The Ultimate Marketing Automation Guide

5 steps to effectively design, implement, and optimize your marketing strategy.



ADNIKA

Table of Contents

Introduction

Why Marketing Automation?..... 1
What exactly is Marketing Automation?..... 1
What problems does Marketing Automation solve?..... 2
What are the benefits of Marketing Automation?..... 3

Step 1. Identify the Goal of Your Marketing Automation

How do I define the objective?..... 6
Is there a difference in the strategy between B2B and B2C?..... 8

Step 2. Identify the Audience You Want to Nurture

What are Buyer Personas?..... 10
How to use personas in marketing, sales, and customer service..... 11 How to create buyer personas..... 15

Step 3. Create and Promote Practical Content for Each Stage of The Buyer's Journey

The value of the buyer's journey..... 17
Awareness Stage..... 19
Consideration Stage.....19
Decision Stage..... 20
Customer..... 20
Promoter..... 21

Step 4. Set Up Successful Workflows Throughout the Buyer's Journey

Time to create workflows..... 23
Lead segmentation/personalisation..... 24
Strategies throughout the buyer's journey..... 25
Different types of Marketing Automation..... 41
Lead Scoring..... 44
How you create practical workflows..... 46

Step 5. Analyze and Optimize Your Workflows

Analyze your performance..... 48
Conducting an A/B Test..... 49

Summary

Now that you're a pro, start automating!..... 50

Introduction

Why Marketing Automation?

Are you tired of doing the same things over and over again? Is it necessary for you to bridge the gap between demand and sell? Are you having trouble converting your leads? Or does the sales team spend time on cold leads on a regular basis?



We understand how annoying it can be. All of these questions, and several more, can be solved with marketing automation. Allow us to assist you in developing a Marketing Automation plan. We address everything from how to work with the buyer's journey, how to automate processes, personalize content, construct lead nurturing, and deliver the appropriate content to the appropriate persona at the appropriate time.

What exactly is Marketing Automation?

Marketing Automation is a solution that allows businesses to automate processes throughout the buyer's journey. Because the data is easily accessible in the CRM tool, the content of marketing activities can be personalized based on the customer's indirect and direct characteristics and behaviors.

We understand how difficult it can be to grasp this. That is why we have created a guide to assist you at every step of the way. Let's get started!

What problems does Marketing Automation solve?

- **Long sales cycle:** sales are hindered due to difficulty in collaborating amongst staff.
- **Low productivity:** sales reps are unproductive because they are spending too much time calling unqualified leads.
- **Bad communication:** lack of communication between sales and marketing is delaying the sales process and sharing of lead generation data (process improvement).
- **Management of database integrity:** data quality issues must be resolved (data collection and cleansing).
- **Difficulties in performance measurement:** inability to analyze marketing data, metrics and to generate reports for budget allocation decisions.
- **Bad customer satisfaction:** de-centralized customer information is causing frustration for sales staff who do not have overview into customer service communications
- **Time on repetitive tasks:** staff is spending time on repetitive, manual tasks that can be automated

What are the benefits of Marketing Automation?

- **Increased Win Rates:** leads that are scored and nurtured before being handed off to sales close at higher win rates because sales cycles are more aligned with the buyer's journey.
- **Alignment of sales and marketing:** alignment occurs when sales and marketing can agree on the definition of a qualified lead; systems are integrated to provide visibility into activities and results; and the loop is closed between lead source and generated revenue.
- **Reduced cost per lead:** when key marketing processes such as lead scoring, lead nurturing, and lead assignment are automated, fewer resources are required to manage new opportunities. Additionally, the use of a web/email-based approach can drastically reduce acquisition costs for new prospects and opportunities.
- **Improved accountability and credibility:** marketing leaders can provide accountability for their spending once they are able to quantify the impact of their investments. When deployed properly, Marketing Automation solutions increase credibility by providing a system of record that tracks and measures marketing activities and associated business results.



- **Better allocation of resources:** having detailed analytics on prospect behaviors and campaign ROI, provides marketers with the insight needed to optimize spending on the most profitable marketing strategies.
- **Cost-effective marketing:** Marketing Automation enables the sending of targeted emails with content that generates potential revenue opportunities.



Step 1

Identify the Goal of Your Marketing Automation



Step 2

Identify the Audience You Want to Nurture



Step 3

Create and Promote Practical Content For Each Stage of the Buyer's Journey



Step 4

Set Up Successful Workflows Throughout The Buyer's Journey

Step 5

Analyze and Optimize Your Workflows



Step 1

Identify the Goal of Your Marketing Automation

- How do I define the objective?
- Is there a difference in the strategy between B2B and B2C?

How do I define the objective?

The first step is to establish a goal! When you have a goal, you can then add various types of metrics that relate to the overall goal.

Having a well-defined goal is one of the most important. Because it is simple to monitor and analyze the progress of a good and concrete goal. We recommend that you set SMART goals which have the following characteristics:

Specific
It is important that goals are not vague but that they are clear and concrete. A good example of a specific goal is to increase lead conversions by 5%.

Mesurable
By making goals measurable, it is clear when one has reached the desired result or not.

Accepted
The fact that a goal is accepted means that all participants must understand the goal.

Realistic
Means that all participants feel that the goal is reasonable and that it can be achieved.

Time-bound
That the time until the goal must be met is predetermined.

What are the goals of marketing automation?
Your goals will, of course, be unique to your company, but here are some general objectives that we recommend:

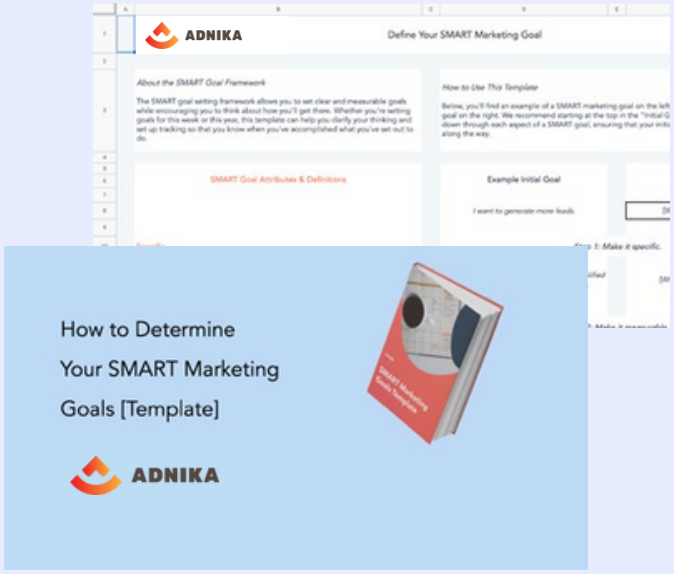
- Obtain more marketing-qualified leads
- Boost your sales
- Boost the number of returning customers.



SMART Goals Template

Do you need assistance developing SMART marketing objectives?

Take advantage of this template! A free template to assist you in developing S.M.A.R.T. goals for your marketing campaign's success.



Yes! I want this template.

Is there a difference in the strategy between B2B and B2C?

Marketing automation looks the same whether you are a B2B or B2C company but there are some differences between them. It is critical to keep these distinctions in mind when developing a Marketing Automation strategy, because we want to provide as much value to our customers as possible.

The most obvious distinction is that B2C processes place a greater emphasis on personalization throughout the buyer's journey. While Marketing Automation in B2B focuses rather on lead nurturing throughout the buyer's journey. Moreover, the work is more extensive in B2B because the decision-making process is generally longer.

	B2C	B2B
Focus	Brand building	Lead generation, Subscriber engagement
Tactics	Buyer's journey, Data-driven product / service recommendations	Content delivery, Lead nurture
Goal	Revenue	Revenue

Step 2

Identify the Audience You Want to Nurture

- What are buyer personas?
- How to use personas in marketing, sales and customer service
- Buyer personas for marketing
- Buyer personas for sales
- Buyer personas for customer service
- How to create buyer personas

What are Buyer Personas?

Buyer Personas are fictional, generalized representations of your ideal customers. They help you understand your customers (and prospective customers) better, and make it easier for you to tailor content to the specific needs, behaviors, and concerns of different groups.

The strongest buyer personas are based on market research as well as on insights you gather from your actual customer base (through surveys, interviews, customer data, etc.). Depending on your business, you could have a few personas or a lot of specialized personas — you can always develop more later if needed.

How to use personas in marketing, sales, and customer service

At the most basic level, personas allow you to personalize or target your marketing for different segments of your audience. For example, instead of sending the same lead nurturing emails to everyone in your database, you can segment by buyer persona and tailor your messaging according to what you know about those different personas. When utilized correctly, buyer personas can allow you to produce highly targeted content that leads to a higher influx of new and repeat customers who are pre-qualified by data.



The first step is to craft your persona by asking specific questions about your ideal customer to find out as much as you can about who they are and how they interact with your organization, in order to pinpoint how to make them a customer.

Questions such as:

- What is their profession?
- What does a typical day in their life look like?
- Where do they go for information?
- How do they prefer to obtain goods and services?
- What is important to them when choosing a vendor?
- What do they value most?
- What are their goals?



