration are essential elements of a successful organization.


At times, it seems salespeople & marketers are not co-workers, but meeting each other for the first time. When, in truth, without a good sales strategy, closing rates are depressing and not as high, and, without marketing, you would not have prospects or leads to follow up with. Can you imagine living in a business world like this? *Yikes!*

In order to find marketing automation success, sales & marketing must work together using their strengths and expertise to contribute to shared goals. You can't live on separate planets as salespeople & marketers to achieve success in one business world.

Getting sales & marketing team members on the same page is crucial to your business' success, and especially with marketing automation.

According to a study from Act-On, a leading marketing automation software company, almost three out of four organizations report some degree of alignment, but only 17% describe themselves as completely aligned.

To get sales & marketing on the same page, managers must be proactive in showing them how they contribute to each other's successes and the organization's success as a whole. True sales & marketing alignment forms with expert communication and expressive commonalities.

The background of the slide features a collage of rolled-up US dollar bills. Visible denominations include \$20, \$10, and \$1 bills. The bills are arranged in a way that they appear to be fanned out or stacked, with various parts of the currency design visible, such as the 'SERIES 2003' text on a \$20 bill and the 'TWO DOLLARS' text on a \$2 bill.

“Studies show failure to align sales and marketing teams around the right processes and technologies costs B2B companies 10% or more of revenue per year.”

MarteKing.IO

“50% of sales time is wasted on unproductive prospecting, and sales reps ignore 50% of marketing leads.”

Type A Communications

THE COST OF SALES & MARKETING MISALIGNMENT

11

Effective Ways to Create Sales & Marketing Alignment Right Now

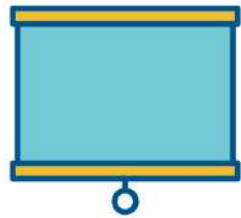
1. COMMUNICATE

Sales & marketing need to remember they're a part of the same team, though they may be a part of different departments. Sales & marketing should meet frequently to analyze marketing automation strategies, campaigns, and reports, analyze trends, monitor results, and more. They should also be comfortable providing each other feedback.



2. TRAIN TOGETHER

When changes or upgrades to your marketing automation system happen, train sales & marketing together so they experience the same conversation and training points. This prevents and eliminates confusion of responsibility, follow-through, tracking, and more.



3. CREATE SHARED GOALS

There should be no dispute between sales & marketing about what makes a lead qualified. Though definitions of leads may vary across organizations, how they are defined internally should be consistent among departments. Sales & marketing should be thinking the same when it comes to goals with marketing automation, CRM, or other shared processes.



4. COLLABORATE ON CONTENT

Messages coming from sales & marketing to customers, leads, prospects, or other key audiences should be the same. When sales & marketing share the same language, the organization itself creates a stronger reputation and industry credibility. When sales & marketing work together to create content or messages, they are more likely to promote and use it in their daily work. Message consistency is key, and having input from sales & marketing will make your content creation process flourish.



5. USE THE SAME METRICS, GOALS, AND KPIS

Though salespeople & marketers have different responsibilities and functions in your organization, they should be working toward shared goals, whether with marketing automation or another business process. Success should be measured in the same terms between sales & marketing.



THE COST OF SALES & MARKETING MISALIGNMENT

1

11

Effective Ways to Create Sales & Marketing Alignment Right Now

6. CLEAN UP DATA TOGETHER

As data is constantly changing, salespeople & marketers need to be updated equally about when CEOs leave companies, contact addresses or phone numbers change, businesses are closed, etc. When both sides are aware of data and know it's clean, salespeople & marketers are more effective in their daily work and collaborations.



7. MAKE SALES & MARKETING ACCOUNTABLE

Sales & marketing need to be held accountable for their roles in turning marketing-qualified leads (MQL) into sales-qualified leads (SQL), which should lead to closing deals. Marketing should know which campaigns are helping sales; and sales & marketing should know how their daily work contributes to shared goals by checking in with each other.



8. CREATE BUYER PERSONAS & LEAD SCORING MODELS

We'll cover this in-depth later in this eBook, but, to start, you need to know that sales & marketing need to have input about buyer personas and lead scoring models for your organization to truly thrive with marketing automation. This effects reaching the aforementioned shared goals. Your buyer personas and lead scoring models should reflect who your ideal customer is, but we'll dive deeper into that later ...



9. CONNECT YOUR MARKETING AUTOMATION SYSTEM WITH CRM

We hope this is obvious, but, if not, we won't hold it against you! Connecting your marketing automation system with your CRM will help prioritize leads for sales, enable clean data, see how sales & marketing are working together and following up, provide the expert insight and tools the teams need to succeed, and more.



10. SET UP AUTOMATION

From triggers to alerts and notifications, set up the right ones for the right people so sales & marketing can keep up their flow throughout the marketing automation process. Automation helps your team stay on track to reach the desired end goal.



