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Experts in the science of search >

Solving Common Sales & Marketing Problems Using Marketing Automation Software (MAS)

by Ann Stanley, Managing Director

What is Marketing Automation?

- A software platform used for automation and integration of your sales and marketing processes

- Mainly used for lead generation and nurturing by B2B companies, particularly where there is a long buying cycle

Key Parts of Marketing Automation?

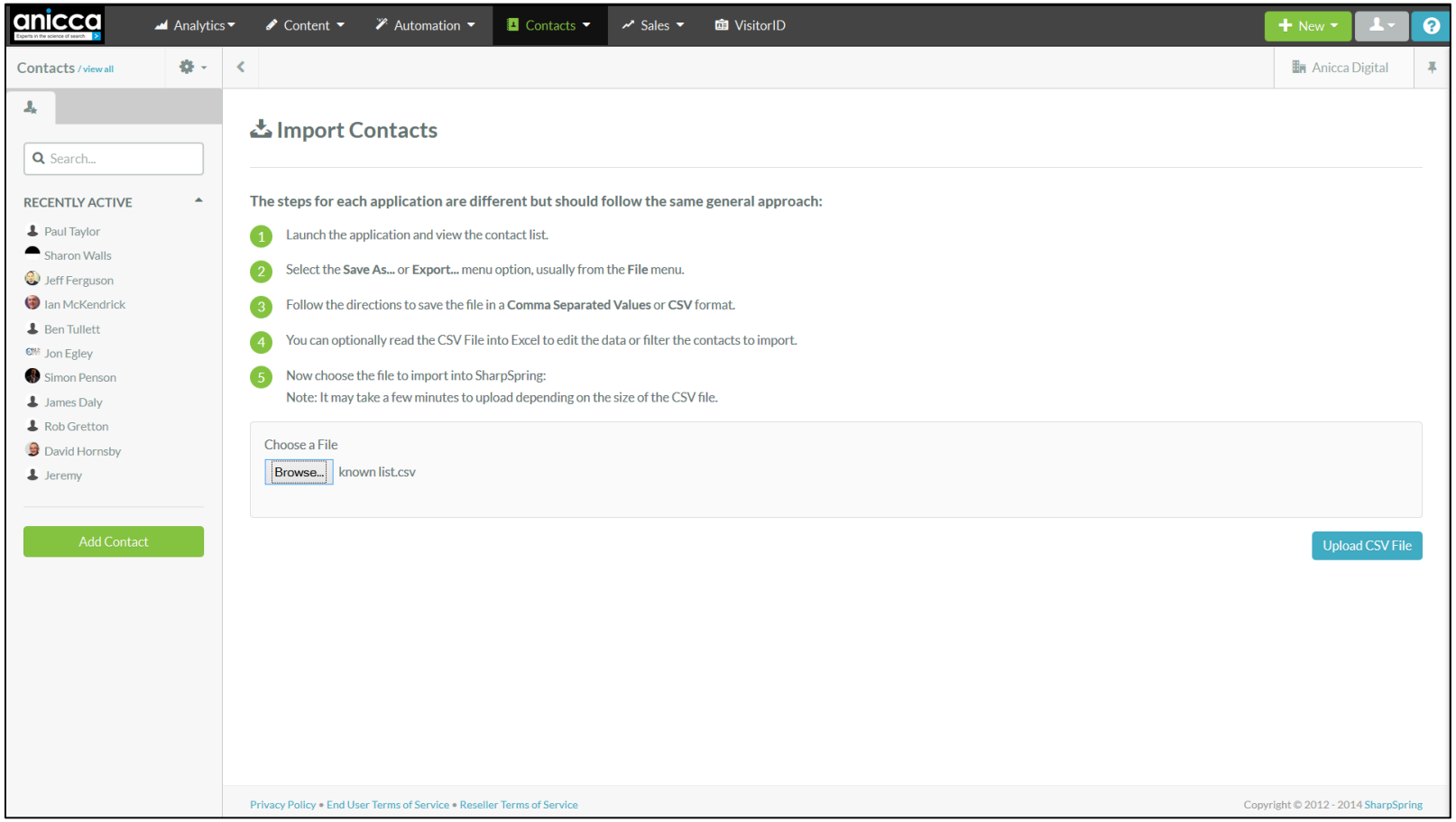
Use of MAS to solve common sales and marketing problems

Customer Relationship Management (CRM) and List Management

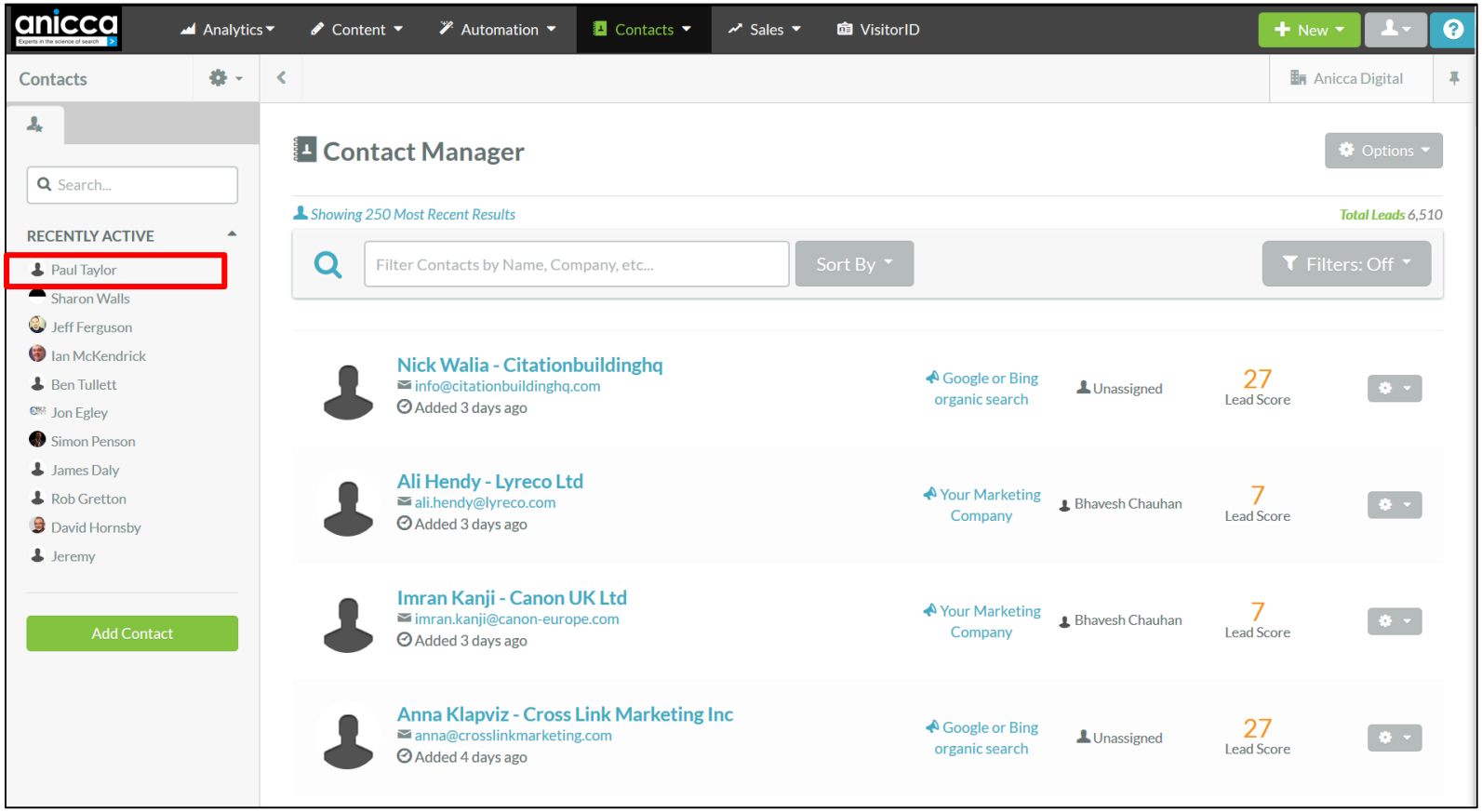
CRM and List Management

Problem	Common Solutions	MAS solution
• Use of Excel for your customer contacts • Multiple lists in each department • No central or correct list • Contacts out of date • Creation of segmented lists	• Use of Customer Relationship Management (CRM) • Zoho, Sugar CRM, Salesforce, Microsoft Dynamics	• Internal CRM system with contact manager in the MAS • Integration with 3rd party CRM systems • Upload existing lists into MAS • Creation of dynamic lists within MAS

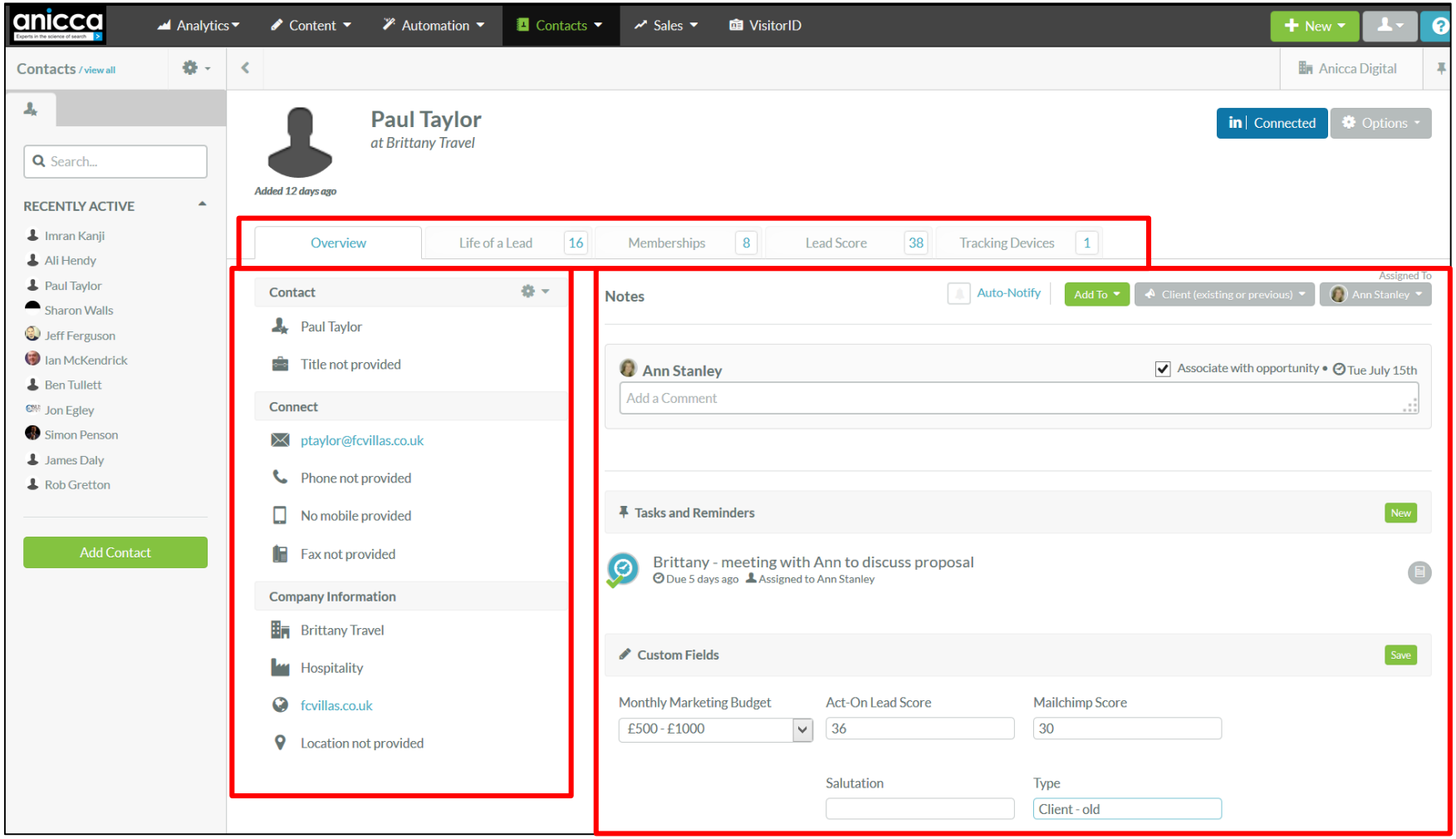
Importing a CSV list of contacts into MAS



