Walk

Run

Fly

A Simple Guide to

MARKETING AUTOMATION

SUCCESS

SharpSpring

GO

When you first dive into marketing automation, it's easy to become paralyzed by the possibilities. SharpSpring offers powerful tools that yield powerful results for agencies. But where do you begin?

The Walk, Run, Fly guide is where you begin.

This is a guide for exploring and inspiring marketing automation strategies. We will build a foundation of ideas and tactics to get you started. We will highlight best practices currently used by agency partners, and we will link these concepts to detailed instructions for implementation within SharpSpring.

While we will showcase numerous ideas in this handbook, marketing automation is only limited by your imagination. We want to be the spark plug in your imagination engine. Don't limit yourself to our ideas; fly beyond our strategies and write the next chapter in marketing automation.

Your Map

We want you to start slow with simple, high-ROI tactics that deliver big value for your clients. Once you're comfortable with the basics, we will help you grow into a sophisticated power user.

How the Guide is Organized

This handbook is divided into three sections with escalating levels of sophistication – walk, run, fly.

Walk – Basic marketing automation tactics with universal value for nearly all businesses as they begin to adopt marketing automation.

Run – Begin using marketing automation to formulate high-value solutions that are specific to an individual business's needs and situation.

Fly – Explore general strategies that build upon the tactics you have learned in Run to further drive leads, convert leads to sales and prove ROI.

These are general suggestions. If a client requests a specific tactic, don't be afraid to jump ahead to a more advanced section for guidance, and if you need assistance, our account managers are always happy to help.

note

The power of marketing automation is rooted in an ability to tailor a specific solution for a business based on the business's unique sales model, marketing funnel, products and/or services sold and the unique behaviors of each lead.

Due to the very nature of marketing automation, the tactics and strategies in this guide are increasingly conceptual in the Run and Fly subsections. The marketing agency's role is to develop ways to adapt these strategies to the unique circumstances of your client's business.

Stamps

In each section, you will see icons indicating the business-to-business (B2B) or business-to-consumer (B2C) value of the strategy. For the purposes of this guide, we are loosely defining B2B and B2C to correlate with high involvement and low involvement sales cycles.

Here is how we are defining B2B and B2C in this book:

B2B
B2B strategies in this guide are based on high-involvement purchases of more expensive products or services. These businesses are characterized by high-value transaction and typically involve longer sales cycles. Generally, each lead is more expensive to obtain and each transaction is more valuable to the business. Leads considering more information prior to the purchase extend the sales cycle. Your experience purchasing SharpSpring for you agency is most likely an example of a high-involvement purchase.

With notifications, email automations and dynamic lists, marketing automation allows these businesses to convert more leads to sales while also shortening the sales cycle.

B2C
When we discuss B2C businesses, we are generally referring to businesses with less expensive and/or low-involvement purchases. These businesses typically involve a much higher number of leads/sales and lower revenue per transaction. Because these transactions are lower value and less risk, the sales cycles happen more quickly and generally don't involve a sales team.

In high lead frequency businesses, marketing automation helps build a personal relationship – via automation and segmentation – with each customer and deliver messages tailored to their unique needs.

Stamps
Look for these stamps tp indicate B2B or B2C strategies:

B2B	B2C

note

Regardless of whether a business is categorically defined as B2B or B2C, there is tremendous value in reviewing both parts of the book. In this guide, we use the B2B and B2C categories as a method of organizing general strategies. However, you should not limit yourself to these conventions; instead, you should consider ideas from both parts that apply to your client's unique situation.

Wait!

Before you start walking, running and flying through the world of marketing automation, you need to have SharpSpring properly set up.

This guide assumes you have been through your initial SharpSpring onboarding meetings and finished the basic set up including:

- The account is set up in SharpSpring
- Users are setup in SharpSpring
- Tracking code is created and posted
- Any 3rd party services are connected to your account
  - Google AdWords
  - CRMs
  - Webinar services
  - Social Media
  - Text messaging
- All forms converted to SS dynamic forms.
  - SharpSpring forms improve conversion rates since they can autofill information already available in the database
- SharpSpring is branded with your agency logo
- First email is sent to drop cookies on current leads in database

STOP
USE OF ESPs $=$ COST SAVINGS $+$ EFFECTIVENESS OF SHARPSPRING

STOP

In order to be successful using marketing automation, it's important that your agency stops using ESPs (like MailChimp or ConstantContact) and start using SharpSpring for email delivery. Your agency chose SharpSpring because of its next-generation tracking capability – which not only captures ESP data (opens and clicks), but also reports the lead's on-site behavior. One of the many ways SharpSpring's tracking code is deployed is through email. Continued use of ESPs cripples SharpSpring's ability to deliver tracking code and track leads effectively.