Buyer personas for marketing

Also known as “marketing personas,” it comes as no surprise that the focus of buyer personas often belongs to your marketing team due in large part to the wide range of insights you can achieve when correctly using a persona for marketing.

Uses for buyer personas for your marketing team include:

- Building effective content marketing strategies by focusing keyword research efforts.
- Identifying and prioritizing the most relevant promotional activities.
- Segmenting your email list by sending targeted offers to buyers based on their preferences.
- Timing your marketing campaigns for peak engagement rates.
- Publishing content and advertisements on the channels (email, social media) most frequented by your buyer persona.
- Aligning messaging to promote brand unity and increase brand awareness.
- Personalizing your Marketing Automation efforts.
- Refining your copywriting to reflect improved
- SEO strategies.

Buyer personas for sales

Knowing your buyers is especially important when you are selling to them. From the start of every potential customer interaction to the end of each successful one, the way in which you sell to a buyer is dependent on what you know about them.

To operate from a person-driven sales strategy, use your buyer personas to:

- Craft emails, phone calls, and face-to-face interactions with potential buyers based on their persona.
- Help build relationships with potential customers
- Understand your prospective buyer on a deeper level to be better prepared to address their concerns.
- Guide the messaging sales representatives use with customers.
- Educate your sales team on each different persona to prepare them to work with any type of buyer.
- Teach sales representatives to better recognize the unique pain points of each persona so they can address them effectively.
- Increase win rates for your sales team.



Buyer personas for customer service

Just because you've closed a sale doesn't mean you have finished your relationship with your buyer. Oftentimes, what transitions a one-time buyer into a returning customer is their interactions with your organization after they have made a purchase. To set your customer service team up for success, involve them in the buyer persona development process so they can tailor their customer service model to each persona.



To use this persona-driven strategy to improve your customer service experience:

- Involve your customer service representatives in the buyer persona creation process to gain their invaluable insights.
- Gain a deeper understanding of the day to day life of each persona.
- Reflect on how marketers and sales teams use each persona to create a holistic approach to reach new customers.
- Train on the specific problems your customers are trying to solve to be better prepared to solve them.
- Use empathy and compassion to best support your customers based on their persona.

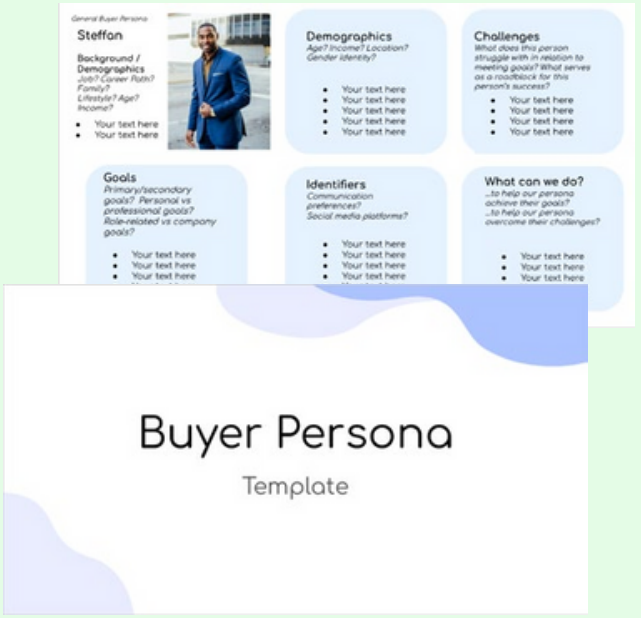
How to create buyer personas

Now that you know the why behind creating buyer personas, it's time for the how. In reality, a buyer persona is the person you think about when you create content, respond to a support ticket, or try to speak a new prospect's language. In practice, you can create customized slide decks outlining the motivations and challenges of your ideal buyer personas then easily share with all teams in your company.

Buyer Persona Template

Check out this template if you are interested in how to create your personas.

Yes! I want this template.



Step 3

Create and Promote Practical Content for Each Stage of the Buyer's Journey

- Awareness Stage
- Consideration Stage
- Decision Stage
- Customer
- Promoter

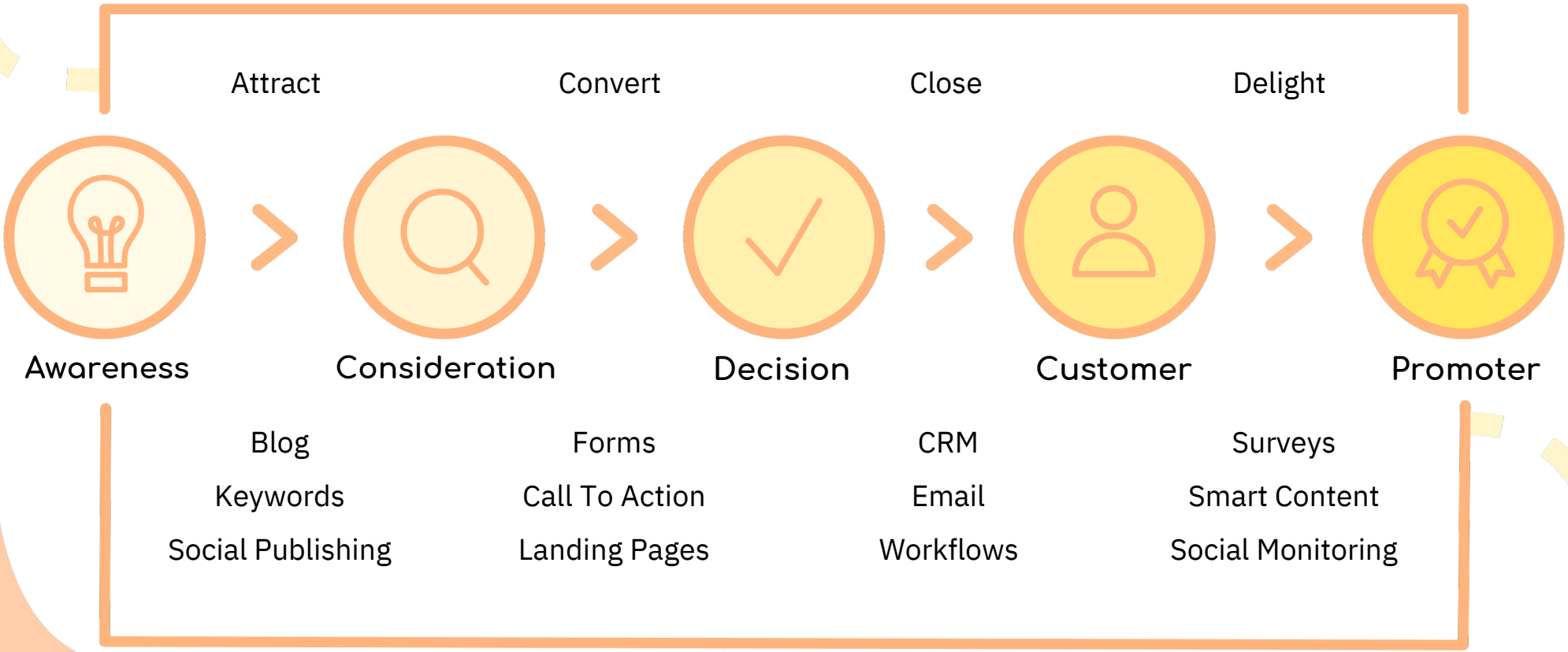
The value of the buyer’s journey

In today’s market, you must actively work with content throughout the buyer’s jour ney to be a successful business. What content does your specific persona require at the precise right time? It is now time to answer that question.

The buyer’s journey is a step-by-step description of a customer’s interaction with your company. A well-defined buyer’s journey allows you to create the right content for the right persona at the right time. Thus, developing a Marketing Automation strategy along the buyer’s journey allows you to improve the smooth transitions between steps and warm up contacts even more to increase conversion.

So, what is the significance of a buyer’s journey? It is no longer possible to become a successful and prominent brand by relying solely on traditional marketing. To compete, you must actively engage your customers with the appropriate content throughout the buyer’s journey.

The Buyer's Journey



Awareness Stage

The Awareness Stage is the first stage of the buyer's journey. You will raise brand awareness in this step. The most important aspect of this step is to respond to the individual's problem and assist the individual in naming their problem. Showcase what you have to offer as well as the results your company has achieved.

The best sellers not only see that the potential buyer's journey has begun, but they also start journeys! You can do this, for example, by incorporating elements from a major industry issue and then bringing them into your perspective with your solution to the problem. It is critical to not only solve problems that your customers are experiencing, but also to create the desired reactions.

Consideration Stage

At this point, the prospective buyer wants more information. The individuals can now identify their issue so they can ask more advanced questions. Prospective customers want to learn more about how the solution works. As a result, it's critical that you use your knowledge to answer these questions. Deliver your content to your targeted personas, add value, and show potential customers that you are extremely knowledgeable about the market subject.

Downloads such as e-books, guides, and templates, as well as comprehensive information on your website, such as blogs, are examples of content that can be useful in this step.