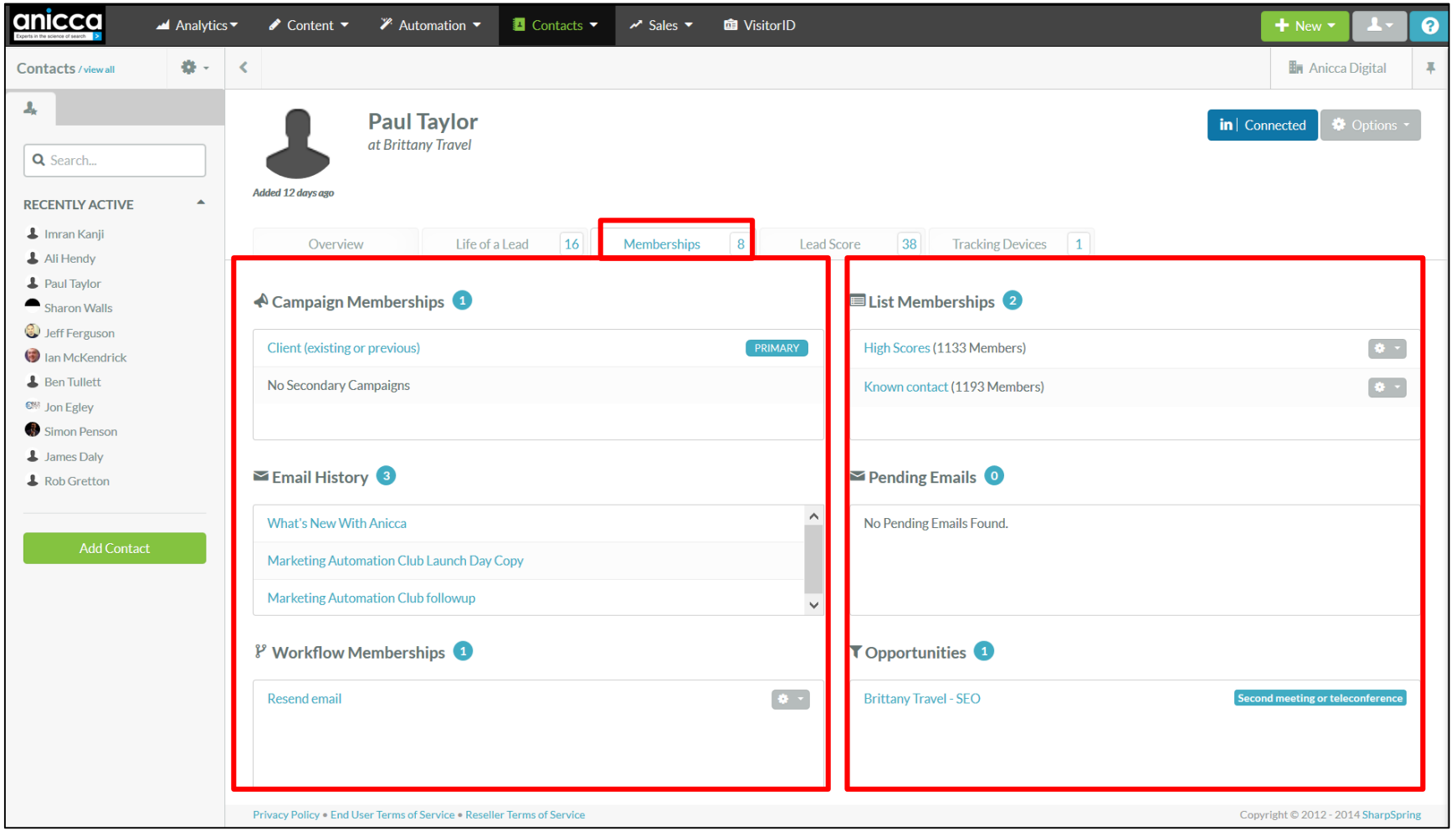
Contact manager



Contact record



List membership and activities



Timeline with all email correspondence (Gmail integration)

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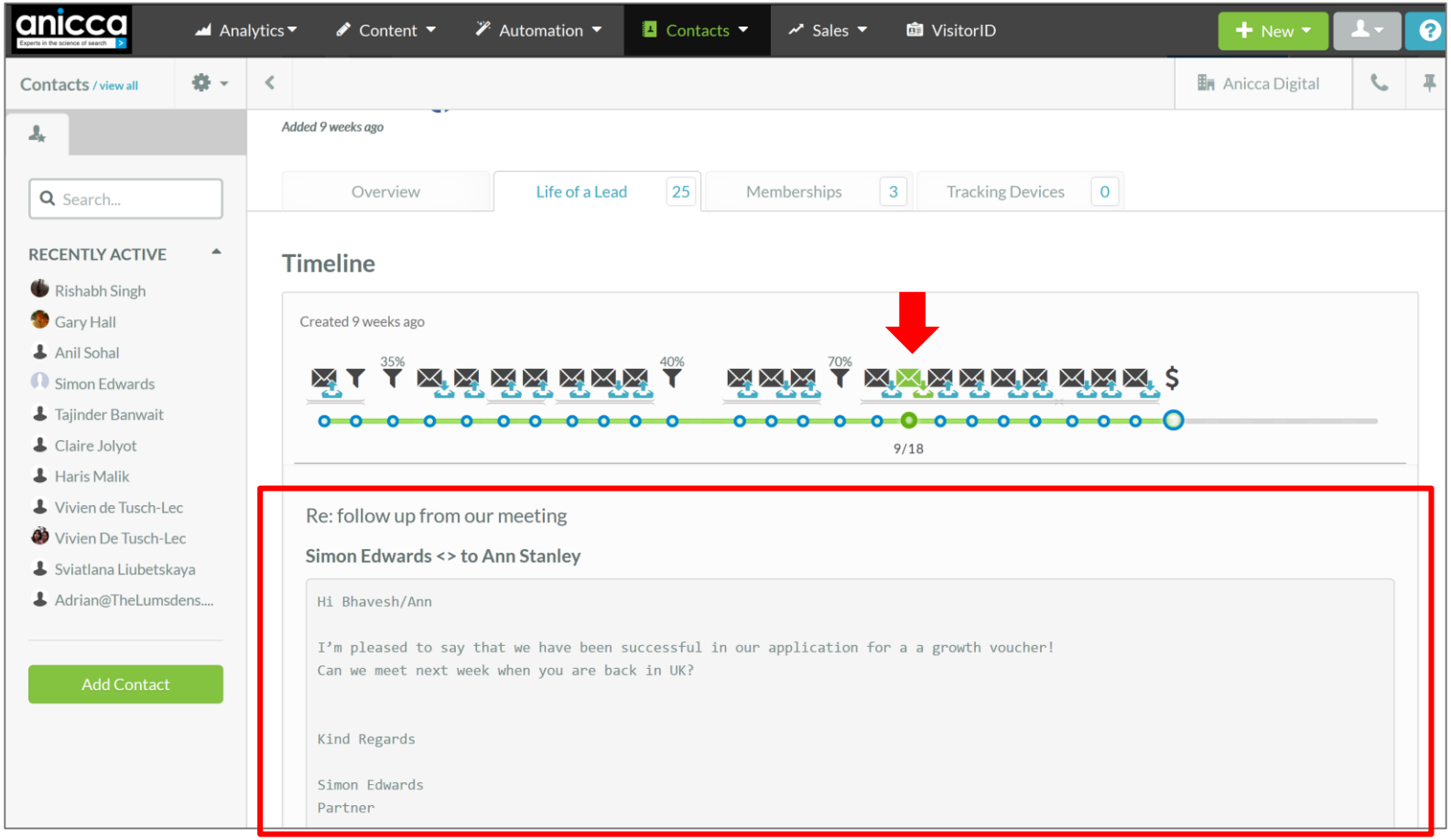

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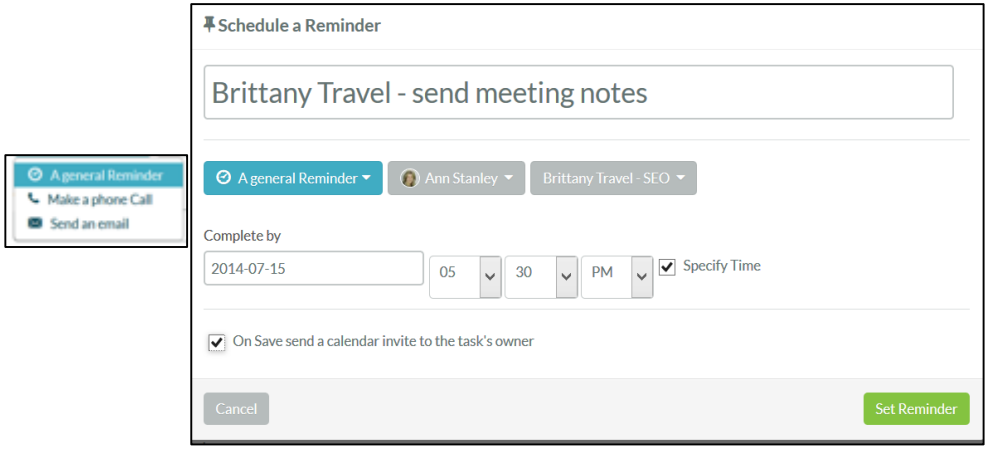
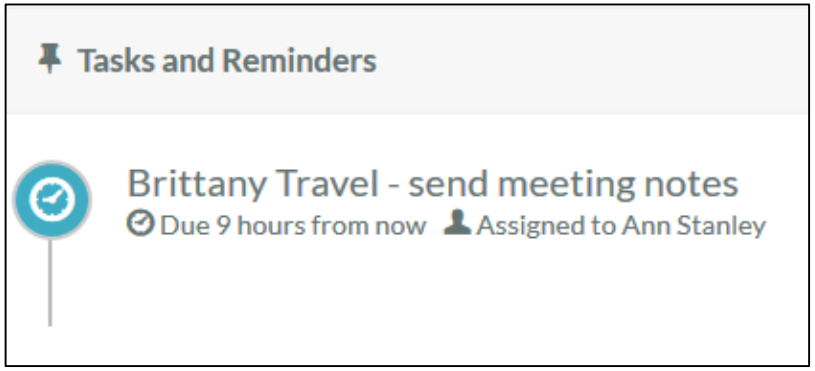
Management of staff tasks and customer notes

Managing staff tasks and customer notes

Problem	Common Solutions	MAS solution
• Allocation and tracking of staff tasks • Tasks recorded in calendars • History of activities associated with customers • Ability of staff to see all notes, correspondence and emails for a customer	• All staff copied into emails (just in case they are interested) • Use of separate or integrated calendars • CRM systems such as Zoho SalesForce etc. have staff tasks linked to customer records • Task management software e.g. Asana	• Allocation of tasks to staff – saved onto customer record • Email sent with calendar integration/invite • History of notes and activities stored on customer record • History of emails stored on customer record

Adding a task to a customer record





Task or meeting sent as email and can update user's calendar

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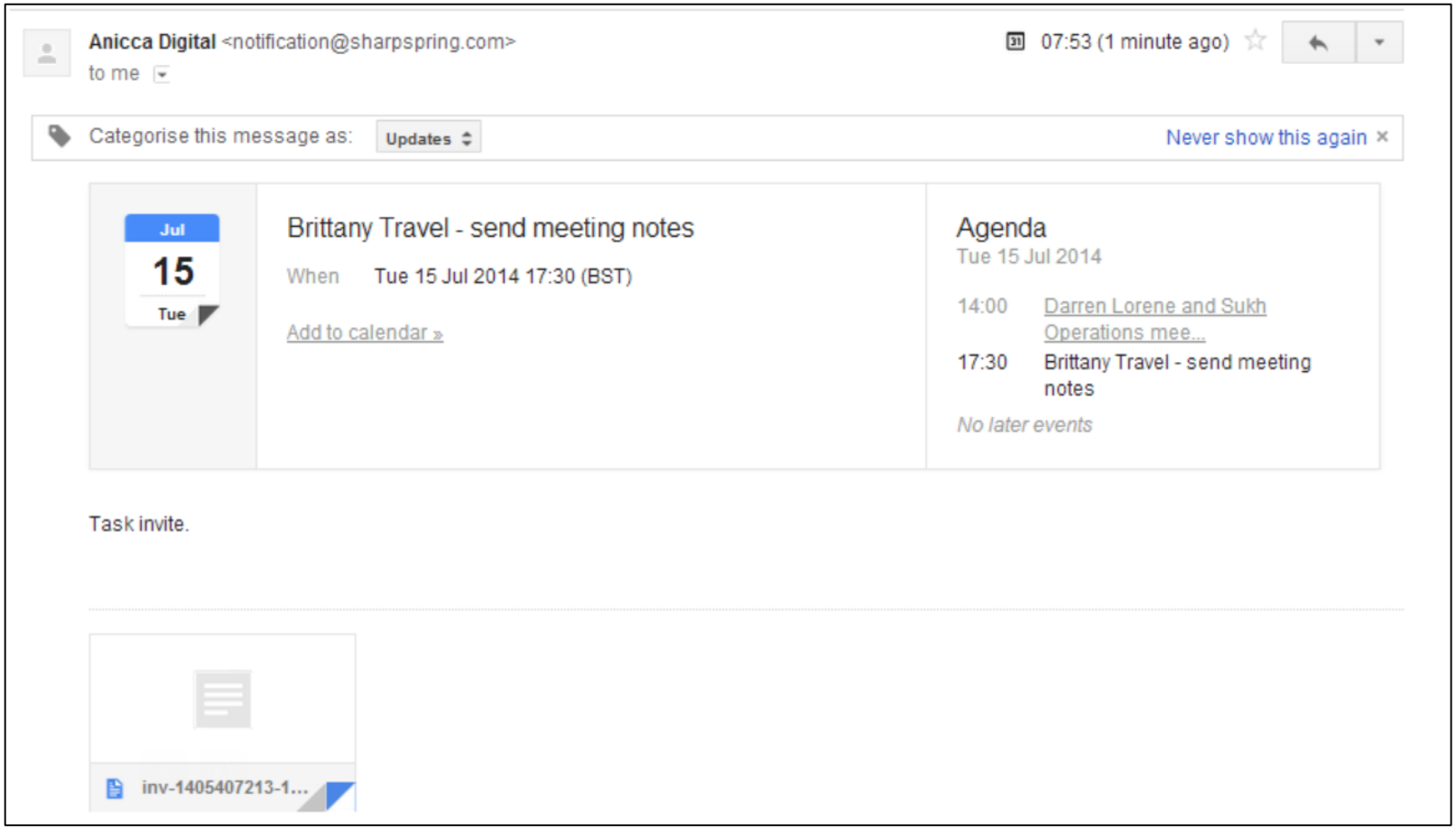