11. ANALYZE THE ROI

Sales & marketing should sit down together to see how their marketing automation system is benefiting their organization. This will also ensure they're using it effectively, or give them a chance to reevaluate and find a better solution to fit their needs.

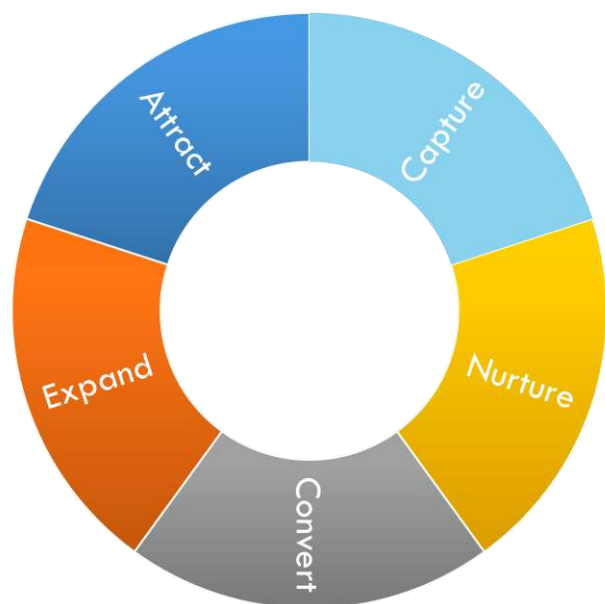


DEFINING MARKETING AUTOMATION: GOALS & VALUES

Now that you've been warned about the cost of sales & marketing misalignment, you're ready to dive in! Let's start with the definition of marketing automation: **Marketing automation is a technology that helps streamline, automate, and measure marketing activities across channels.**

Though commonly lumped with email marketing, it's much more than that! It's your way of ensuring the right messages get sent to the right people at the right times from the right networks.

A good marketing automation system will provide not only email marketing, but web tracking, lead scoring, nurture or drip marketing, campaign tracking, forms, surveys, landing pages, and *much more!* This makes the value of marketing automation *incredible*.



The ultimate goal of any marketing activity is to increase conversions defined by key metrics as determined by company leaders.

Whether this is B2C purchases, B2B relationships, or engagements with customers, your goals should be simple and straightforward.

DEFINING MARKETING AUTOMATION: GOALS & VALUES

6

Simple Marketing Automation Goals You Should Set Now

1. DEFINE YOUR TARGET AUDIENCE

How will you be able to target an audience if you don't know who they are? Identifying them before you target them will be the solid foundation you need to succeed with marketing automation.

2. GAIN AUDIENCE ATTENTION

Through various programs you set up in your marketing automation system, you will gather data and be able to analyze results about content your target audiences responds to. Listen to their wants and needs, and respond accordingly to keep gaining their attention.

3. IDENTIFY WHO IS ACTIVELY ENGAGED

You can find out who is actively engaged with your brand and content by seeing who is actively engaging with your emails, website, social media, and other channels. Track your audience's activity regularly.

4. NURTURE THAT ENGAGEMENT INTO A CONVERSATION

Your messaging should be consistent across channels, so it's important to set this goal from the get-go of nurturing that engagement into conversations. Your marketing efforts should all coordinate and aim for the same shared objective(s).

5. TRACK AND MEASURE CONVERSION METRICS


Tracking and measuring conversion metrics will help you identify your success with marketing automation and see where you are going right or wrong. Tracking and measuring metrics will help you create better marketing automation campaigns in the future.

6. LEVERAGE RELATIONSHIPS TO CREATE CUSTOMERS

Create long-term customers and drive growth by leveraging the relationships you have. Referrals, testimonials, and success stories are beneficial to your marketing efforts and business goals overall. Personal appeals create sentimentality, relation, and connections.

The real value of marketing automation is the visibility and insight it gives you into the behaviors of your audience to drive revenue!





"91% of the most successful users agree that marketing automation is 'very important' to the overall success of their marketing across channels."

CMO

"80% of marketing automation users saw an increase in number of leads, and 77% increase of conversions."