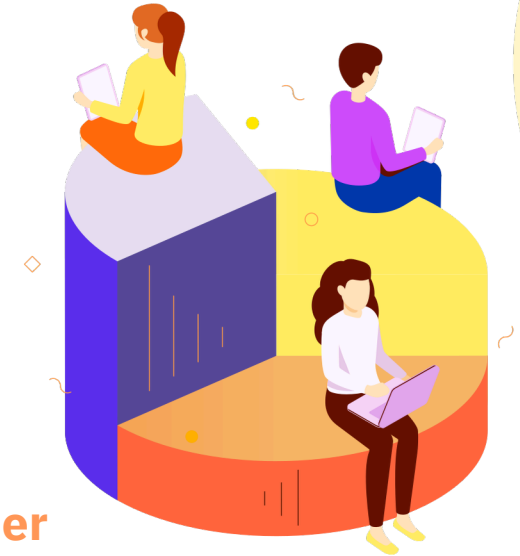
But, in this phase, how do I approach potential customers? Your previously created persona is extremely important now. Personalize the customer experience based on your persona. The goal is to increase the person's commitment and loyalty to your organization. It is critical to create relevant content that showcases your expertise and passion for solving the customer's specific problem. As a result, the contact will wish to learn more about your brand.

Decision Stage

In this step, the person understands the problem and looks for someone who can provide a solution. So, at this point, contacts require more information on why they should choose you. Display what previous customers think of you and explain what makes you stand out in the market.

And how should I approach these people? Personalized content is essential in this case. With a one-on-one setting, you can customize the experience. The goal is to get the person to think beyond their immediate limitations and want to grow alongside you. If you succeed in this, the customer's loyalty to your company will be unquestionable.

But how am I going to get there? Investigate the buyer's journey in depth and try to think outside the box. But don't forget to ask these people what they need from you in order to have a good chance of building a better relationship.



Customer

In this step, the individual has determined the best solution and has decided to purchase it. The steps that follow differ depending on whether they bought a service or a product. If it is a service, the individual receives physical assistance from the company to solve the problem before beginning to use it. If it is a product, the individual receives it and begins to use it.

The content that a customer requires when making a purchase is highly dependent on the type of company. So, think about your company. Is there a question that all customers have that you can answer with content?

Promoter

When the purchase or service is completed, i.e. the problem is solved, the post-purchase step begins.

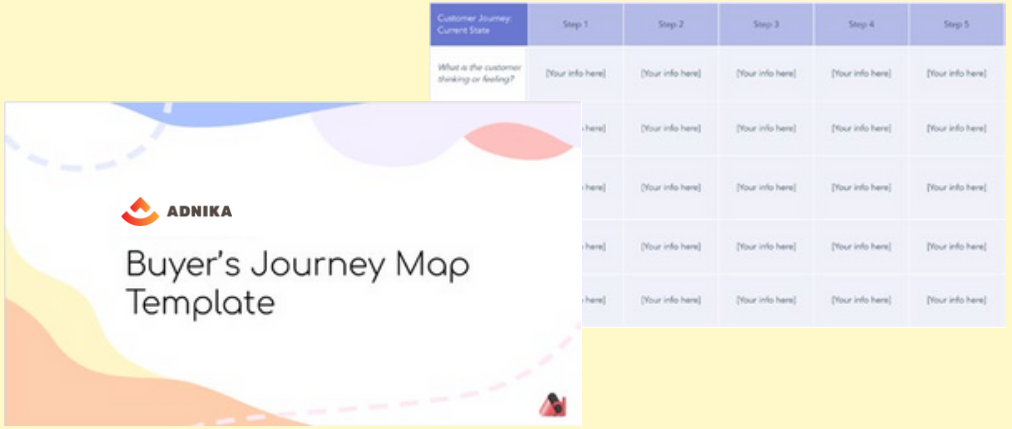
The post-purchase step is incredibly important. Because this is where word-of-mouth plays a significant role. Because in the end, word-of-mouth has a greater impact on consumers than regular marketing. We still blindly trust the people who are close to us. Have they had a horrible experience, well then we do not want to buy anything from that company.

So in this step, it is important to follow up with content that ensures that the customer is satisfied with the result. Is there possibly something you need to fix? Or is the customer very happy and will spread positive words about you? If the customer is satisfied, it is a great opportunity to ask if the person wants to share the experience with someone.

Capture customer feedback to be able to show potential customers in the future, but also for you as a company to know what you need to improve. And use the new information to personalize the content in the future to that customer.

Buyer's Journey Template

If you want to create a buyer's journey for your company, download this template! There are several issues outlined in this piece of content that are relevant to each step.



Yes! I want this template.

Step 4

Set Up Successful Workflows Throughout the Buyer's Journey

- Lead Segmentation
- Strategies throughout the buyer's journey
- Different types of marketing automation
- Lead Scoring
- How you create practical workflows

Time to create workflows.

You now have a defined goal, a persona, a clear buyer's journey, and an understanding of what content to produce for each step of the buyer's journey. It's now time to start designing workflows!

70% *of the companies report that the most important benefit of automation technology is better-targeted customer communication.*
(Liana Technologies, 2017)

Lead segmentation/ personalization

Lead segmentation entails organizing your data into lists based on various actions, among other things. In addition, you should use the Marketing Automation tool to create life cycle steps and lead status steps. By organizing your data, you create a logical structure from which to work. It will be nearly impossible to trigger workflows based on life cycle steps and specific behaviors without first creating an order.

The power of personalization!
You can create personalized content by organizing data. In recent years, there has been a significant increase in the popularity of personalizing content. Working with personalized content has helped market leaders increase their revenues by 5-15 percent.

600 people at Zalando work with personalizing content to gain perspective on personalization.

Working with names and email addresses isn't the only way to personalize an experience. Personalization is the process of adapting the digital experience to the person's behavior and preferences, much like when a customer enters a physical store and a salesperson looks for the person's preferences.

When you sign in to your Cmore or Netflix account, it's the same. What appears on the first page is personalized for you. These are the episodes that will appear on the first page if you are interested in football and have streamed football-related episodes. They are the ones that appear at the top of the page, unlike if you watched a lot of reality television.

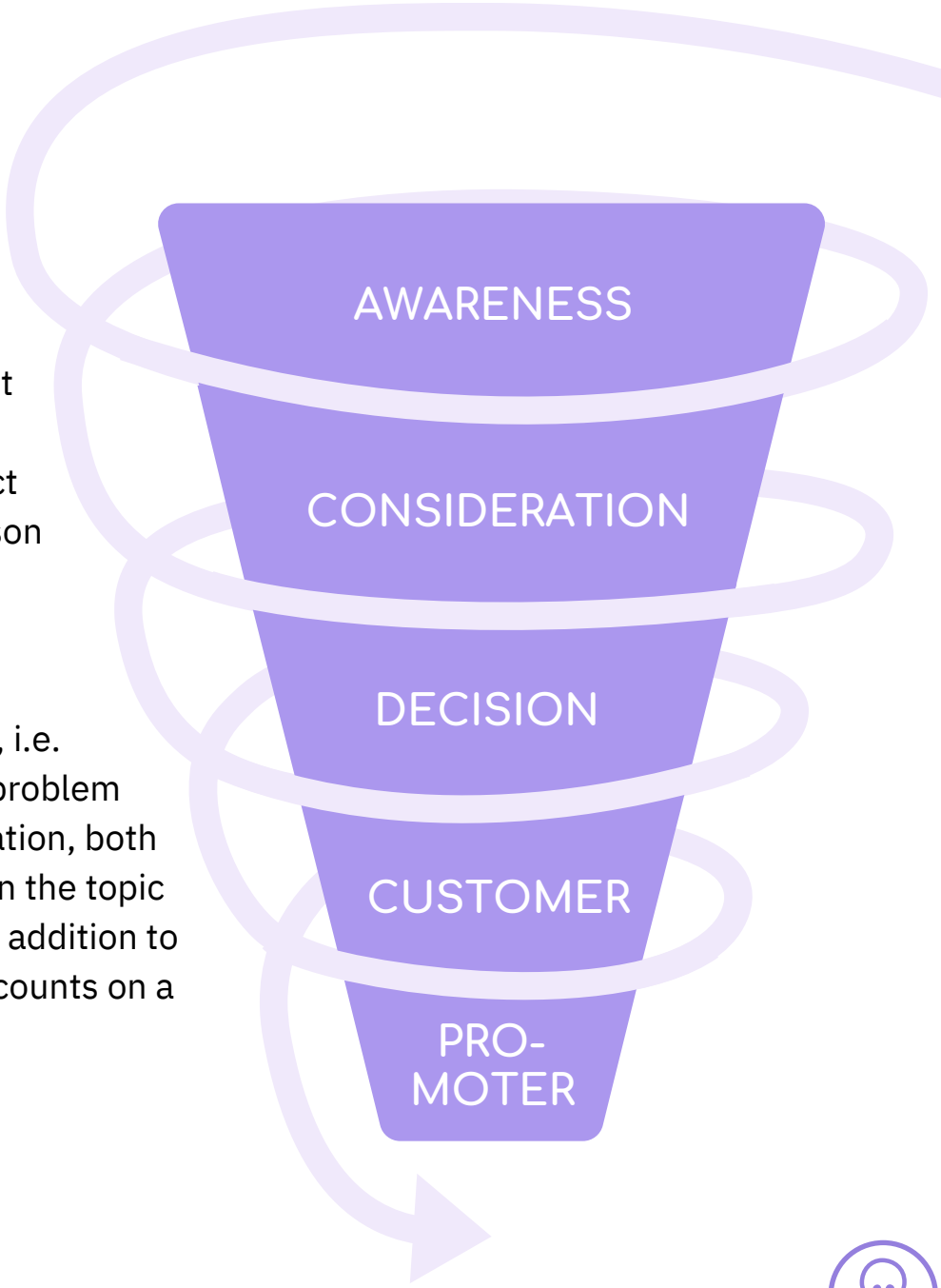
It is a big picture approach in which you gather both direct and indirect data about the person. To then target personalized content based on its preferences, behaviors, and intentions.

