Powerful Marketing Automation Campaigns to Consider

MARCH 23, 2023

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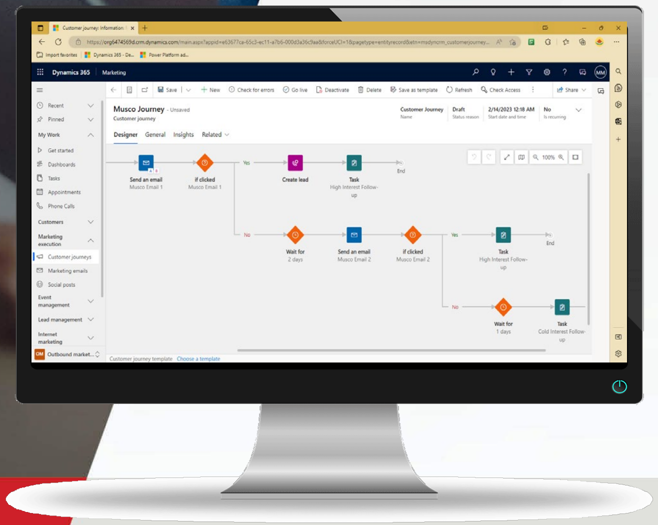

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- Microsoft Dynamics 365
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- Sage
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Presenter

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Agenda

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- What Is Marketing Automation?
- Automation 1: Lead Scoring
- Automation 2: Nurturing
- Automation 3: Gated Content
- Automation 4: Event Management
- Automation 5: Subscription Management
- Automation 6: Re-Engage Previous Customers

Marketing Automation

- Market Size 2022

$5.2 billion

- Market Size 2027

$9.5 billion

MartechMap an initiative by chiefmartec & MartechTribe

2022 Marketing Technology Landscape May 2022

visit martechmap.com to search, sort & filter

What Is Marketing Automation?

"Marketing automation is the technology that allows companies to centrally orchestrate and manage their interactions with customers."

Automation #1: Lead Scoring

- What is it?
  - Lead scoring is the process of assigning values to each lead you generate for the business
- What makes it effective?
  - Lead scoring allows you to score your leads based on a variety of attributes
  - Once it's set up, the system assigns the points without your involvement
- How to incorporate lead scoring
  - Set up scoring models based on your company's data from past leads

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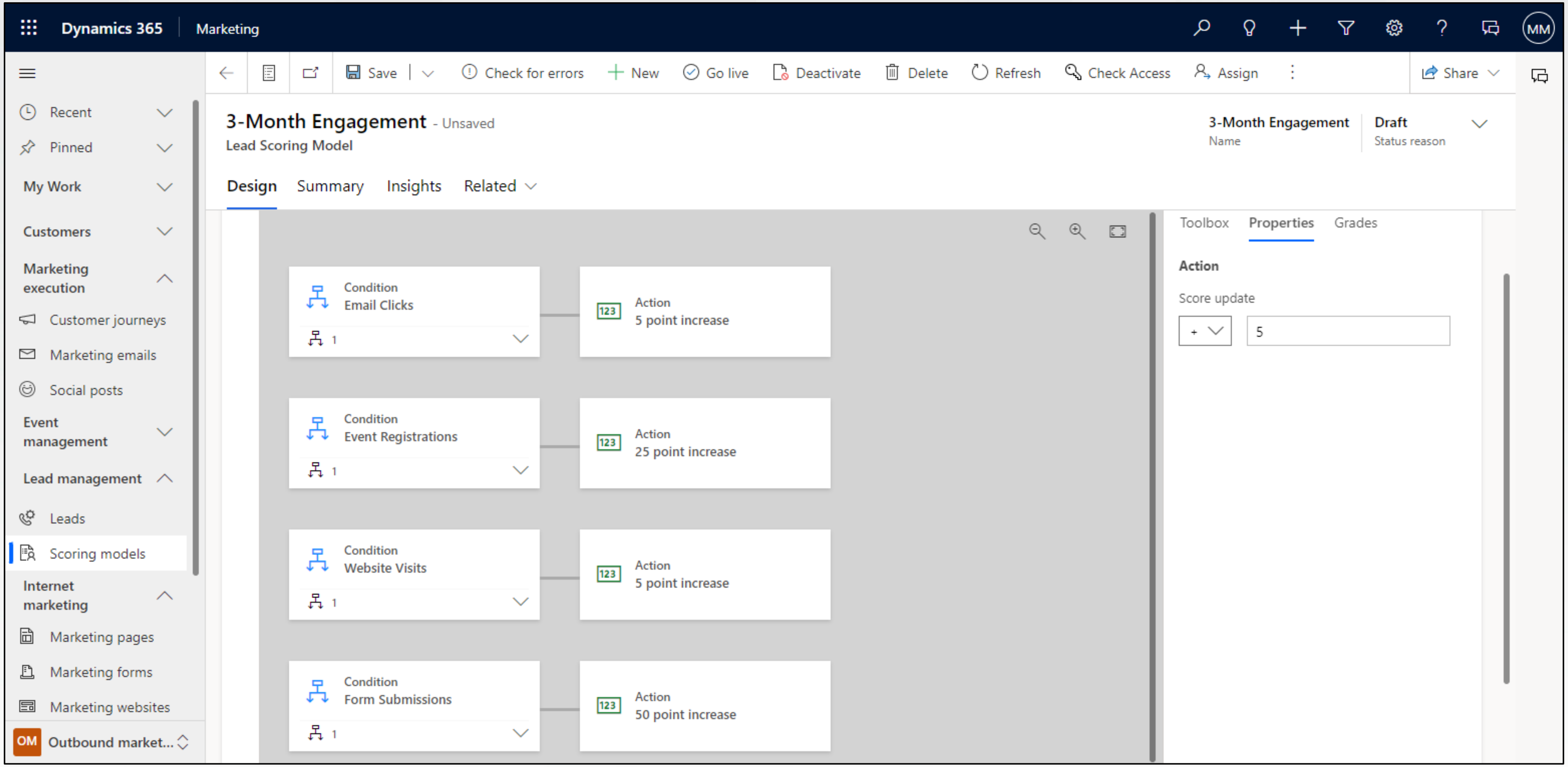
Lead Scoring Examples



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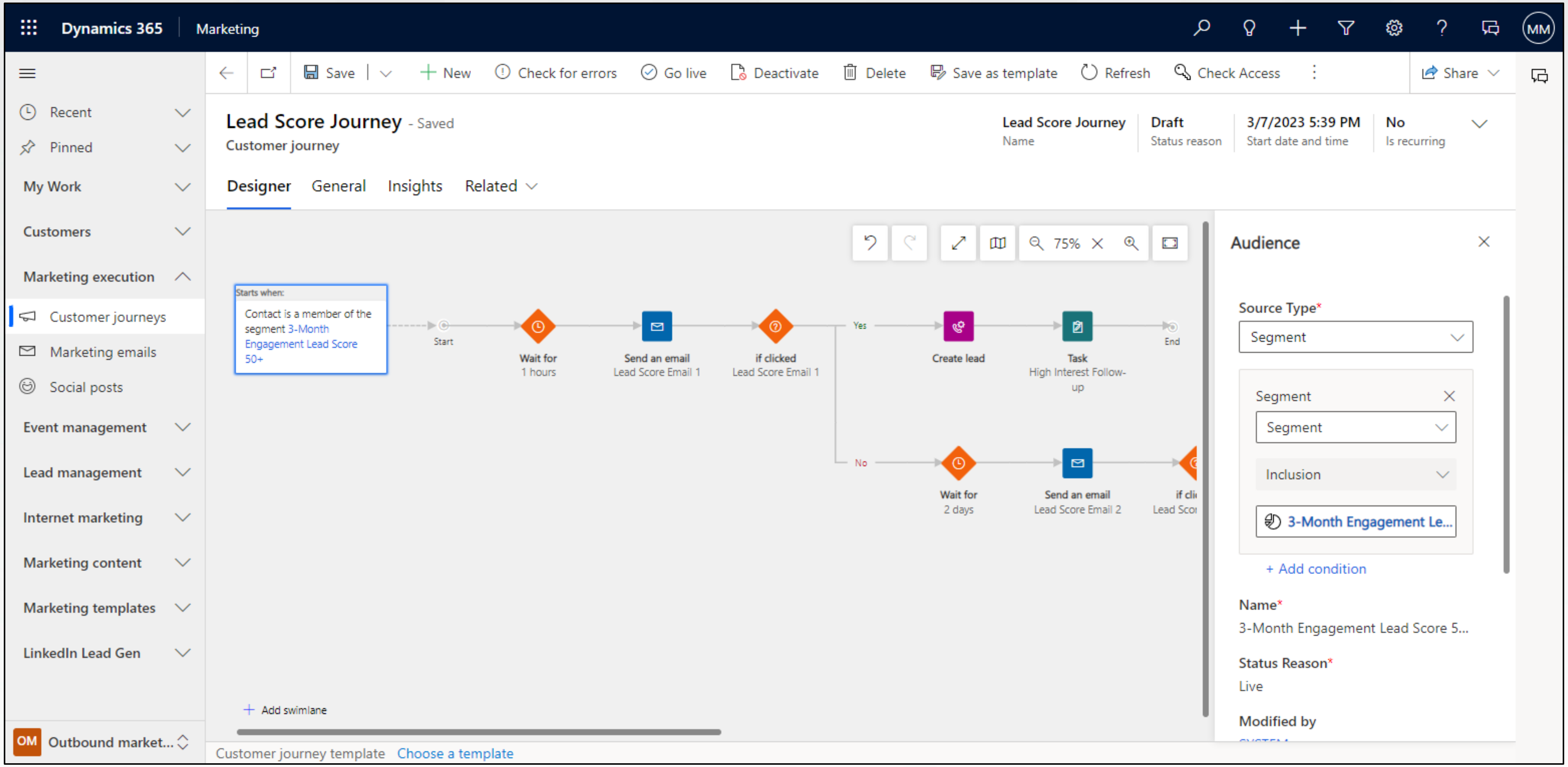
Lead Scoring Examples