Venture Beat

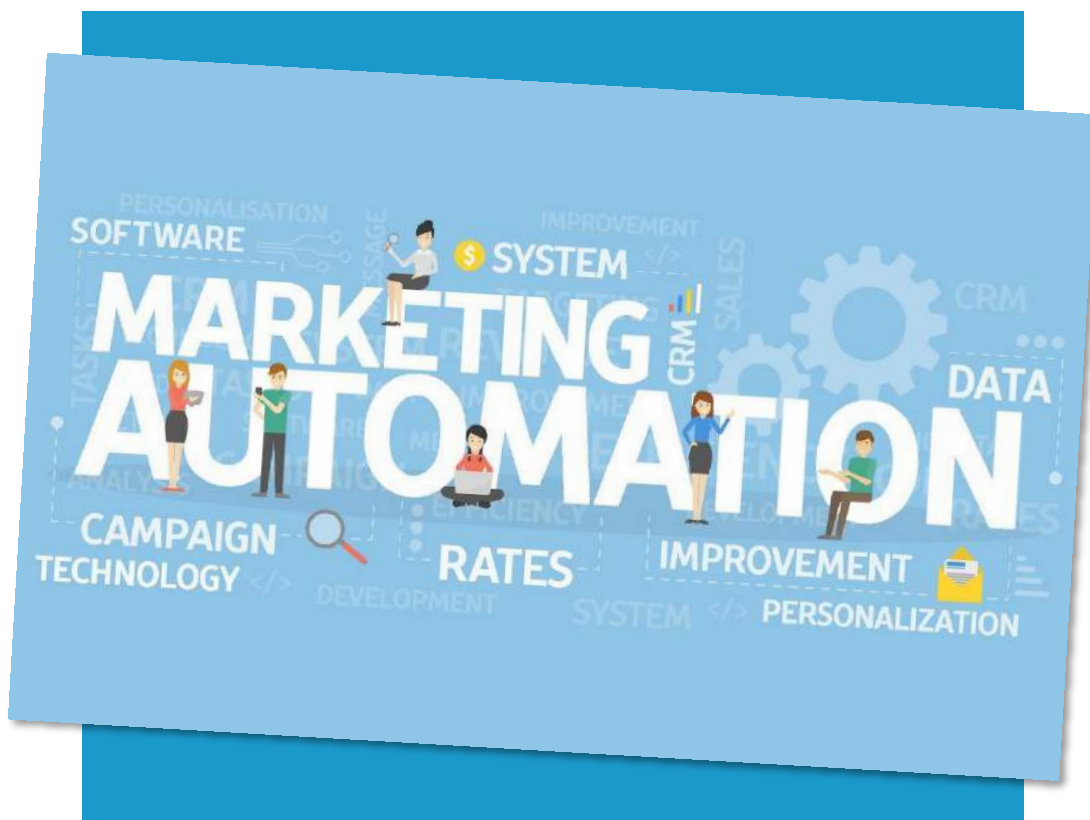
"Marketing automation drives a 14.5% increase in sales productivity and a 12.2% reduction in marketing overhead."

CMO

SELECTING THE RIGHT MARKETING AUTOMATION SOFTWARE

With the variety of marketing automation systems on the market to choose from, you may find it difficult to narrow down the one that's right for you.

When it comes to selecting your marketing automation system, you will want to **consult your CRM partner if it will be integrated into your system.** Of course, we **highly recommend** this as it's better for data cleanliness and consistency, along with many other benefits.



Some of the most common marketing automation systems you may be familiar with include **ClickDimensions, Act-on, Hubspot, Pardot, and Marketo.** All of these offer a wide array of content like on-demand webinars and demos, eBooks, data sheets, and much more.

When it comes to selecting one, don't be afraid to try them out. Many marketing automation systems offer trial runs before you buy. **Using a third party to help you evaluate marketing automation systems will offer you an agnostic point of view and help you pick a solution that matches your current infrastructure, culture, processes, and other resources.**

Consult your industry peers to see what they use for marketing automation. Read case studies, customer testimonials, and references on company websites to learn more about what industries and business sizes typically use the marketing automation system you are scouting. Consider your options and be thoughtful during the evaluation process of selecting a marketing automation system.

Gather insight from those who know your business and the business of marketing automation with CRM best.

3 KEY STRATEGIES FOR GROWTH WITH MARKETING AUTOMATION



1. UNDERSTAND YOUR AUDIENCE

When you are creating buyer personas, ask yourselves: Who is my target audience, buyer, or customer? Then ask: What industries am I speaking to? What products am I targeting to them? What is the title or role of this person? Are they decision-maker at the executive level, influencer at the manager or director level, or user who typically benefits from the product or service? **Who is this person?** Think about these various roles and what their titles might play in the purchase decision process. **Include profile information, and outline the main goals and objectives you have with these individuals.**

2. SET UP WEB TRACKING & INTELLIGENCE

At any given moment, **97% of your website visitors are invisible.** Since that leaves about 3% of people as identified, it puts a serious crimp in a salesperson's ability to "strike while the iron is hot." Your goal as a salesperson or marketer with marketing automation should be to convert anonymous visitors to known. How do you do this? **Set up a tracking beacon with your marketing automation system on your web and landing pages.** Make sure your marketing team is using the tracking beacon to record visits and get information about visitors. With marketing automation, you're always tracking. Use the data you gather to your advantage. **Last, make sure you're in compliance with data and privacy laws, and your use of cookies for tracking.**

3. THINK IN FUNNELS

When you think in funnels, you want to think in three main components: **Awareness, Interest, and Consideration, or, moving through the top of the funnel to the middle to the bottom.** Outline potential problems and pain points. Provide content like eBooks, white papers, checklists, infographics, case study reviews, webinars, and in-person education to those moving through your funnel.

