

MARKETING AUTOMATION FOR B2B

10 Best Practices Every
Marketer Should Know and Use

INTRODUCTION

WHAT IS MARKETING AUTOMATION?

Marketing Automation refers to the process of automating a number of recurring tasks, with the aim of processing a high number of potential customers, identifying those, who are most likely to engage further, and applying various tactics to increase their likelihood to convert. The term **Lead Nurturing** is often used interchangeably with Marketing Automation.

Marketing automation has emerged as a mainstream marketing activity, and companies of all sizes are taking advantage of the possibilities it opens up. There are many factors that drive this, with the most being:



The need to deal with thousands of visitors and potential customers in a time and cost-effective way



The emergence of new and more sophisticated marketing software



The explosive growth of ecommerce



One of the most paradoxical facts about automation is that it humanizes marketing, as it allows practitioners to segment and initiate conversation with those who are most likely to become customers. That is the reason why so many marketers have found it to be extremely beneficial.

Unfortunately, many business professionals are hesitant to try marketing automation, because they fear it requires a high degree of technical knowledge. The rise of new software has created a number of products, which are easy to use, even by experts lacking coding skills. However, those interested in trying lead nurturing still need to know how to structure their efforts in the most productive way.

This is where this white paper comes in. Its purpose is to provide anyone who is interested in automation with some of the foundational best practices, so they can easily get started. By using the techniques described here, marketers can achieve higher **marketing ROIs**.



PART I

LAYING THE GROUNDWORK FOR
SUCCESSFUL MARKETING AUTOMATION

Some of the best practices need to be implemented before marketers even start thinking about their campaigns.

🗨️ BEST PRACTICE 1

There is enough traffic to feed the automation engine

The goal of marketing automation is to improve the performance of the middle of your funnel.

Before marketers start putting time and money into automation, they must be sure they have enough top of the funnel traffic. Lead nurturing campaigns can be costly, as they require investment both in human management time and automation software. Without enough engagement to feed the automation engine, it will be challenging to succeed. Moreover, by running it on a limited audience, marketers risk deriving the wrong conclusions about what works because of the skewed results seen from working with a limited group of people.



🗨️ BEST PRACTICE 2

There is buy-in from management (including investment)

It is crucial to get buy-in from management before a company engages in any automation activities. Without support and attention from senior management, automation will be treated as a side activity that comes after other, more important tasks.



For this practice to be effective and impactful, various departments need to be involved in it. Cooperation between marketing and sales, at a minimum, is crucial for the success of marketing automation.

Before starting on automation, marketers must also have a thorough understanding of the basics. One of the best practices is to appoint an **Automation Champion** – a person who is educated on both basic and more advanced topics and techniques, and who is responsible for making decisions and pushing automation to the foreground of company operations.

That Automation Champion can also be responsible for researching, building up the case, and even making the decision on what software package will be used. Of course, key company decision-makers need to participate in this process, as software will impact other systems that are already in place (we cover more of this in Best Practice #4).

PART II

BUILDING BLOCKS OF AUTOMATION STRATEGY

A study* by software provider SharpSpring shows that nearly half of the marketers surveyed identify creating and implementing a robust strategy as the biggest challenge in marketing automation.

Creating a master plan is a must when engaging in lead nurturing. The time spent in this stage will be repaid in the form of better results and higher ROI from all automation activities.



48%

OF MARKETERS STRUGGLE WITH STRATEGY FOR MARKETING AUTOMATION

... BEST PRACTICE 3

Having superior knowledge of the customer base

The planning process starts with segmenting the existing customer base, so you can understand the distinct groups of customers you are targeting. Brands that target several markets should adjust their marketing strategy accordingly.

The essence of marketing automation is to attract potential customers by appealing to their individual interests and needs. This is achieved by employing personalization, which will be covered in more depth in the following pages. However, the first step in applying this technique is to define your audience segments.



Marketing Personas

Marketing personas use the information derived from the segmentation research. The goal of this exercise is to create an in-depth and more realistic picture of the distinct types of buyers you are targeting. When creating personas, marketers should strive to flesh them out as much as possible.