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Creation of new forms and landing pages on your website

Creation of new forms and landing pages on your website

Problem	Common Solutions	MAS solution
• Ability to create and add new forms onto your website • Create landing pages for specific promotions • Create landing pages for A:B testing	• Use CMS system within your website • Use form creator plug-in on your website e.g. for WordPress • Use 3rd party landing page creation and testing tools e.g. Unbounce, Visual Optimizer, Optimizely	• Custom field creator • Form creator (where standard and custom fields can be added) • Add form to website via an i-frame • Creation of landing pages or integration with 3rd party software

Set-up Custom fields for use in forms and contact database (CRM)

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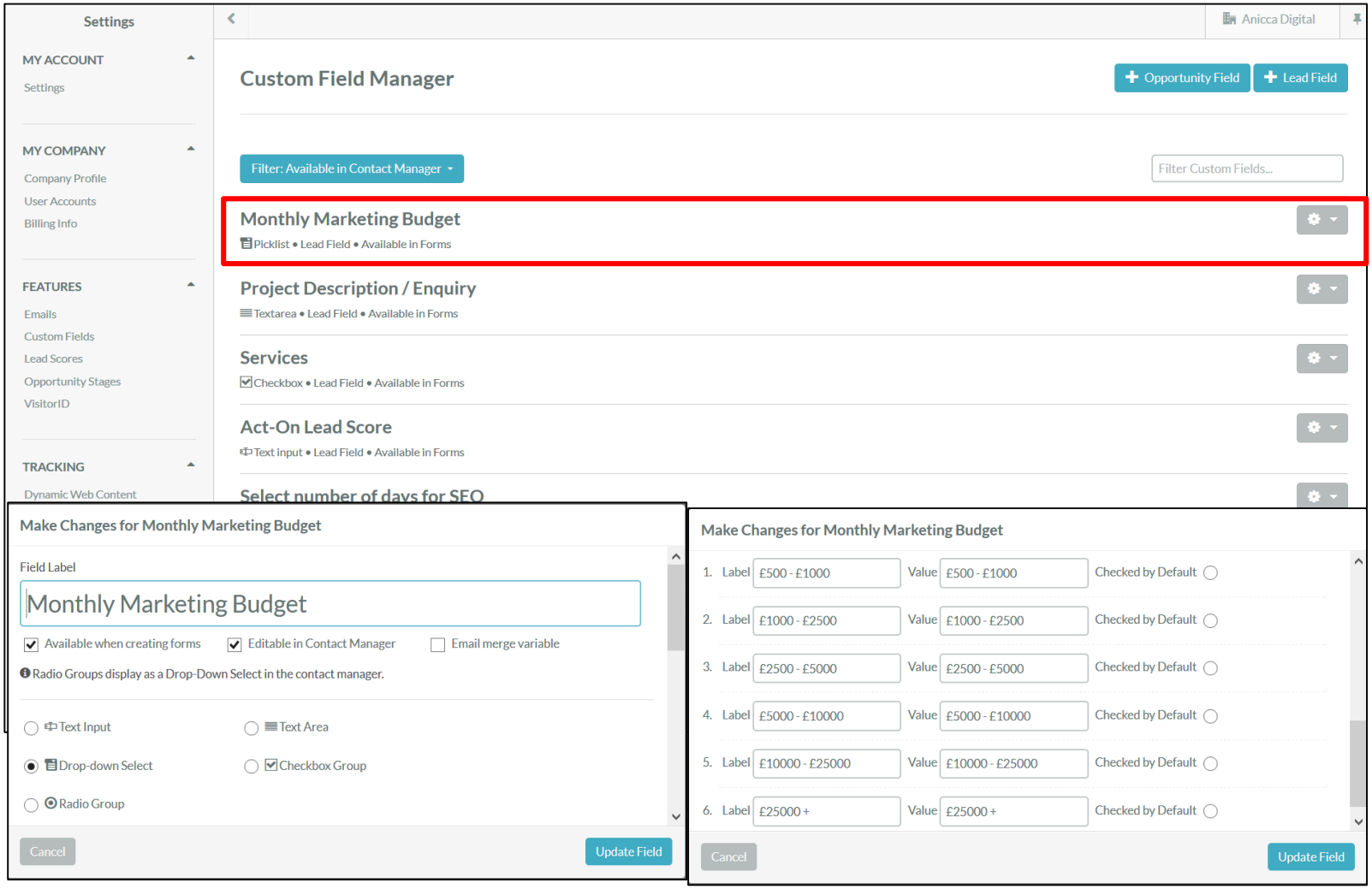

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Create (or edit) contact form using pre-existing fields or new custom fields

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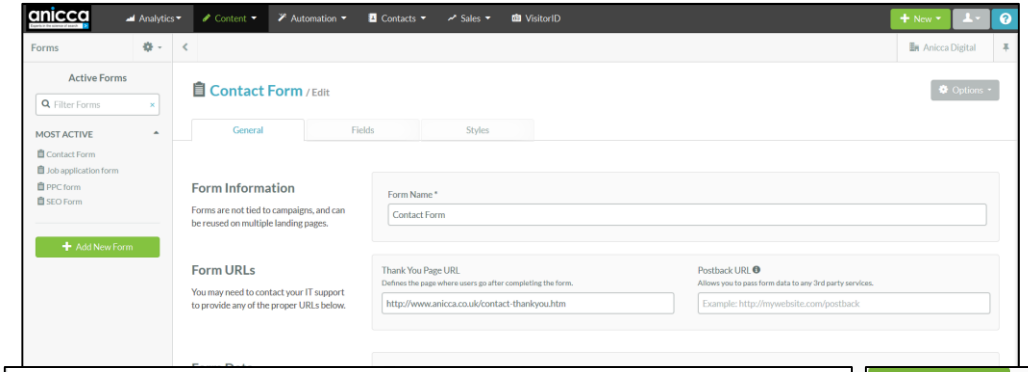

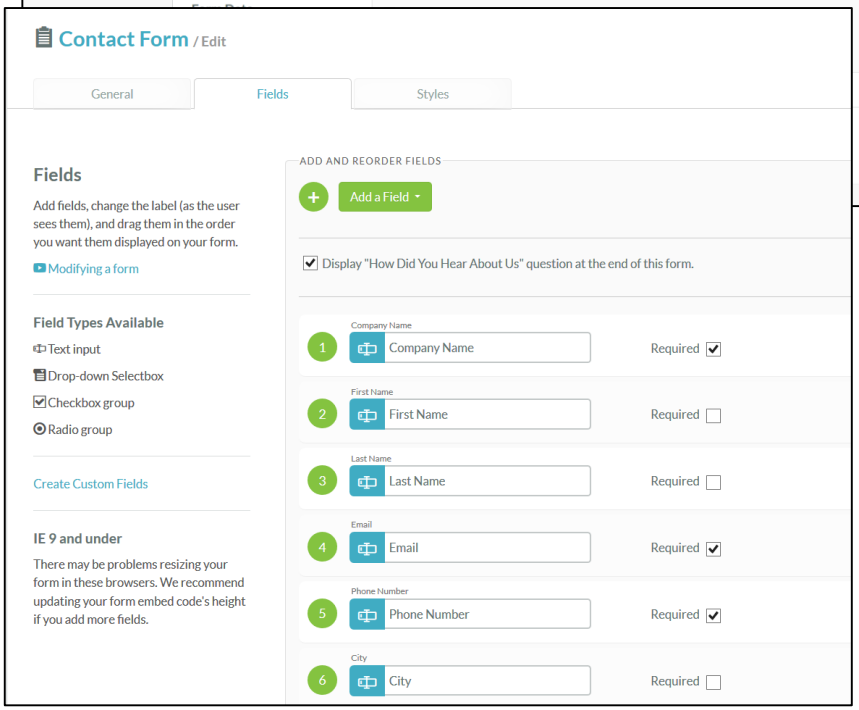

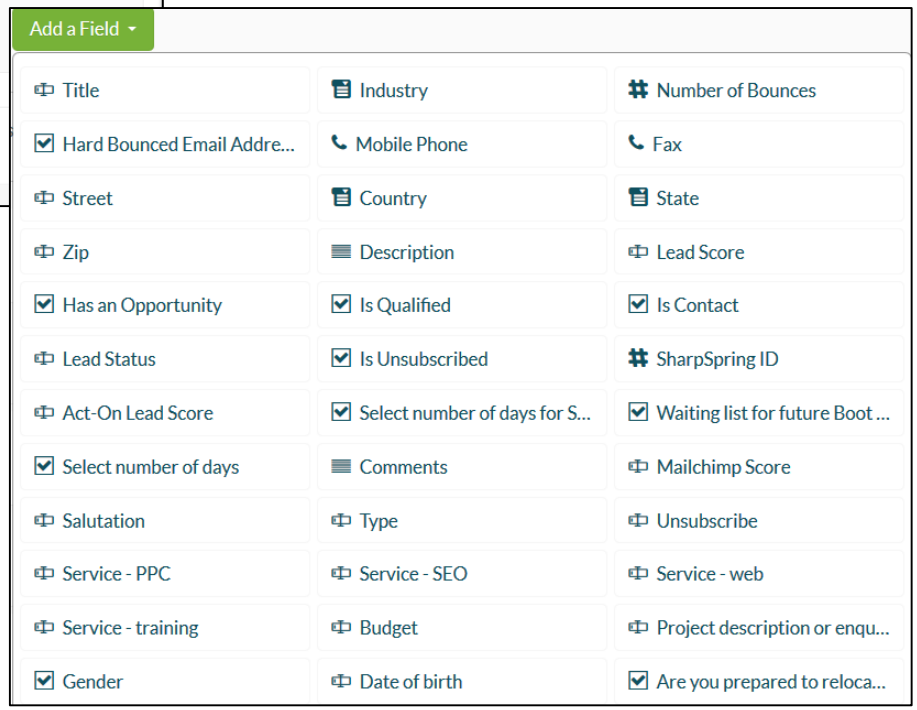

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Contact form added via an i-frame onto your website