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Automation #1: Lead Scoring

- Scoring leads based on a variety of attributes
- System assigns the points based on their engagement
- Set up scoring models based on your company's data from past leads
- Nurture those leads that are currently engaging with your content

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Automation #2: Nurturing Current Customers

- How do we nurture current customers?
  - Segmentation
  - Product-specific campaigns
  - New customer onboarding
- What makes it effective?
  - Personalized content
  - Already customers
  - Once this automation is set up, it runs on its own

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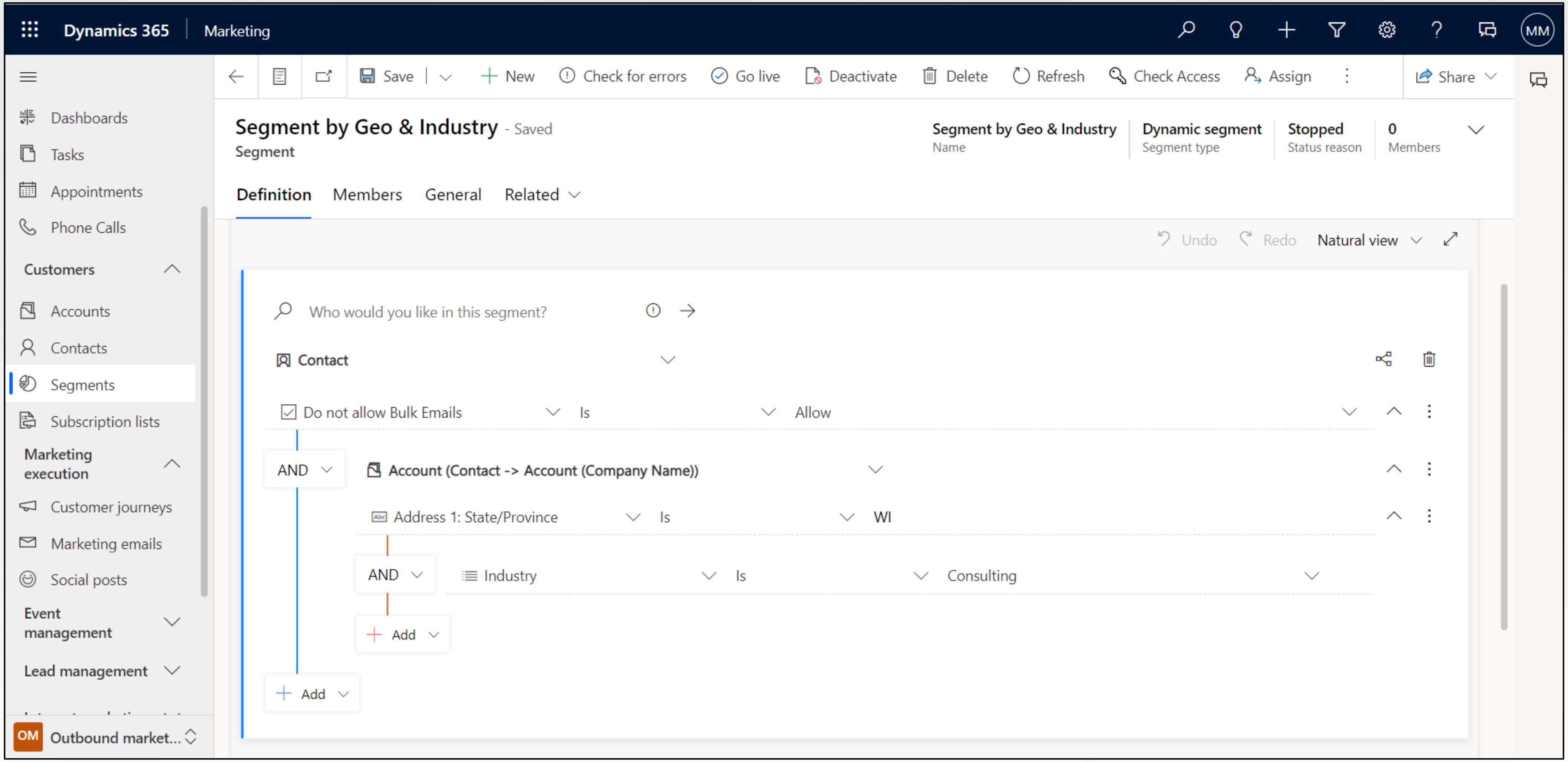
Segmentation



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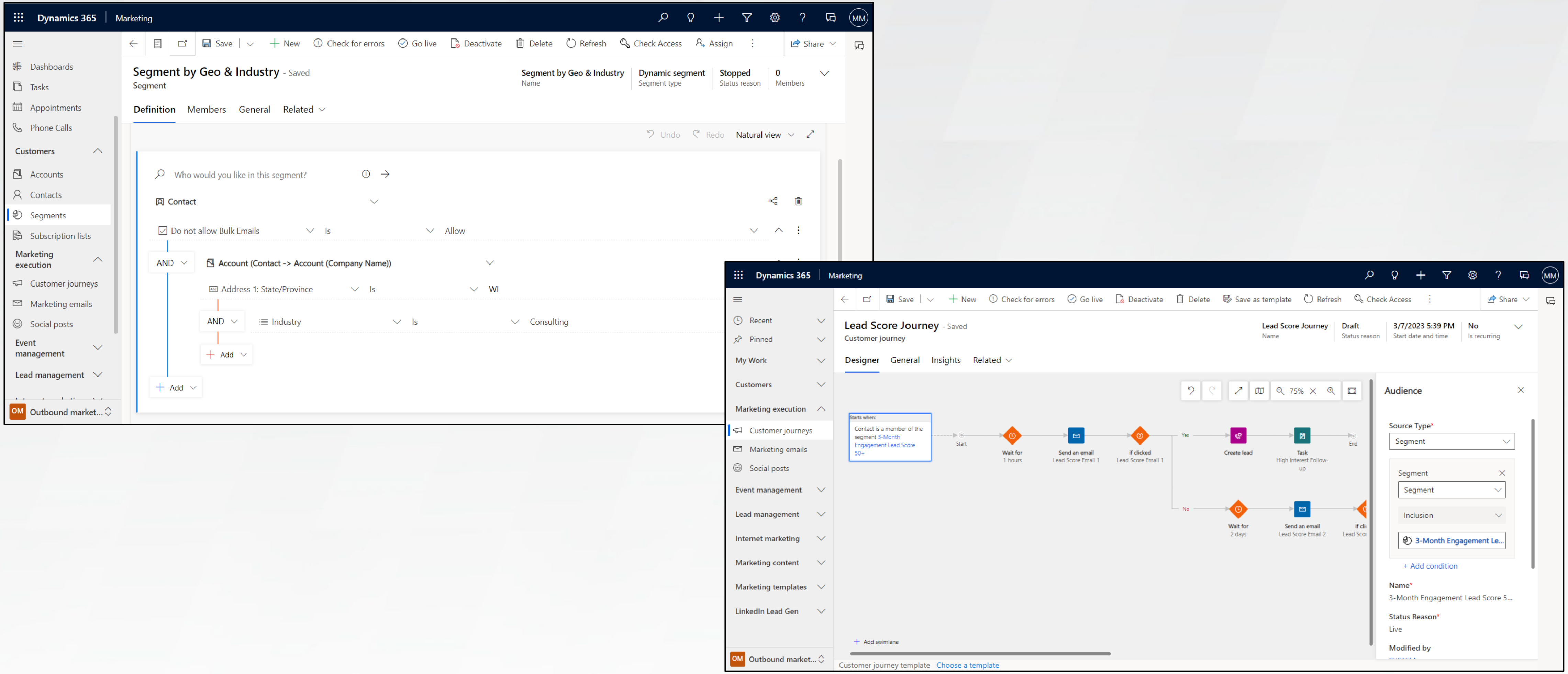
Segmentation



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Segmentation Options

- Limited only by your solution
- Demographics – age, location, job title, industry, etc.
- Product interest
- Engagement (lead scoring, web visits, downloads, etc.)
- Open Quotes
- Opportunities/Opportunities lost
- New Orders
- Much more