With funnels, your goals should be to increase brand awareness and increase the number of sales-ready leads, often (and preferably) at a lower and lower cost per lead. **Consider how customers engage with you from different points and how you can effectively engage from the start of their buyer journey.** If you have a solid process in place for attracting and capturing leads with funnels, you will find success in your marketing automation process.

3 KEY STRATEGIES FOR GROWTH WITH MARKETING AUTOMATION

Your Actions for Thinking in Funnels



AWARENESS – Use big-picture and industry-focused content such as social media, advertising, sponsorships, and PR to get your target audience to become aware of your company. **Remember, your goal will be to turn anonymous visitors into known visitors by enticing them to interact with your campaigns.** This will allow you to start tracking your website visitors and gain a clear picture of typical buyer behavior.

INTEREST – Educate and help prospects evaluate buying criteria. **The sooner you engage and help them, the better.** Create and promote white papers, eBooks, webinars, events, analyst reports, videos, reviews, and checklists to gauge their interest. Use the buyer behavior data you gather to target engaged prospects.

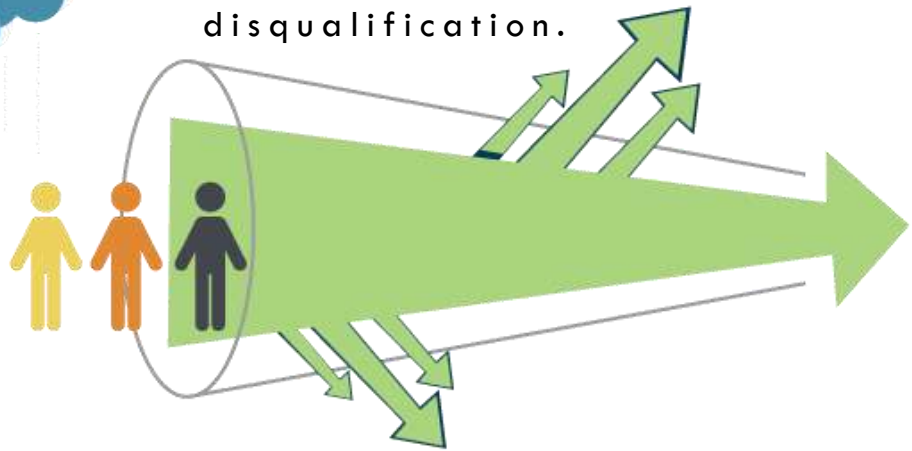
CONSIDERATION – As they get closer to the buying phase, use demos, trials, data sheets, pricing, case studies, references, vendor comparisons, and implementation data to get them leaning closer and closer to you. Your prospects are evaluating specific products and services and at this stage become willing to engage with sellers. **Consideration can turn into purchasing in a hurry.**

“79% of B2B Marketers aren’t using lead scoring.”
MarketingSherpa

PROBLEMS create a need for a person to find a solution.



HAVE PATIENCE! Pushing to Sales too early results in disqualification.



THESE PEOPLE are attracted by your Marketing.

POOR OR LACK of Nurturing Loses their Attention.

“Lead Scoring + Lead Nurturing = 50% more sales-ready leads at 33% lower cost.”
Forrester Research

“65% of B2B Marketers aren’t using lead nurturing.”
MarketingSherpa

LEAD SCORING BEST PRACTICES

5

Proven Steps that Really Work



1. HOW TO SCORE LEADS

You may decide to score leads based on a variety of factors such as opening a message, clicking on a message, submitting a form, downloading media, etc. In most marketing automation systems, you can also assign negative values to personas or actions, such as if the person is a competitor or intern, meanwhile you're looking for potential customers or those at the executive level. You may also assign negative values to potential employees who are not looking for your services, but for work.

2. DEFINING YOUR LEAD SCORING STAGES

With lead scoring stages, you will want to **refer back to each funnel stage pictured earlier in this eBook (chapter 4)**. Each stage will align with a score range. For example, in a 40 point marketing threshold, the Awareness (top of funnel) stage usually falls in the 0-10 range, Interest (middle of funnel) in the 11-29 range, and (bottom of funnel) Consideration in the 30-40 range. In this example, after 40, a lead would be triggered to move to sales. Typically, you can assign ANY value you wish (10s, 100s, etc.)

3. ATTRACTING WITH CONTENT, CAPTURING WITH FORMS

Capture data on your website by using 'gated' forms in your marketing automation system to collect information about leads. **Examples of content you may use "gated" forms on include eBooks, white papers, data sheets, how-to guides, checklists, blogs, on-demand videos, and webinars.** The possibilities are expansive. Collecting information helps you to learn about your leads and what they like so you can create better content and marketing campaigns around them.