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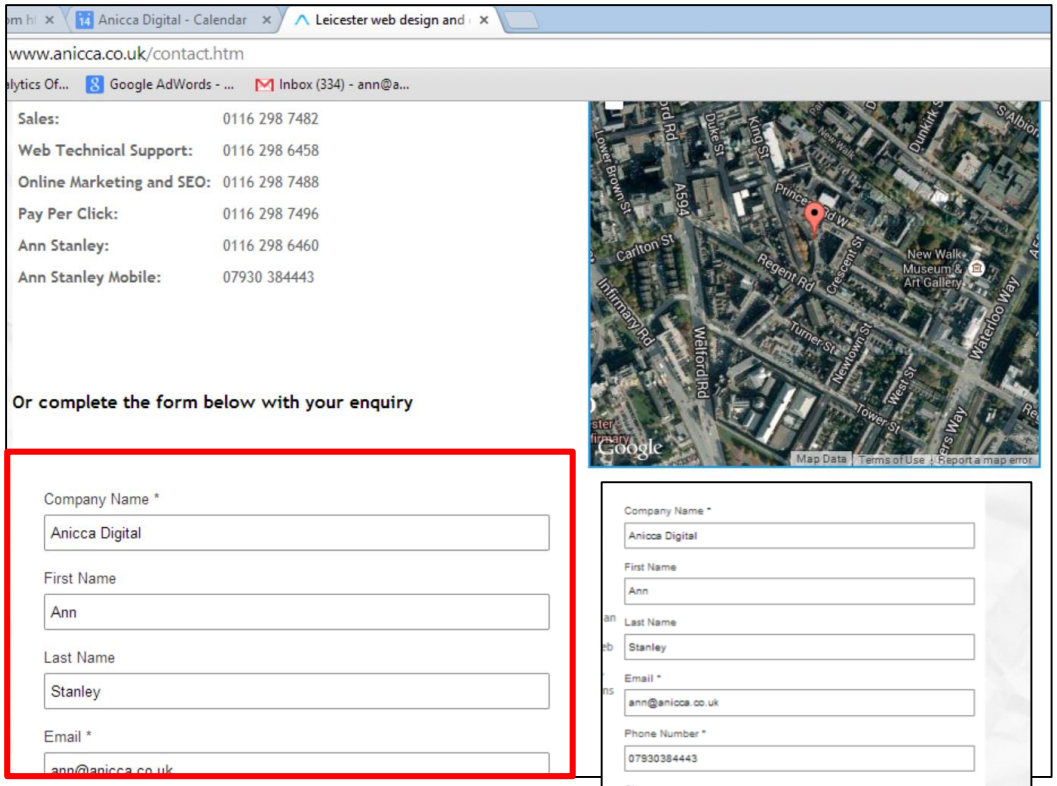

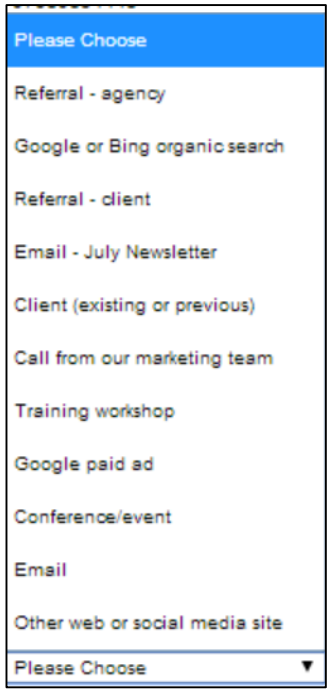

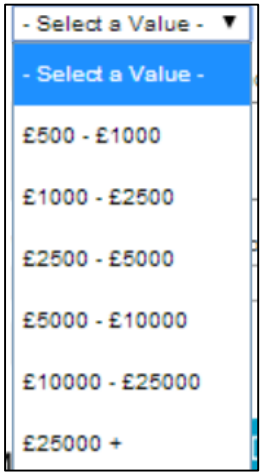

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Anonymous visitors, tracking of individuals and web Analytics

Anonymous visitors, tracking of individuals and web Analytics

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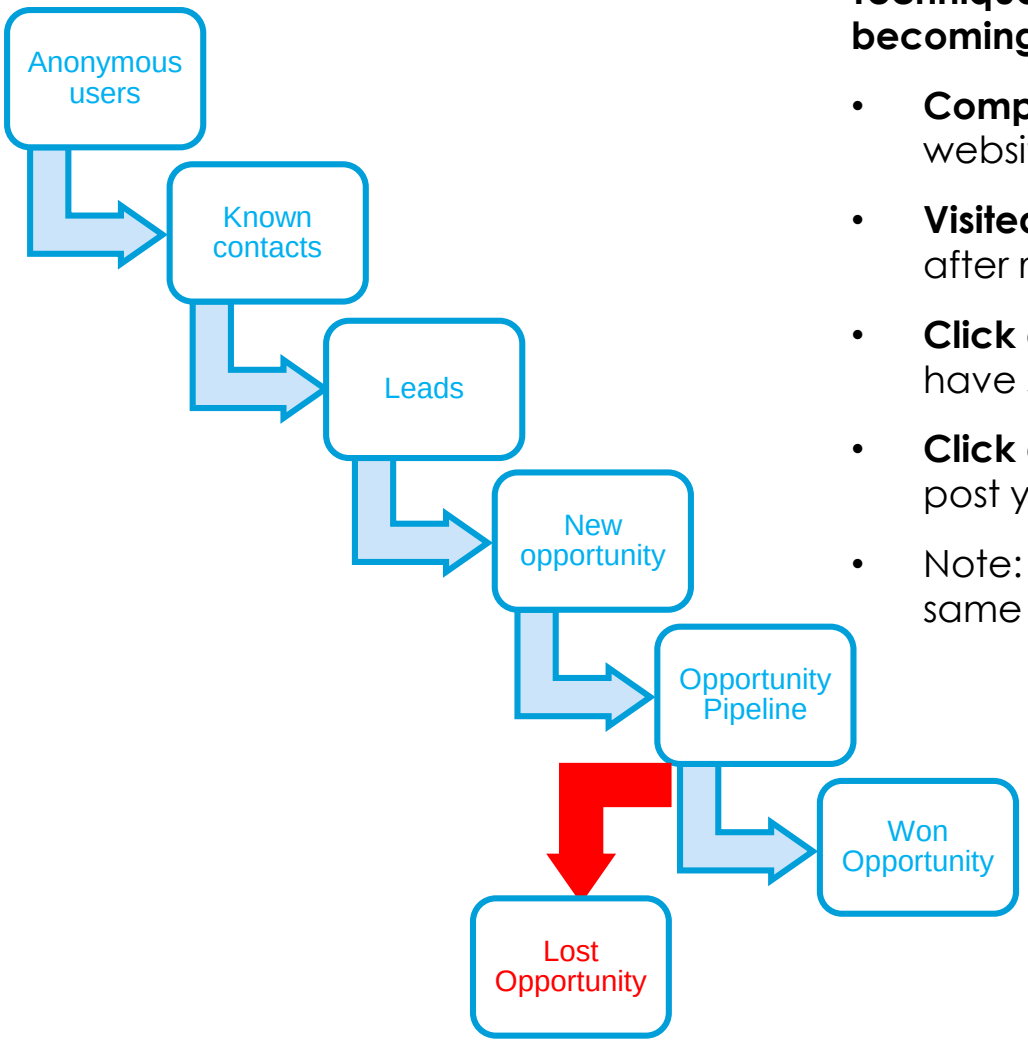
Problem	Common Solutions	MAS solution
• Understanding user behaviour on your website • Who has been to your website and not contacted you? • History of each individuals' visits to your site	• Google Analytics (tracks trends and averages) • Reverse DNS Look-up to identify company name of visitors • Software from Lead Forensics, Canddi, A1webstats, Ruler Analytics, Who Is Visiting) etc.	• MAS also uses DNS look-up to track anonymous visitors • Refer to a database to provide additional company information • History is saved, and added to customer card once they become known visitors • Complete history of individual retained

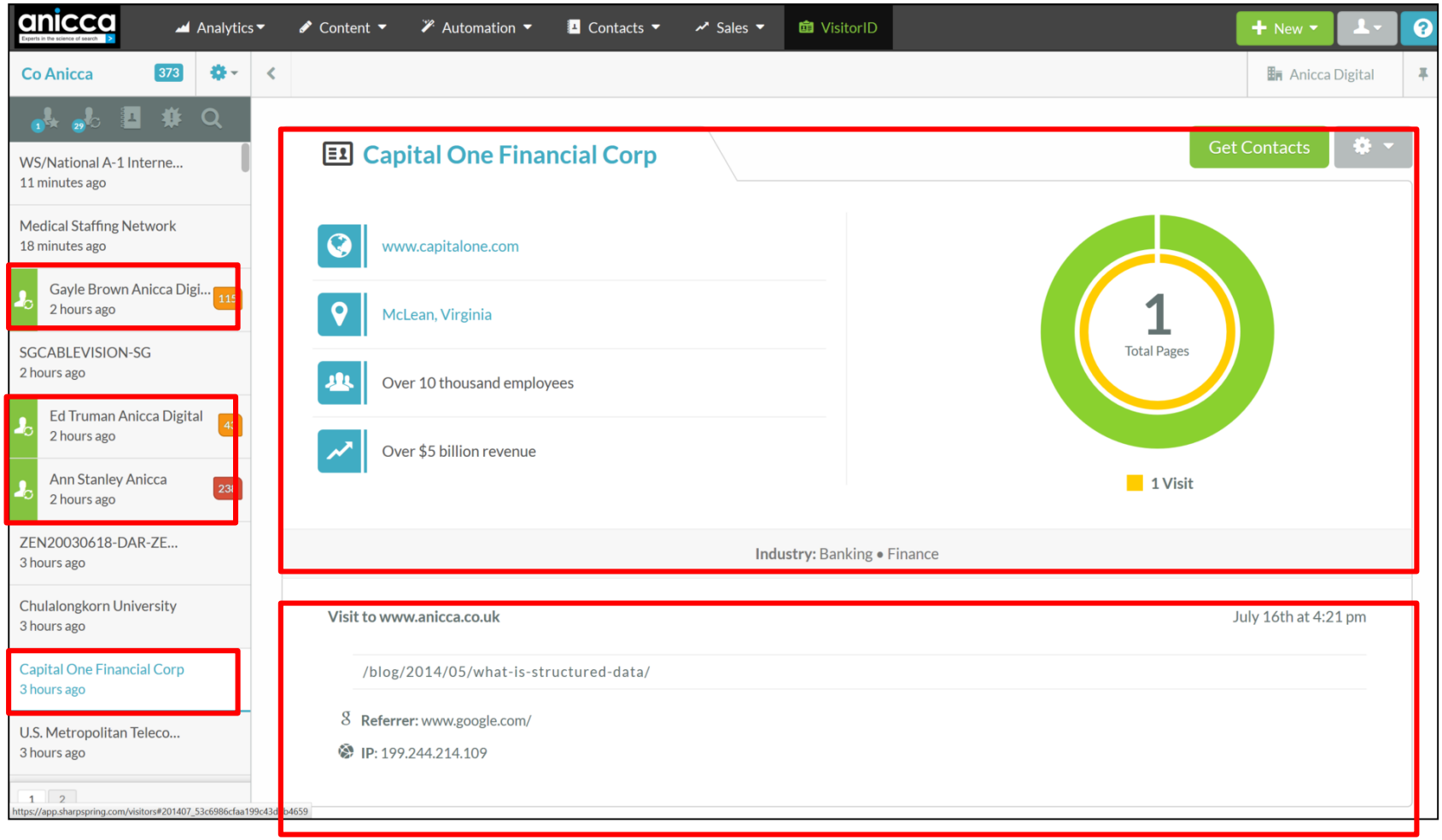
Naming convention



Techniques for Anonymous becoming a known visitors

- **Completed a form** on your website
- **Visited a page** on your website after receiving an email
- **Click a link** from an **email** you have sent out
- **Click a link** from a **social media** post you have created
- Note: Not all software uses the same methods

Anonymous and known visitor tracking



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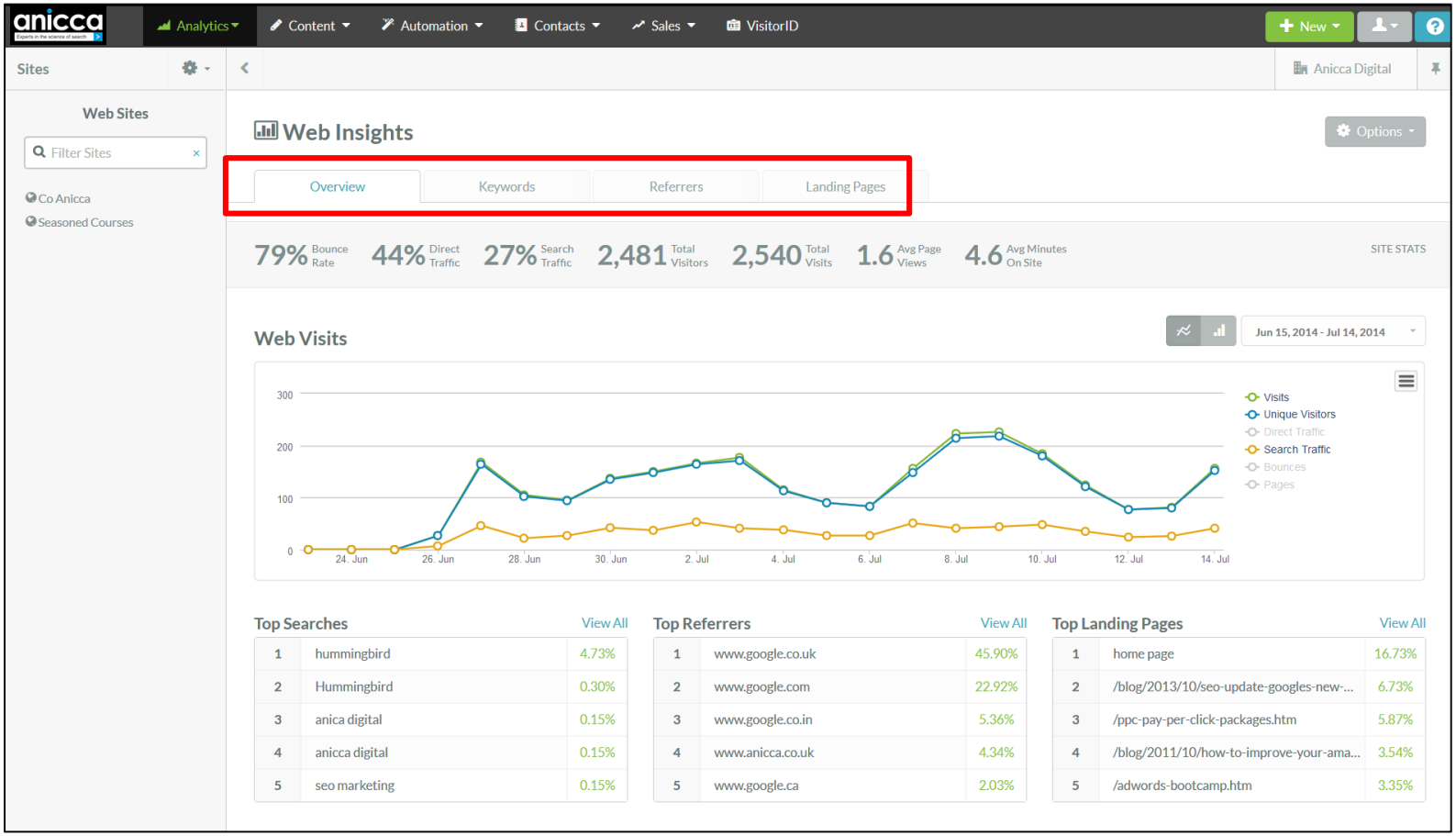
Website analytics

