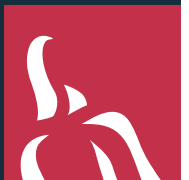


Marketing Automation – an Introduction

Achieving better marketing success with digital transformation





**A hands-on guide
for a better
understanding
and implementing
marketing
automation in
your organization.**

Content

	Introduction	4
1	Marketing 4.0 – Digitalization of the customer relationship	5
2	Outbound Marketing ist Out	6
	The customer cycle is not linear	7
3	What's Marketing Automation?	8
4	Why you shouldn't do without it	9
	Create concrete incentives	10
5	Three steps to your goal	11
	Step 1: Define your buyer personas	12
	Step 2: Define the content for the customer journey	14
	Step 3: Develop a marketing automation strategy	15
6	Ideas for more marketing success	16
	1. Deliver newsletters with dynamic content	17
	2. Automate event invitations	17
	3. Automate lead nurturing	18
	4. Increase ROI with retargeting campaigns	19
7	Measuring success	20
	Contact Chili Digital AG	21

Introduction

In the past, a lot of time was spent writing and publishing various emails, newsletters and posts. The aim was, reaching as many leads as possible.

Today, it's all much easier. The magic formula is: **marketing automation**. Marketing automation software like HubSpot allows you to leverage customer data and launch campaigns to deliver content to customers and guide them through the conversion funnel. The marketing automation solution integrates with other marketing software and CRM solutions to bring marketing and sales teams together and streamline the customer journey.

In this guide, you'll learn all about marketing automation and how you can use it to significantly simplify and improve your marketing operations.

Let's go!

Marketing 4.0 – Digitalization of the customer relationship

Customer Relationship Management in Transition

It is now obvious that the way we communicate and design sales processes has changed. There are many reasons for this:

- Social Structures
- Technological development
- Structuring the work

All this leads to a lifestyle that is characterized by mobility and communication, everywhere and at all times.

In customer relationship management, the changes are visible, through the constant multiplication of the communication channels used, the speed and, above all, the reversal role between buyer and seller.

The seller was the master of the purchase decision process. He excelled with the information about products and solutions and made the prize. The consumer, for his part, was rather poorly informed and had to trust the seller almost „blindly“. This situation has shifted markedly. Today, there is an almost endless wealth of information and consumers are well informed.

*Over 65% of consumers have
already made up their minds before
confiding in a potential supplier.*

”

This has far-reaching consequences for marketing: It must be possible to attract attention in the initial phase of the buying process, otherwise the train has left.

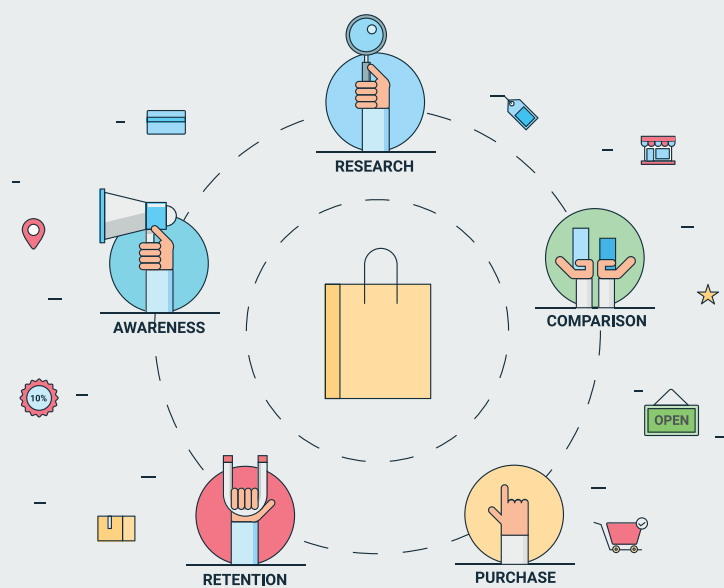
Outbound Marketing is Out



The modern consumer is mature and listens less and less to advertising slogans. A certain immunity is spreading. What consumers are looking for, however, is **assistance** at the various stages of the buying cycle. Life has become complicated, and so more and more areas of life are affected, in which consumers are looking for support. An ideal basis for new business ideas.

