



# MARKETING AUTOMATION IN 12 KEY STEPS

An introduction to Marketing Automation.  
How to ensure you deliver the right content  
to your target audience at the right time.



# 1 INTRODUCTION

Background, overview and the different stages, explained step by step. Each step is accompanied by examples to ensure the outline material is completely understood.

# 2 INTERMEDIATE

For someone who is already familiar with the subject, this paper will develop and enhance your knowledge.

# 3 ADVANCED

You are an expert in this subject so we are going to elaborate fully the concepts behind Marketing Automation, its technical aspects to show how it all works together.

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## SO WHAT IS MARKETING AUTOMATION?

Marketing Automation allows you to integrate all of your digital marketing activity.

You have a dashboard, almost like a fully-fledged control tower, enabling you to perform:



### segmentation

Attract new visitors, collect personal data and profile them



### nurture

Offer relevant content at the right time to drive interested visitors to your website



### engage

Develop loyalty with your visitors and turn them into clients.



**1** You are in the driving seat of a software system which logs events and actions, sends out emails, segments, automates campaigns, assigns points for specific visitor behaviour and puts you in complete control of your digital marketing strategy.

**2** Abide by the rules of e-marketing to avoid unnecessarily spamming your contacts.

**3** Remember - without email addresses, you have no chance of engaging with a contact. However, a visitor to your website who uses a static IP address, will also reveal the name of the company he or she works for. Identify their projects!

**4** Your email database may be fed by your CRM system as well as real life marketing such as showcase events, conferences etc.

**5** Capture new prospect data: when a new prospect visits your landing pages, it is a good idea to offer 'rich content' as an incentive in exchange for an email address. This could take the form of a white paper, a user guide, a voucher, a free trial, a demonstration, a Q&A session or a health check.

**6** These landing pages may be launched on the back of a paid search engine marketing campaign, a call to action on your website or from social media channels.

**7** Segment visitors by personal profile, demographics, or by the stage they have reached in their buying cycle.

**8** As you get to know them better, you will be able to create multichannel campaigns in advance in order to enhance the work flow script of 'email address + landing page + content'.

**9** Visitor response will speed up or slow down these scripts. Avoid spam.

**10** Every time your website contact interacts, he or she is assigned points which will route the contact to the sales team once a predetermined total is reached.

**11** The reports generated by the system are immediately available for both marketing and sales teams.

**12** The process is almost completely automated and just relies on you continually adjusting it.

# HOW TO START

## ATTRACTING VISITORS



Attracting visitors to the site



Follow / track IP addresses

## FUELLING



Create and display targeted content



LEAD

## INCREASING THE VALUE OF THE DATABASE



Generate real-time alerts  
Integrate with your CRM system  
Generate reports automatically

## IDENTIFYING AND SCORING



The prospect identifies him/herself



Segment prospects



Qualify prospects

Now it's time to go into the detail of our presentation:

- How to do it?
- Hints and tips
- A brief conclusion

# 1 SOFTWARE SUITE FOR MARKETING AUTOMATION

You are in the driving seat of a software system which logs every event and action, automates campaigns, sends out emails, segments, assigns points and puts you in complete control of your digital marketing strategy.

As the name suggests, Marketing Automation requires automation. It is controlled by a software dashboard, that is your 'control tower'. The dashboard learns rapidly but nonetheless requires some expertise to get the most from it.

Tracking is carried out by a code which is automatically added to your emails but needs to be manually added to all website pages just as you would with web analytics tracking codes.

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## PRICES

*Webmecanik has one of the most competitive offerings in the market with packages starting at:*

### **400 EUROS/MONTH**

*This includes technical support to configure the system.*

## AS A MINIMUM THE PACKAGE INCLUDES:

- ▶ The dashboard
- ▶ Advanced report generator
- ▶ Real-time visitor tracking
- ▶ A complete suite of marketing tools.
- ▶ Email creation
- ▶ Campaign building including simple and complex scripts.
- ▶ Precise segmentation based upon multi-layered criteria. The software system is able to integrate with other application suites such as CRM and social media... which is generally managed through an API (application program interface).

