Marketing automation is <u>more than software.</u>
It's strategy.

Bring together strategy, people, and processes.

"I've seen over and over where a company will be unsuccessful with their marketing automation strategy and they blame the technology; they blame the platform. They say, 'Well, we need to switch to a new platform because this just isn't working out.' And in my observation, nine times out of ten, it's not the technology's fault; it's the fact that the strategy, if it exists, is flawed and is not executed well."

Matt Heinz
Marketing Automation Expert

While there are important differences between marketing automation platforms, success is often primarily determined by three things: your strategy and process, your content and lead flow, and your people. With limited investment in these areas, you can usually get good (but not great) ROI from marketing automation. But the more you invest, the higher you move up the curve, and the better your return on investment.

The key is to think big, start small, and move quickly. In other words, the best results usually come from getting started with what you have today and then incrementally investing over time.

Build *new processes.*

Don't just automate your old processes when you are introducing marketing automation into your organization. New technology requires new ways of doing things. When it comes to automating marketing, the most important thing to understand is that you still have to think.

"You would not build a house without a blueprint, and yet many companies rush into marketing automation without a plan. Marketing automation is a tool that requires careful planning for it to be successful."

Jason Kort
Former Editor, Marketing Automation Times

Some of the processes that your company should examine as it thinks about marketing automation include the following:

Sales and marketing alignment

- What defines a sales-ready lead?

- How does your lead qualification team prioritize their time?

- How will you implement lead nurturing for leads that are not yet ready?

- How will you recycle sales leads that don't move forward?

- What service-level agreements (SLAs) will you have for lead follow-up?

Marketing automation can drive the most results when a company uses it as an opportunity to realign its entire revenue engine around the modern customer's new buying cycle.

Measurement and metrics

- What key metrics do you report on a weekly, monthly, and quarterly basis?

- How do you measure campaign ROI?

- What key performance indicators (KPIs) will you use to determine if your revenue processes are on track?

With marketing automation, marketers can look beyond traditional metrics like clicks and opens and start measuring and forecasting what executives really care about: current and future pipeline, revenue, and profits.

Data quality

- Do you have dirty data full of duplicates and bad records?

- Missing or incomplete data?

- How will your data get cleansed and maintained to ensure your marketing automation doesn't suffer from "garbage in, garbage out"?

Quality data is an essential underpinning of any successful marketing automation implementation.

Create content and *find leads.*

Having enough content is often the most underestimated challenge for successful marketing automation. Simply put, content is a must-have for consistent lead generation and nurturing. Ideally, the content you create will be based on a solid understanding of your buyer personas, so that your content and messages resonate with your audience. Without this, even the most finely crafted marketing automation programs can fail to deliver results. Ask yourself, do I have a defined content calendar, and do I have enough content for each stage of the customer buying process? If the answer is not yes, then you'll need to make progress in this area, or risk limiting your long-term marketing automation success.

Some companies have too many leads and need to score them before handing over only the highest-quality and most sales-ready. Other companies, especially new and small businesses, don't have enough leads. Marketing automation can help leads flow through the funnel more efficiently and, if done right, can nurture leads to make them sales-ready. But if you have nothing coming into the top of your funnel, you will have nothing to nurture. If you don't have enough sales leads, put a plan in place to get more by using content marketing, social media, trade shows, and promotions—anything that will help you gain prospects.

"People, skills, and processes must come first. Once you have those in place, the right technology is simply there to support, enhance, and simplify the processes you've already defined."

Hana Abaza
VP Marketing, Uberflip

Choose the *right* people.

Your internal employees, as well as external service providers, are the most critical aspects of success with your marketing platform. As such, they should possess the following skills:

Business process design and implementation

- Can your team envision demand generation and lead-lifecycle processes that align to today's modern buyer?

- Can they work cross-functionally to implement across the organization?

Analytics

- Do you have a team member who can absorb, visualize, and discuss large amounts of data and complex concepts, and make decisions based on available information?

- Are you measuring content effectiveness to create the most compelling content for prospects and leads?

Technical aptitude

- Do you have marketers ready to grow their technical aptitude to embrace evolving marketing technologies?

- Do you have a marketing technologist on staff who can help bring up the technical acumen across your current marketing team?

"One of marketing automation's great advantages is its ability to offload tasks and perform those tasks at a much faster pace. The key here, though, is that for a team without proven processes and content already developed, automating a bad process will not magically make content more effective or compelling."

Caitlin Culbert
Marketo Practice Director, The Pedowitz Group

Dream big. Start small. Win quickly. And build from there.

All of the factors discussed here are critical for marketing automation success, but don't let not having all of them keep you from getting started. The best marketing automation implementations adhere to the adage, "think big, start small, win quickly."

If you dream big, you'll position yourself to achieve the grand—albeit granularly articulated—vision of what you want success to resemble. Depending on your organization, this end goal may take the form of a full revenue performance management (RPM) transformation. It might also be more modest.

If you start small, you won't get stuck in analysis paralysis or feel the need to wait until all of your content is created. You won't need to map out every single campaign or get your website perfect. Slow and steady wins the race.

If you win small victories quickly, you'll show results in a way that your organization values—whether it's a new lead generation campaign or a basic system for lead scoring. These small wins will cultivate stakeholder buy-in across your organization and increase your chances for success over the short and long term.

Overall, be realistic about what resources you'll require to achieve your objectives, but don't let "perfect be the enemy of good." Get started. See value. Then, evolve.

Learn more

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