Existing customers are a good starting point for creating marketing personas. The information known about them can be complemented with customer interviews to draw a more detailed picture.



*All studies mentioned throughout the text can be found in the "Further reading" section at the end of the document.

WHO IS A MARKETING PERSONA?

Marketing Personas are fictional characters that portray target customers. In a B2B environment, most often this is the person on the other end of the relationship, who has the responsibility of direct influence on making the decision to buy a product (or service).

Skilled B2B marketers look at who their key decision makers are and use information about their job positions, their seniority at the target company, their demographic data, their goals, pains, values, and fears. Based on their findings they create an actionable portrait that not only includes basic information, but can also help make informed decisions on best ways and topics to influence and convert that target customer.

BUYER'S JOURNEY



Another essential piece of information that business professionals need to know is what the buying process looks like for their customers. This helps them determine the best content to serve their customers at each stage of the automation process.

Having good understanding of who their potential customer is allows marketers to offer custom and relevant content to the leads they are working with in the marketing automation stage. This improves the chances of success of the automation campaign.

BEST PRACTICE 4 Using relevant data and high degree of integration

Before marketers start using automation techniques, they need to audit and update their databases to make sure they include only the most reliable information about their customers. The best professionals are very conservative with their data, pruning it from obsolete entries and verifying they have permission to send messages to each entry on their list.

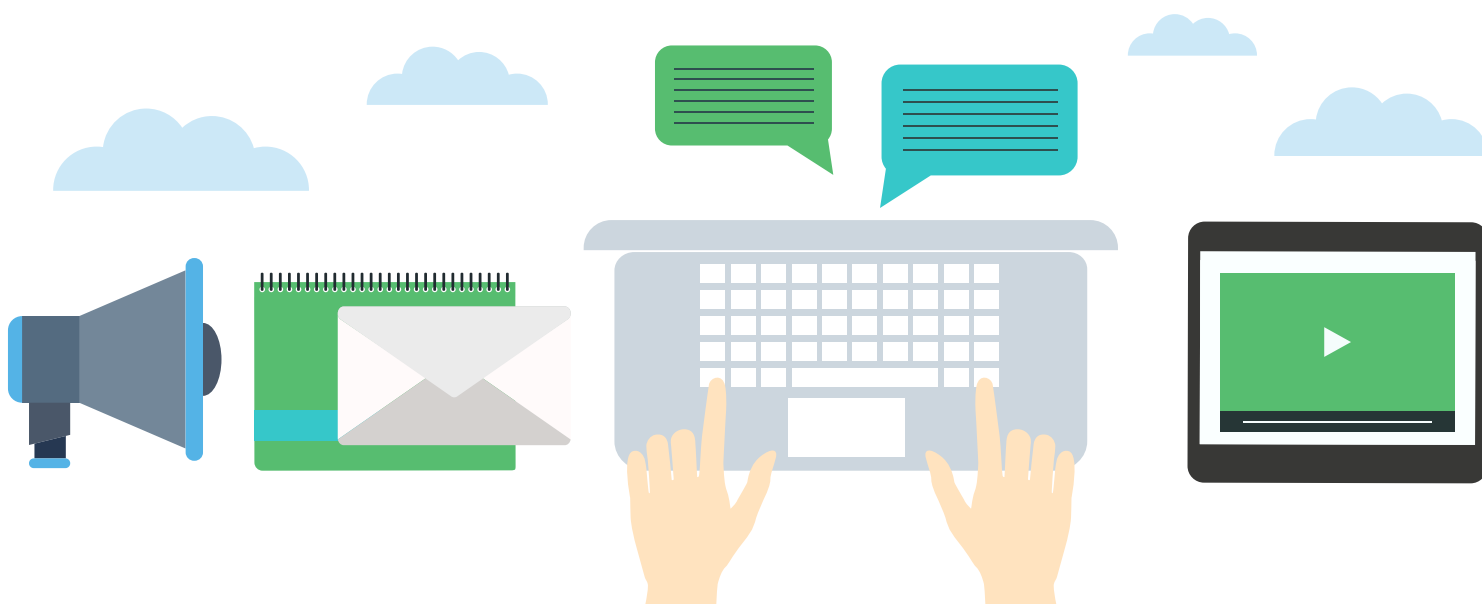
This not only prevents issues with deliverability and being labeled as SPAM, but also has the potential to improve key metrics, such as conversion rate and ROI, saving automation experts time, money, and effort by allowing them to focus only on leads that will most likely be receptive to their campaigns.