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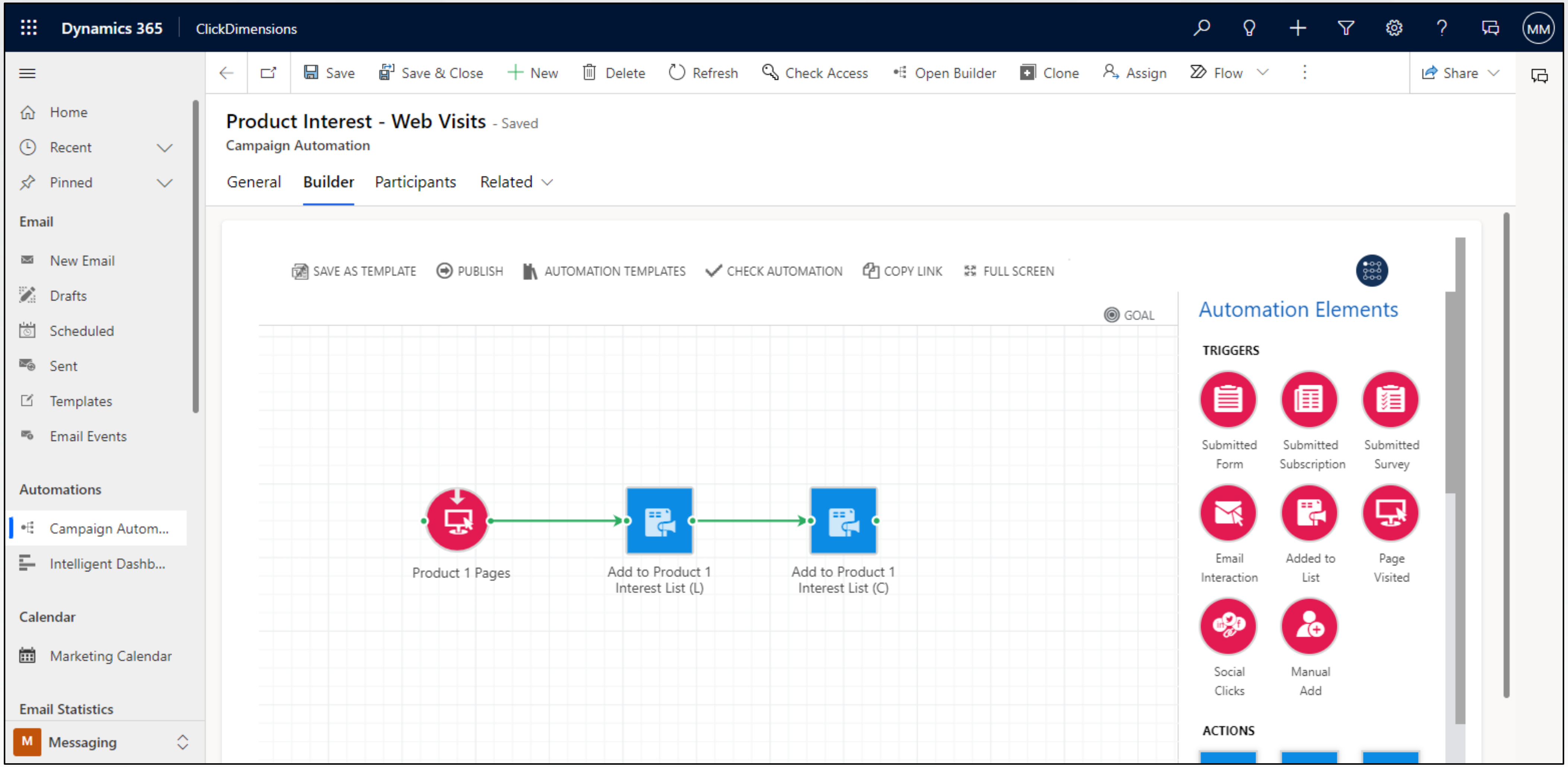
Product Interest



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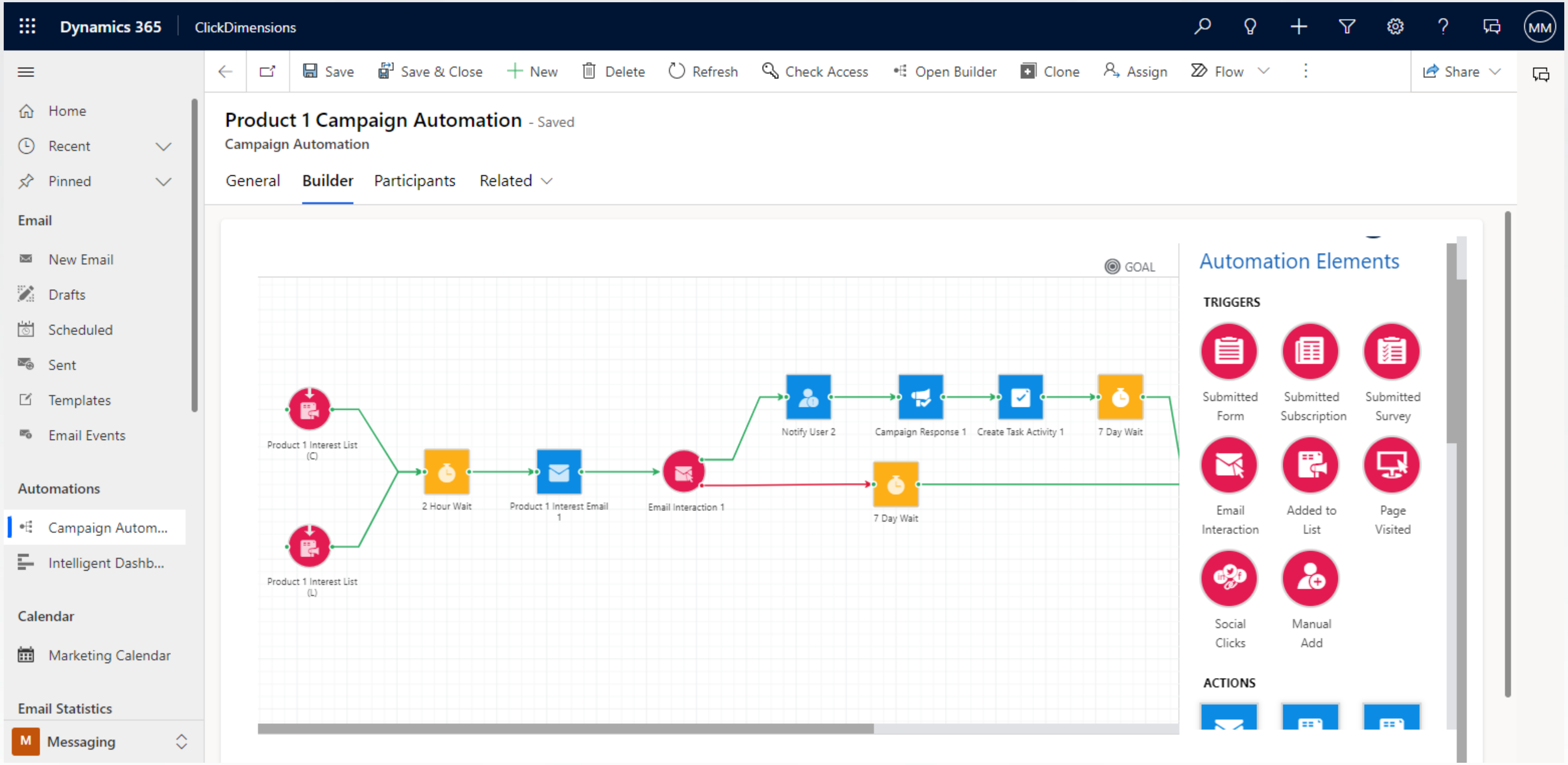
Product Interest



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Product Interest Benefits

- Send tailored product content to engaged leads
- They tell you when they're ready to purchase
- Personalized content can be more effective
- Continue to stay in touch with customers automatically

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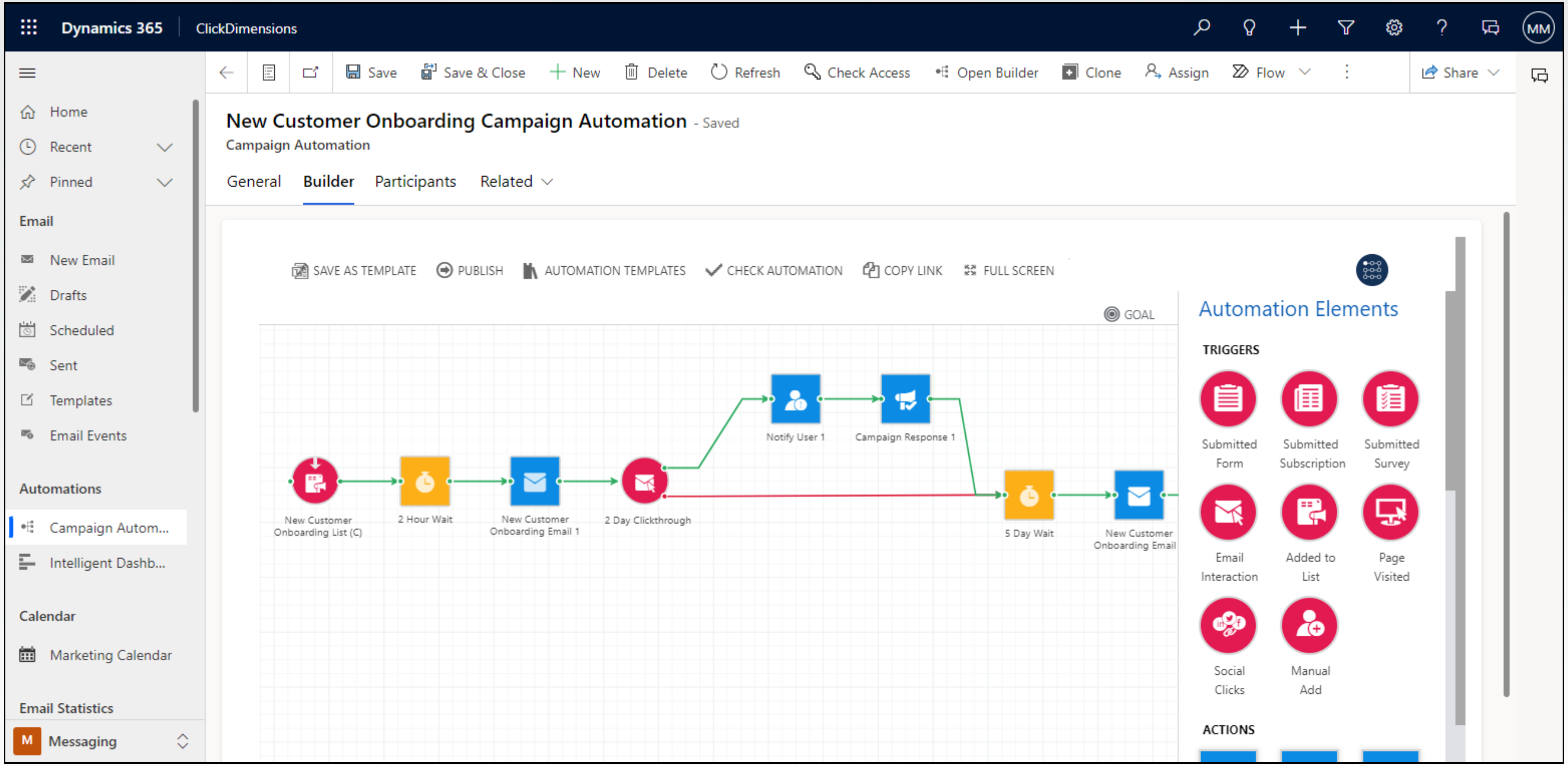
New Customer Onboarding