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## GETTING TO GRIPS WITH THE SYSTEM:

*Allow 2-3 hours to acquire a basic understanding. Afterwards, allow around 15-20 hours to develop your first successful project. Don't be afraid to ask for help.*

# 1 SOFTWARE SUITE EXEMPLE CAMPAIGN

Take a look at this campaign using a sponsored link:

1. A web page to capture an email address in return for a white paper.
2. A 'thank you' email generated immediately by an auto-responder.
3. 'Prospect' segmentation.
4. Scoring: Score 4 points for downloading a PDF.
5. Three days after the first interaction, generate an automatic email which offers a more detailed technical overview in return for the target's postcode.
6. If the email is unopened, subtract 4 points, remove the target from the campaign and adjust his/her segmentation tag to 'cold prospect'.
7. If the email is opened, add 2 points; if there is a download, add 4 points; if the prospect remains on the website for longer than 5 minutes and browses 3 pages, add 5 points.
8. If the postcode is identified, allocate the prospect to an account manager, Mr. X.
9. Thirty days later, send out the first market survey.
10. If the prospect opens the email and clicks on the link, add 4 points. Tag the prospect as 'qualified prospect'; on the landing page offer a proposal to address his/her potential requirements.
11. When the prospect reaches 20 points it is time to add him or her to the CRM system and so on. It might be better to start simply with scripts involving one or two emails.



## 2 ALWAYS BE ETHICAL, BECAUSE YOU ARE INTRUDING

Always be reasonable and cautious when you make use of any personal navigation data that you collect.

You must include a specific cookie policy statement to your legal terms and conditions explaining why you add a cookie to a prospect's web browser. The Editor function will assist you in preparing this legal statement.

Your website designer will be able to help when you need to create a precise paragraph of legalese. Any abuse will be rapidly picked up.

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### PROPOSITION:

*For a few hundred euros, all the legal statements on your website can be proofread.*

## 3 NO EMAIL ADDRESS, NO CONTACT ENGAGEMENT

A visitor to your website who uses a static IP address will also reveal the name of the company he or she works for. Identify their projects!

A static IP address offers the digital marketer the same opportunity as a landline phone number offers the telemarketer.

If, when you start out, you have only a small number of email addresses, tracking the names of companies that visit your website will allow you to employ more successful tactics such as 'cold-calling a warm prospect' or getting an account manager to call the buying department of a company which has recently surfed a few pages of your website.

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### RECOMMENDATIONS:

*Never buy email lists. Rent them. Generally speaking, the quality of B2B contact databases is very poor. We strongly advise against using them.*



# 4

## **BUILD UP YOUR EMAIL ADDRESS LIST IN THE FIRST INSTANCE WITH DATA FROM YOUR CRM SYSTEM**

CRM, Customer Relationship Management, is the best sales force automation tool you can use.

If your CRM system is not part of your marketing automation tool or connected via an application program interface (API), you can still start sending out emails by importing a list of target addresses from an Excel spreadsheet. If your company doesn't use a CRM system, you will have to resort to importing email addresses from your ERP (Enterprise Resource Planning system) or Outlook.

You can also get excellent data using 'non-digital' tactics such as showcase events, conferences, client meetings and professional trade association symposia. Make sure you update your software system with the information on any business cards you collect.

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### **HINTS AND TIPS:**

*Now is also a good time to gather up all those business cards which are gathering dust on the desks of the sales team. It's also a good idea to put in place a process of collecting and recording personal information after each and every business meeting or conference.*

# 5

## **EMAIL ADDRESS CAPTURE**

### **WHAT IS A LANDING PAGE?**

They come in different shapes and sizes:

- A simple landing page with one or two calls to action and a thank you page.
- A page with a number of thumbnails or a complete mini-website.
- A series of web pages complete with branching and qualifiers to categorise the web surfer as, for example, a private individual or a professional.
- An online sales transactions page.

How do you build them?

You can use an online web page creation tool, linked to your marketing automation software system or ask your web development agency to create them.

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### **N.B.**

*Each page or group of pages must be separate from the main website. They should be viewed as a mini-website and should not normally be linked to the company website to avoid distracting the visitor.*

# 5

## **BUILD UP YOUR EMAIL ADDRESS LIST**

### **WHITE PAPER, GUIDE, EBOOK:**

Known as ‘rich content’, these may be offered as an incentive to a website visitor who gives their email address in return for downloading the item.