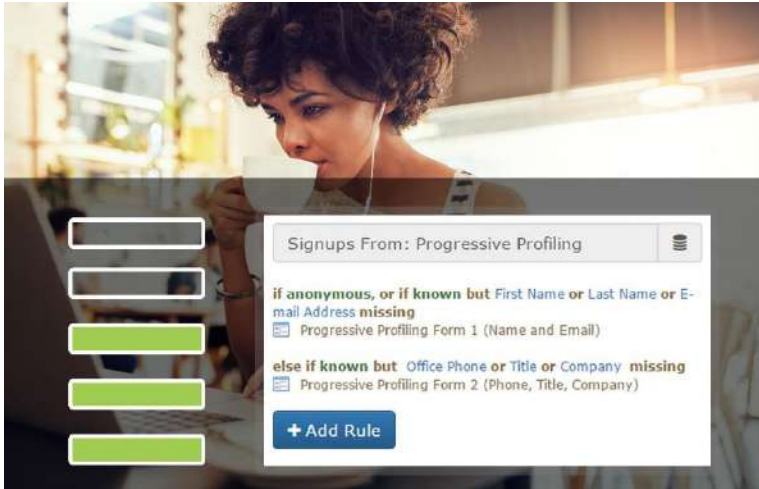
"61% of B2B marketers send all leads directly to sales; however, only 27% of those leads will be qualified."

MarketingSherpa

LEAD SCORING BEST PRACTICES

5

Proven Steps that Really Work



4. USE PROGRESSIVE PROFILING

Progressive profiling serves different form fields to your contacts based on what you already know about them. **It's done through Dynamic Forms that present questions incrementally over time.** When you want to know everything about your leads, prospects, and customers, progressive profiling is an amazing asset to have in your marketing toolbox.

root@act-on.net

Flaherty, Julia;

Collett, Chad

11:37 AM

Act-On Form Submit Alert (Form: Defining Your Process from Lead to Opportunity, Submitted)

Form Submit Report for Defining Your Process from Lead to Opportunity (Defining Your Process from Lead to Opportunity)

First Name : Chad

Last Name : Collett

Company Name : Ledgeview Partners

Job Title : Director of Marketing

Email Address : ccollett@ledgeviewpartners.com

Additional visitor information based on GeoIP lookup (this information can often vary from known contact details)

Company/ISP: Tds Telecom

Area Code: 920

State/Province: WI

Country: United States

Contact Us Form Completed on Website - [Chad Collett](#)

This contact/lead filled out the "Contact Us" form on our website.

Information Submitted

First Name	Chad
Last Name	Collett
Job Title	Director of Marketing
Company Name	Ledgeview Partners
Phone Number	920-560-6882
Address	
City	Appleton
State	WI
Zip Code	54914
Email	ccollett@ledgeviewpartners.com
What Can We Help You With?	I need help to find the right Marketing Automation technology for our company.

5. AUTOMATE FORMS

Using forms in marketing automation can create immediate, automated, and time-saving actions like:

- Sending an Automated Email Response
- Adding a New Lead to a Marketing Automation System or CRM
- Adding a Lead or Removing them to or from a Marketing List or Nurture Program
- Notifying the Account or Record Owner of their Activity and Assigning New Leads like you see with email notifications, Contact Us pages, or gated eBook forms

Make your daily work processes easier and more efficient with automation.

SEGMENTS: TYPES & REPORTS

As part of the nurture stage of your marketing automation process and strategy, you will create segments, breaking prospects up into types and gathering reports based on the data you gather.





Once you know how to identify prospects and make them known, you can start marketing to them. Start by creating groups or segments of prospects separated by score or funnel stage to offer an overview of how many prospects are in each stage.

Additionally, this will lay the foundation for you to start nurturing prospects with content they are most likely to deem valuable and relevant.

Segments will feed your nurture programs, which consist of one or more messages built to deliver information you know prospects will want and need to move to the next stage of the customer journey.

As stated in chapter 4, your goal as a marketer should be to leak in the sides of the funnel to increase the quality of the leads you are delivering to sales.

By breaking your prospects into segments, you will begin to gather relevant data in the form of reports that you can integrate with CRM and use to clarify your segment types.