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New Customer Onboarding Potential Benefits

- Improve customer sentiment
- Simplify their journey
- Provide them with helpful information
- Setting up the next purchase (upselling)
- Increase customer lifetime value
- More revenue comes from existing customers
- May be able to get testimonials, reviews, & referrals

Automation #2: Nurturing Current Customers

- Creates segmented lists
- Personalized messages
- Provides an evergreen approach to sending content
- Helps move leads through the funnel automatically
- Sets up new customers to be return customers

Automation #3: Gated Content

- What is gated content?
  - Online materials, such as whitepapers, eBooks, videos, recorded webinars, anything that requires the visitor to fill out a form before accessing the content
- How can I use gated content?
  - Use your content to gather leads
  - Start them on an automated journey
- What makes it effective?
  - Captures lead information & interests
  - Automation provides them with nurturing
  - Can help marketers know what content works & what doesn't

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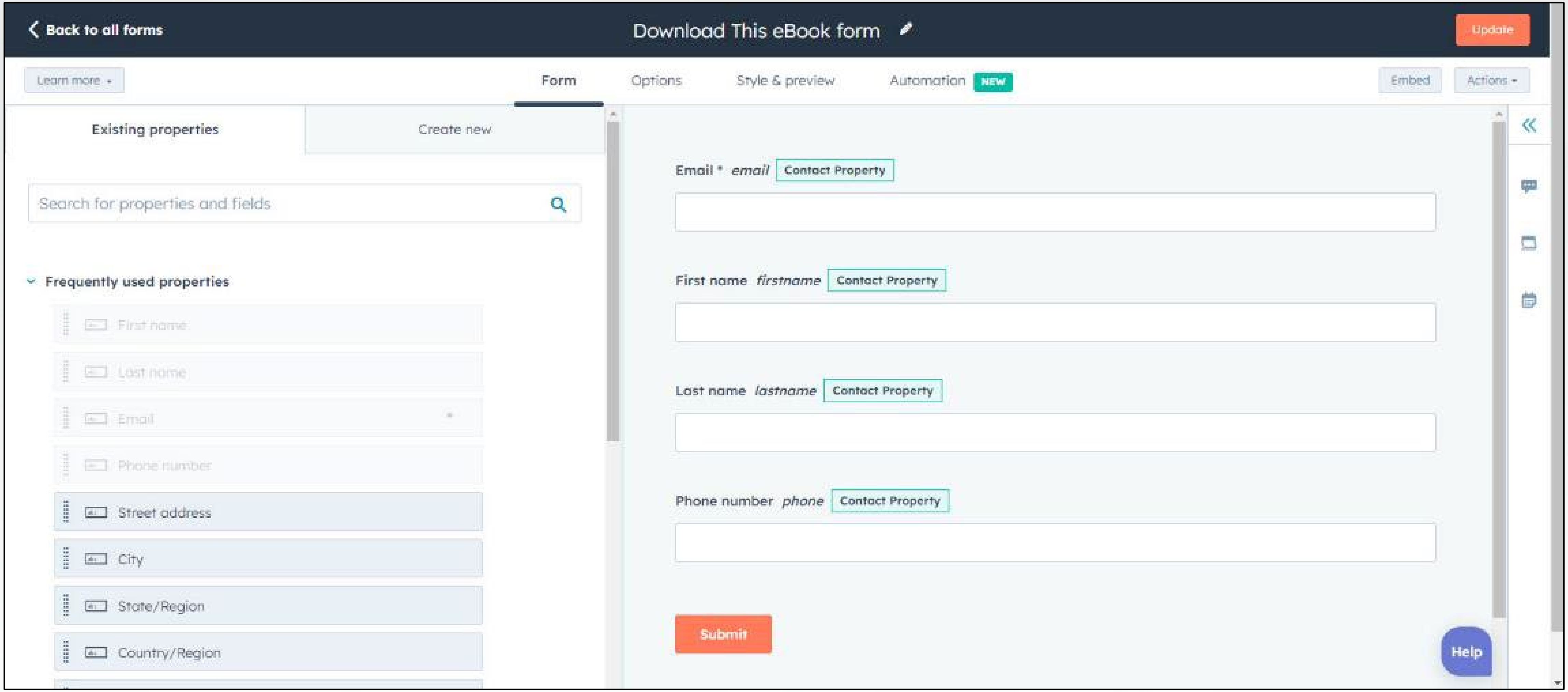
Gated Content



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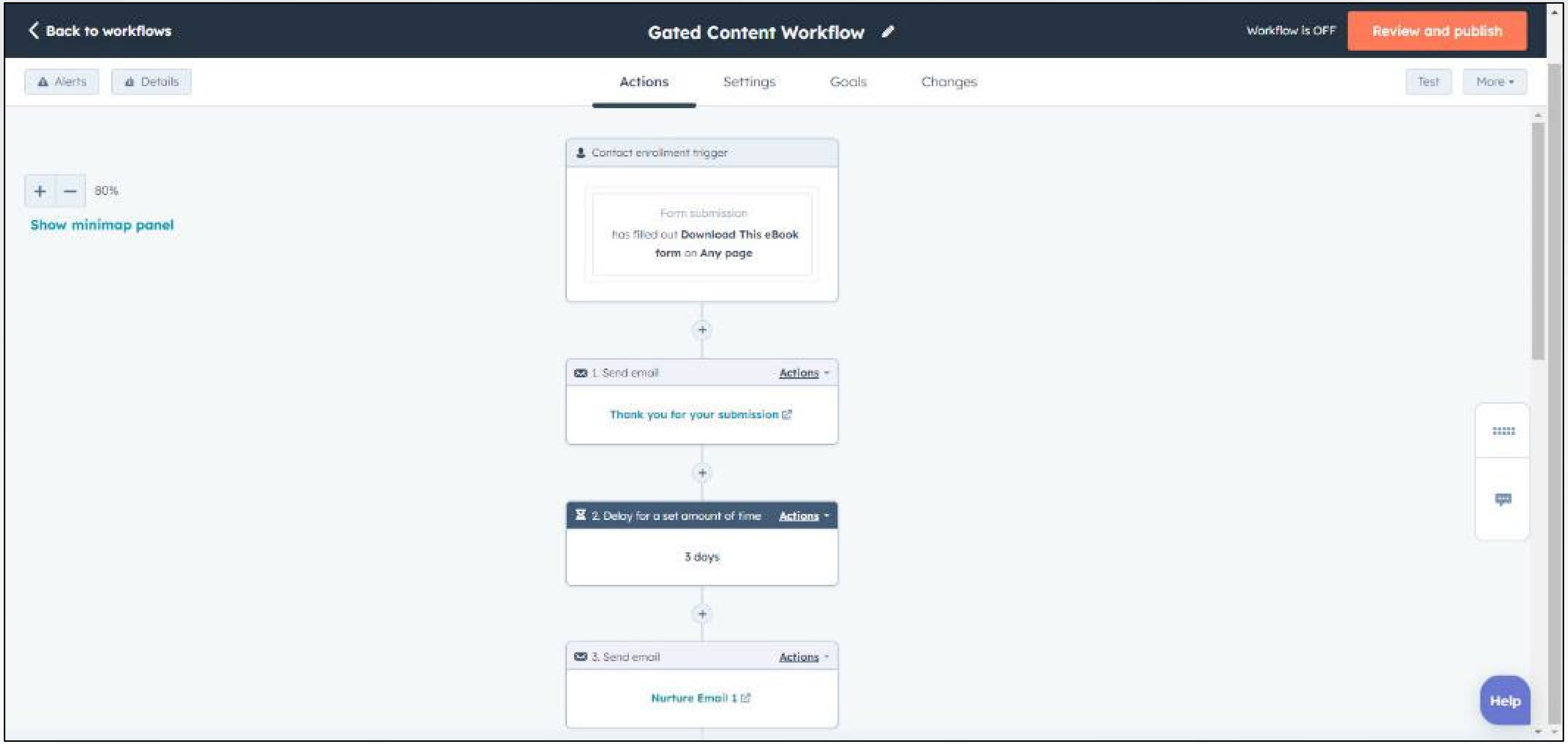
Gated Content