Do not disappoint. A free trial, system demo, or a voucher are easy tactics to use. A Q&A session or a health check may also yield excellent results.

It is also worth mentioning the ability to download future plans and members-only areas where you may store premium quality material.

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#### **N.B.**

*Make sure you are quick to offer an initial incentive.  
Don't hesitate to outsource such content if you suddenly  
find yourself suffering from writer's block.*

# 6

## **LANDING PAGE**

### **HOW TO ENSURE VISITORS REACH THE LANDING PAGE?**

Certain pages may appear as a result of an AdWords pay-per-click campaign, a call to action from the website or a social media channel.

When executing paid search campaigns like this, as with social media postings, it is the norm to set up dedicated landing pages. This way, the website visitor is less likely to get lost within the site and is encouraged to focus on the pages' main call to action.

If each page of your website is tagged as a landing page, it may be difficult to stop your visitor from wandering about all over the site.

Anyone who talks about interaction on the website really means on-site traffic, and search engine optimisation (SEO). It may cost a great deal of money to employ the services of an SEO agency to improve your page ranking.

# 7

## SEGMENT THE VISITORS

### PROFILE YOUR VISITORS - THEY ARE YOUR FUTURE CUSTOMERS.

In order to make all marketing and sales activities successful, it is crucial to establish for each and every visitor their needs, challenges, irritations, potential success criteria, solutions, products and services, value to your portfolio and their geographic location.

A visitor becomes a 'persona' once he or she has been profiled. A simple spreadsheet with a single column for each of the criteria which you have noted will suffice.

### SEGMENTING BY PERSONA.

If you define a segment for each of your visitors, you will be able to catalogue them automatically and then run the appropriate reports against them.

It's important to deliver relevant content and messages to each of your personas: you wouldn't use the same language when speaking to a buyer as you would with a technician.

Ideally, you adapt written communication to be as appropriate as if the visitor were standing in front of you.

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#### EXAMPLE FROM OUR E-BOOK:

*Paul is a company director, aged 43, married with 2 children and living in Lyon. He is unsure how to make the best use of the internet in order to grow his business and disappointed that progress is so slow: he wonders if marketing automation could be the answer to his prayers.*

## 8 **BUILD A CAMPAIGN THEN A SCRIPT WITH EMAILS + LANDING PAGE + MESSAGING.**

As you get to know them, you begin to build development campaign which execute a script of email + landing page + content.

Now you have mastered the concepts, you are ready to pull them all together and make them sing.

First of all, develop the landing pages which will be used to support the messaging you have developed. Next, create your emails which you will find easier to write.

Start off with a project comprising of one or two scripts in order to improve your technique. Then, when you feel ready and able, go to the next step.

## 9 **DO IT BETTER AND CHEAPER WITH MARKETING AUTOMATION SOFTWARE.**

The scripts may speed up or slow down depending on user behaviour. Avoid spam.

After you have executed your first few scripts, you will begin to feel more and more comfortable. You will be able to add in some time parameters within the script.

Therefore, if your target doesn't open the email you have sent or doesn't click on the link, you can defer sending the next email in the script by several days or even weeks.

On the other hand, if your prospect browses several target pages of your website, the script may fire off an email within a few hours which delivers message content that is relevant to the pages he or she visited.

Your website visitor may think he or she has received a mass mailing but in reality he or she is the only one to be targeted.

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### **N.B.**

*Act smart and do not give away the fact that you know what content he or she has seen while surfing your site.*

# 10

## **AWARD POINTS FOR EACH ACTION PERFORMED BY YOUR WEBSITE VISITOR.**

Every time your website visitor interacts, they are awarded a number of points which will trigger an intervention by your sales team once he or she reaches a predefined total.

Even if you have relatively few visitors to your site, it is still impossible to track the events and actions of dozens of visitors.

Imagine the challenge if you have a hundred, thousands or millions of them! Scoring, that is, awarding points to different behaviour patterns adopted on the site, resolves this problem.

The software system must allow for allocating points at different stages: profiling, interaction and commitment.