 Nurture Leads	21,576
Segment Last Counted: Tue May 08 2018 11:53 AM CDT	
 Top of Funnel (LS Between 0-10)	20,223
Segment Last Counted: Tue May 08 2018 11:59 AM CDT	
 Middle of Funnel (LS Between 11-29)	970
Segment Last Counted: Tue May 08 2018 11:59 AM CDT	
 Bottom of Funnel (LS Between 30-50)	364
Segment Last Counted: Tue May 08 2018 12:00 PM CDT	

Campaign Middle of Funnel Nurture Campaign

Revenue Attribution

Edit

Close

Messages

Messages Report

Name	Sent	Opened	Clicked
Quick Introduction	0	0	0
Are you available for 15 minutes this week?	0	0	0
The Future is Now!	59	0	0
Your registration is accepted for 7 characteristics of Great Marketing Content	1	1	1
Join us to learn more about Great Marketing Content	1	1	1

Landing Pages

Name	Views	Clicks
Copy of Infotronics Whitepaper Target 1	1	0
Infotronics Whitepaper Target 2	2	0
Infotronics Whitepaper Target 1	37	0
Infotronics 2	0	0
Infotronics 1	34	0

Forms

Name	Views	Submits
Infotronics Test Form	30	32
NEW and IMPROVED using TIMEachine to get your business on track	84	37
New Product Launch	165	77

“Lead nurturing emails get 4-10 times the response rate compared to standalone email blasts.”

SilverPop/DemandGen

SEGMENTS: TYPES & REPORTS

6

Segment Types to Break Down Your Leads Into

Lead score isn't the only type of segmenting you should consider. **You should also consider complementing your strategy with Persona, Industry, and specific product segments.** As you refine your marketing strategy, these more granular types of segments come in handy to evolve automated nurture marketing campaigns. Lead segmentation is the “secret sauce” that makes your email messages personal and relevant, boosting engagement and conversion.

We recommend segmenting your leads into the following 6 types:

1

PERSONA/ROLE

This is absolutely the most important type of segmentation you can have. Persona-based segmentation usually fits into three key categories: Decision Maker, Influencer, and User, and generally these tie to job titles.

2

INDUSTRY

Tailoring your message with industry terms will be a huge differentiation that shows your expertise, credibility, and attention to the prospect's needs.

3

PRODUCT/INTEREST

This type of segmentation is usually based off of track behaviors, such as those discussed earlier in this eBook.

***Refer to Chapter 4**

4

ENGAGEMENT

This refers to Top, Middle, and Bottom of Funnel Leads.

***Refer to Chapter 4**

5

GEOGRAPHY

Timing your message and content distribution based on cultural norms and time-zones is a great way to dramatically increase campaign effectiveness. Different promotions or calls-to-action (CTAs) can be elicited based on where a target lives in any part of the world. Optimization is key.

6

CUSTOMER STATUS

You know who your active customers are, so make sure your marketing automation system and CRM does, too. Plus, you can use marketing automation for customer onboarding!

SEGMENTS: TYPES & REPORTS

Going Beyond Demographics, Reacting to Behaviors

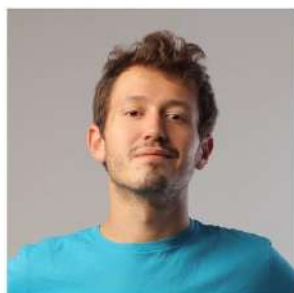
Now that you've discovered the "secret sauce" to your marketing automation campaigns and system, make sure your email messages are relevant and personal with List Segmentation. How can you compose and distribute the most effective email marketing campaigns to boost engagement and increase conversion? *By targeting specific behaviors!*



Consider how you will move from the standard criteria of a job title or department and the lead's location. Then, move on to add observed behaviors. Separate by score, and identify whether or not they've taken favorable actions such as attending a webinar, downloading specific content or visiting specific web pages. Finally, focus on whether or not this behavior is repeated. Did it happen once? Did it happen today? Did it happen in the last 7 days? Did it happen in the last month?

Have you ever received a sales call after looking at specific content on a website or right after you clicked through an email you were interested in, then thought, "Wow, what a coincidence!"

Trust us, that's no coincidence – *that's marketing automation!*



THE POWER OF EMAIL MARKETING

With all of the outlets you can distribute content from and reach your target audience, you may wonder, is email marketing on its way out? Rest assured – *it's not!*

According to Constant Contact, 205 billion emails are sent everyday, and it is estimated that by 2020 email will be used by 3 billion people based on Radicati's Email Statistics Report. Needless to say, this makes email's ROI impressive! For every \$1 spent on email marketing, according to Constant Contact, you can expect an average return of \$38.

So, if you aren't convinced yet, just check out more powerful email marketing statistics:

"35% of email recipients open email based on the subject line alone."

Convince and Convert

"Personalized emails improve CTR (click through rates) by 14% and conversion rates by 10%."

Aberdeen Group

"People who buy products marketed through email spend 138% more than people that do not receive email offers."

Convince and Convert

"A/B tests can improve conversion rates by 49%."

Campaign Monitor

"Email is the third most influential source of information for B2B audiences, behind only colleague recommendations and industry-specific thought leaders."

Wordstream

FINDING LEAD NURTURING SUCCESS

Marketing Qualified Leads vs. Sales Qualified Leads

Now that you know the stats and benefits of lead nurturing, it's time to define what a "lead" is. Generally, organizations define a lead as:

Lead /lēd/ (noun)

In business, a lead is someone you have identified, or they have identified themselves as being a fit for your product or service.

