



# Marketing Automation in Practice

Part Two: Choosing the right tools & executing your first automation

17th December, 10:00

Webinar

# Your Presenters

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## James Beeson

Managing Consultant

Drawing on extensive experience in the digital industry, working in both global companies and agencies, James provides strategic consultancy to clients on new technologies and their implementation, encouraging digital maturity, business results and, above all, customer-centricity.

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## Kristina Angelova

Digital Strategy Consultant

With an academic background in Business and Marketing and wide-ranging experience in the digital industry, Kristina combines technical knowledge with deep understanding of the commercial environment. Kristina is responsible for the strategic initiatives such as customer analytics and personalisation:

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## Matthew Brackenbury

Customer Delivery Manager

Bringing his skills in enterprise-level relationship management and project delivery to Rika's more agile and focussed organisation. His diligence in client management and the customer journey helps Rika deliver best-in-class and right-first-time solutions, whilst helping grow the Rika brand

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# rika.

## Who we are.

Rika's mission is to help clients maximise the opportunities presented by the strategic alignment of business, marketing and technology.

As an organisation we occupy the space between consultancy and digital agency.

Rika helps organisations drive greater **effectiveness** and **transparency** in their marketing and media ecosystem, whilst our technology and analytics capabilities help create more **powerful, valuable** customer experiences.

Crown  
Commercial  
Service  
Supplier

**The Drum.**  
**Recommends**  
**Digital Awards**  
Winner 2020



# Experience



Rolls-Royce  
Motor Cars





## Agenda

Following on from Part 1 in our Webinar series on Marketing Automation, today we'll be going into detail about choosing the right MA software for your business, what to look out for and how to assess fit.

What is Marketing Automation? (recap)

Choosing the right tools for your business

Q&A

Demo

Q&A

Close

# What is Marketing Automation?

## So what is Marketing Automation?

MA is a method; a process and a technology solution. It can be simple & linear (e.g. drip campaigns) or more complex, representing a suite of powerful conditions, filters and actions, based on certain user behaviours.

You combine this into workflows that reflect a desired journey or experience.



Email Automation



Social Media



Contact List Management



Lead Nurture



Campaign Tracking

# Best MA tools in 2020





# Choosing the right tool for your business

At their core Marketing Automation tools have the following features and capabilities:

- **A central marketing database:** A place where all your marketing data lives (e.g. detailed contact profiles, prospect and customer interactions and behaviors). Think of this as a “system of record”.
- **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.

## Key areas to consider

- Ease of use
- Analytics and reporting capabilities
- Support
- Limitations
- Pricing and scalability
- Integrations
- Fit for your business





All in one solution, including CRM, CMS and full MA capabilities; Supports simple linear drip campaigns as well as complex, multidimensional workflows. Our top choice for B2B companies.

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The updated marketing platform now offers much more than just email automation, including landing pages & website, digital ad management, social media scheduling and event direct mail.

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Powerful, open-source MA software, which allows you to execute multiple complex automations at the same time. Free if self-hosted or more costly cloud subscription; best for bespoke use-cases.

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Enterprise-grade suite of engagement tools, such as lead management, email automation & mobile marketing. Best for larger SMBs requiring more mature & complex ABM programmes.

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Email-only MA service offering web-based administration and email design, focusing on growing subscriber lists through modern and simple sign-up forms you can embed into your website.

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Email-only MA service offering web-based email template and landing page design. Offers a separate mobile email builder to improve consistency and simplify the testing process.

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eCommerce-focused MA platform with email and SMS delivery capabilities; Provides built-in templates for cart-abandonment engagement and customer on-boarding.

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Comprehensive MA platform delivering via email, social media, SMS, chat. Includes landing page and CRM capabilities as well as flows for retargeting and team-based inboxes.

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A "no code" chatbot builder designed to help convert leads, capture data, and personalise the customer journey in real-time, both on the web and in messaging apps like WhatsApp.

# Q&A

# 2.

## Setting up your first automations

There are many use cases for automation; just in an email context, you can design automations such as:

- Welcome sequence for a new subscriber or a lead
- Welcome sequence for new customers (onboarding)
- Reactivation of customers who lose engagement
- Abandoned shopping cart follow-up emails
- Time to repurchase or replenishment emails

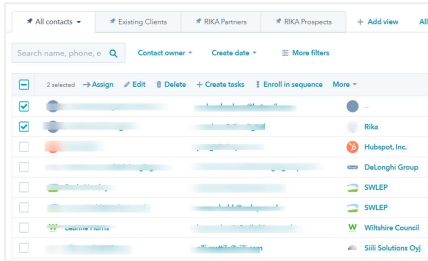
But Marketing Automations can extend beyond email; it is most effective when executed across channels and it can help you with tasks such as

- Customer data management & segmentation
- Personalisation (!)
- Social media management
- Nurturing leads.

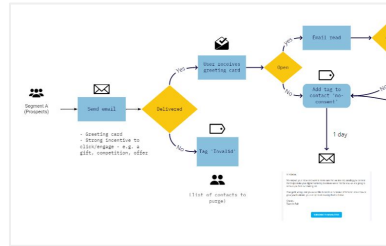
But great marketing requires a **solid foundation** built around your brand, content & quality products/services.