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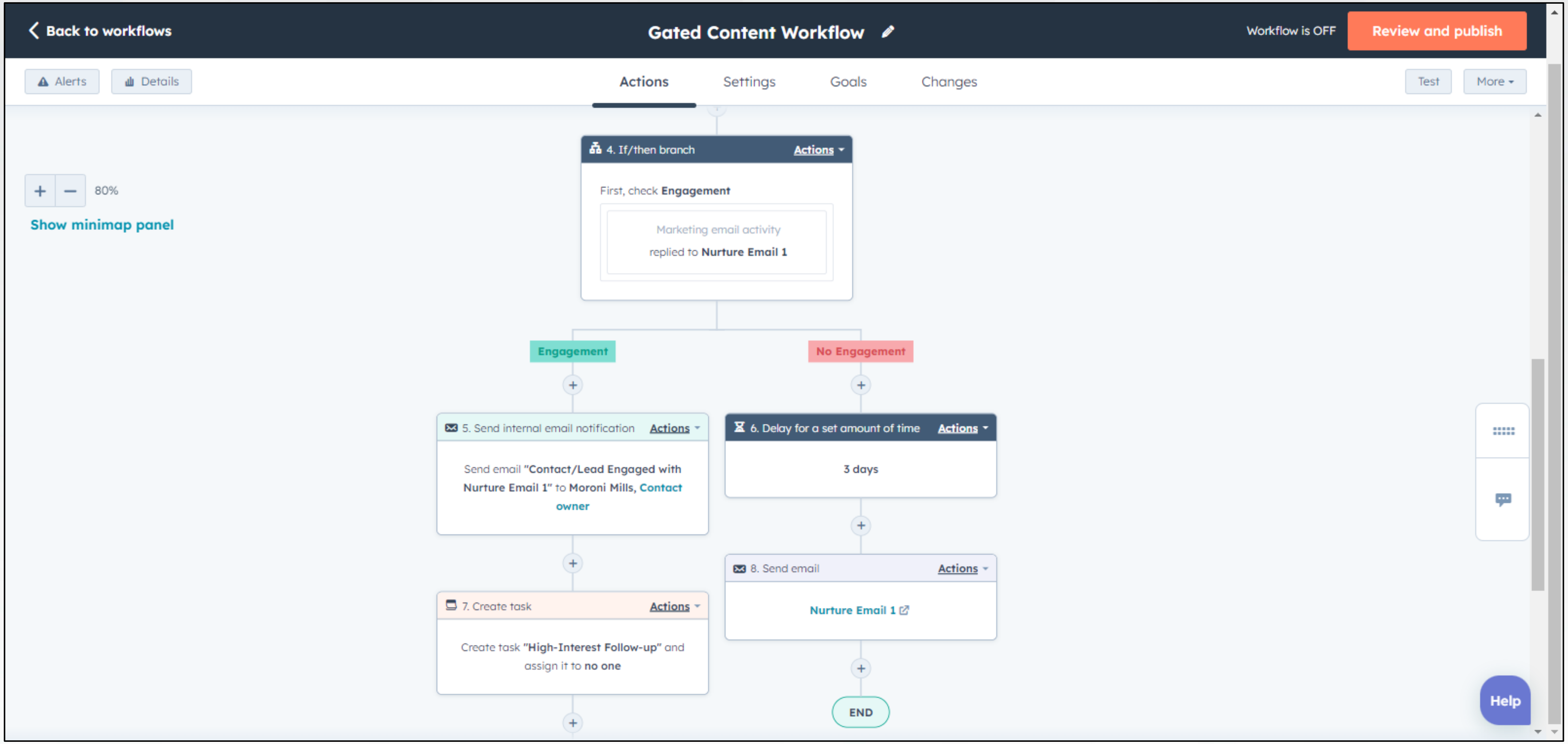
Gated Content



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Automation #3: Gated Content

- Capture specific information about those most interested
- Place these leads into an automated journey
- Can increase traffic to website
- Segments your audience
- Helps visibility to measure analytics

Automation #4: Event Management

- How can we automate events?
  - Develop a regular cadence for your events
  - Create a drip campaign
  - Follow up with a survey & other content
- What makes it effective?
  - Automate critical event management tasks
  - Capture lead information
  - Nurture leads to become actual customers

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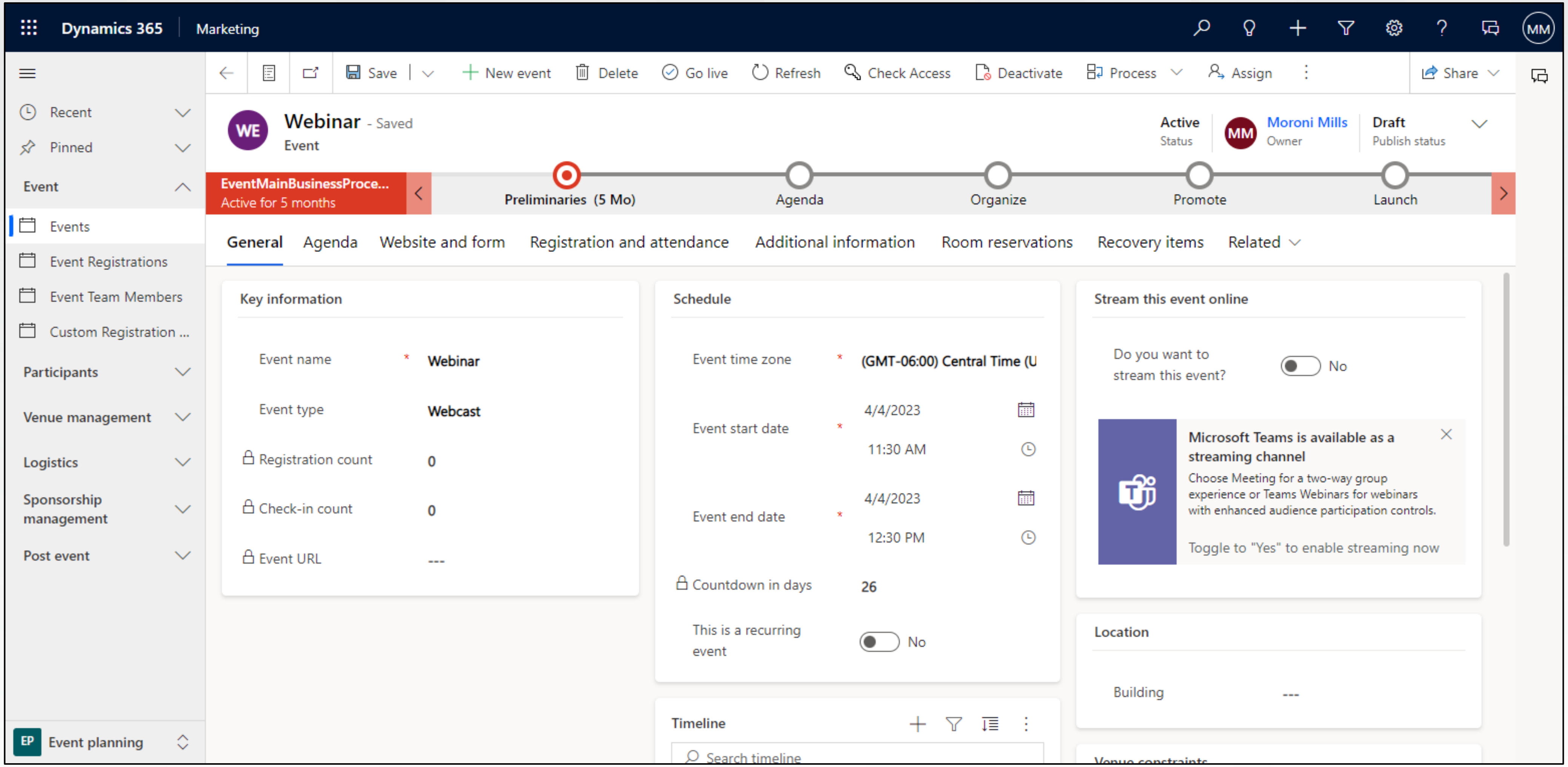
Event Management

- Conferences
- Trade Shows & Expositions
- Seminars/Workshops
- Demonstrations/New Product Unveilings
- Facility Tour
- Lunch & Learns
- Parties/Celebrations
- WEBINARS!