If we take a deeper look at that lead definition, we separate leads into marketing qualified versus sales qualified.

SQL (Sales Qualified Lead)

Triggers indicate they are ready to engage with a member of your sales team. This could be a culmination of triggers (lead scoring) or a single trigger (contact us form) that moves a lead to this stage.

MQL (Marketing Qualified Lead)

This type of lead indicates someone who has raised their hand and identified themselves as being interested in learning more, but may not necessarily be ready to purchase your product or service.

As marketers, if you are quickly sending your leads to the sales team and they are quickly being disqualified because they do not have an immediate buying intent or if your leads have indicated they are not ready to purchase right now, what are you doing with them in the meantime?

Don't wait for them to reconnect. In most cases, this person will either purchase from you or a competitor in the next 24 months. Therefore, you want to stay connected and keep them top-of-mind for when they are ready. **Lead nurturing keeps you engaged with them.** While there is no set formula for leads, these general definitions can help guide you through creating a successful lead nurturing program.

FINDING LEAD NURTURING SUCCESS

Setting Up a Lead Nurturing Campaign

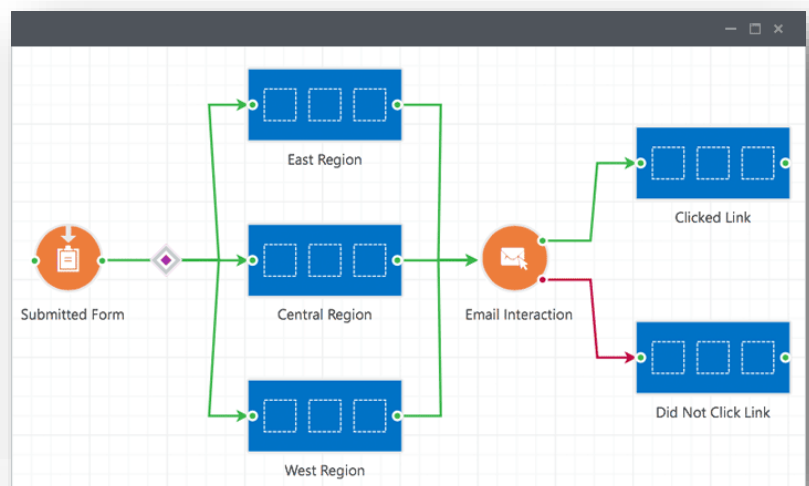
Though the marketing automation system technology you're using may be different, the concept for setting up lead nurturing campaigns follows a similar trend across industries and business sizes, no matter the specific technology.

With lead nurturing campaigns, your aim is to develop a series of actions and communications based on behaviors.

For example, when someone submits a form, perhaps from a “gated” piece of content like a tip sheet, white paper, eBook, or on-demand webinar, this could be a trigger to add the lead or prospect to the nurture program or specific marketing list in your system.

Once a person becomes a part of a list like this, they are entered into the nurture program and are assigned targeted communications that relate to them as they move further through your cycle. Keep in mind that nurture programs typically have time delays, such as waiting a couple of days or weeks, depending on the actions you set up. This way, you can control the start or end times of your nurture campaigns automatically.

Customization is valuable with nurturing programs. They will contribute to your overall personalized marketing efforts in valuable ways.



FINDING LEAD NURTURING SUCCESS

7

Steps to Getting Started

As you continue to improve marketing & sales alignment through working in your marketing automation system, you will arrive at the point of being ready to start your lead nurturing campaigns.



We recommend following these 7 steps to get started:

1. DISCUSS LEAD NURTURING WITH YOUR MARKETING & SALES TEAM

Establish communication from the beginning. Get everyone on the same page. Connect on goals, projected outcomes, timelines, etc.

2. IDENTIFY AN INITIAL TARGET GROUP OR CAMPAIGN

As we discussed earlier in this eBook, in order to effectively target your audience, you need to know who you are targeting. Sales & marketing should identify who your ideal customer is together.

3. SET CAMPAIGN GOALS

By setting campaign goals, you will better stay on track to reaching them. Make sure everyone shares these goals and knows their responsibilities in reaching the desired end-result.

4. BEGIN WITH A SMALL SAMPLE SEGMENT OF YOUR DATABASE

You don't have to start with everyone. Pick a sample of your segment to begin, see how it goes, then refine as is necessary, and, when you're ready, amplify it based on your findings.

5. MAP OUT YOUR LEAD NURTURE PROCESS FOR THE IDENTIFIED TARGET

When you prepare a lead nurture program's steps out, you can better prepare to solve potential problems or pain points along the way, creating a smoother and more effective process.

6. IDENTIFY YOUR CONTENT AND COMBINE CONTENT

Combine content messaging with CTAs (calls to action) to allow for sales conversions. Lead nurturing programs are a lot more than creating a simple email template!

