



Starting with **MARKETING AUTOMATION**



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9 POINTS TO INSTALL MARKETING AUTOMATION SOFTWARE CORRECTLY.

“7% of companies believe that the impact of traditional marketing techniques on their strategy has decreased.”

Source : markentive.fr

A certain number of steps must be respected. Then regular improvements will have to be planned. That said, after choosing your Marketing Automation platform and signing your contract, we recommend you do not neglect the phase where your Marketing Automation software is set up.

You may have already performed these tasks during your test period, but in any case this guide will be of great help.



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1 BASIC SOFTWARE SETTINGS

- 1.** Add your tracking code to each of the website pages you wish to analyse (don't forget the Blogsite).

Usually this code sits at the bottom of the page which is common across all of the site but if you have satellite landing pages across other web domains, make sure that these are included in the tracking process. Don't forget any other domain and sub-domain names you may own. You will also want to track them from your Marketing Automation platform.



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1 BASIC SOFTWARE SETTINGS

- 2.** Set your scoring criteria for your contact profiles, their activity and their engagement. This will help your sales and marketing teams to filter the prospects or clients that can be identified as the most promising leads.

Ideally, you will have built your scoring criteria during a workshop with your teams and/or agency, before launching your Marketing Automation tool. However, we think this activity can be carried out after implementing Marketing Automation, depending on the results you expect from your tool.



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1 BASIC SOFTWARE SETTINGS

3. Configure the DNS of the domain name your Marketing Automation platform uses to create progressive profiling forms, host your documents and publish landing pages online so that you hide the fact you are using a third party solution. You'll need help from your IT expert or webmaster to do this. Follow the same instructions to optimise your email deliverability rate.



2 MANAGE YOUR DATABASE

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To start off, if you have a CRM tool, set it to integrate with your new Marketing Automation software. Custom API integration may be needed.

Then create your personalised contact and/or account fields in your Marketing Automation tool. You'll then have to link them to existing fields in your CRM according to what has already been created.



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2 MANAGE YOUR DATABASE

If your contacts are not in a CRM tool (or if all of them are not), import your contact lists from a CSV file, associate default fields and personalised fields. It is recommended to add these contacts to a dedicated list.

Also import all unsubscribed and bounced emails from any other platforms to prevent addressing emails by accident to someone who has already unsubscribed from your newsletters. You want to avoid getting complaints about spam.

Start creating your first segments based on socio-demographic criteria, such as the region and position in the company, that you wish to target through email campaigns. Add these segmented contacts to dedicated lists.



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3 ADD PROSPECT- GENERATING CONTENT

Import your downloadable documents (business case, white book, etc.). Your Marketing Automation platform will host this content to connect them to your emails, landing pages, etc.

Starting with this step is important as you'll need all of this content at the ready when you come to implement your campaign.



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4 PREPARE YOUR EMAIL TEMPLATES

Add the emails that you have already prepared and which will act as autoresponders for your drip or nurturing campaigns.

Take time to create and save empty canvasses that can be used as models later on. You will be able to rapidly duplicate and create a specific version adapted to the subject of your email.



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5 CHOOSE THE SETTINGS FOR YOUR FORMS

It's up to you whether you use your Marketing Automation's form editor (that often has excellent features) or if you link with other forms already set up on your pages.

Add or update every form located on your web sites. Don't forget to activate autoresponders before publishing them online.



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6 CREATE YOUR LANDING PAGES

Most Marketing Automation software packages provide a drag and drop landing page editor. It's easy and fast to publish your page without having to request the services of a graphic artist or developer.

Don't forget to update the forms already in your landing pages.



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7 **BUILD YOUR NUTURING CAMPAIGNS**

This is the most important step in Marketing Automation. It is where you manage the leads and contacts generated by your Marketing Automation tool. There are a thousand things to do, but let's start with the basics.

Build your campaigns to nurture your relationship with your contacts.

We recommend designing them in advance by using a flowchart. This will highlight the campaign process, list the documents needed for the campaigns and provide the triggers to qualify or disqualify a campaign contact.



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7 BUILD YOUR NUTURING CAMPAIGNS

Create a schedule and your campaign will beat to a rhythm that is in line with the best marketing practices.

AN EXAMPLE:

A campaign of 3 to 5 contacts with your prospect (every 2 to 5 days) after the person filled out a form and meets the qualifications of the campaign. To change status, it could be that he or she is disqualified after the campaign.



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9 CONFIGURE YOUR SEGMENTATION AND ALERTS

Create segments based on a specific activity or engagement and set associated alerts to notify your teams when a contact is behaving in a way that needs notification.

Use these segments to change list contacts so that they may evolve over different nurturing campaigns.



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INTEGRATE YOUR TOOL WITH OTHER TECHNOLOGY

Make an inventory of the tools you are currently using, like webinar tools, that also work with your new Marketing Automation platform.

Connect the ones that require no specific development.

Also take a look at what you can connect using your software API. We will probably be able to connect other third party applications.



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TA-DA! YOU DID IT!

You have rapidly performed the most important first steps in using your Marketing Automation software as efficiently as possible.

If you have human resources available (2 to 3 people), you will be able to set everything up within the first 30 days. If you are alone in this Marketing Automation project (plus everything else on your plate), it will take around 60 days.

In any case, this guide will lay down the road markers that will help you concentrate on what is a priority and what is not.

Don't forget that your digital marketing agency is also capable of doing this in addition to managing your websites, social networking and generating traffic.



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