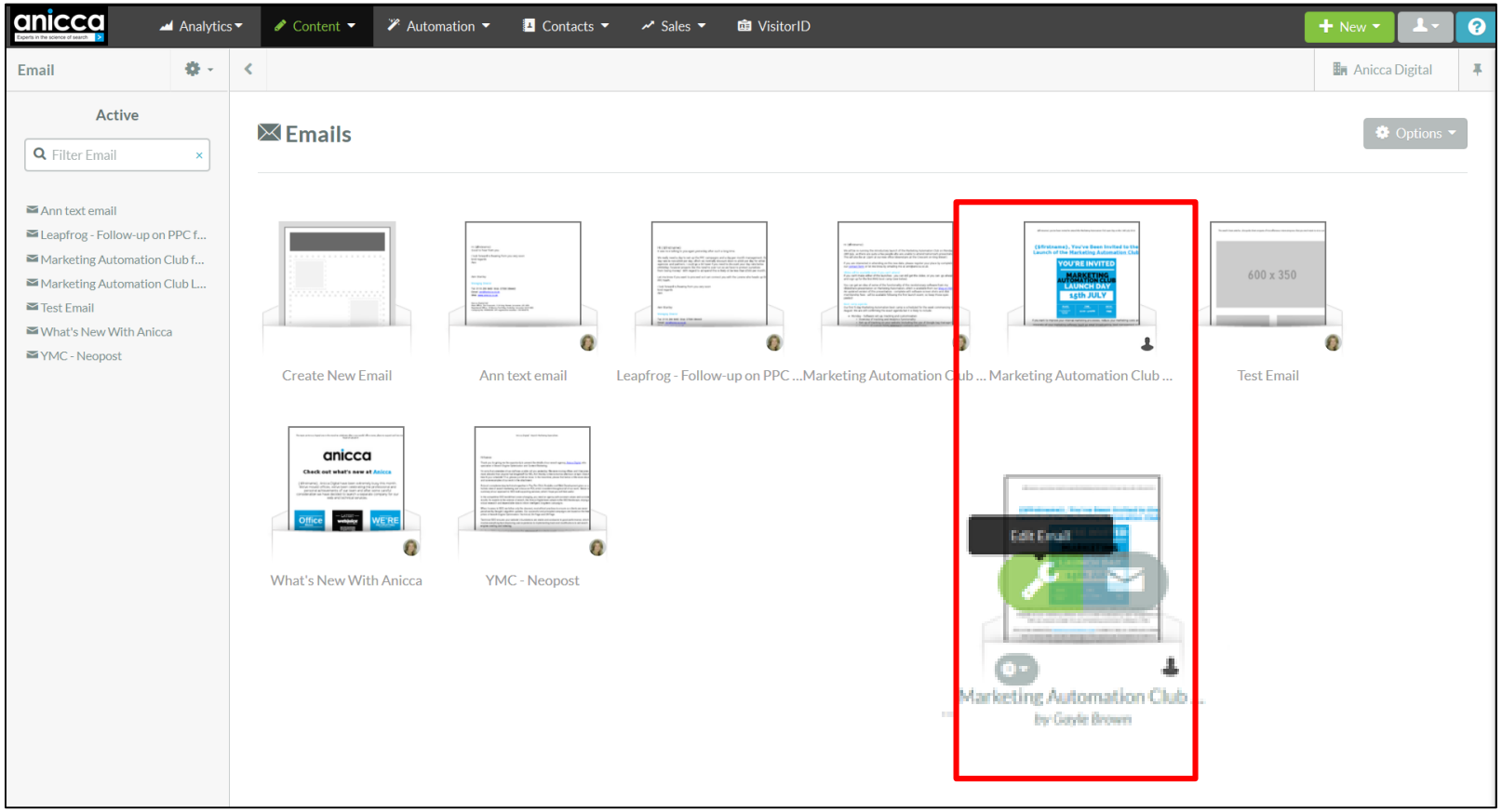


Email broadcasting and reporting

Email broadcasting and reporting

Problem	Common Solutions	MAS solution
• Ability to email using own templates • Ability to upload your own list • Blocking of an account if it contains info@ or sales@ addresses • No tracking of customers history	• MailChimp and web-based broadcasting are cost effective • Have to purchase own software e.g. Adestra, Pure360 to overcome issues around uploading your own lists • Use of CRM or other system to track history	• MAS has integrated email broadcasting system • Ability to upload own lists • Ability to use MAS templates or upload your own • Reports email performance for each email or each customer

Email management



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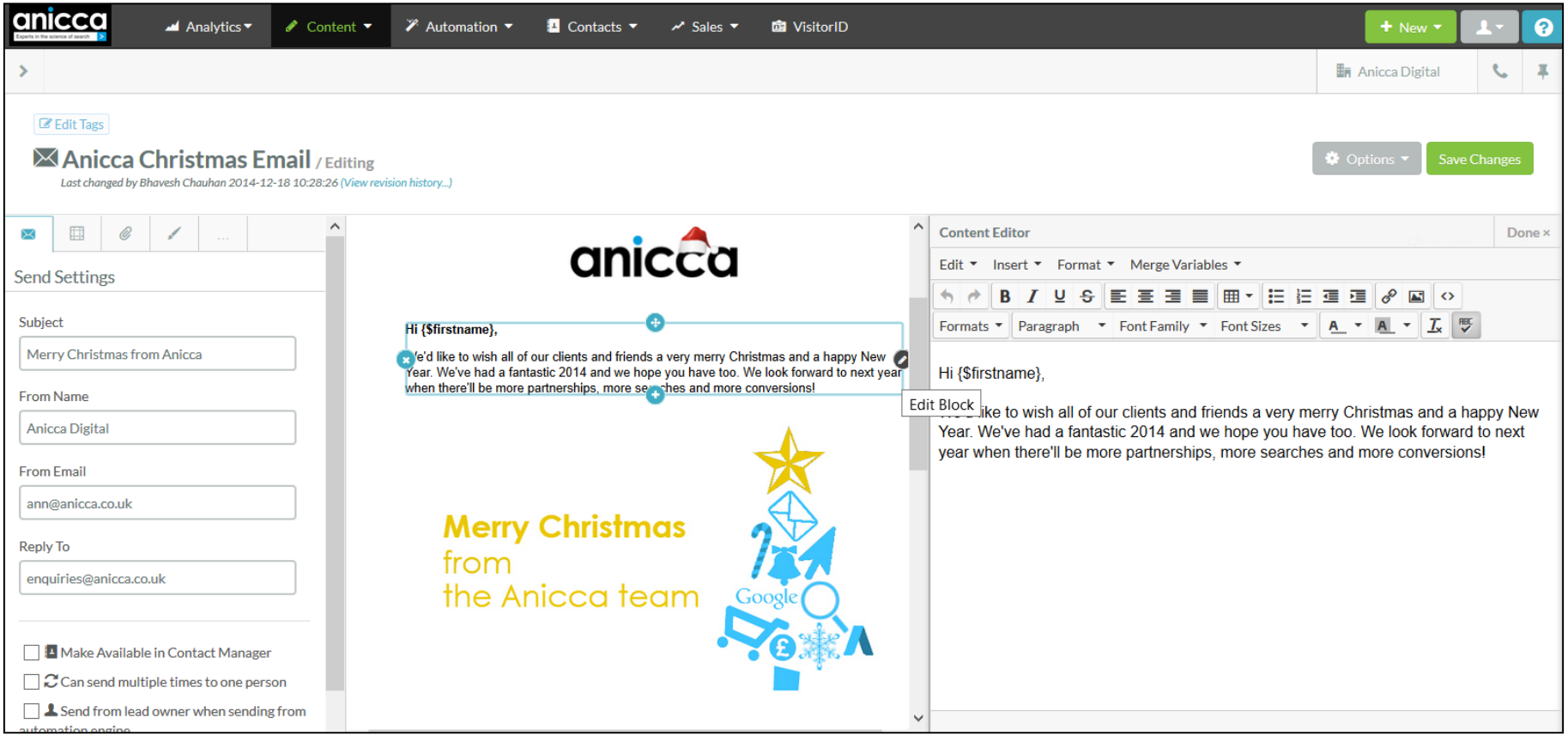
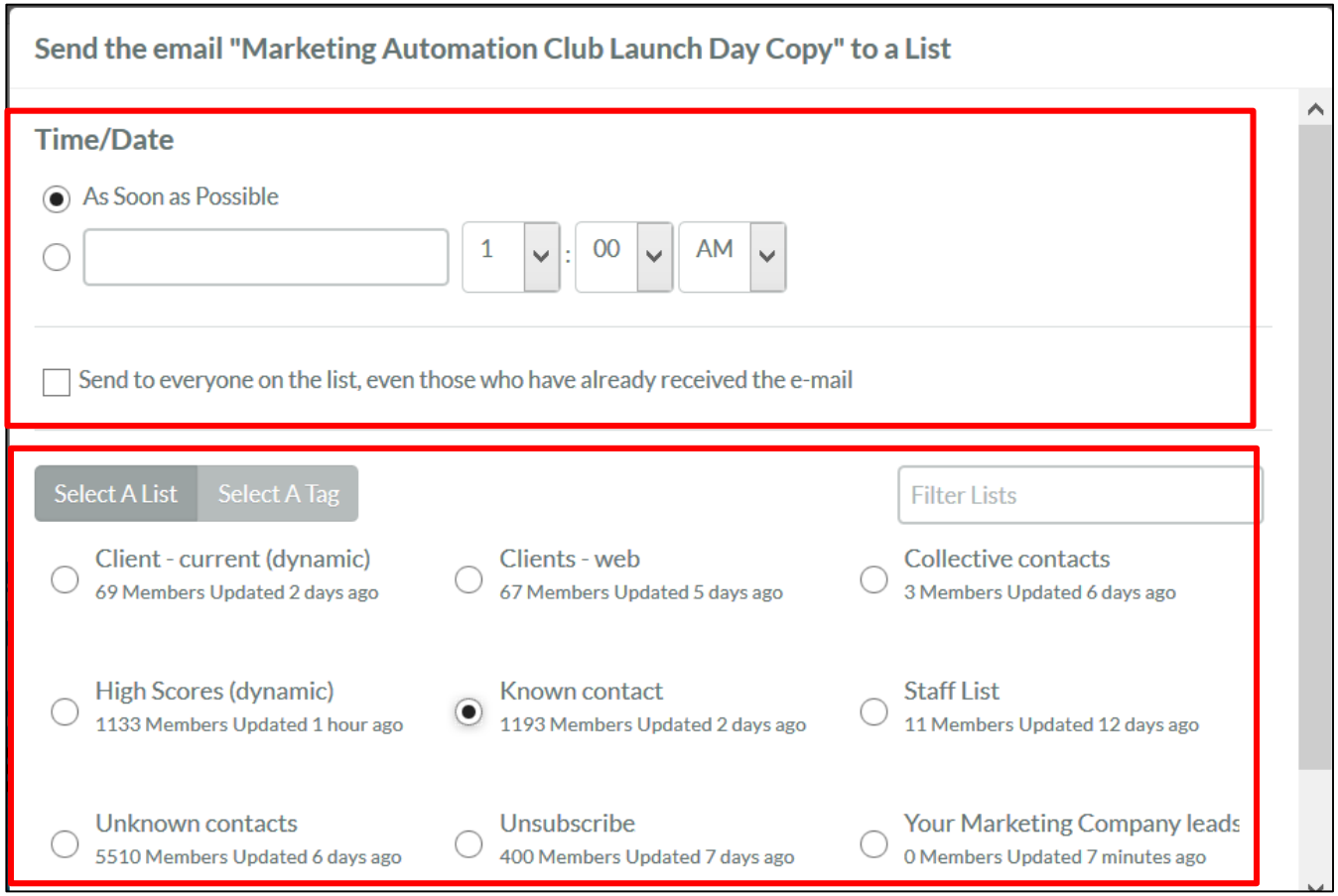
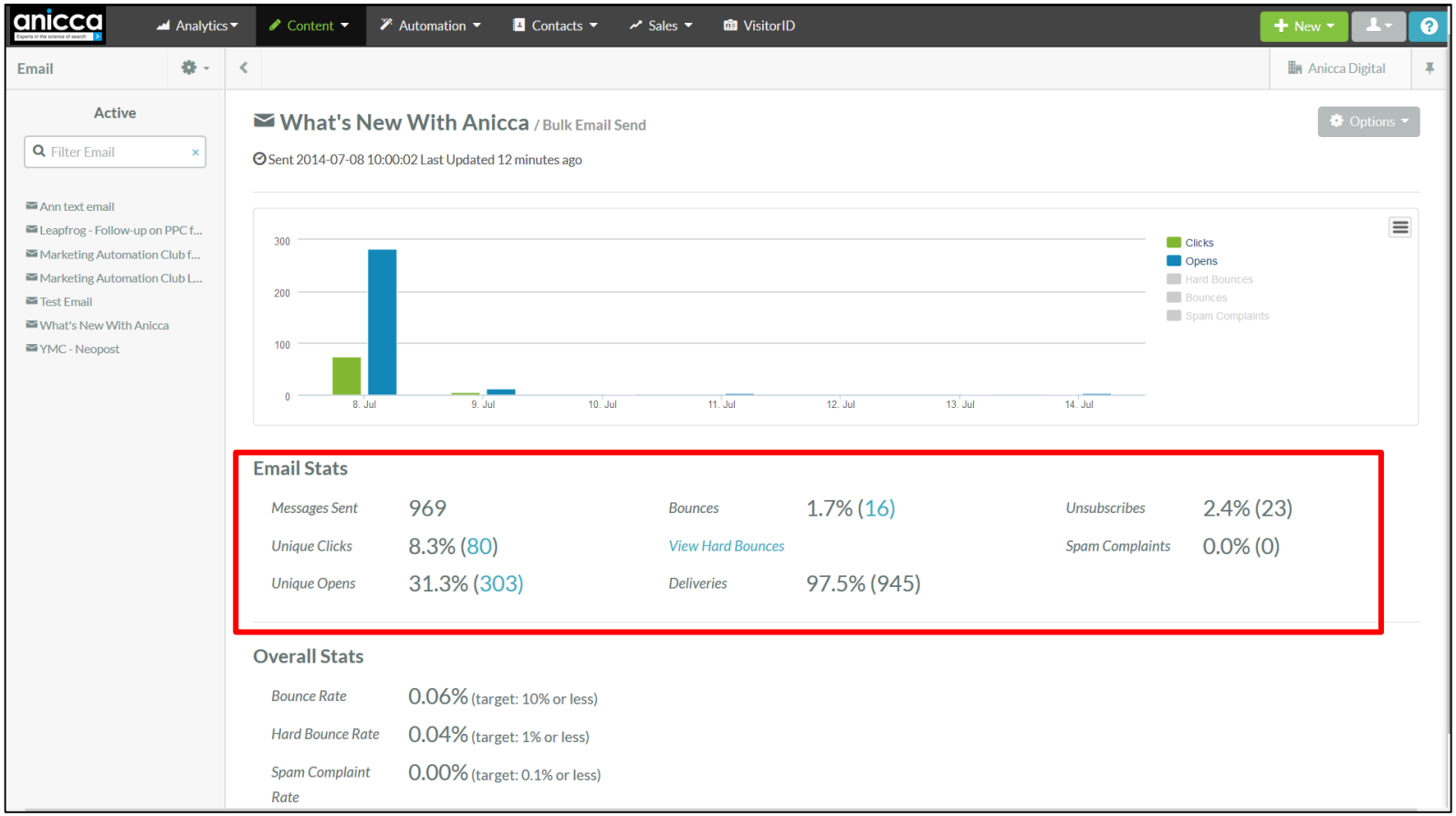
Editing an existing email