Walk

This section includes a few simple steps to get you moving in the right direction to deliver immediate value to clients.

Basic Notifications

VisitorID B2B B2C

Right from the start, you can triple the leads you provide your client. VisitorID will identify visitors in the 98% of traffic that doesn't fill out a form. These leads can then be reported to all the key contacts in your clients company.

On a daily basis, you can put your agency's brand in front of your client with a laundry list of new leads. This is a great way to introduce your client to the unique value of marketing automation.

Notify Form Submissions

Studies show that following up with a prospective customer within the first hour increases your likelihood of converting him or her into a lead by 700%. This underscores the importance of recognizing when prospects are trying to connect with your business.

Set up automatic notifications for your sales team so they don't waste a minute filling the top of the funnel.

Notify Web and Email Clicks

Timing is everything. The right message at the right time can close a deal. Empower your sales team with the ability to immediately know when a lead is researching your client's business.

Basic Automations

Thank You Automations B2C

The power of marketing automation is the ability to seamlessly build relationships with each lead and customer. Gratitude is an important aspect of forging a strong bond. Set up thank you emails based on behaviors such as filling out a form, visiting from an important email or making a purchase.

Build Your First Drip Email Campaign B2B B2C

The majority of leads that visit your site are not "sales ready." The key to maximizing your conversion process is to nurture leads via targeted communication as they move through the funnel – eventually becoming sales ready. This is the purpose of a drip email campaign.

A drip email campaign is a series of emails sent automatically over time with information about the products or services that the lead is interested in. Drip email campaigns are used for the purpose of keeping leads at the top of your sales funnel engaged with your company and moving them further along the funnel. Pick a product and get going!

Walk

Basic Segmentations

Build Your First Lead Scoring Model B2B

Lead scoring is numerical value used to measure the engagement and/or "sales readiness" of an individual lead. Leads with high lead scores can be automatically passed to your sales team to engage in the sales process. Leads with low lead scores need to be nurtured with drip campaigns, case studies and other sales tactics until they are sales ready.

Setting an initial lead scoring model is easy and can be recalibrated at any point, so don't worry about getting it exactly right. Start experimenting!

Build Your First Dynamic List B2B B2C

Dynamic lists are used to segment customers based on their behaviors, demographics and interests. They are "dynamic" because they are automatically kept up to date in real time via SharpSpring's automation platform. As new leads meet a dynamic lists criteria, they are automatically added to the list.

Like the lead scoring model, dynamic lists can be created and recreated, so don't be afraid to start tinkering. Consider setting up a dynamic list of leads who, based on web tracking, appear to be interested in one or more of your products or service.

SharpSpring CRM (Skip this if you're using a 3rd party CRM)

Set up Your Deal Stages B2B

Build your pipeline to reflect your sales funnel. A typical sales pipeline might include stages such as Initial Discovery, Needs Analysis, Demonstration and Price Negotiation, etc.

Set up your deal stages to reflect your client's unique sales cycle. The deal stages can be modified later, so don't be afraid to experiment.

Set up Custom Fields Relevant to Your Sales Srocess

Custom fields for anything you would like to record in the lead record. Typical custom fields include product interests, revenue, competitor experiences, etc.

Set up Smart Email Templates for Sales B2B

In SharpSpring, Smart Emails are trackable, so your sales team will know when Smart Emails have been delivered, opened and clicked. The sales team will have an opportunity to edit the templates before sending, and Smart Emails can be scheduled for future delivery. There are a few basic smart email templates we recommend including:
· Thanks for contacting us
· Hey you told me to contact you later
· Invite to Social Media
· Blank Template

Check Out Social Notes

Most sales processes require a lead to interact with more than one person in your organization. Social notes allow your team to communicate important details about the lead as the relationship is transitioned through your organization. If you have a member of the sales team qualifying the leads, details from his or her conversation can be passed with Social Notes to the sales rep to enhances the pitch.

Run

Now that you have your feet under you, lets build some momentum with more advanced automations. These strategies can take your lead generation and sales to the next level.

Advanced Notifications

Notify Lead Score `B2B`

As discussed in the Walk section, lead scoring is a great way to quantify the position of your leads in the sales cycle. With notifications trigged by lead scores, you can alert your sales team to leads moving through the funnel. If a lead has earned a high lead score, he or she is ready to buy. Notify your sales team to pick up the phone and close the deal!