**ACCORDING TO HUBSPOT, MARKETING DATABASES
DECAY NATURALLY AT THE RATE OF 22.5% PER ANNUM**

Incorporating information from external sources, such as social media, is also important. Depending on the context, such information can improve your knowledge about the target customer (going back to the previous chapter and the use of tools such as Marketing Personas) and provide insight into their progression on the buyer journey.

Another essential step is to integrate existing solutions (Customer Relationship Management, Content Management System, etc.) with the automation tools used. Integrating your various marketing automation tools will allow you to save time and ensure smooth cooperation between your sales and marketing teams.



PART III

RUNNING MARKETING AUTOMATION CAMPAIGNS

Marketing automation gives the experts a chance to play with the intricate details that can have impact on the end results. Before engaging in fine-tuning, however, it is imperative to know the most important aspects of running an automation campaign.

BEST PRACTICE 5 Automation campaigns feel human and personal

All the hard work marketers do in the early phases of their automation activities allows them to align their campaigns to the target customers. The most sophisticated professionals combine demographic data with behavioral input (i.e. how their leads interact with the brand across different channels) to understand what content will resonate.

Personalization is another critical factor that should not be forgotten when planning a campaign. Segmentation and the information gathered on customers, allows marketers to customize several aspects of their campaigns, including messaging, tone, content, etc. This creates a feeling of humanness in the mind of the audience and helps marketers fulfill the goal of starting a relationship with those who are most likely to become customers. Here is an example of personalization in action:

DEMOGRAPHICS

Age & Gender
Location
Job Title

BEHAVIOR

Pages visited
Downloads
Social media activity

BEST PRACTICE 6

Using more than one channel

Too many marketers still think that automation equals email. However, the most advanced platforms give you the opportunity to engage and communicate with your audience across multiple channels.

Professionals who only monitor one channel are only listening with one ear. To take full advantage of the opportunities created by automation, marketers need to reach their audience wherever they are, including social media, conversations happening on their websites, etc.



BEST PRACTICE 7

Knowing what information is needed and how to get it

Before engaging in lead nurturing, marketers must gather enough information on their leads. Having sufficient customer intel will allow marketers to complete the nurturing stage effectively. The best experts in the field know the exact amount of information they need before they start and have everything necessary to collect it in place.

Collecting Information

One of the best techniques is **progressive gathering**. Instead of asking the customer to provide all of their information in one go, it is collected gradually, during each successive interaction. This creates much less friction for a website visitor, thus lowering the possibility for that they abandon the site without submitting information.

Tools to collect

Knowing what information is needed, allows automation experts to prepare landing pages, forms, email copy and other materials required to engage in data gathering.

There is a plethora of research-backed resources on best practices for each of these topics, so marketers do not need to reinvent the wheel when working on these assets.



BONUS BEST PRACTICE: ASK EXPLORATORY QUESTIONS

Another good idea is to collect not only relevant demographic data, but also to ask questions, which help discern where in the buyer's journey each lead is. This practice helps place leads in the correct stage of the nurturing efforts, based on their current stage and needs.

BEST PRACTICE 8 There is an inventory of high-quality content

Content is the currency of marketers when it comes to automation. Collecting information from potential customers allows you to provide a stream of high quality and relevant resources.

Developing the inventory to be offered should go hand in hand with the effort to create landing pages, email copy, and other collateral.

It is also very important to tie the content offered to the target audience, based on what is known about their background and stage in the buyer's journey. For example, a potential customer in the awareness stage is usually researching ways to fulfill identified needs. This person would require educational resources, such as e-books, white papers, research findings are all relevant content types to serve the prospect. On the other hand, someone in the decision stage is usually comparing available solutions – so feature tables, case studies, and comparison sheets will be much more useful to that lead in that stage of the cycle.