Broadcast email to lists



Email stats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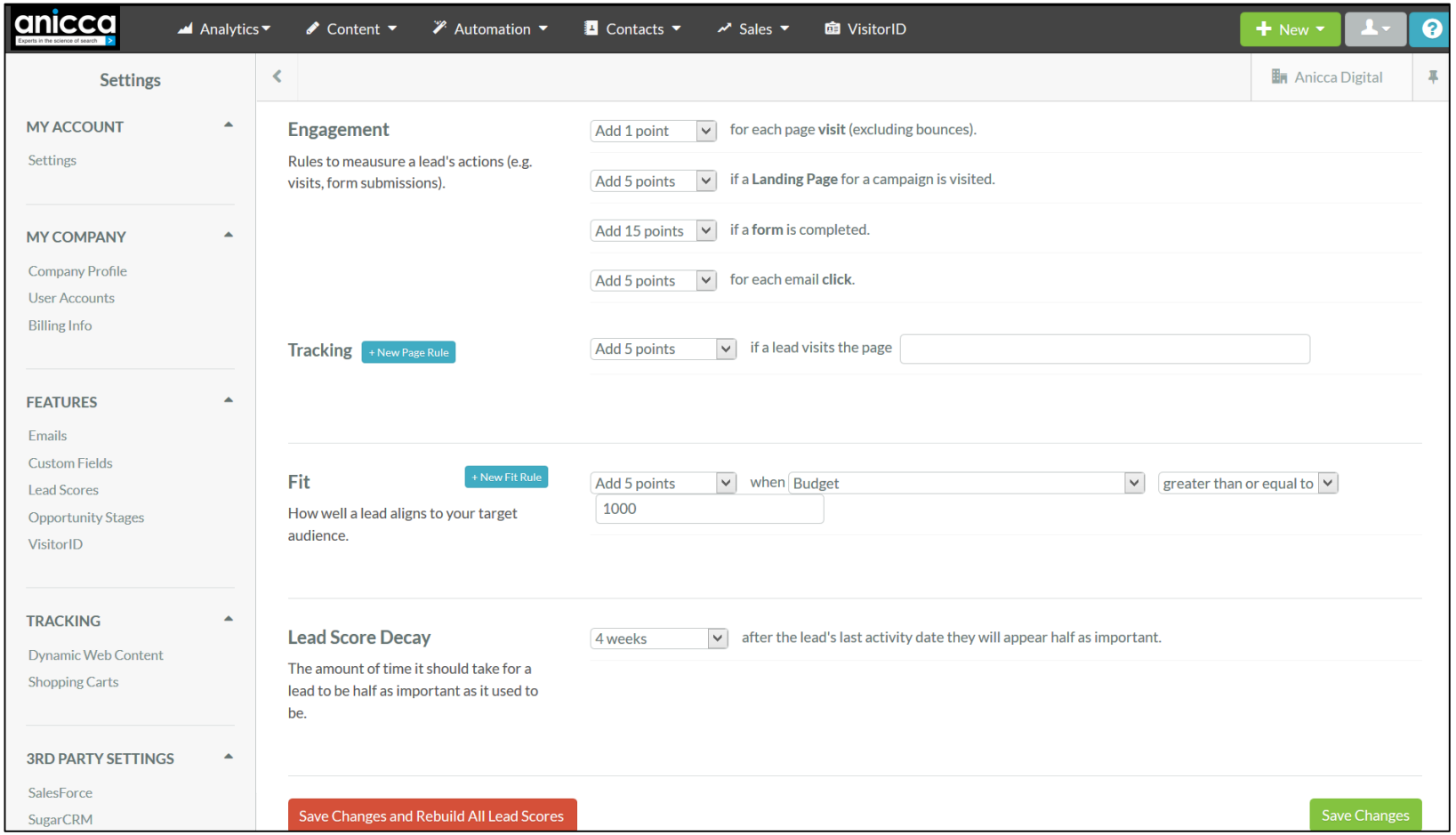
Analytics
Content
Automation
Contacts
Sales
VisitorID
New
Email
Anicca Digital
Active
Filter Email
Ann text email
Leapfrog - Follow-up on PPC f...
Marketing Automation Club f...
Marketing Automation Club L...
Test Email
What's New With Anicca
YMC - Neopost
What's New With Anicca / Bulk Email Send
Options
Sent 2014-07-08 10:00:02 Last Updated 12 minutes ago
300
200
100
0
8. Jul
9. Jul
10. Jul
11. Jul
12. Jul
13. Jul
14. Jul
Clicks
Opens
Hard Bounces
Bounces
Spam Complaints
Email Stats
Messages Sent 969
Unique Clicks 8.3% (80)
Unique Opens 31.3% (303)
Bounces 1.7% (16)
View Hard Bounces
Deliveries 97.5% (945)
Unsubscribes 2.4% (23)
Spam Complaints 0.0% (0)
Overall Stats
Bounce Rate 0.06% (target: 10% or less)
Hard Bounce Rate 0.04% (target: 1% or less)
Spam Complaint Rate 0.00% (target: 0.1% or less)

Tracking leads and sales opportunities

Tracking leads and sales opportunities

Problem	Common Solutions	MAS solution
• Use of Excel to track and qualify leads in order to focus on hot leads • Change stage of sales opportunities • Use percentages to calculate pipeline and likely revenue	• CRM software allow tracking of sales opportunities but rarely have lead tracking based on user behaviour	• MAS allow you to score leads based on users' activities and behaviour • Integration with CRM system so that the sales team only focus on hot leads • Some MAS also have opportunity tracking