# Prerequisites

## List of segmented contacts



## The user journey map, workflow diagram & channel plan (for multi channel automations)

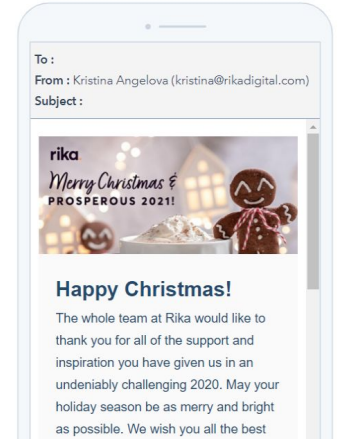


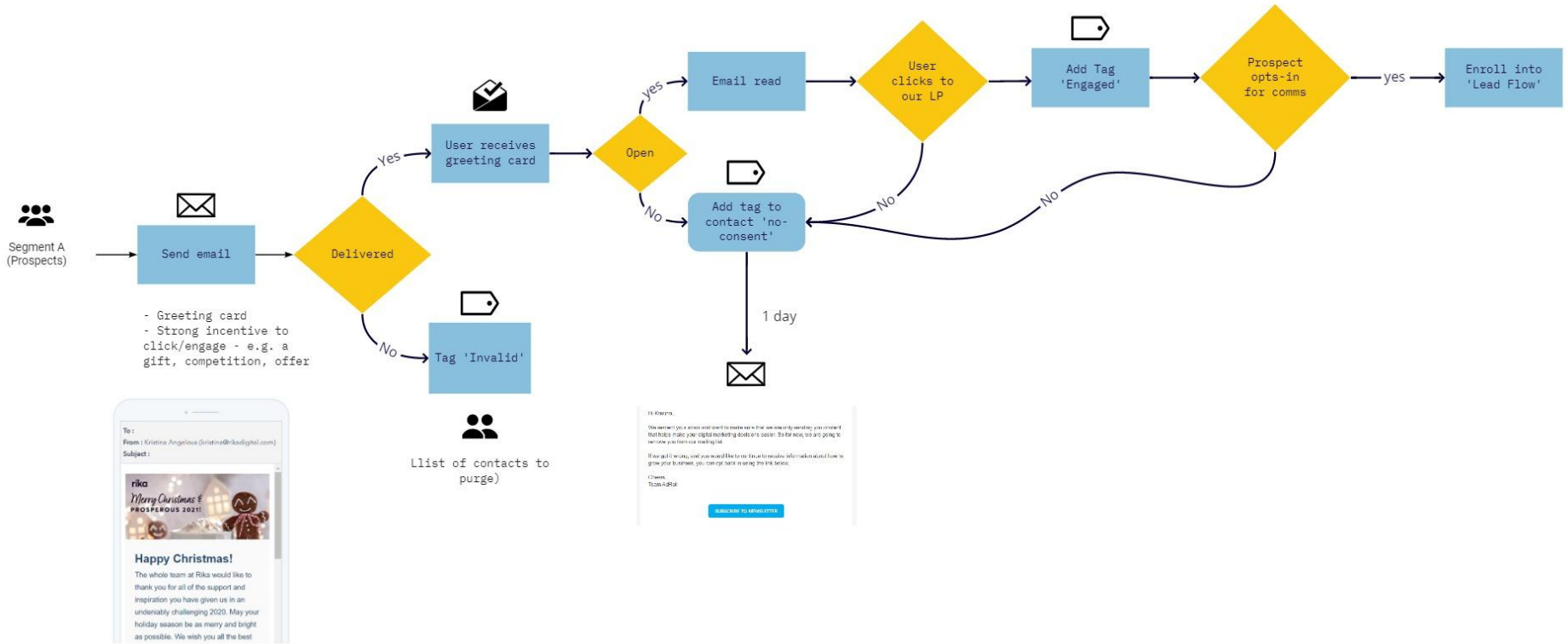
CHANNEL	THREAT	AUG	SEP	OCT	NOV	DEC
PAID	DISPLAY					
	SEARCH					
	SOCIAL					
UNPAID	DIRECT MAIL					
	VIDEO					
	EMAIL					
	TEXT					
	APP					
	SOCIAL					
MARKETS	SEARCH					
	MARKETS					

## A messaging map (if automations spans across channels and multiple customer lifecycle stages/touchpoints)

	MESSAGING BY LIFECYCLE STAGE & TOUCHPOINT										
	Onboard	New Device	Engaging Device	Whisper In-App	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store
CRM CONTACTS											
RSMC Web/Develop - Web Push	Whisper App Store	Request In-App	Request In-App	Get App	-	-	-	-	-	-	-
RSMC Web/Develop - Web Push	Whisper App Store	Request In-App	Request In-App	Get App	-	-	-	-	-	-	-
RSMC Mobile/Develop - Web Push	Whisper App Store	Request In-App	Request In-App	Request In-App	Get App	-	-	-	-	-	-
Whisper Landing Pages (TTC)	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store
Email	Request In-App	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store
	Request In-App	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store
Mobile Push	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App
	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App	Request In-App
In-App											
Display & Social (Program)	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store
	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store
Messaging & SMS	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store	Whisper App Store

## Content Assets: Email templates, landing page(s), form(s)





# Demo – HubSpot

# Q&A