Inbound marketing is the basis for modern marketing. The goal is to support the consumer with **valuable content** in the respective phases of the customer cycle and thus gain trust and thus create the basis for a sustainable customer relationship.

The customer cycle is not linear



The customer doesn't always go through the same process at the end of which the purchase is completed. The **decision-making process** is **individual**. While one buyer makes quick and emotional decisions, the other circles around a product for months, researching, reading, watching videos, and discussing with other consumers.

Since the decision-making processes that lead to the purchase of a product or the booking of a service are not reliably traceable, it is now important to provide relevant information at the crucial touchpoints.

*The magic formula is
Inbound marketing.*

What's Marketing Automation?

The term marketing automation stands for marketing activities that are automatically implemented with the help of appropriate software. This not only saves a lot of time, effort and money, but also works much **more efficiently**.

However, marketing automation is far from a magic bullet that allows you to sit back and watch the results come naturally.

But let's start at the beginning...

Digitalization is forcing companies to make processes more efficient and reduce costs in order to remain competitive. Nowadays, the customer is in a position of power due to access to any information. They also want relevant and personalized interactions with companies.

Marketing automation is therefore an important building block in the digital marketing strategy. Whether it's a personal birthday greeting, an individual discount code or a helpful eBook – marketing automation makes it possible to interact with potential customers in a very precise and at the same time personal way and to provide the right content at the right time.

The foundation is formed by the individual needs of the target customers or **buyer personas**, which should be addressed with the right content and on the right channels at the right time.

Classic marketing automation stands for offering high-quality, useful and, above all, personalized content-based information from your CRM, lead management system and web analytics. As an e-mail, eBook, or blog post, they serve to accompany the (potential) customer on his or her **customer journey**. Marketing automation also includes the individual reactivation of existing contacts or the complete handling of invitation processes.

Marketing automation is a software category that automates, unifies, and makes marketing tasks and workflows measurable.

*This allows companies to increase their operational **efficiency** and their **revenue growth**.*

Why you shouldn't miss it out

The use of marketing automation primarily serves to **save time** and **increase efficiency** and enables modern business processes, which are crucial for any modern marketing department.

For B2B companies, this includes highly personalized **lead nurturing** and **lead scoring**, as well as **lead lifetime management**. For B2C companies, the focus is on cross-selling, upselling, and customer loyalty.

Marketing automation is much more than automating processes. It helps marketing leaders identify marketing programs that work and identify metrics to present the revenue impact at the management level.

Seven reasons why you should use marketing automation:

- 1** You generate leads but ignore those that aren't ready to buy.
- 2** You send all your emails to the same contact list.
- 3** You're gathering valuable information about your leads, but you're not using it for segmentation.
- 4** You want to get more customers from your leads through lead nurturing.
- 5** You want to make profitable use of digitalization.
- 6** You want to measure your marketing success.
- 7** You want to save time.



Create added value and build trust with an individual approach.

Create specific incentives

Depending on the marketing automation software, the **possible applications** are wide-ranging. The most common features are:

- A built-in email marketing tool that can be used to send personalized emails (e.g., follow-up) to actual and potential customers and analyse their performance.
- Registration forms, which can be placed on landing pages or other websites, and which are used to generate leads and store them in the database.
- Lead nurturing workflows in which relevant messages are sent over a period of time based on the behaviour of potential customers and predefined campaign steps.
- Web analytics tools used to analyse specific website visits from potential customers and identify preferences with the ability to report to sales representatives.
- Marketing databases, which provide a comprehensive perspective of all marketing interactions between individuals and the company, such as website visits, email clicks, etc.

In order to be able to perform these tasks, it is worthwhile to rely on **professional automation software** that covers a wide range of functions.



Three steps to your goal



Nowadays, companies must be able to capture the ***attention of potential customers*** in the early stages of the buying process and support them with valuable content at the respective stages of the customer cycle, thereby gaining trust and thus creating the basis for a sustainable customer relationship.

With marketing automation, you have a practical tool at your disposal to carry out exactly such ***dialogue processes*** in an efficient way.

Step 1

Define your buyer personas

Before you even think about any automation options, it's important to think about who you want to target with your content in the first place. It is important to define how a **potential customer** looks like, what challenges he is struggling with and what his or her needs are. This way, you can better tailor your content to the specific needs, behaviours, and interests of your **buyer persona**.



