



# Getting Started with Marketing Automation

Part One: The Foundations

10th December, 10:00

Webinar



## Agenda

In this webinar we discuss what is marketing automation? When and how can I use it effectively? What tools are appropriate for my business? How do I get started and how do I know whether I'm doing this right?

What is Marketing Automation.

Q&A

How to start

1. Setting your objectives
2. Know your customer & their journey
3. Decide what (and what not) to automate

Q&A

4. Choosing the right tools for your business
5. Measuring Success

Close & Q&A

# What is Marketing Automation?

Firstly, let's deal with what Marketing Automation isn't.

MA does not allow you to sit back and have your marketing done for you!



# 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

# What is Marketing Automation?

## What are the benefits?

If implemented well, MA can make your marketing activities more efficient and effective, helping you with tasks such as

- Customer data management
- Customer segmentation
- Targeting
- Personalisation
- Customer engagement
- Increase / optimise conversions
- Improved Analytics & Measurement of Marketing Efforts

It will also introduce a test & learn mindset in your business, which is invaluable in today's landscape of changing consumer behaviour and technology.

# Q&A

# MA

# Foundations

**Steps to a successful  
automation programme**

# 1.

## Set your objectives

Your first step is to be clear about what you want to achieve by implementing MA in your business. It's often helpful to pick one of the benefits or outcomes. Over time you can expand and mature your marketing automation efforts to include multiple objectives.

### Benefits of MA

- **Customer Data Management**
- Customer Segmentation
- Targeting
- Personalisation
- Customer Engagement
- Conversion Optimisation
- Improved Analytics & Measurement



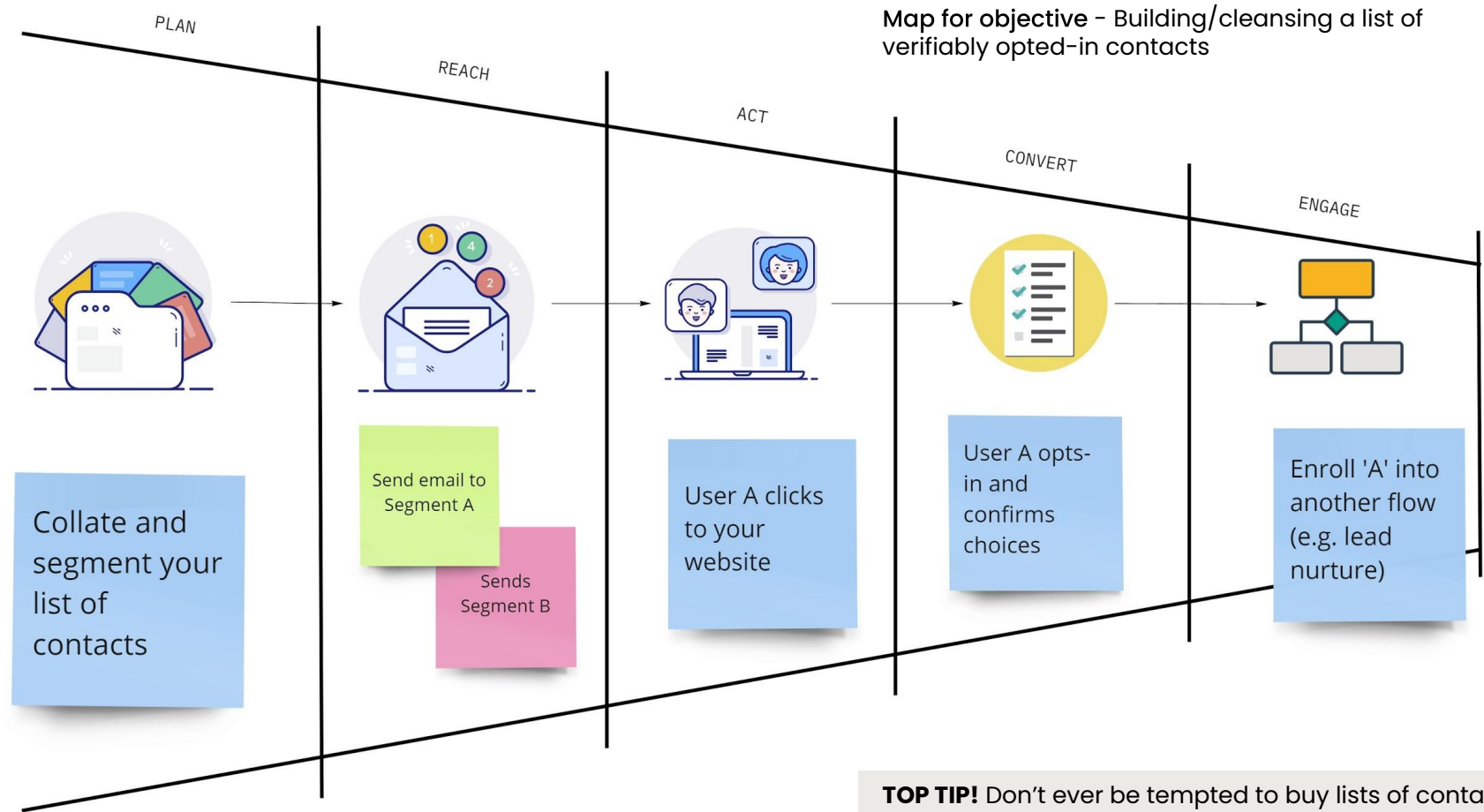
# 2.

