

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. The aim is to process a high number of potential customers, identify those who are most likely to engage further, and apply various tactics to increase their likelihood to convert. The term **lead nurturing** is often used interchangeably with marketing automation and is best done using a multi-channel approach. See our whitepaper entitled Best Practices for B2B Lead Generation [here](#).



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

The need to deal with thousands of visitors and potential customers in a timely 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 a 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 popularity of this practice has given rise a number of products, most of which are easy to use even by experts lacking coding skills. However, those interested in trying marketing automation still need to know how to structure their efforts in the most productive way.

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

Before launching a campaign, it's critical to first implement the following best practices.



1 Ensure enough traffic to feed the automation engine

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

Before marketers start putting time and money into automation, they must ensure 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.

2 Gain buy-in from management (including investment)

It's crucial to get buy-in from management before engaging in any automation activity. Without support and attention from the decision makers, automation will be treated as a side venture that comes after other more important tasks.

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

Before starting, marketers must also lay the groundwork for success from the standpoint of operations management. 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 is responsible for making decisions and pushing automation to the foreground of company operations.

This Automation Champion can be responsible for researching, building up the case, and even choosing what software package will be used. Of course, key company decision makers need to participate in this process, as the software will impact other systems that are already in place.

The path towards marketing automation maturity is strewn with obstacles. The great majority of marketers say that they need to improve their marketing automation capabilities and craft a robust strategy.

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.

3 **Develop 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 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.

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.