Persona
Name

Background:

- Basic details about the role of the persona
- Important statement about the company of the persona
- Relevant background information such as education and hobbies

Demography:

- Sex
- Age category
- Household income
- Urbanity (does the person live in an urban, rural or agglomerated area?)

Typical characteristics:

- Persona keywords
- Habits

Draw on existing demographic typologies. Share with others what you've learned about respondents' motivations.





Persona
Name

Goals:

- Primary goals of the persona
- Secondary goals of the persona

Challenges:

- Primary Challenges to the persona's success
- Secondary Challenges to the persona's success

How we help:

- How can we solve the problem of the persona?
- How can we help the persona achieve their goals?

Conduct interviews with your target audience to find out more about their goals and challenges.



Persona
Name

Citations:

- Use some quotes from the interviews that represent the persona well.
This makes it easier for your employees to understand the persona.

Common objections:

- Identify common objections that your persona will raise during the sales process.

Use quotes that show what your buyer persona is concerned about and what keeps them up at night. Such concrete examples help your sales immensely.



Persona
Name

Marketing message:

- How would you describe the solution for your persona?

Elevator Pitch:

- Describe your solution in a simple and consistent way so that everyone in your company understands it.

Help everyone on the team get an overview of how best to address this persona. Whether it's on the phone, on social networks or face-to-face, everyone should know how this persona wants to be addressed.

Last but not least, give your persona a **name** and add a real **photo**. The more real the person becomes to you, the better.

Step **2**

Define the content for the customer journey

Once you've defined the buyer personas for your company, it's time to define **appropriate content** for each phase of the customer journey.

The customer journey or the customer cycle can be divided into different phases:

- **Attract:** In the recruitment phase, the consumer is looking for information that will help them understand their problem. Therefore, offer content that helps to identify the problem and show alternative solutions.
- **Convert:** Provide consumers with helpful and valuable information on the way to finding solutions, so-called „offers“, e.g. in the form of a free white paper or e-book, which help them solve their problems. In return, the visitor leaves their contact details, which allows you to generate leads.
- **Close:** After an initial approach phase, you are now on your way to winning customers from the leads generated. This is where marketing automation plays an important role in satisfying the individual needs of each lead and efficiently nurturing leads until the lead is ready to buy.
- **Delight:** Once you've won a new customer, that's when the real work begins. Try to strengthen customer loyalty and ensure that satisfied customers recommend your company to others.

Different channels and **content** are used in the individual phases, which are tailored precisely to the customer's needs.

Step **3**

Develop a marketing automation strategy

The strategy is about planning the *distribution* and *interaction* of content along the customer journey, measuring it with *lead scoring* and making it as interactive as possible with *workflows*. The following questions can help you develop a marketing automation strategy:

- Which marketing goals can be supported by marketing automation, and which cannot?
- How can more prospects be led into the sales funnel?
- Which triggers can be used sensibly? Where are the limits?
- How can automation better support customers and marketing teams?
- How should the success of automation be measured?

Start with *simple automation processes* to gain routine and quickly achieve initial improvements. Simple examples of this are pre- and post-sales emails, which alert users to abandoned shopping carts or a special discount. Reminder emails or personal messages, such as birthday wishes, are also easy to implement first steps. In general, all actions with a repetitive character are suitable for automation.

Observe and analyse your first implementations and check whether they actually bring the desired success. Use the analysis tools included in the marketing automation software to optimize your automation processes and continuously adapt your strategy. Define suitable content along the customer journey.

More ideas for marketing success



Whether it's a personal birthday greeting, a custom discount code or an informative eBook - marketing automation makes it possible to interact with potential customers in a very precise and at the same time personal way and to provide the right content at the right time.

Nowadays, it is becoming increasingly difficult for companies to be noticed in the mailbox of potential or existing customers. Despite this, a majority of marketers still rate email as a very important part of their

marketing strategy. That's why most companies still engage in classic email marketing, which involves sending unsegmented mass emails instead of **customer dialogue**.

The following four examples are intended to illustrate why you should move away from classic email marketing and opt for an **efficient marketing automation solution**.



1. Deliver newsletters with dynamic content

With marketing automation, e-mail newsletters become *dynamic, highly individualized information mailings*. Since the recipient's profile information is included in such newsletters, his or her interests can be considered exactly. This is how a personal approach works – coordinated on the level of familiarity of the recipient - *much more appealing* than an impersonal greeting.