Strategies throughout the buyer's journey

Awareness stage

As previously stated, the first step is to raise awareness about the company. As a result, Marketing Automation processes proceed to the next step, where we have some type of contact with the person. The contact starts, for example, when a person visits your website (you place a cookie on them) or submits a for m.

So, in this step, it is critical to work on becoming top-of-mind, i.e. becoming the contact's first thought for a solution when the problem arises. To get there, you must work on your keyword optimization, both paid and organic. You should publish several blog posts within the topic using relevant keywords for organic keyword optimization. In addition to the following, you must post content on your social media accounts on a regular basis.





Consideration stage

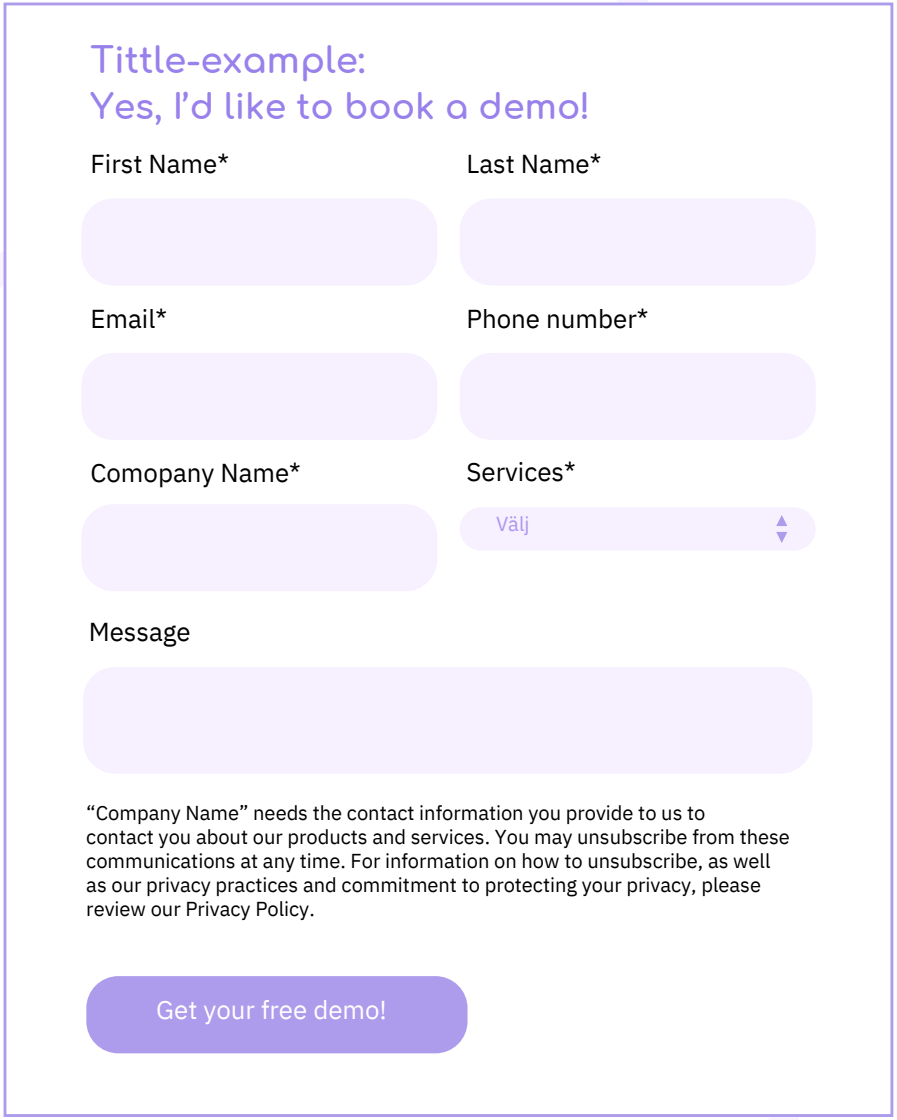
In this step, what should I think? Make use of lead generation! Lead generation is the process of capturing potential customers and nurturing them until they express interest in your offer. The key is to make smooth transitions that ease the contact into conversion.

When a visitor fills out a form, he or she becomes a lead. To convert visitors into leads, simple forms, call-to-actions (CTA), and landing pages are required.



For ms

For the visitor, the forms should be simple and easy to submit. Because as a company, you want to collect as much information about your customers as possible, while as a visitor, you may be discouraged and feel that filling out a lot of fields is too much of a step. So strike a balance between the two. However, keep in mind that what is a winning concept for a company may not be the same for you. So, discover your one-of-a-kind success concept.



This is how a form could look like

CTAs

It is critical to create effective call-to-actions (CTAs). How? A CTA should be consistent with the theme of the website, but it should not blend in with the background colors. As a result, it is critical that it stand out and that you, as a visitor, do not feel overwhelmed. So decide how many CTAs you need, but don't have too many.

Title-example:
I need an Inbound
Marketing solution

CTA here!

This is how a CTA could look like.



Landing Pages

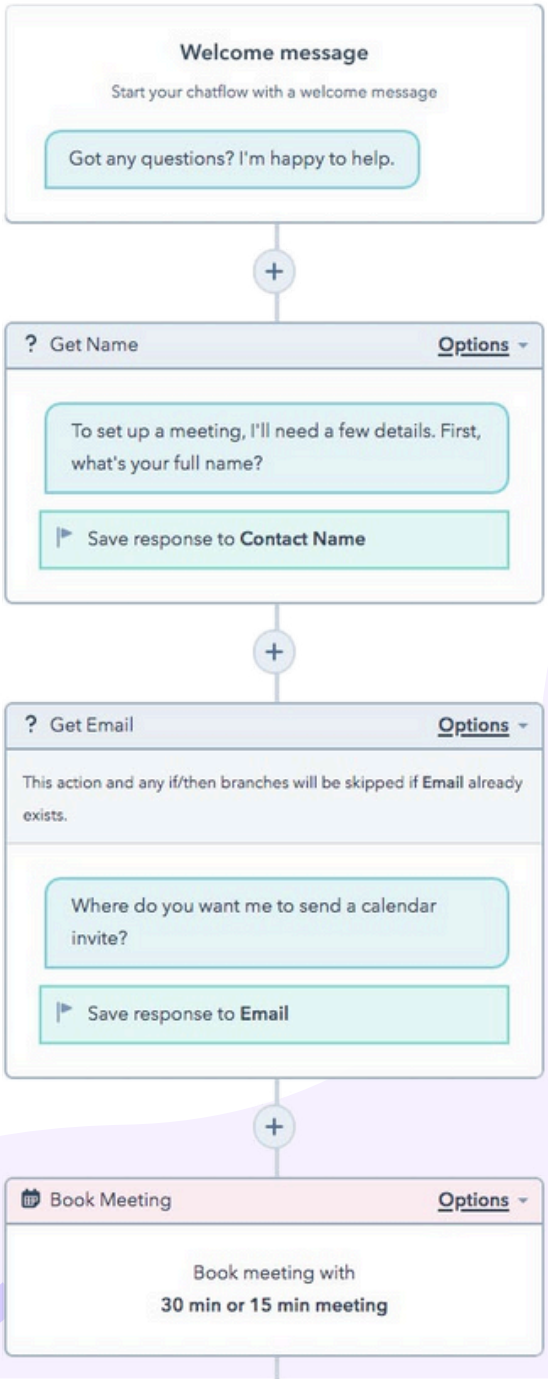
As previously stated, landing pages with a wealth of infor mation on the subject are critical in this step.

Keep in mind that because the length of a contact at this stage can vary greatly, leads can be both cold and hot. So, by using lead scoring (which we'll go over in more detail later), you can easily see which ones are hot and which ones are cold. If you're a B2B company, don't forget to create automated content for both of these types of leads!