It must also support a suite of actions within a script such as passing the visitor profile into a CRM system once he or she has been awarded a number of points which meets the benchmark predefined by the sales team.

# 11

## **REPORTS THAT ARE BENEFICIAL TO BOTH MARKETING AND SALES.**

If you have to build a business case to support having a marketing automation tool, start off by presenting the range of reports generated automatically for all identified visitors.

This will incentivise the sales account managers to get to know visitors to the company website. It will also give them courage and make them eager to call them on the phone.

The results of all marketing campaigns are carefully recorded by marketers. If the necessary technical infrastructure exists, they may even be able to quantify the marketing contribution directly as a part of overall sales results.

Every single parameter in the system is user-customisable including segmentation, behaviour pattern and personas. In short, you really cannot manage without this kind of system.

# 12

## IT IS COMPLETELY AUTOMATED OR ALMOST ;-)

Luckily there are some aspects that are not automated as that would be utopia.

But as you gain experience in using the system, you will become more confident in automating scripts which are complex and deliver real value.

The intuitive nature of the system ensures you quickly get up to speed with automating your marketing processes.

Check out these aspects during system testing:

- Ease of use.
- Functional design of the scripts.
- Intuitive nature of the report generator.
- External interface via API (application program interface).

# #

## CONCLUSION

After you have followed these 12 steps, you will be well equipped for success when using marketing automation for your digital marketing campaigns.

All that remains is to:

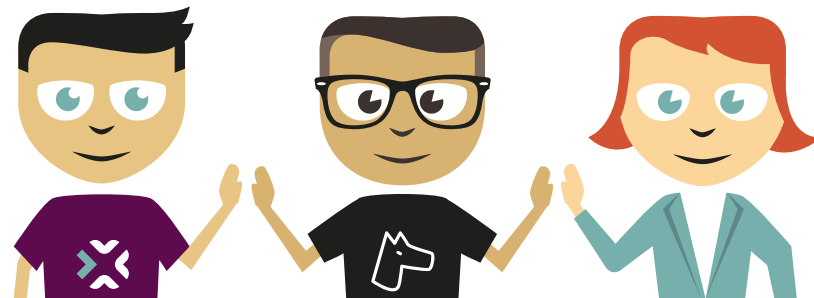
- Assemble a strong project team which includes members from senior management, marketing and sales. Ideally, the team will include technical support, quality assurance specialists and all those with a client facing role.
- Draw up an action plan with a budget which reflects the investment in both time and money.
- We strongly recommend that you ask for support to get off to a good start in order to become effective as soon as possible.

## ABOUT US

Since starting in 2006, Webmecanik has focused on segmenting and creating sales leads. Our research led us to conclude that no matter what digital strategy we employ, scarcely more than 1% of all visitors become clients. It is the “41% of website visitors who will become a customer one day, but not today” (Prestashop Survey) that inspired us to deliver Marketing Automation solutions to the marketplace. We now deploy Automation – the crème de la crème solution integrated with your current applications – at the lower price on the market, with a close partnership with the world’s best agencies.

## SOUNDS GREAT, BUT WHAT DOES AUTOMATION DO ?

Webmecanik Automation provides detailed lead tracking along with powerful lead nurturing tools to help organise your marketing campaigns. Our Automation software completely automates processes such as finding and nurturing leads through landing pages (and forms, games, surveys, interactive videos), sending emails, tracking social media; and integrates with your CRM and other systems.



### SHOW A RETURN ON INVESTMENT

Track the path of your website visitor. Make strategic decisions based on the content of your database, which is constantly updated in real-time.



### CREATE A DATABASE AND GENERATE SALES OPPORTUNITIES

Identify sales opportunities by tracking behaviour patterns. Nurture your online visitors with multichannel content as they navigate their way around your website.



### PAY FOR WHAT YOU USE

There is no limit to the number of emails you can send out. Your licence includes free technical support and you'll have access to a shared online workspace.

## REMAIN ALERT

You say you don't know how your clients and projects are going to evolve? Guess what, neither do we! To help you, we maintain a permanent community forum which is open for all kinds of input.

Our systems are driven by intuitive graphical user interfaces. Your investment is protected for the future through our Open Source software port. We are continually improving the integration between our systems and your CRM and ERP systems.









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