Event Management



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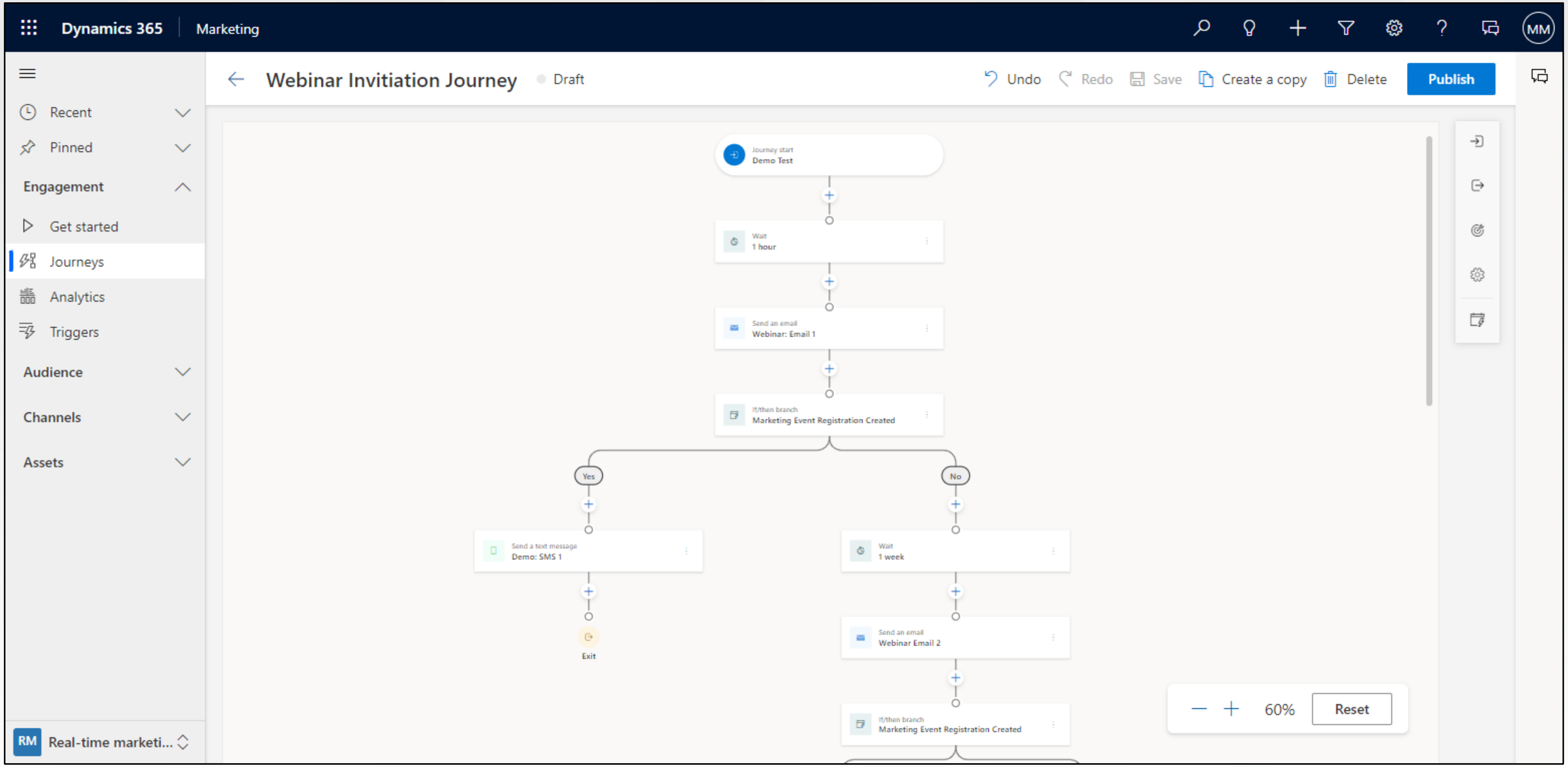
Event Management



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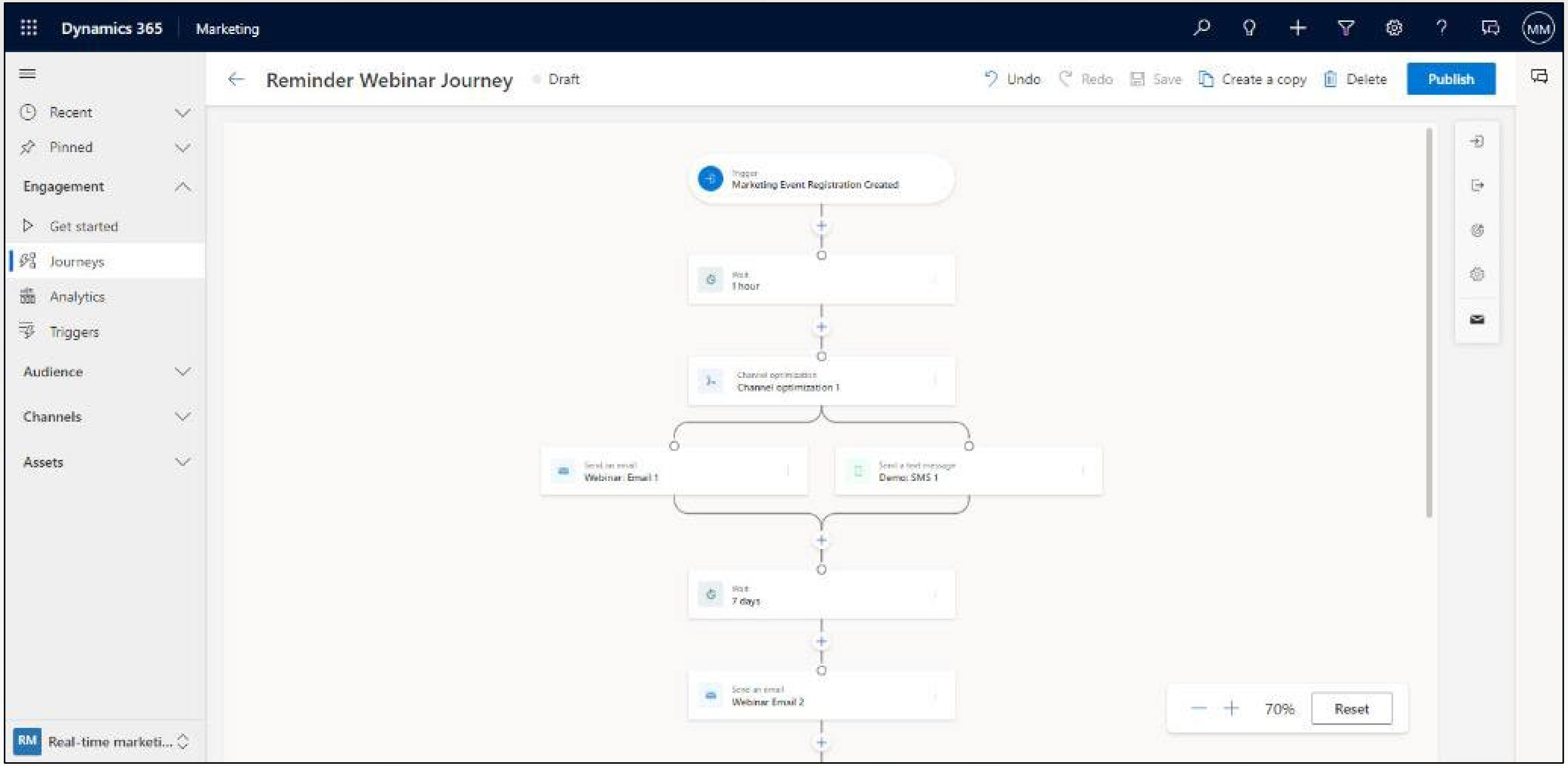
Event Management



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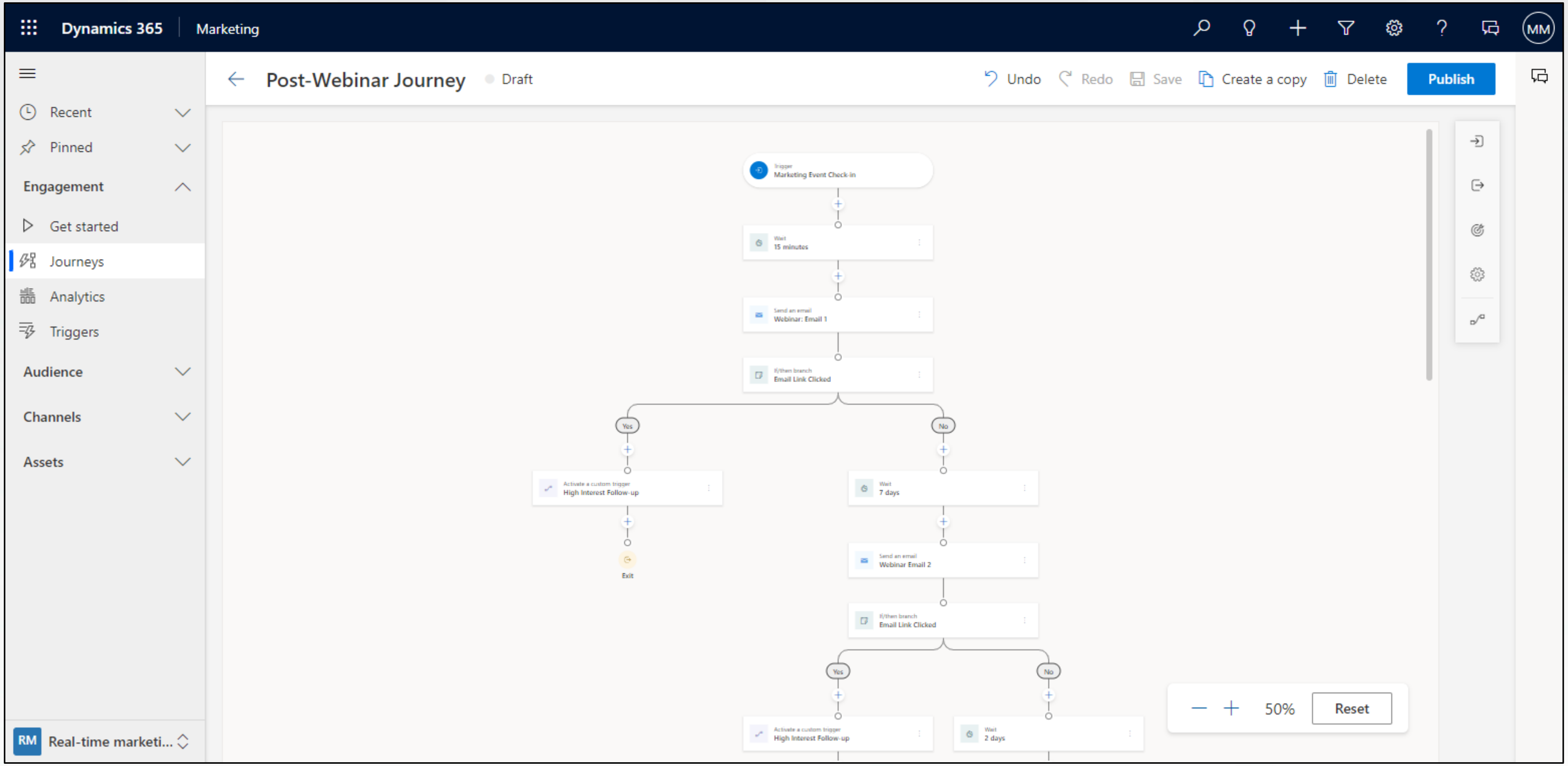
Event Management