Chatbot workflows

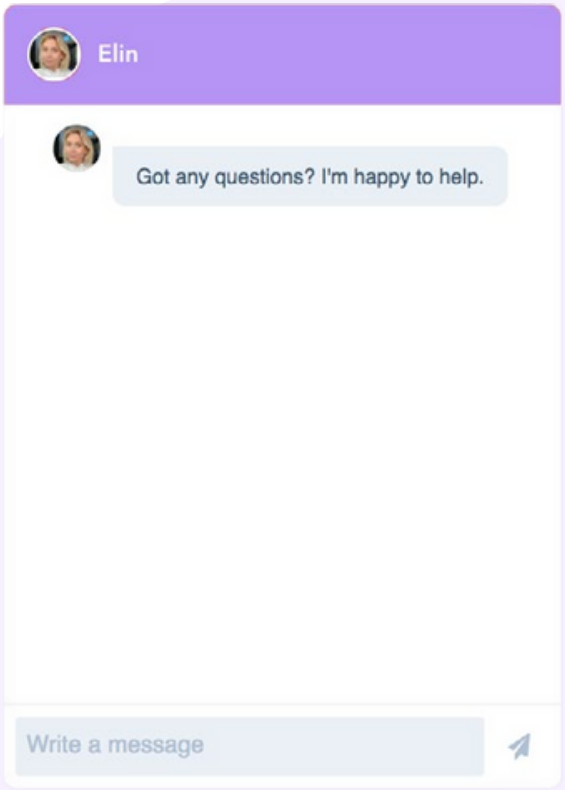
What are the most frequently asked questions that customer service must address? Make chatbots that are automated based on this specific content. Map out the most common conversation and automate it with a chatbot.

This is how a chatbot workflow appears in HubSpot.



Live chat

Create live chats on the website that send direct notifications to the sales team's responsible person. Being able to easily write a question to someone on the website as a visitor is extremely valuable when it comes to smoothly generating leads.



This is what a live chat looks like automated.

Onboarding workflows

For example, the visitor can indicate that they want to begin using a service or that they are interested in a service. So, using a workflow, follow up with content that provides more information to the potential customer.

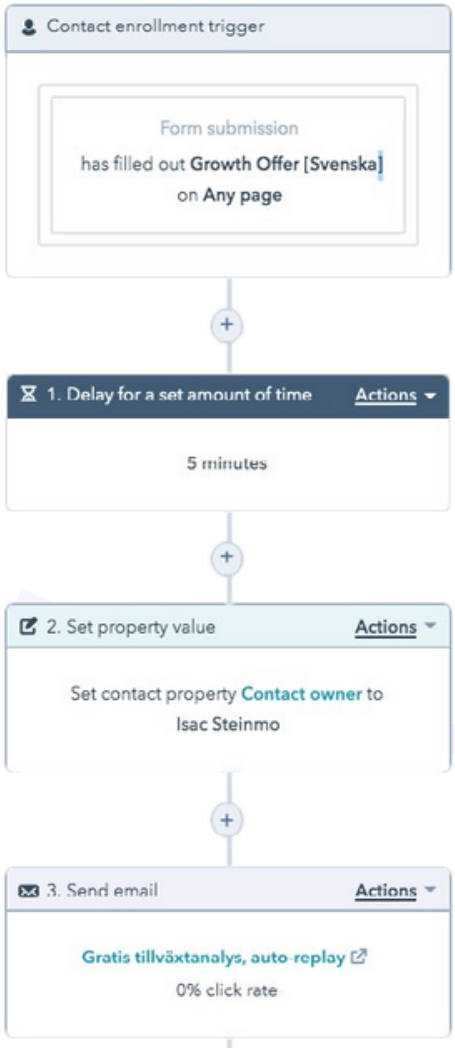
This is how an onboarding workflow appears in HubSpot.



Free demo workflows

Has the visitor requested a sample of your service or product? Automate a workflow that drives the customer closer to conversion. Give the person more information about the contact's interests.

This is how a free demo workflow appears in HubSpot.



This is how a download workflow appears in HubSpot.



Download workflows Has the contact requested that you send them a template or document? Similarly, follow up with a workflow that gets the contact warmed up. Create a need in the download, indicating that the person requires more information from you and is interested in your offer.

Here are some ideas for triggers!

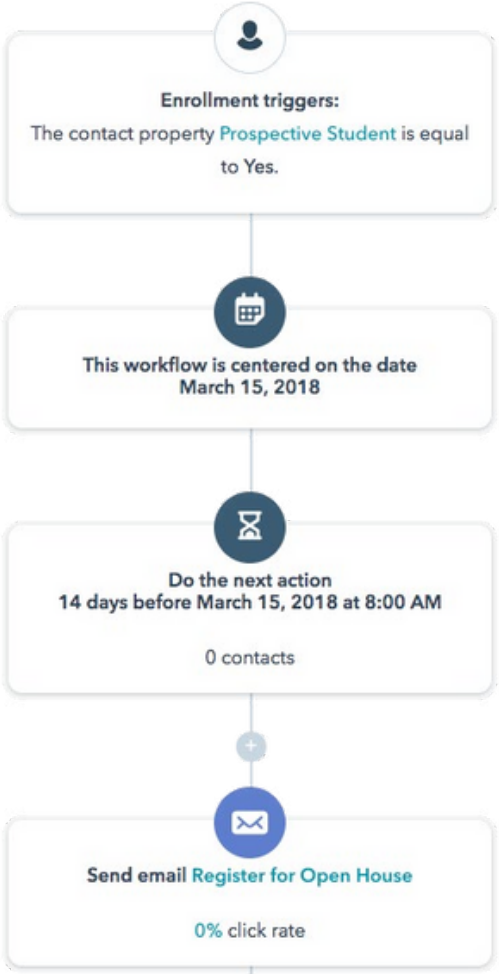
For instance when:

- Contact fills in a form
- Contact visits a specific page

Webinar / event reminder

Are you planning to hold a conference or a webinar? Create a workflow that sends out reminder emails a few days ahead of time.

Following the webinar, send out content to those who attended, including recommendations for future webinars or blog posts on the subject. Make a summary of what was discussed at the webinar for those who did not attend.



This is how a reminder appears in HubSpot.



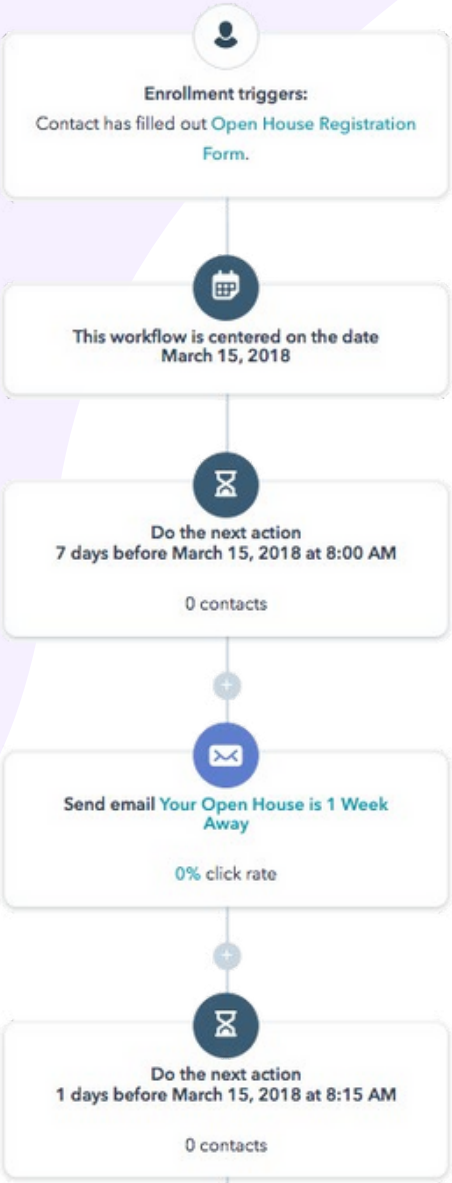
Decision Stage

It is critical to actively work on warming up the lead with even more personalized content at this stage. Make workflows that will automate these processes.

What does it mean to nurture leads? Lead nurturing entails warming up the unique persona by providing them with the appropriate content at the appropriate time. To get closer to making a purchase and having the contact become a customer. Similarly to lead generation, this is about creating smooth transitions that the customer can move through without difficulty.

Just as you don’t propose on the first date you don’t ask someone to buy something right away! You get to know each other, fall in love, and then decide if the courtship is right for you. Similarly to those steps, you must warm up the potential customer before they make a purchase.





This is how a lead nurturing workflow appears in HubSpot.

Lead nurturing workflows

Lead nurturing workflows boost the interest of a potential customer by delivering the right content at the right time. It is critical to personalize the content and demonstrate what makes you stand out in the market.



This is how it appears in HubSpot when you automate the lifecycle stage to SQL.

Update the lifecycle stage

Has the contact met certain criteria, indicating that the buyer's journey step needs to be updated? For instance, if the person is a lead who voluntarily emails to inquire about your service. Create workflows that update data for the life cycle, deal, or lead status step automatically. This means you avoid manual labor while keeping your data accurate and organized.