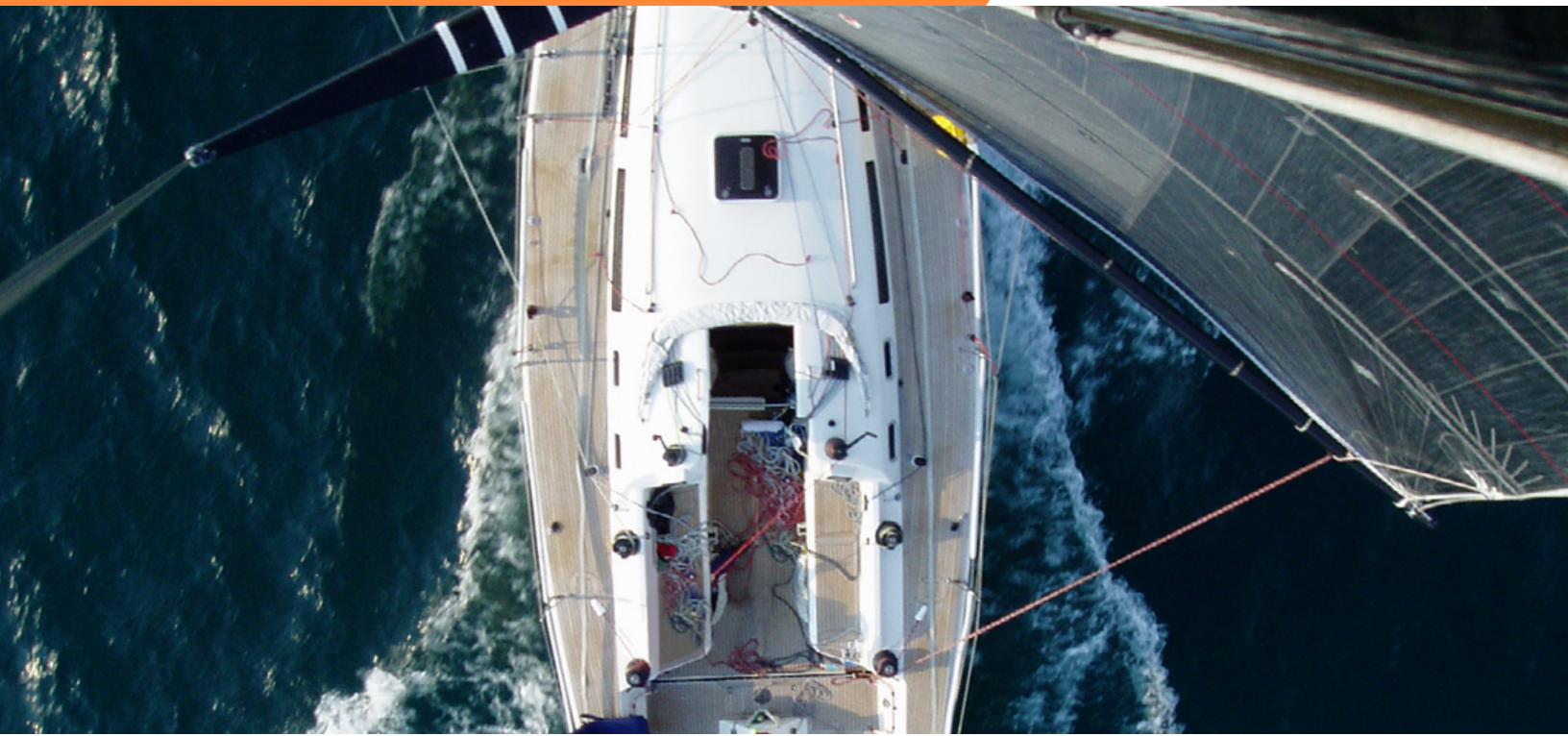
4 **Update and integrate data**

Before marketers begin 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 that they have permission to send messages to each entry on their list.

This not only prevents issues with deliverability and potential spam complaints but can also improve key metrics, such as the conversion rate and ROI. Automation experts can save time, money, and effort by focusing only on the leads that will most likely be receptive to their campaigns.

Incorporating information from external sources, such as social media, is also important. Depending on the context, this 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 through 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 platforms into a well-thought-through martech will allow you to save time and ensure smooth cooperation between your sales and marketing teams.



5 Ensure automation campaigns feel human and personal

All the hard work marketers do in the early phases of their automation activities will allow 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 with their audiences.

Personalization is another critical factor that should not be forgotten when planning a campaign. Segmentation and the information gathered on customers allow marketers to customize several aspects of their campaigns, including messaging, tone, content, etc. This creates a feeling of kinship 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.

6 Use 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 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 channels, conversations happening on their websites, and so on.

7 Know 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.

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

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

There are 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.

8 Build 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 copies, 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; e-books, whitepapers, and 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 a lead in that stage of the cycle.

9 Use lead scoring and grading

Lead scoring and grading are two of the most advanced aspects of marketing automation and the bridge that connects marketing and sales.

A scoring system enables marketers to assess whether a lead is sales-qualified. Points are assigned based on behavioral data, 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 in order 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 equilibrium is found. Again, it allows both marketing and sales to focus only on the leads with the highest potential, thus increasing ROI.

Lead scoring enables marketers to evaluate the readiness of each lead before it's sent to sales. However, grading can be used to segment leads and decide whether they are worth pursuing.

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

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.



10 **Continuously analyze and improve**

When it comes to marketing automation, it's 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-actions, and so on.

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, the most relevant metrics for this automation campaign are open rate and click-through rate. On the other hand, if the goal is to produce new revenue flows, the conversion rate will be the key indicator to look at.

AUTOMATION IS THE FUTURE

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 reaped the benefits. However, this investment requires that marketers learn and apply best practices.

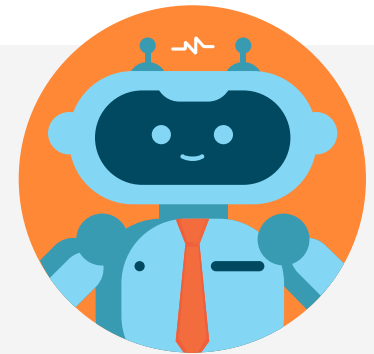
As with any other segment of marketing, those who apply a structured approach to their automation efforts see the biggest returns. This process starts with getting management on board, setting aside company resources, spending time getting to know the target audience, and strategizing how to reach it.

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 and getting them ready for closing by sales teams.

Finally, the most productive experts spend a sizable amount of time analyzing and testing each aspect of the campaigns they create and 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.



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Alexander Kesler is a visionary B2B digital marketer with over 20 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.

As Founder and CEO of INFUSEmedia, Alexander leads a global team that executes campaigns across all industries and company sizes. He leads all facets of global marketing, including go-to-market strategy, demand generation, vertical marketing, data management, field marketing, pricing, retention, analyst relations, product management, inside sales, and sales enablement.

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