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Automation #4: Event Management

Events can …

- Generate more business
- Increase brand awareness
- Lead to a better understanding of your products & services
- Build relationships
- Help you be seen as a thought leader & build brand trust

Automation #5: Subscription Management

- What is subscription management?
  - The process of allowing customers to choose which emails or SMS messages they would like to receive from you by letting them opt in & opt out of message types
- How can we create automated subscription management?
  - Create a subscription management page/list
  - Create forms on website for visitors to receive e-newsletters or alerts
- What makes it effective?
  - Can increase retention
  - Can reduce unsubscribes
  - Can help keep your lists clean

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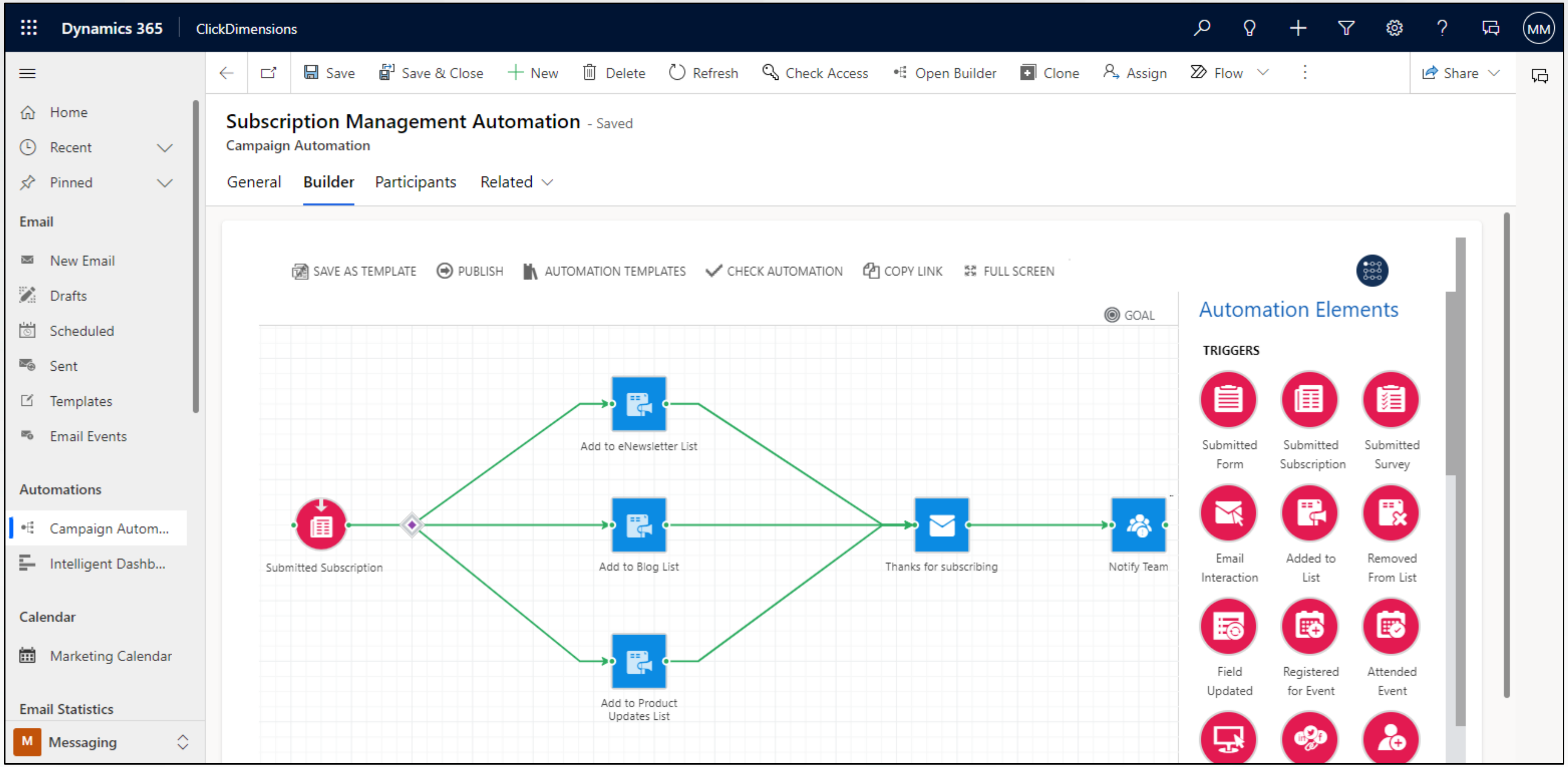
Subscription Management Tips

- Review what types of subscription lists to have
- Review GDPR & other requirements for your area & industry
- Assess opt-in & opt-out options

Subscription Management



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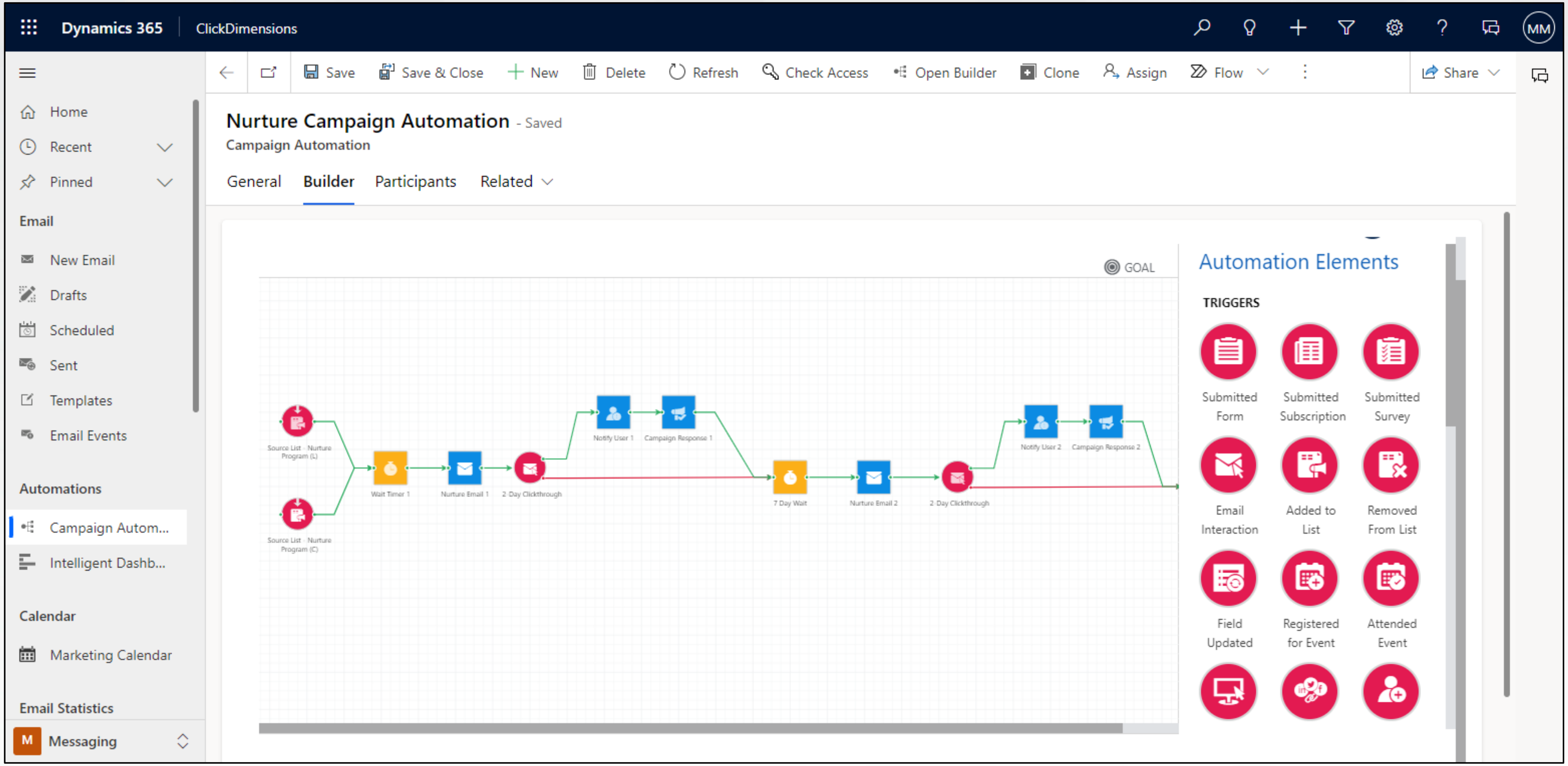
Automation #5: Subscription Management