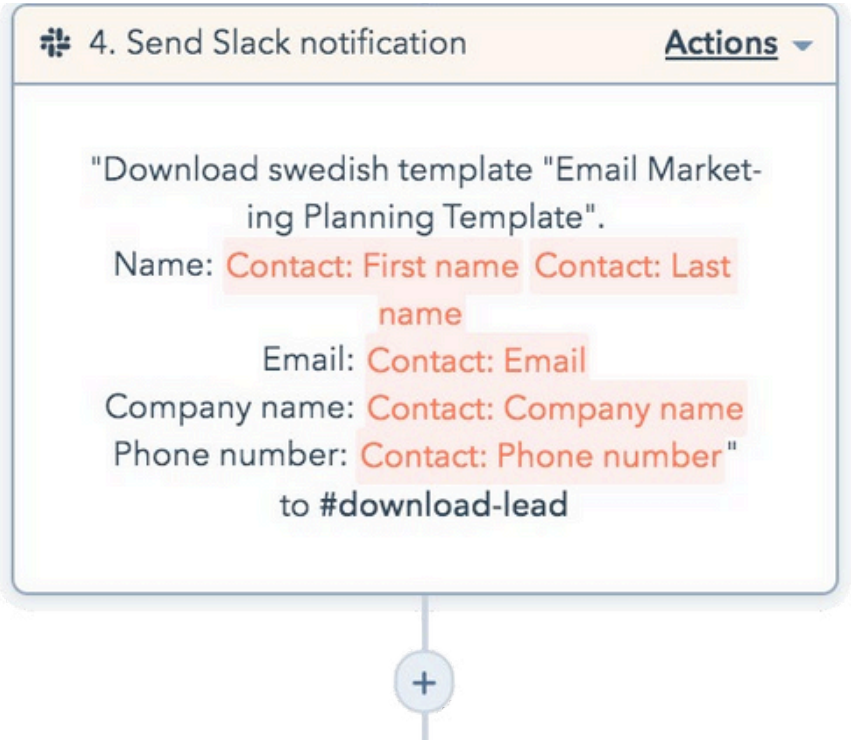
Internal notices Inter
nal process automation is extremely beneficial. Create workflows that send notifications to the appropriate person at the appropriate time. In a B2B context, it is critical that the sales team take over as soon as the lead becomes sufficiently heated. Send a notice to sale, for example, after a marketing qualified lead (MQL) has been on the price page or visited your website a certain number of times.

You can integrate Slack with HubSpot and receive direct notifications to the responsible person or channel.

Here are some ideas for triggers!

For instance when:

- Contact shares an email
- Contact respond to email
- Contact visits the price page
- Lifecycle steps have changed
- Contact leaving things in the shopping cart
- Changes in the business stage are made



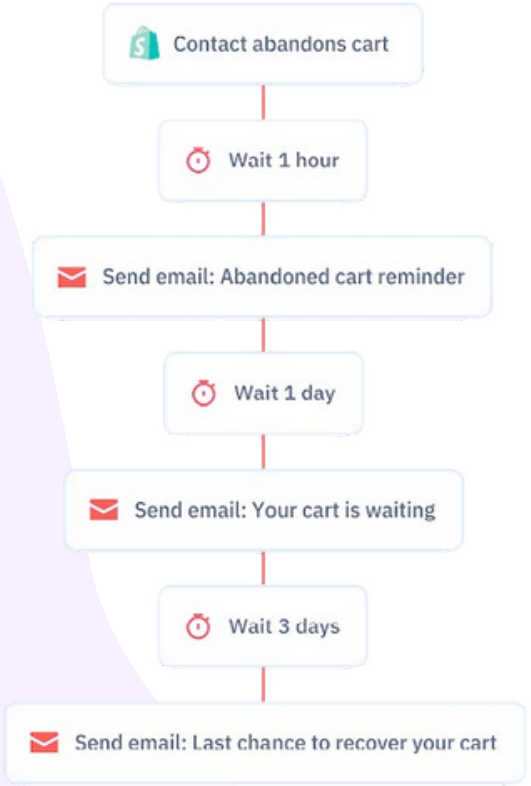
This is how it appears in HubSpot when you send a notification to Slack.

Customer stage

Depending on what the company offers, the process in this step will look very different. Depending on whether it is a B2B or B2C company, as well as whether it is a product or service sale. As a result, it is critical to begin with your own company’s capabilities. Analyze your purchasing processes; is it possible to automate any of them?

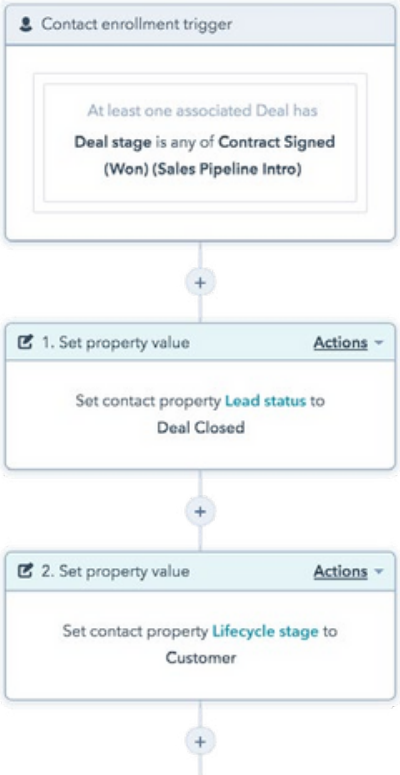
Order confirmation This is extremely important for B2C companies that sell their products online. Create an automated workflow for order confirmation that includes clear information about the order number and possibly product tracking.

This is how an order confirmation workflow could look like.



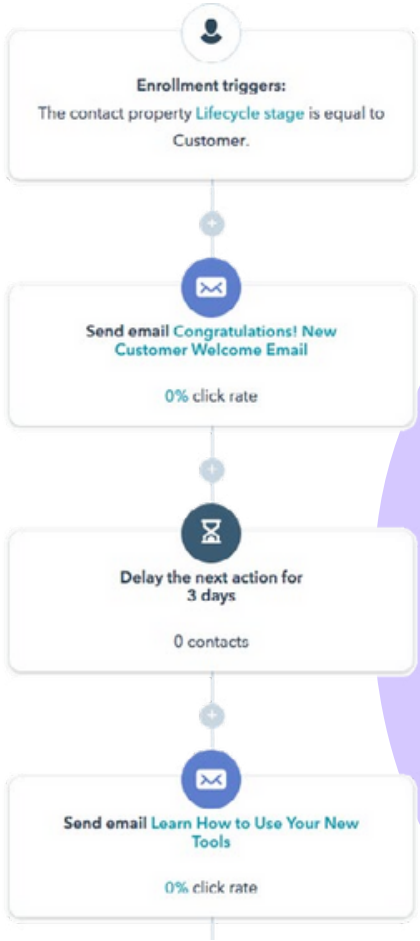
Automate the step to customer Save time by automating the process of converting a contact into a customer. When the sales team updates the deal step to the signed contract, the workflow automaticall y updates the lead status to “closed deal” and the life cycle step to “customer”.

This is what it looks like when you automate the customer stage in HubSpot.



When you update a contact to a customer, you can also automate so that an email is sent out immediately about how to use your product or service.

This is what it looks like when you automate an email in HubSpot.



Promoter

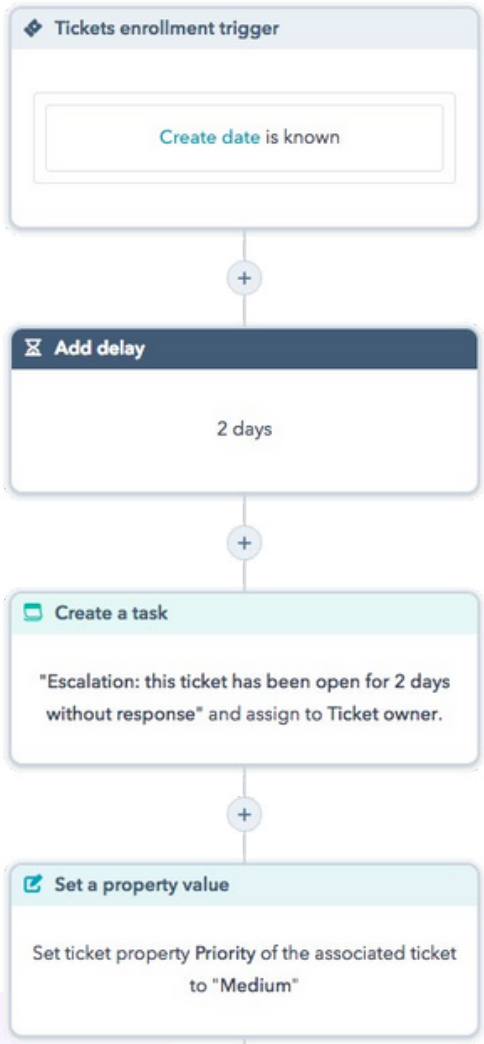
It is critical to find out what the customer thinks of your company at this stage. Is the individual satisfied? It is critical to analyze and try to determine how you can capture the customer's opinion of you. Then you have the ability to then use these recommendations to attract new customers.

In addition to focusing on recommendations, it is critical to work with the individual to become a returning loyal customer. So just because you've completed the purchase doesn't mean you're done marketing to that person. It is now that the marketing targeting the individual will focus on maintaining the customer's loyalty. This can be accomplished, for example, by developing a loyalty program that begins after the purchase has been completed. The goal is to establish a distinct brand with loyal customers.