Lead scoring rules



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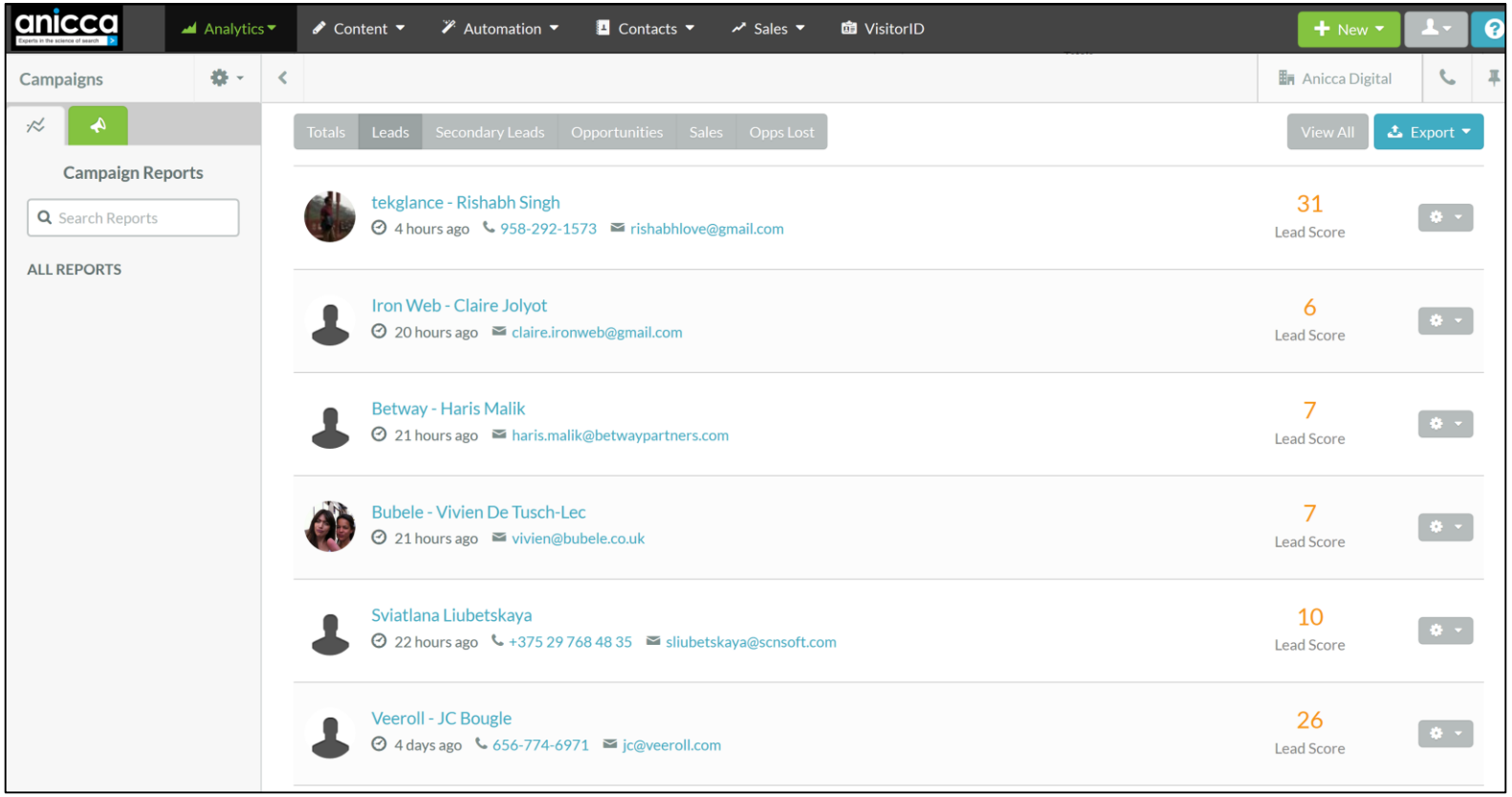
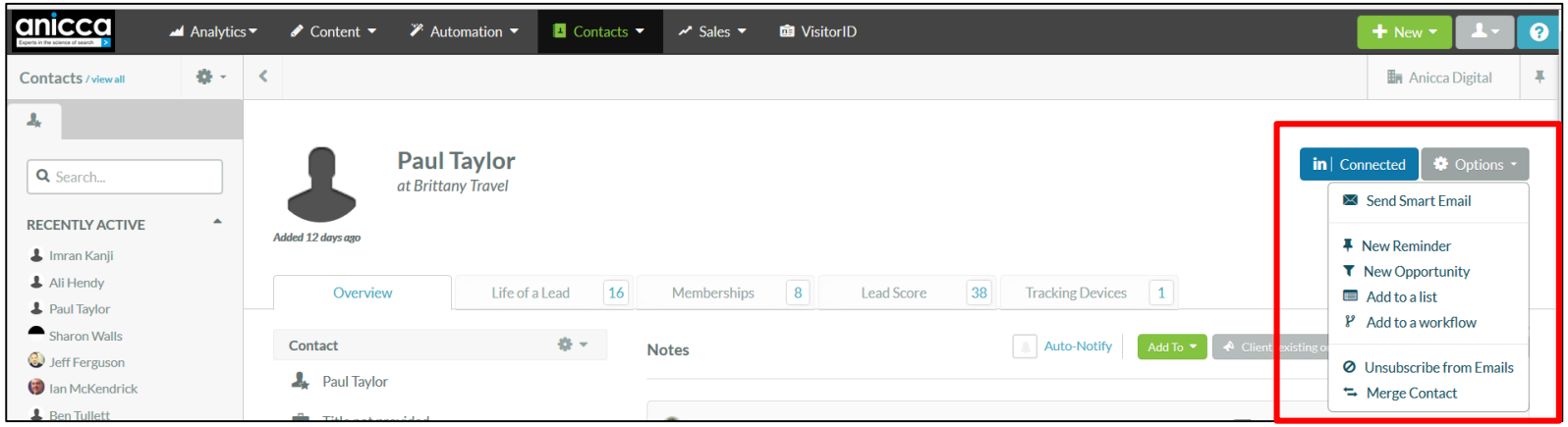
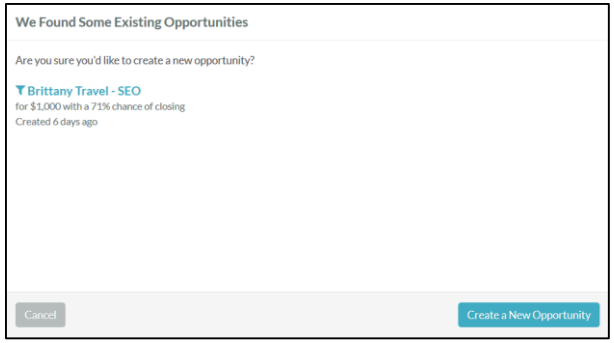
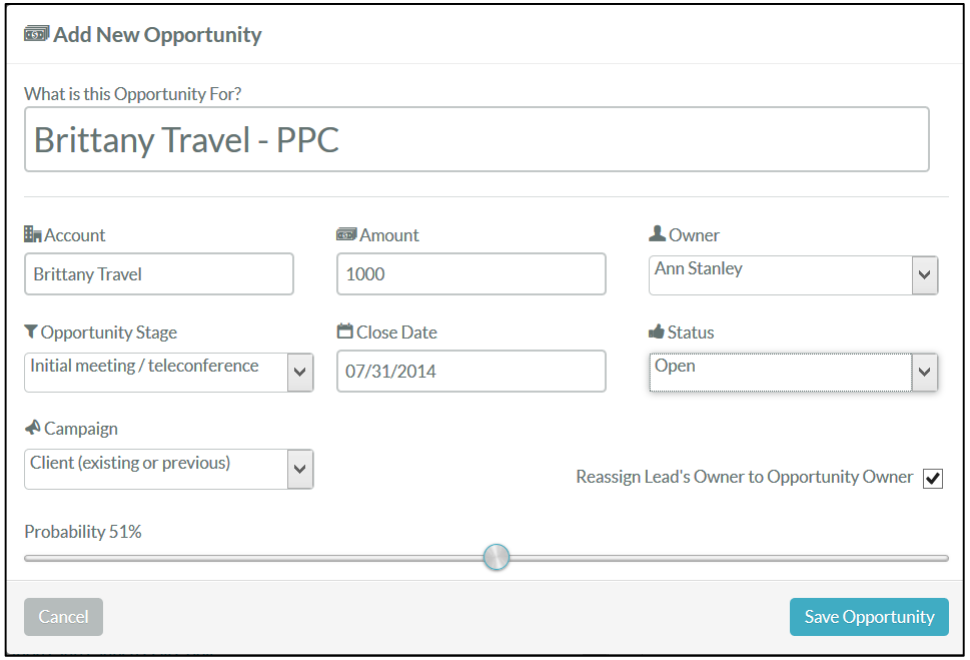
Viewing the leads