- Continue to nurture contacts/leads
- Get used to a regular cadence of content
- Turn to your business with questions
- Update marketing lists
- Segmentation

Automation #6: Re-Engage Previous Customers

- What are some ways to re-engage previous customers?
  - Develop nurture automations for old contacts
  - Send emails to abandoned carts
  - Look at contacts with Lost Opportunities
- What makes it effective?
  - Re-ignite an old flame
  - Keep your brand top of mind
  - Leaves a window open even if a door was shut

Re-Engage Previous Customers



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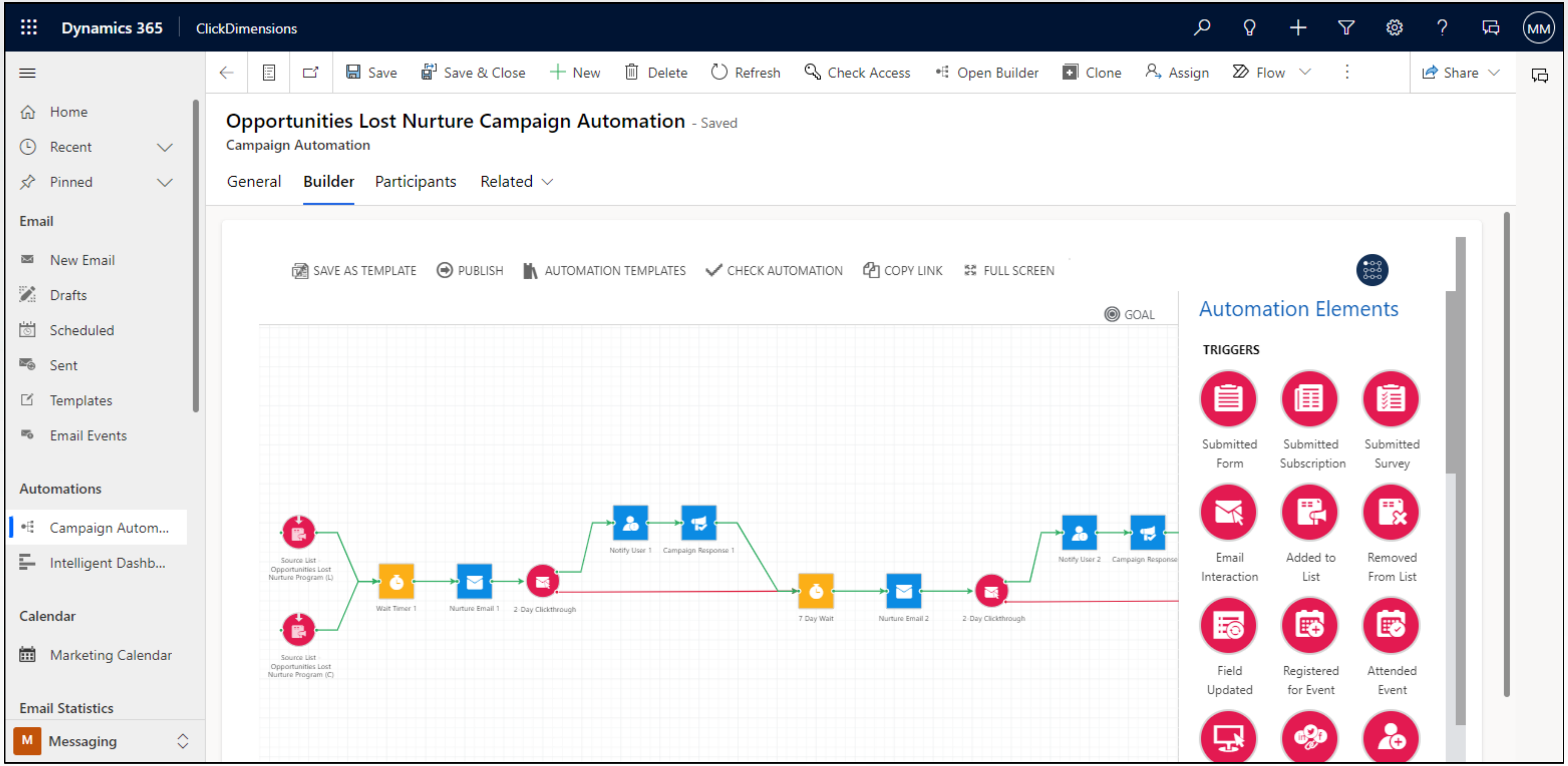
Re-Engage Previous Customers



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Automation #6: Re-Engage Previous Customers

- Provides opportunities for future engagement
- Gets your brand back in front of contacts/leads
- Higher probability of returning to their carts for purchase
- Cleans up marketing lists
- Ease of setup

BONUS Automation #7: Social

- Ways to automate social?
  - Use social integrations
  - Form submissions to create segments
- What makes it effective?
  - Can create a fluid campaign
  - Lead generation from different source
  - Engaging with audience

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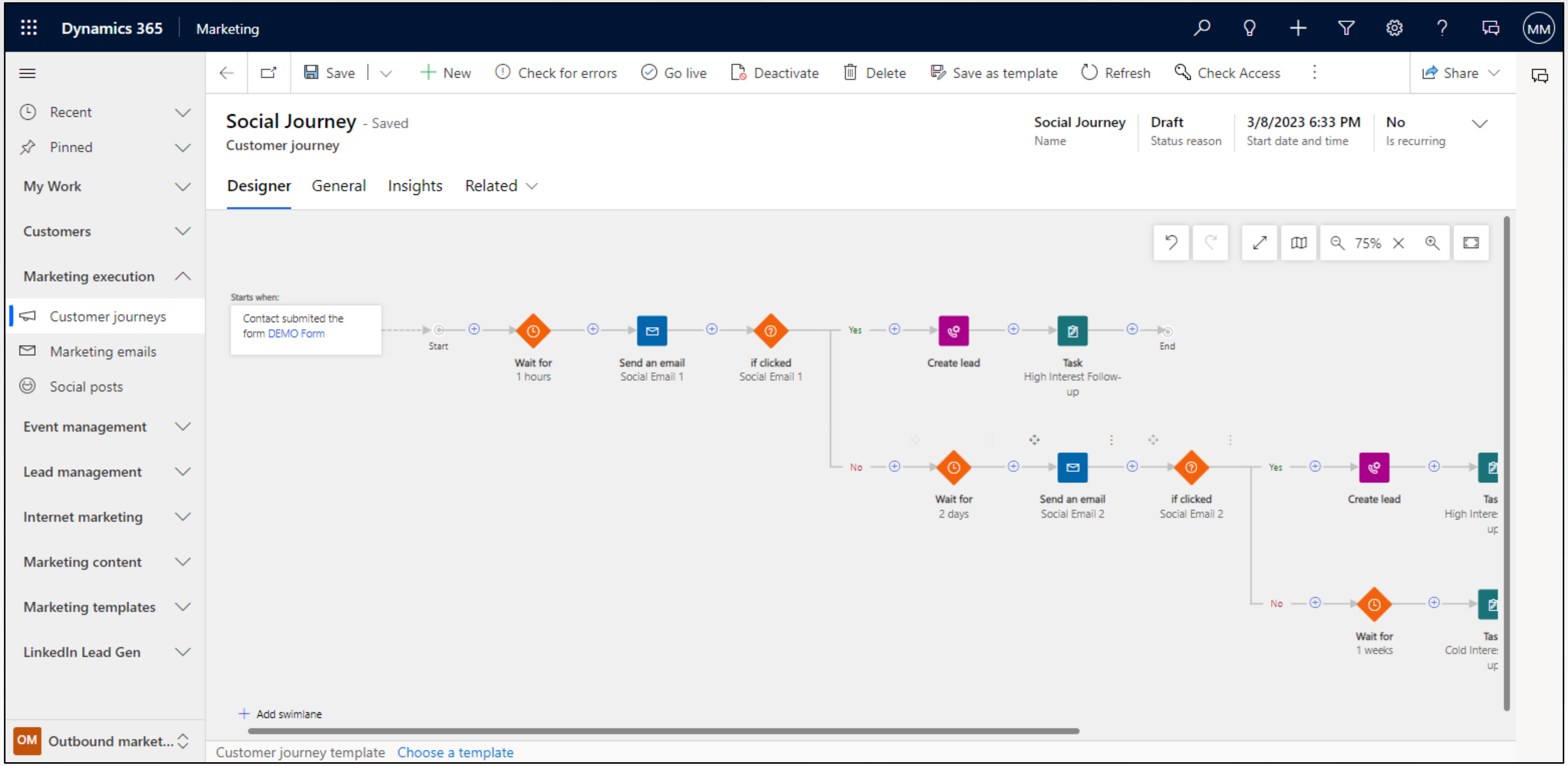
Social



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BONUS Automation #7: Social

- Gain insights across different channels
- Narrow the focus of which channels are supplying quality leads
- Extend your reach to the audience
- Focusing on social can help develop a more consistent schedule
- Provide more marketing qualified leads to sales

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Q&A

Use the Q&A tool to submit any questions you may have

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