7. MEASURE EFFECTIVENESS, EXPAND ON SUCCESSES

When you see success, measure it, then keep improving and growing. Your results will speak to the value of a well-planned and collaborative lead nurturing program. Make sure you A/B test your email templates, and set that up in your nurture campaigns to measure effectiveness and build on it.

IDENTIFYING GOALS & KPIs



The importance of identifying goals with lead nurturing programs make their own chapter, because they effect many aspects of your marketing automation system and marketing efforts overall!

Here are some examples of goals & KPIs you can track. To decide what's best for your sales & marketing teams, have them sit down together, as we described earlier in this eBook, to decide on these shared goals. Remember, when everyone is working in the same marketing automation system world, you prevent disconnect, create connection, and drive success with your marketing automation strategy.

- 1. NUMBER OF MARKETING QUALIFIED LEADS (MQLs) GENERATED**
- 2. PERCENT OF MONTHLY LEADS CREATED FROM NURTURE (%)**
- 3. LEAD TO OPPORTUNITY CONVERSION RATE (%)**
- 4. EMAIL CLICK RATES (%)**
- 5. EMAIL UNSUBSCRIBE RATES (%)**
- 6. CAMPAIGN CONVERSION RATES (%)**

You've done it! It's time to **completely** ...

**ALIGN SALES & MARKETING TO FIND
SUCCESS WITH MARKETING AUTOMATION**



ALIGNING SALES & MARKETING TO FIND SUCCESS WITH MARKETING AUTOMATION



Congratulations!

You've come a long way since the beginning of this eBook, and now that you're well-versed in the art of marketing automation, it's time to make sure your sales & marketing teams are completely aligned so you can find the ultimate success you set out to find from the start.

With the tips in this eBook, you have the new insight, perspective, and methodology to succeed with sales & marketing alignment and marketing automation.

The stats don't lie. Organizations with tightly aligned sales & marketing teams **enjoy 36% higher customer retention rates** according to MarketingProfs. When sales and marketing teams are in sync, Marketo reports **companies become 67% better at closing deals**, and, according to MarketingProfs, companies with aligned sales & marketing teams **generate 208% more revenue from marketing**.

Can you imagine having this success with marketing automation? With the knowledge you now have, it's entirely possible, and we look forward to hearing about your results! With all the work you've put in to aligning your sales & marketing teams to create a more effective marketing automation system and marketing strategy overall, a high five and marketing automation system launch are in order!

Get more eBooks from Ledgeview to expand your knowledge on marketing automation, aligning sales & marketing, generating leads, and more ...



DEFINING YOUR PROCESS FROM LEAD TO OPPORTUNITY

What is a Lead? What is the process for a Lead to become an Opportunity? Within this eBook, you will get a thorough overview that helps you define your process from Lead to Opportunity to create alignment between your Sales and Marketing team members. Alignment should be consistent among organizations, whatever your product, service, or industry. The unfortunate reality between the majority of departments within organizations is a misalignment. When it comes to defining Leads and Opportunities, misalignment disables you from moving forward! Drive success. Get on the same page. Get top insight that shows you how!

HARNESSING THE POWER OF MARKETING AUTOMATION

If you are new to Marketing Automation systems you may be a bit overwhelmed by the feature set available to you and you may be wondering where you should begin. Or maybe you have been using the email functionality in your Marketing Automation tool but you are unsure where to begin with the rest of the features.

Marketing Automation is a very powerful tool and we are going to look at 4 strategies to unleash the power of the system to enhance your marketing strategy in this new eBook!



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marketing

LEDGEVIEW PARTNERS MARKETING SERVICES:

Overcome the Obstacles to Marketing Success with Ledgeview

The world of marketing is always changing. With an endless amount of information, customers can access prior to engaging with your company, it's critical marketers are ahead of the curve with their creativity, savviness, and strategies. More than ever before, marketers must be constantly in tune with their brand's reputation, credibility, presence, and more.

Experts at Ledgeview with many years of experience in a variety of industries take the time to understand your culture, industry climate, marketing history and future needs to address your marketing concerns and shortcomings. It may sound overwhelming, but Ledgeview provides smooth solutions every time! With a customized set of metrics and goals to measure success and ongoing training resources, Ledgeview has the tools you need to succeed.

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With Your Sales, Marketing, Customer Service, and CRM Consulting Needs

Ledgeview Partners is a business and technology consulting company who partners with organizations to transform sales, marketing, and customer service operations and processes that are supported by core technologies including Customer Relationship Management (CRM) and Marketing Automation.

Ledgeview Partners' consultants combine savvy business intellect with a strong technical aptitude to provide solutions that extend well beyond software implementations. It's about building relationships, transforming business, and delivering phenomenal customer experiences.

Ledgeview Partners is a Microsoft Dynamics Gold Partner and Salesforce Silver Consulting Partner.



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