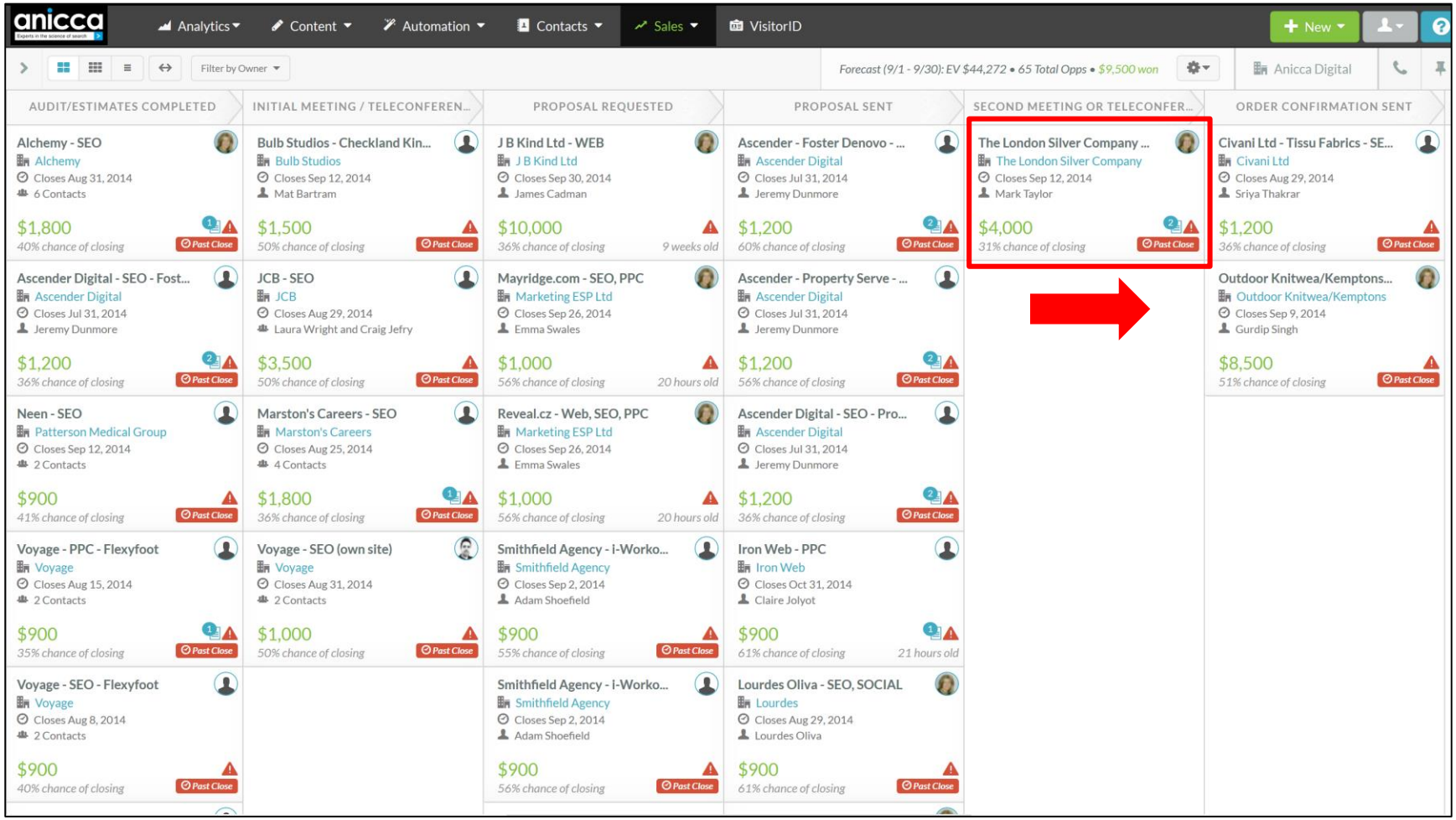
Creating a sales opportunity







Opportunity pipeline

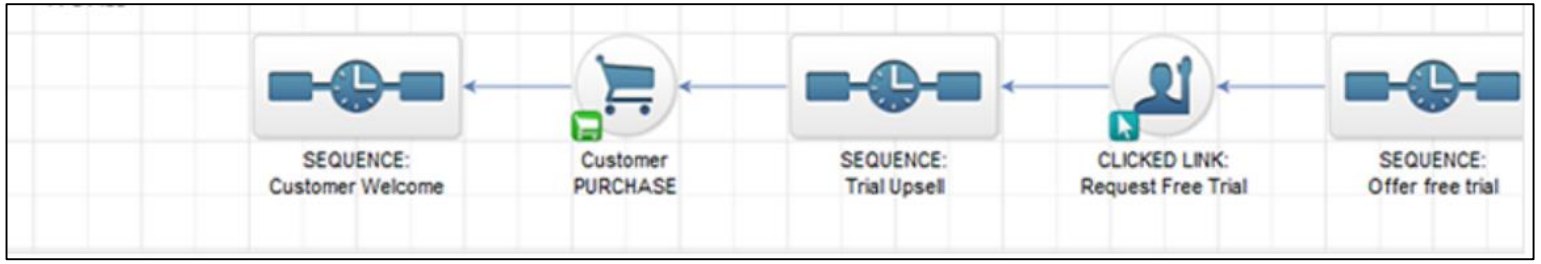


Automated or drip campaigns

Automated or drip campaigns

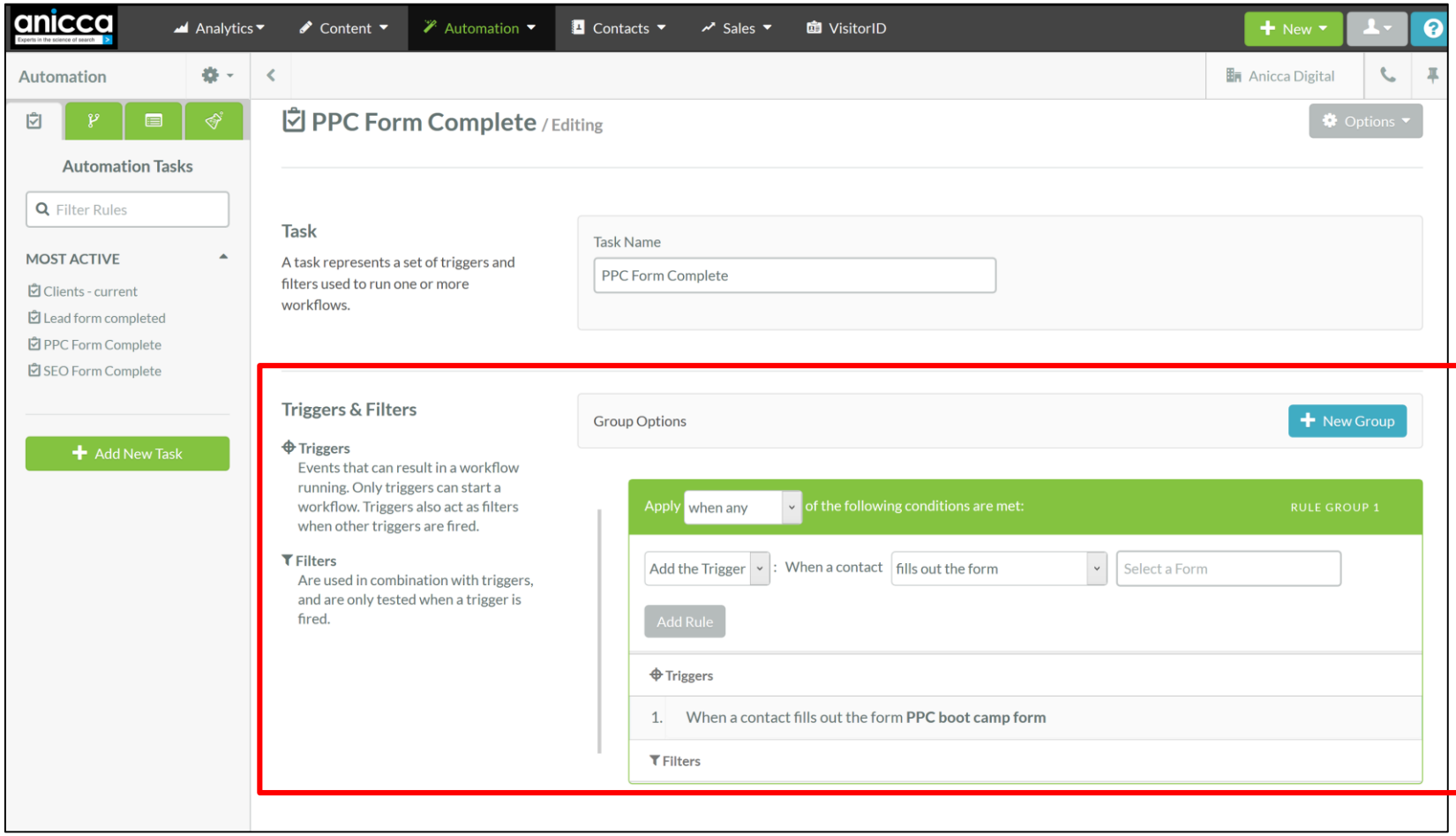
Problem	Common Solutions	MAS solution
• Ability to automate email responses to campaigns • Drip campaigns to assist in content marketing • Ability to follow-up shopping cart abandonment • Cross-sell spares and other products at timed intervals • Send annual or date triggered emails • Others as required	• Some email broadcasting systems have automated or triggered emails • Specialist software for shopping cart abandonment	• MAS software allows complex workflows based on filters and triggers • Workflow or task can happen immediately or be scheduled with a delay • Can be used purely for internal processes or as part of external communications

Planning a drip or automated email campaign

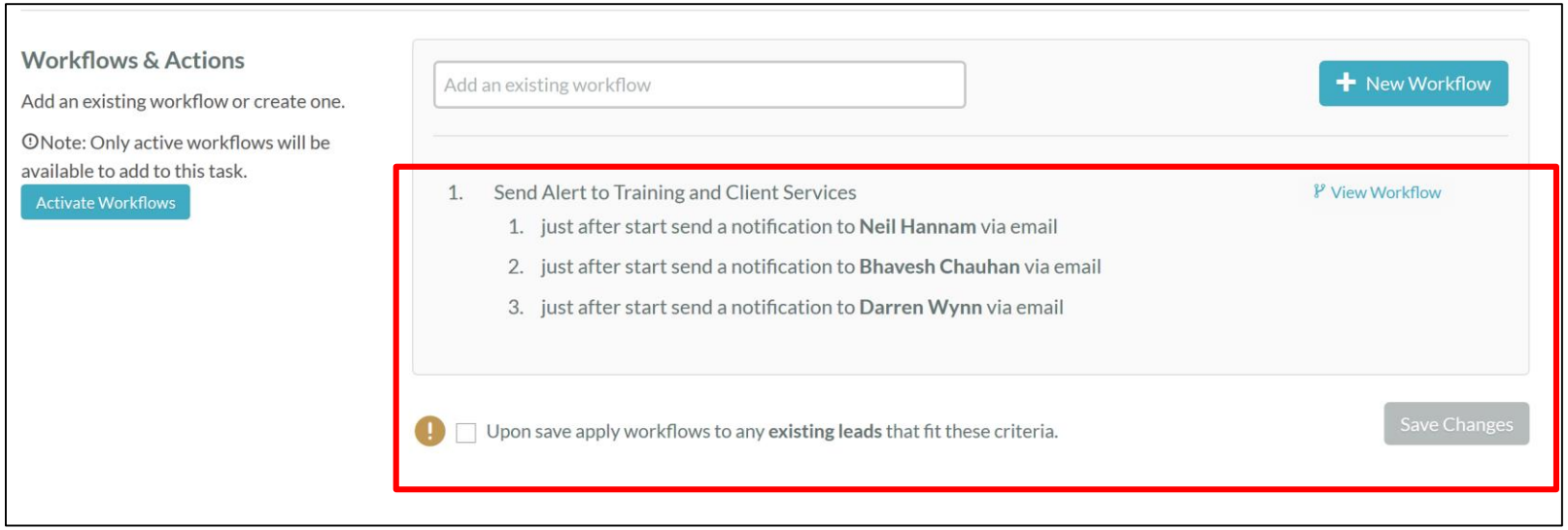


1. Requires a trigger or filter – to select segment
2. Followed by a task or workflow

Filter – visitor complete a form



Workflow – email staff



Examples of automated workflows or tasks

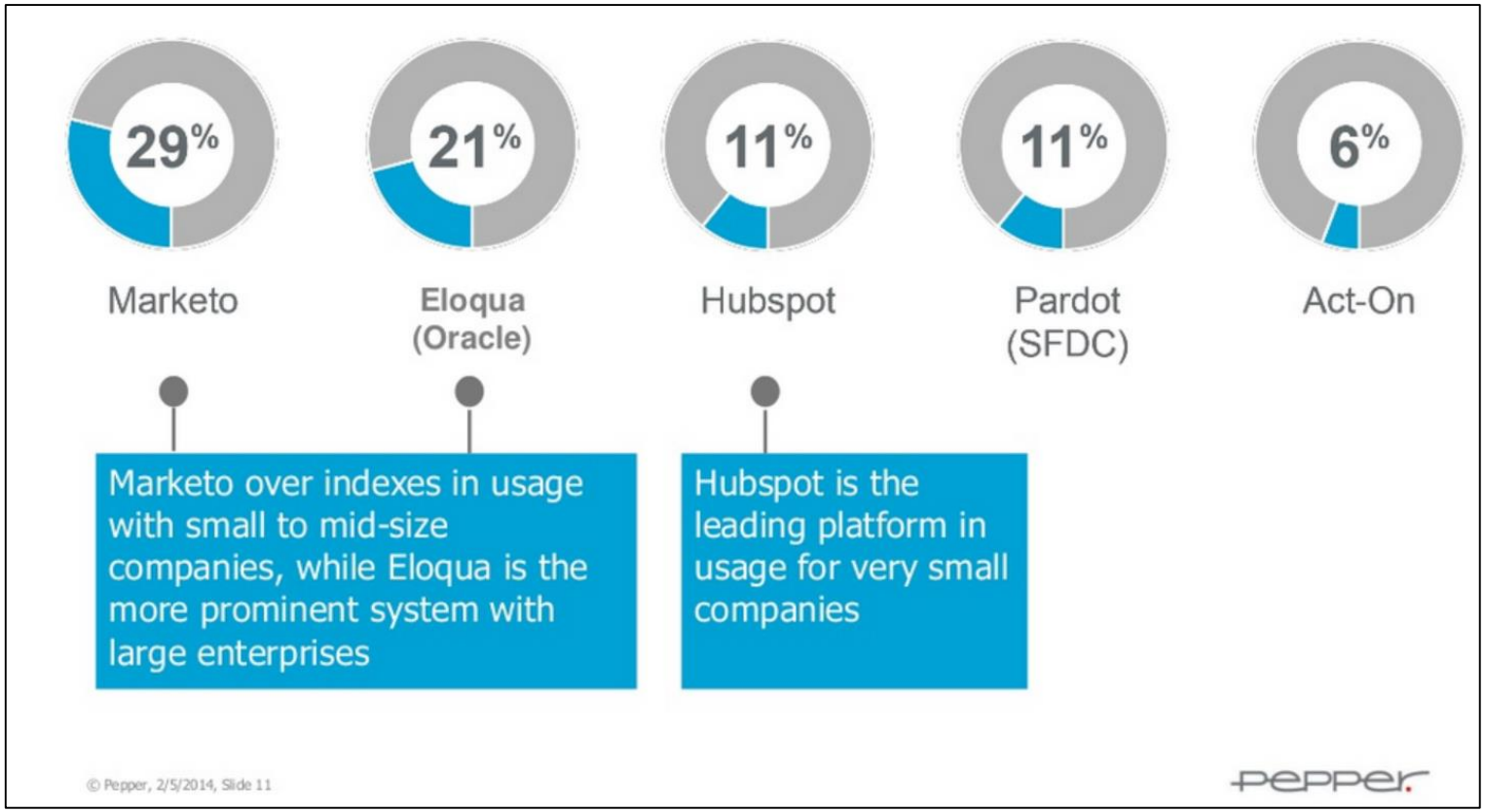
- **Internal**
- Visitor completes form or goes to a specific page – alert staff by email
- Customer reads content on a specific subject – change preferences or interest fields
- Lead score reaches specific number then alert staff and change status to "hot lead"

•External

- Visitor completes form or sale and receives email requesting a Review or social share
- Visitor goes to cart but does not complete sale – customer sent voucher or offer to encourage sale
- Drip-feed blog content based on time and areas of interest
- Customer sent reminder to purchase maintenance or support contract (or other cross-sales)
- Send birthday or other time-triggered emails

Choosing a MAS Supplier

Most popular systems



How much does it cost?

Vendor	Pricing/ Month	Maximum # of Database Contacts	Notes/Additional Fees
Act-On Software	$500 $700 $900	2,500 5,000 10,000	Pricing based on active database contacts. Unlimited emailings available for all pricing plans. Customized pricing for marketers with larger active contact databases
eTrigue	Ranges from $1,000/month to $3,500/ month	Ranges from 10,000 to 250,000	Pricing based on the number of database email records. Customized pricing available for enterprise customers with databases of more than 250,000 email addresses
HubSpot	$200 $800 $2,400	NA	Pricing levels based on number of database contacts. Services increase with each pricing tier. For example, $200/ month pricing includes hosting, blogging tools, and landing pages. $800/month tier adds CRM integration, custom lead scoring, and smart content
Marketo	$1,195	10,000	Reflects SMB pricing; enterprise pricing is customized
Oracle Eloqua	$2,000 $4,000	10,000 10,000	Pricing level based on number of users and database contacts. Customized enterprise pricing is available. Unlimited emailings included for all pricing plans
Pardot	$1,000 $2,000 $3,000	30,000 30,000 30,000	Features increase with each spending tier. Clients pay an additional $300/ month for each additional 30,000 contacts up to 500,000, and $200/month for each additional 30,000 contacts over 500,000
Salesfusion	$750 $1,500 $1,800	All plans include 30,000	All plans include unlimited emailings and users. Customized pricing available for more than 30,000 contacts based on business size and services used

NA=not available

Source: Third Door Media

<£250/month:
- InfusionSoft
- Anicca MAS

£250 - £1000/month:
- Act-on
- Salesfusion
- Hubspot (lite versions)

£1000+
- Marketo
- Pardot
- eTrigue
- Eloqua

Alternative pricing info at : http://blog.capterra.com/2014-marketing-automation-software-pricing-guide/

How Anicca can help you?

- **In-house sales and marketing teams**
- Rental of MAS software (£200/month)
- Training courses and materials

Other agencies

- Refer you to our MAS supplier – which only sells software via agencies
- Training courses and materials
- Happy to partner with international agencies wanting to sell in the UK market

Useful resources

- https://library.hubspot.com/marketing-automation
- http://uk.marketo.com/reports/siriusview-marketing-automation-platforms-2014/Forrester
- http://www.eloqua.com/content/dam/eloqua/Downloads/whitepapers/Forrester-Wave-L2R-Platform-Vendors-Q1-2014.pdf
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Thank You!

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