Notify Returning Visits

Making sure your sales team knows when an important lead comes back to the site can be the difference between losing or winning a deal. SharpSpring can be set up to send alerts when a lead they are currently working with returns to the site so that sales can make that "well-timed" phone call.

Advanced Automations

Targeted Drip Email Campaigns `B2B` `B2C`

In the Walk section of this guide, we set up your first drip campaign. Consider using those new skills to create additional drip campaigns for each of your customer segments. Typically speaking, segmenting your pipeline into individual customer segments and addressing each with a specific drip campaign will lead to higher conversions and more revenue.

Hot-Lead Burst Campaigns `B2B` `B2C`

With your lead scoring model, you can identify leads that are closer to making a purchase. These "sales-ready" leads can be converted to sales with frequently delivered messages geared towards encouraging a purchase.

Burst campaigns are different from drip campaigns. Drip campaigns are intended to be periodic and informative. The objective is to maintain brand awareness with your young leads. On the other hand, burst campaigns drive sales by focusing on social proof (testimonials), credibility (3rd party reviews) and purchasing incentives (promotional discounts). These messages are more frequent and help close a sale.

Replicate A Recommendation Engine: *The Amazon.com Experience* `B2C`

Your drip campaign skills can also be used to send helpful emails recommending products or services similar to previous purchases. These emails can replicate Amazon.com's recommendation engine experience. For instance, a dynamic list of leads that purchased or showed interest in three products could receive emails about a fourth product commonly purchased with the three other products.

Advanced Automations (continued)

Confirmation and Appointment Reminders `B2B`

If each transaction is worth a lot of money, missing an appointment can be devastating for a business. Not only will confirmation and appointment reminders be a courteous gesture, they can improve attendance rates and drive sales.

Advanced Segmentations

Segment By Demographics `B2C`

By having leads fill out forms for gated content or webinars, you can collect more details about who they are and segment leads based on this demographic information.

Segment By Products

Emails that speak to specific interests will drive more engagement and build stronger relationships. Take advantage of a dynamic list's ability to organize your leads around the product pages they visit.

Segment By Lead Scores `B2B`

When you create dynamic lists of leads based on lead scores, you can measure how many leads you currently have in each stage of the marketing funnel. This will allow you to see how many leads are ready to buy and how many new leads are just starting the research process. An up-to-date view of your marketing funnel allows you and your sales team to communicate accordingly.

Advanced Analytics

Track Your Webinars Using SharpSpring Dynamic Forms `B2B` `B2C`

SharpSpring offers excellent integration with WebEX and GoToWebinar. Be sure to drive traffic to a SharpSpring form tied to the webinar. The integration allows you to use a SharpSpring form to capture leads and track behavior without interrupting the webinar platform.

Measure & Optimize PPC

Track your PPC campaigns to identify the keywords that close deals and stop wasting money on the keywords that don't deliver. Build a list of negative keywords for your campaign to avoid, or start identifying long-tail keywords to optimize your campaign.

Measure Email Campaigns

Email marketing is still the king of digital marketing. Carefully tracking your open rates and click-through rates will help you refine and improve your subject lines, messages and calls to action.

Measure Specific Engagements

Keeping track of certain behaviors can help you gauge the success of different tactics. For instance, when hosting a webinar, you can set up lists to keep track of who registers to attend and who actually attended. Or to help track behavior, understand what content is driving leads and converting sales.

Fly

You've got it down. Marketing automation is no longer a mystery. You should think about the entire Fly section as combining the various tactics you learned about earlier in the guide to create new, more powerful solutions. As you "fly," it's no longer about segmenting based on demographics or behaviors or using dynamic lists or notifications. Instead, it's about combining all of these tactics to create incredibly personalized, engaging and effective solutions that drive more revenue and increase your marketing ROI.

Expert Notifications

Notify Specific Products Interest
The best purchasing experiences are tailored to our unique needs and interest. The sales team can be notified when a lead visits a specific product or service page, so the sales team can adjust their pitch around the product and build urgency for the lead's specific needs.

Relevant articles
- Building a Dynamic List Based on Clicking on a Link
- How to Create an Automation Task

Notify High-Value Behaviors and Form Submissions   B2B
Forms fields and web tracking can be used to instantly qualify leads. When a lead completes a form and/or behaves in a way that says "I'm the perfect customer," you can send a notification to your sales team for immediate communication.

Relevant articles
- How to Create a Custom Field
- How to Edit a Custom Field
- How to Create a Custom Form Button

Notify Referral and Upsell Reminders   B2B
Businesses live and die on referrals and upsells. Unfortunately, the demands on the average sale rep can interfere with requesting referrals and upsell pitching. Help the sales team out and remind them with a notification after a set duration of time has passed since the deal closed.