In addition, it is possible to filter out which content the recipient has already seen and which he or she does not yet know.

2. Automate event invitations

Event invitations integrated with marketing automation go beyond just sending emails. If you are planning an event, participants fill out a form to register. This will automatically take them to a *list of participants* for your event. With automation software, the next steps such as appointment reminders, appointment confirmations, and last-minute reminders before the appointment can *be carried out automatically*. In these e-mails, the recipient can optionally change the date or make personal comments at any time by simply clicking on the corresponding link.

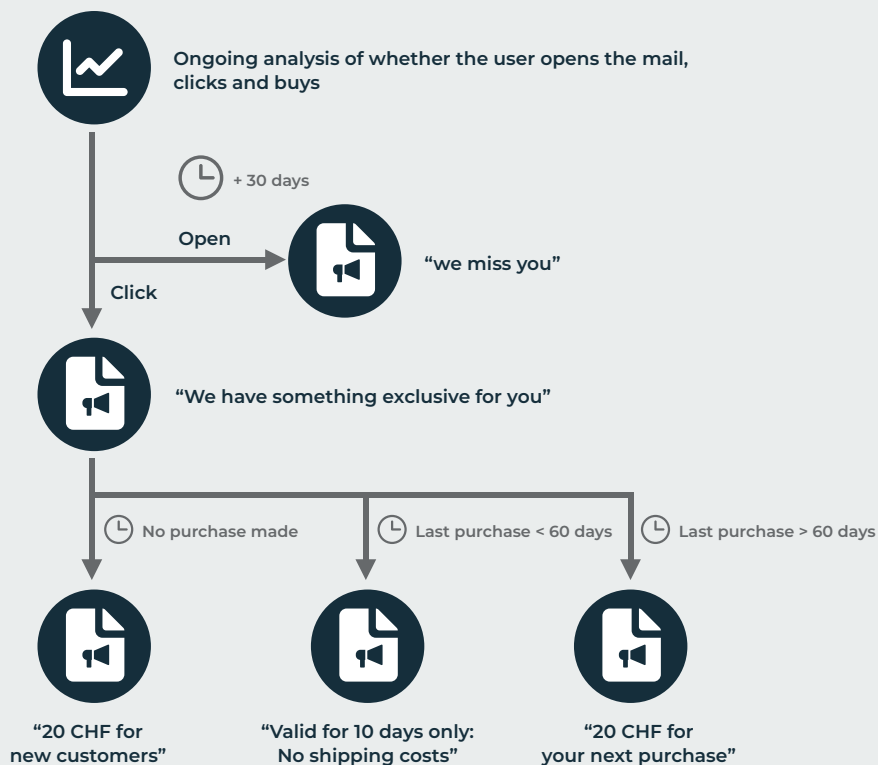




3. Automate lead nurturing

Lead nurturing includes all the measures that a company takes to address a prospect at the right time with **relevant information** in the form of free **eBooks, white papers, or videos**, appropriate to the respective stage of the customer journey in which the lead is currently located.

Lead nurturing can therefore be implemented excellently with marketing automation, in which (potential) customers receive information **in return for their email address**. As a result, companies not only gain valuable data, but at the same time can position themselves as experts in their field and win customers in the long term.





4. Increase ROI with retargeting campaigns

In classic retargeting, Internet users who have visited a certain website or clicked on a certain product are addressed with targeted advertisements. Through this form of personalized online advertising, advertisers hope to **increase the conversion** of their website. In order to comply with the inbound marketing approach, instead of switching of advertisements, the download of personalized, free offers in exchange for the email address in order to accompany the potential customer through the customer journey. These use cases are just a fraction of what is possible with marketing automation. Once you've decided on certain automation processes, it's important to choose the right tool and develop a clean strategy and then implement it.

Soon, you'll be reaping the benefits of automation.

Measuring success



The beauty of marketing automation is that the success of this communication can be measured well. Would you like to know how many people click on the link in a corresponding e-mail and who stays on the website and for how long? It's easy to find out. Also, how many users ultimately decide to buy.

Do you want to take off in terms of marketing? Rely on [marketing automation](#) – we support you!

Chili Digital AG

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