Do not forget that through the purchases you get more insights about the customer. Which allows you to further personalize the content. For example, if you are an e-commerce company and you know that the customer regularly buys a certain brand or a certain product, put this brand or similar products as a recommendation for the person.

We also recommend that you automate your customer service. In such a way that the customer still perceives it as human. HubSpot provides various tools to help with this, such as live chat, which allows you to communicate with your customers in real time.



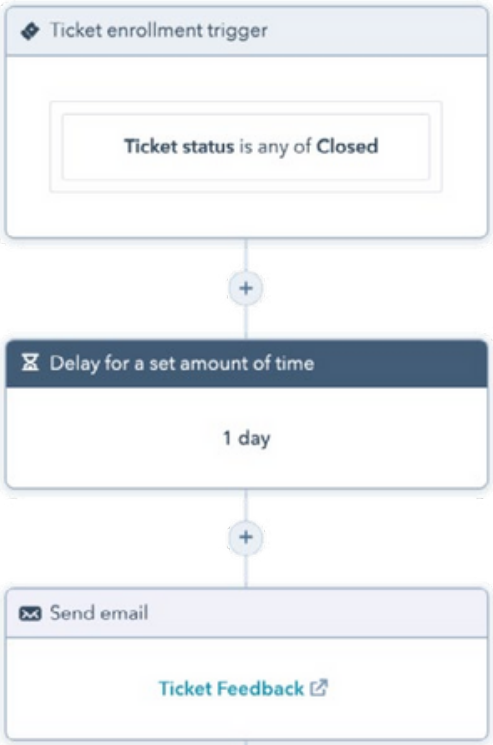


This is a ticket workflow in HubSpot.

Ticket workflows

To keep the workflow moving, customer questions can be logged as tickets and assigned to different team members. As a result, we recommend that you set up ticket automations in HubSpot to keep your ticket statuses up to date. This assists those in charge in understanding the next step to be taken with the assistance of a ticket. You can also automate certain actions, such as sending an email when a ticket is created or when it is closed.

***67%** of marketing leaders currently use a Marketing Automation platform. (Salesforce, 2017)*



This is how a recommendation workflow appears in HubSpot.

Recommendation Email workflows

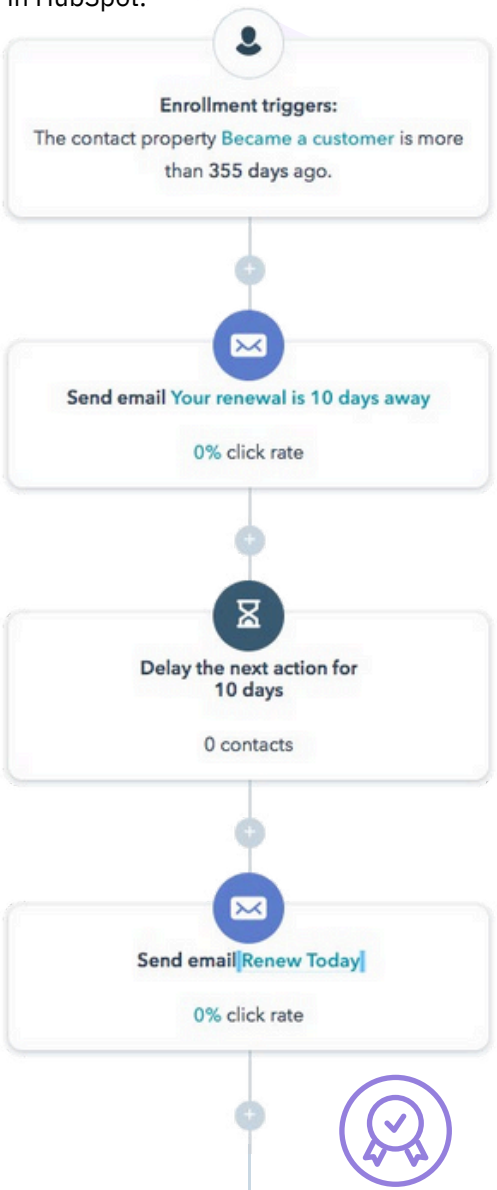
Capture the customer's experience with you by sending an email asking if the customer is satisfied. After a certain time period, you may request a more detailed review.

What works best for your business? Do you want the customer to write down their experience with you? Or to rate the experience on a five-star scale? You know your customers best, so remember to make this step as easy and efficient for them as possible.

Workflows with offers

Triggering offers based on specific behaviors or actions can be effective. Because it keeps and grows a person's loyalty to the company.

This is how an offer workflow appears in HubSpot.



Here are some ideas for triggers!

For instance when:

- Customer visists a page for another service
- Contact is no longer a customer
- Customer visits the price page for another service
- Customer downloads a "get started"-form for another service
- Customer leaves things in the shopping cart

Different types of Marketing Automation: Internally

Marketing Automation with CRM

Working with a Marketing Automation tool opens up a plethora of possibilities. Because the CRM system is built into the Marketing Automation tool, you can automate a wide range of internal processes. When internal processes are automated, sales, marketing, and customer service become more closely aligned. When a MQL contacts a salesperson, for example, the salesperson can manually update the lead status step to SQL. Whereas in one workflow, the life cycle step is automatically updated to SQL, and in another, the contact owner is automatically updated.

With a Marketing Automation tool, all data is gathered in one location, which simplifies work, brings all departments at the company closer together, and saves time.



Different types of Marketing Automation: Externally

Email marketing automation

The fact that Marketing Automation entails working with automated e-mails is now almost self-evident. There are numerous advantages to automating email distribution. It improves the quality of the email, saves time, and allows you to spend that time on other important things, among other things.

So, with email marketing automation, you can send out automated newsletters, e-mails after a specific action, such as a visit to a website, or if a contact is updated from lead to customer.



Email automation campaigns are among the top three tactics used by email marketers to improve performance. (HubSpot, 2020)

Digital Marketing Automation and the automation of social media marketing

It is critical for a company to be active and relevant on social media today. It is critical to have a well-thought-out plan in place in order to publish well-thought-out and interesting content that follows trends. This can be difficult to keep up with, especially when you're also trying to help the company grow and develop. As a result, with the help of HubSpot, it is possible to schedule when a post will be published. With the Hubspot service, you can activate a monitor that will show you the best time to publish based on the persona, saving the marketing team a significant amount of time.

Automations for advertising

You can automate marketing processes for advertising in the same way that you can automate email sending. This also saves a significant amount of time. The tool automatically sends out the content at the appropriate time and with the appropriate graphic copy. Lead generation campaigns on Facebook, Instagram, and LinkedIn.



This is how automations for advertising appears in HubSpot.

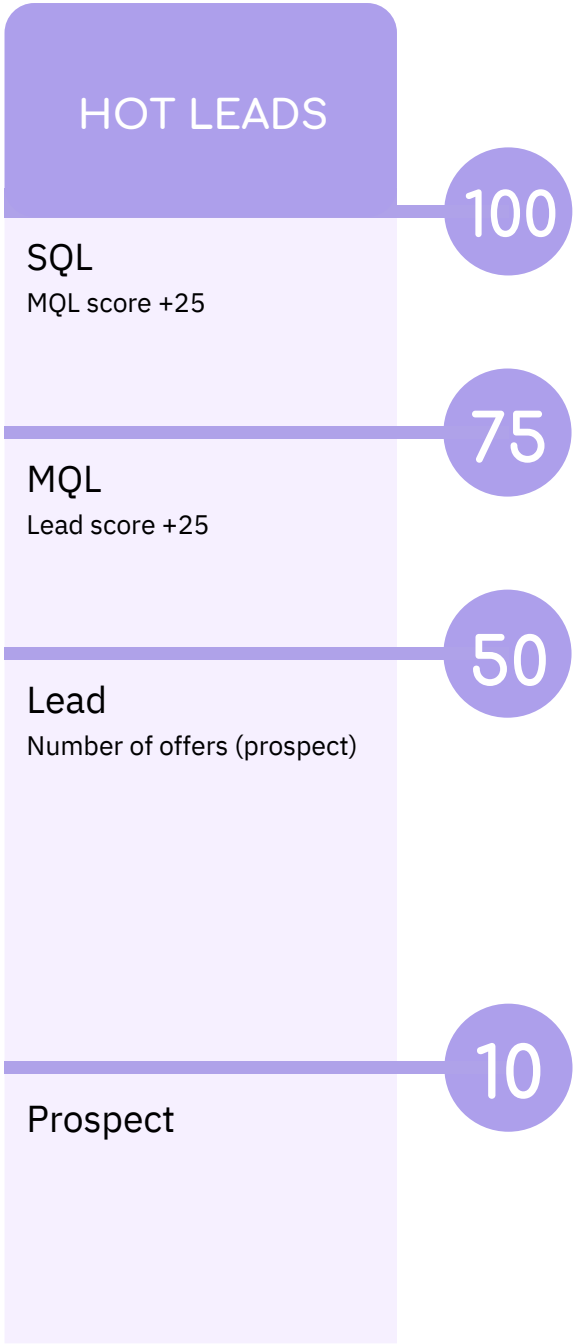
Lead Scoring

Lead scoring is the collection of desired behavior throughout the buyer's journey. As a result of scoring various desirable types of traits and actions, the score will rise. This means you can clearly see which companies are interested and which ones correspond to your target group. At the same time, it filters out those who aren't of interest to you.