## Define the high-level customer journey and touchpoints

Time to think about how you want your prospects and customers to respond and to which touchpoints you want their actions to be led.

It can often be helpful to visualise each touchpoint to get a clear picture of your customer's journey. If you've not done this before, you can use a template to help you.

**TOP TIP!** Define the map's scope; Ideally, user journey mapping focuses on the experience of a single persona or a single scenario with a single goal. Else, the journey map will be too generic, and you'll miss out on opportunities for new insights and ability to act on it.



**TOP TIP!** Don't ever be tempted to buy lists of contacts from companies that sell them. Instead make the effort to build your own list, from scratch if necessary.

# 3.

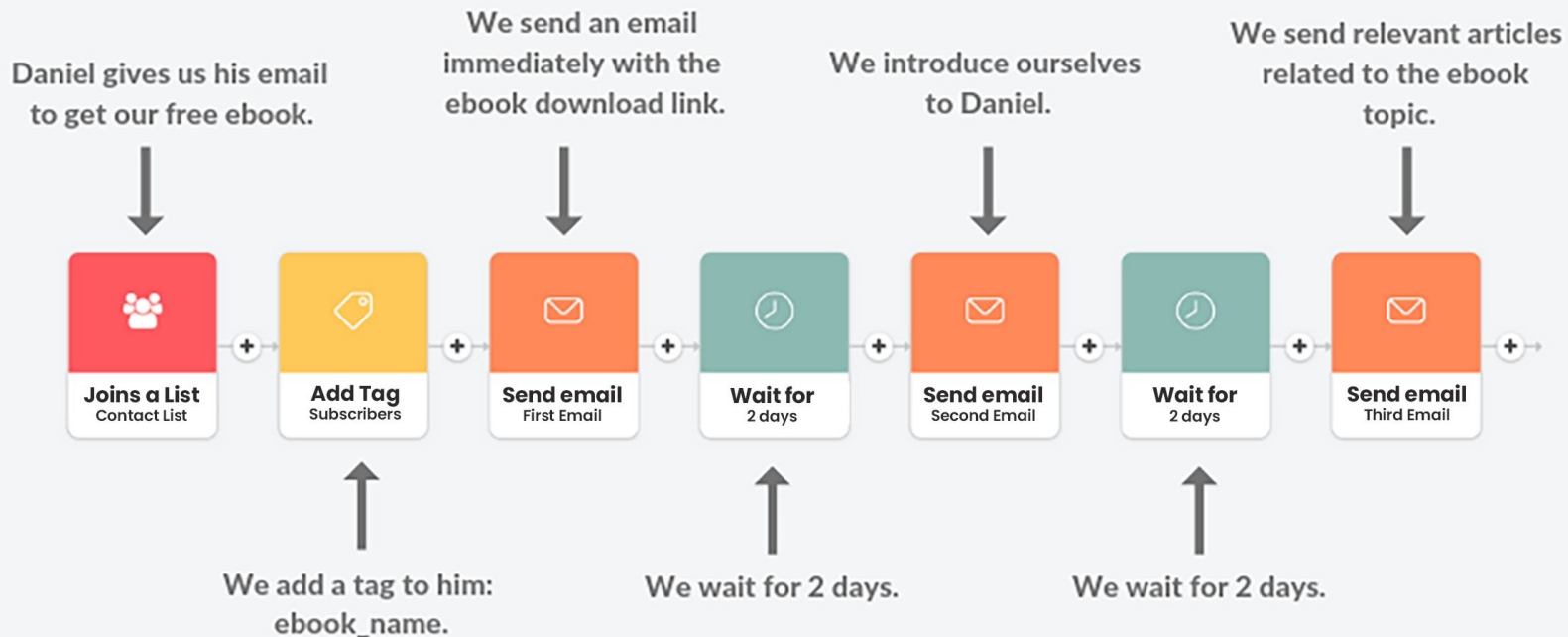
## Decide what to automate

Depending on your set objectives and individual customer journeys, there may be multiple candidate activities for automation; from acting on marketing triggers (e.g. website actions) and email series (e.g. onboarding) to social media, qualifying and nurturing leads.

Start small and then expand to multiple channels or more complex automations.

If you've decided that your first MA effort should be focused on compiling an effective first party prospect list and engaging with them, the best place to start will be your **website content / forms and a simple "nurture" email flow.**

## With a 'lead magnet'



# Q&A

# 4.

## 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

## Best MA tools in 2020



**mailchimp**



**mautic**

**HubSpot**



**moosend**



**automizy**

**Marketo**

**ActiveCampaign**



**Landbot.io**



**Drift**



**ConvertKit**

**autopilot**

**LEANPLUM**

**omnisend**



**sendinblue**

## Vendor

## Best for



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