PART IV

MAKING THE BEST USE OF MARKETING AUTOMATION

The aim of marketing automation is to create leads that are ready to become customers. To do this, marketers need to devise automation strategies, which include systems to classify and evaluate the level of preparedness of a lead.

Similarly, marketers also need to devise evaluation frameworks for their campaigns in general, so they can measure what works and what needs to be improved.

💬 BEST PRACTICE 9

Using lead scoring and grading



One of the advanced aspects of marketing automation, lead scoring and grading is the bridge that connects marketing and sales.

Lead scoring

A scoring system enables marketers to assess whether a lead is sales-qualified. Points are assigned based on behavioral data (actions taken) with a set number that must be reached before a visitor is passed on to the sales team.

Negative points can be assigned to certain leads that are not likely to become customers, to avoid wasting time on them, no matter how many steps in the nurturing process they complete.

Creating a robust scoring system can be a challenging task, but it pays off when an equilibrium is found. Again, it allows both marketing and sales to focus only on the leads with the highest potential, thus increasing ROI.

Lead grading

Lead scoring allows marketers to evaluate the readiness of each lead before it is sent to sales. However, grading can be used to segment leads based on how attractive each lead is.

When used together, lead scoring and grading allow managers to quickly identify those leads who are a) the best fit for their business; and b) in the highest level of readiness to be sent to sales for closing.

Lead recycling

Sometimes leads are sent to sales prematurely. In this case, it is important to have a procedure in place for a prospect to be returned to marketing for “re-nurturing”. In such cases, a review of the scoring framework should be conducted to optimize the scoring mechanism if possible.

BEST PRACTICE 10 Continuously analyzing and improving

When doing marketing automation, it is very important to collect as much information as possible about the way prospects use the content provided. This includes adding tracking information to your website, so that you can measure the performance of various campaigns and analyze what works best.

Along with this, automation marketers also need to test every possible detail of their campaigns – headlines, call-to-action’s, and so on.



Measuring success

There are many ways to decide whether a campaign has fulfilled its purpose. When choosing a metric, make sure it aligns with the goals set for the marketing automation strategy.

For example, if the goal is to raise awareness about a product/service – open rate and click-through rate (CTR) for the automation campaigns will be the most relevant metrics. On the other hand, if the goal is to produce new revenue flows, then conversion rate will be the key indicator to look at.

CONCLUSION

The proliferation of marketing software and resources has made lead nurturing available to businesses of all sizes. Those who were quick to take advantage of it have already seen the benefits it can create. However, the investment automation requires, in terms of both time and money, makes it imperative that marketers spend time learning and applying the best practices in the field.

As with any other segment of marketing, those who apply a structured approach to their automation efforts see the biggest returns from them. This process starts with getting management on board, setting aside company resources, spending time getting to know the target audience, and strategizing how to reach it.

In the application of the chosen strategy, automation experts get personal with their audience and make sure they have enough quality content to nurture leads into getting them ready for closing by sales teams.

Finally, the most productive experts spend a sizeable amount of time analyzing and testing each aspect of the campaigns they create, to find ways to improve them.

The boom of content marketing and the increasing sophistication of software are clear signals that the use of automation will continue to grow. There has not been a better time for companies of any size and industry to take advantage of the possibilities this technique opens up.

If you are interested in marketing automation and would like to explore the ways it can help your business, please do not hesitate to get in touch with INFUSEmedia. We would be happy to provide advice and help you get started with your first automation campaign. Please contact us at info@INFUSEmedia.com.



FURTHER READING

We have collected a number of resources that can help you delve deeper into the subject.

An Introduction to Lead Nurturing

HubSpot

[Download here](#)

Marketing Automation eBook: Best Practices for Marketing Excellence and Operational Efficiency

SilverPop

[Download here](#)

Mastering the Art of Marketing Automation

Pardot

[Download here](#)



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Alexander is a visionary B2B digital marketer with over 15 years of experience. Focusing on solutions for B2B demand generation, digital marketing, ABM, Intent and AI driven lead generation, among others, Alexander embraces innovation and turns concepts and methodologies into products and marketing programs that drive ROI.

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