What is the scoring process? The scoring model can take many forms. However, it is generally recommended to identify a number of industries to prioritize. Then you assign a score based on which one best matches the desired target group.

Work roles, the country in which the company is located, and industry are examples of characteristics that can be scored. Actions / behaviors that can earn points include, for example, downloading a form, asking a question in the chatbot, or visiting the price page.

This allows for higher scores to be assigned to specific job roles that are more important when making a purchase decision. For example, if a CEO visits the price page, you can assign a high score. And you can automate it so that a notification is sent directly to the sales team when this happens, allowing sales to contact the potential customer at the exact right time.



The primary benefit of using lead scoring is that it bridges the gap between the sales and marketing departments. Furthermore, with lead scoring, you can deduct points for undesirable behaviors or qualities. This means you sort through the leads that the sales team should not pursue. Furthermore, it enables the sales department to call or contact the potential customer at precisely the right time.

Lead Scoring Template

Do you want to get started right away with lead scoring? Download our lead scoring template and begin examining the characteristics and behaviors that are important to your business right away.

Yes! I want this template.



How you create practical workflows

1. Analyze - Examine your marketing processes to determine which can be automated.

2. Create a visual image of your workflow - Once you've determined which workflows you want to perform, it's time to create a visual representation of that workflow. This allows you to see if someone has forgotten to think about something at an early stage. Furthermore, a clear visual image aids in explaining the function of the automation to others in the company.

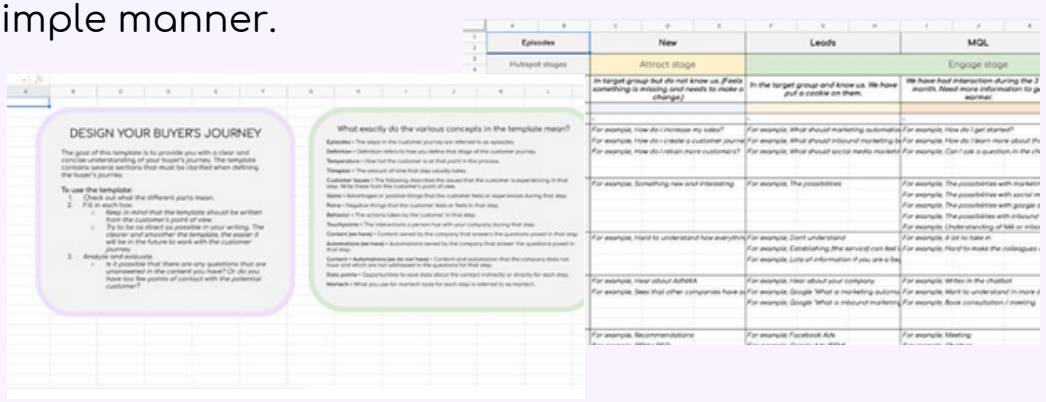
3. Check your data - Check that your data is available and that it can be used to create triggers. Is it possible that you require the integration of another system with your MA system? You can integrate a variety of tools with HubSpot.

4. Inform the person who will be responsible -Infor m the person in charge of the workflow and the email. So the person is aware of what will occur if, for example, a notice about a download or information about calling a person is displayed.

5. Create workflows and turn them live!

Set Up Workflows Throughout The Buyer's Journey Template

Do you want to begin right away? We recommend that you use our buyer's journey template, which shows you your shortcomings and opportunities in a clear and simple manner.



Yes! I want this template.

Step 5

Analyze and Optimize Your Workflows

- Analyze your performance
- Conductiong an A/B Test

Analyze your performance

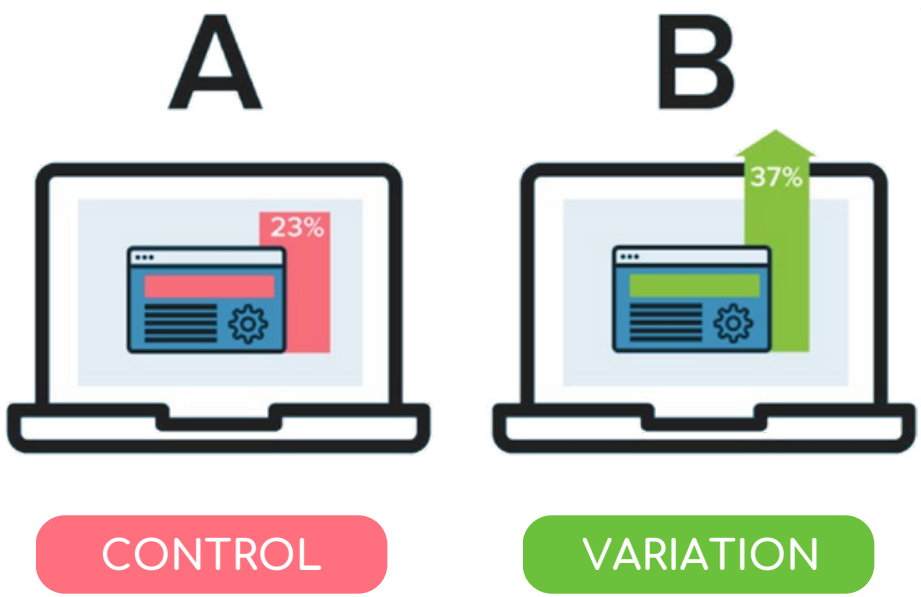
The final, but equally important, step is to analyze! What works now might not work in a month. So, look at your automated processes. Do contacts drop out? How many of your leads become customers? Is the outcome in line with your expectations?

Actively analyzing your workflows means that you are constantly improving your automated processes and determining what content needs to be changed or supplemented in order to increase conversion. So, by going down to the level of detail, you improve your workflows and are likely to discover more processes that can be automated.



Conducting an A/B test

We recommend conducting an A/B test. A/B testing entails testing two variants for two different groups of website visitors and comparing small changes to see which ones result in the most conversions. The key to successful A/B testing is to test one thing at a time, as this allows you to clearly see what works best. Because you don't know which unique component made a successful difference if you test several things at the same time against each other.

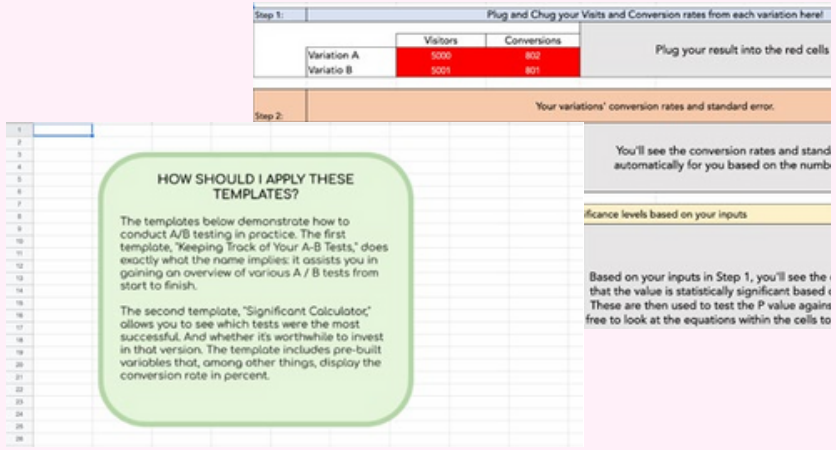


Landing pages, emails, pictures, and forms are all examples of things you can A/B test.

A/B Testing Template

Do you require assistance in determining how to begin A / B testing? Download our template for assistance in getting started.

Yes! I want this template.



Summary

Now that you're a pro, start automating!

Marketing automation may seem like a lot to learn upfront... But imagine what it'll feel like to kick back and relax once you've got everything in place. OK, maybe not relax, but Marketing Automation will certainly help you shorten that to-do list.

From email marketing to advertising and retargeting to internal tasks, Marketing Automation can help you save time, energy, and money — and make your customers' lives easier and happier. It truly is a marketer's best friend!

As you can see, Marketing Automation is not a solution that can be used by all types of businesses. You must begin with your needs, systems, marketing methods, and goals, among other things. Automate your unique processes to increase the number of converted leads, create lead nurturing, and make marketing and sales work as a unified unit.

Hungry for more? Get in touch with us!

We hope that this guide has been helpful to you. If you are furthermore interested in how you can optimize your marketing strategy, you are more than welcome to contact us regarding questions and services.

We are AdNIKA, a Growth Agency that helps your business achieve its growth potential through Inbound strategies and HubSpot. We can provide you with a Marketing Automation Solution to help you attract the right audience, convert more visitors into customers, and run complete Inbound Marketing campaigns at scale — all with a proven strategy and an easy-to-use platform powered by HubSpot.

Let us consult you and decide together which services or subscriptions suit your goals and needs. We look forward to hearing from you!

Let's talk!

ADNIKA



Ehsan Khorsand and Team