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



Powerful, open-source Marketing Automation software, which allows you to execute multiple complex automations at the same time. Requires self-hosting; best for bespoke use-cases.



Offers a suite of engagement tools, such as lead management, email automation & mobile marketing. Best for larger SMBs and more mature ABM programmes.



Email marketing automation; Best for CRO;  
14-day free trial



All-in-One Marketing Platform



Omnisend is best for ecommerce email marketing & SMS



Sendinblue complete sales & marketing toolbox; sendinblue is great for SME (cost efficient)



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# 5.

## Measuring Success

How do you know if your MA campaigns are having an impact on business growth? The key to answering this question lies principally with knowing what to measure, what's meaningful and what's not.

In our third webinar of this series we will look into measurement frameworks and metrics you can adopt.

Register at [growthhub.swlep.co.uk/webinars](https://growthhub.swlep.co.uk/webinars)

# In Conclusion

It takes time to develop a well-performing marketing automation programme capable of nurturing leads. You need to be patient and have a strategy;

- Set your objectives
- Be clear on who your customer is, what is their typical (or desired) journey and where are the opportunities to introduce MA.
- Pick the area of automation. Start small.
- Choose the most appropriate software for your business
- Test, measure and learn

# Q&A



# 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.**  
**Recommended**

# Experience



## Your Presenters

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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:

**Kristina@rika.digital**



### 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

**Matthew@rika.digital**