Expert Automations

Automate Your Social Invites and Interactions
The success of your social marketing strategy is directly related to the footprint and reach of your social network. Use SharpSpring automation to connect all your high-value leads, customers and contacts to each of your social networks.

Relevant articles
- How to Create an Automation Task

Automate Customer Feedback   B2B   B2C
Throughout your sales and customer lifecycle, consider automating the delivery of surveys to capture valuable insights about how your leads and customers feel about their experience. You can set this automation up once and collect actionable data forever.

Automate Referral System
Once the deal is closed, you have created an advocate for your company. Setting up an automated email to solicit referrals is a cost effective way to generate high quality leads. You can also notify your sales team to reach out for leads, and you can automate emails to solicit referrals at regular intervals, like once a quarter.

Expert Segmentations

Practice Segmentation Jujitsu   B2B   B2C
You're becoming a pro. Use Dynamic Lists to slice and dice your data – discovering valuable insights.
- Are the customers who are interested in product 1 also interested in product 2?
- If a customer downloads a white paper, are they more likely to purchase a product?
- Are leads from a specific geography more likely to buy?
- What is the most valuable content (ebooks, white papers, case studies) to the sales process? Can that content be made more prominent on the site to drive more leads?

Relevant articles
- How to Create a Dynamic List Based on the Lead Score
- Building a Dynamic List Based on Clicking on a Link
- How to Create a Dynamic List of Contacts That Have Unsubscribed

Expert Analytics

Dive into Campaigns   B2B   B2C
SharpSpring gives you the tools to track anything and everything from a marketing perspective, so that you know what is working and what isn't. Use this knowledge to eliminate what is not working and double down on the tactics that are working – driving more leads back into the top of the funnel.

SharpSpring's comprehensive set of analytics tools allows you to track every lead that enters a business via UTM codes/ referrer IDs, dedicated landing pages and the "How did you hear about us?" question. Uses these tools to optimize your marketing spend across your entire funnel.

SharpSpring allows you to review your data through the prism of closed-loop analytics. This means looking at all the deals that have closed and attributing them to the sales and marketing tactics that lead to the revenue. By looking at your data from the perspective of all the closed deals, you can gain insights on campaigns that are wasting money.

For instance, you might have a campaign that generates 100 leads at a cost per lead of $5, but if only one of those leads becomes a deal, your acquisition cost is $500 for that campaign. Compare this campaign with a campaign that generates 20 leads at a cost per lead of $10. At first, this might seem to be a less efficient campaign, but if half of these leads become deals, your cost per acquisition with this campaign is $20 – a fraction of the former campaign. Close-loop analytics means sitting down to carefully calculate your campaign's impact on the bottom line.

Relevant articles
- How Campaign Attributions Work
- How to Track Campaigns
- How to Setup UTM Codes to Track Campaigns
- How to Map Lead Sources to a Campaign
- Guide to Creating a Campaign

Rebrandable Reports
Your clients need to see the progress you are making. Export the data you are collecting from SharpSpring with your agency's logo and share the reports via email.

Your Arrival

If you forget everything else in this book, remember that marketing automation empowers your sales and marketing process with high-converting, one-on-one communication.

The conclusion of this book is really just the beginning of your journey. There are limitations to simply applying our ideas. The magic of marketing automation deserves your creativity. There is so much opportunity to build webs of workflows and dynamics lists that replicate a person-to-person experience.

We are building a library of resources and tools to help you continue your quest. These resources include tools for selling SharpSpring, strategies for your clients' campaigns and technical support.

Sales Enablement
- Brandable PowerPoint Presentation
- Brandable Sell Sheets

Thought Leadership
We are a team of marketing automation nerds. We are constantly learning about strategies, tools and analytics. If you'd like to learn from our sources, we've outlined a few of our favorite blogs and thought leaders.

Blogs to Read
- Chief Marketing Technologist
- Convince and Convert
- Customer Experience Matrix
- Digiday
- Crazy Egg Blog
- Hubspot Blog
- Unbounce Blog
- KISSmetrics Blog
- Signal vs. Noise
- GigaOM
- Inbound.org

People to Follow
- Matt Cutts - @mattcutts
- Rand Fishkin - @randfish
- Seth Godin - @ThisIsSethsBlog
- John Koetsier - @johnkoetsier
- Jay Baer - @jaybaer
- David Raab - @draab
- Scott Brinker - @chiefmartec
- Georgiana Laudi - @ggiiaa

Technical Support
If you have any questions, email partnersupport@sharpspring.com and a member of our account management team will respond to assist you.