

The Fab 4: Client Goals You Can Achieve with Marketing Automation

Identifying which clients are candidates for automation based on their business needs.



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About the author

Greg started his career in direct mail and learned the importance of targeting and reporting. This is the foundation for his success with marketing automation for both his agency and its clients. Core Integrated has been a SharpSpring agency partner for more than 2 years and currently has 80 clients on the platform.

In today's fast-paced world, it often feels like there isn't enough time in the day. From meeting with new clients and managing existing projects to our busy family lives and constantly buzzing phones, it's hard to make time for anything.

We all want our marketing campaigns to exceed all expectations, and marketing automation is designed to help us do just that. As a concept, it's relatively easy to explain to your clients, but its impact is complex and extends to nearly every aspect of business. When it comes to selling marketing automation, it helps to know exactly what it can do for different user types so you can identify clients who are the best candidates for the platform.

While marketing automation no doubt has potential benefits for just about every one of your clients, some are simply more "in need" of such a solution, and knowing how to spot those sales opportunities right away will put you ahead of the game.

In my experience, there are four specific goals that marketing automation addresses more effectively than any other tool on the market. As a result, clients that are concerned with achieving any of these four goals typically make the best candidates for marketing automation.

Marketing automation is an ideal fit for clients that are looking to:



Increase inbound conversions



Increase sales team accountability



Boost email marketing performance



Improve lead distribution effectiveness

When I ask clients about inbound conversions they are either thrilled or convinced it's a wasted effort. Either way, marketing automation can have a big impact.

Clients who are happy with their inbound conversions

Let's consider the first group – clients who are happy with the results of their current PPC or inbound campaigns. If they've got a steady stream of inbound conversions coming in each month, they might not realize that there is room for improvement.

But if they're getting 100 inbound leads per month and only converting 10, what's happening with the other 90? Why settle for 10 a month if you could be getting 20? How about 30?

According to Forrester Research, Inc., companies that effectively implement lead nurturing “generate 50% more sales-ready leads at 33% lower cost.”

By keeping prospects engaged over time with personalized nurturing campaigns, your clients could double or triple conversions and get way more out of their inbound efforts. Marketing automation makes this easy by allowing them to set up workflows that automatically and continuously segment and nurture leads.

For example, clients can set up a workflow around a particular piece of content, like a white paper. They can send an initial email containing a link to a gated page with the content along with some compelling reasons for them to download it. If a prospect downloads it on the first send, he is automatically added to a campaign that will follow up with other similar content and relevant promos and demo offers. If a prospect doesn't download right away, he'll receive a follow-up email reminding him to do so. Those who download it at that point are also added to the aforementioned list (or a similar one), and those who don't are assigned to a less aggressive, long-term nurturing campaign.

Clients who are not so happy with their inbound conversions

As for the second group – clients who are getting no conversions out of their inbound traffic – there are many factors that could be contributing to the problem.

The first step is to figure out what's working and what's not, and marketing automation makes it really easy to measure results through advanced analytics. Is the problem that they're not attracting the right types of leads to begin with? If so, powerful performance metrics will give them the visibility they need so they can adjust their tactics.

If the problem is that they're marketing to the right audience but not managing to keep people engaged over time, automated nurturing campaigns can help them actively engage and segment those leads. As leads interact with the brand over time, their lead scores update dynamically to reflect these interactions, and automatic notifications alert salespeople when leads are ready to convert.

No matter what challenges your clients are facing, marketing automation will give them the visibility and insights they need to adjust their campaigns and increase their inbound conversion rates.

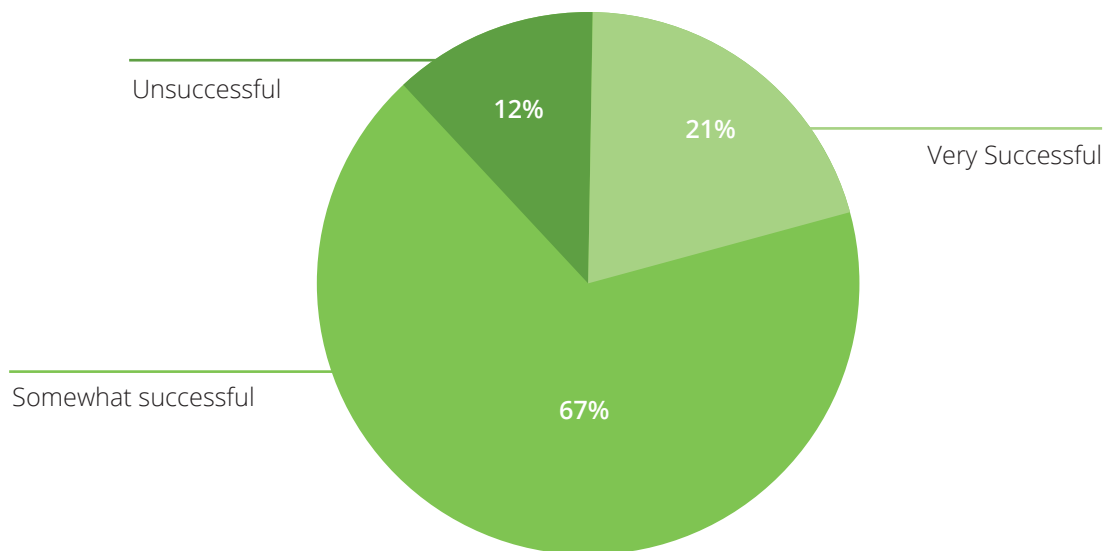
With billions of emails being sent out on a daily basis, businesses are finding it difficult to get their emails to be seen and opened. To make matters worse, email blasting has become very inexpensive, and in turn the quality of email marketing has gone way down.

As a result of all of this, many of your clients might be experiencing lower-than-ideal performance on their email marketing efforts. For those clients, marketing automation is the perfect solution, as it offers a range of tools and features that set it apart from traditional email service providers.

How marketing automation improves email performance

Built-in behavior tracking allows them to setup automated drip email campaigns to keep their leads and customers engaged with personalized, relevant content. They can set up a timeline for the various touch points in the customer journey and then customize their content as they go along based on the lead's activities and behaviors, nurturing the lead until he/she is ready to buy.

According to a recent survey of marketing agencies, lead nurturing is a successful tactic for 88% of them. Marketing automation makes lead nurturing simple with drip campaigns to well-segmented lists.



The platforms we use to communicate with our leads have evolved from face-to-face meetings and phone calls to texts and emails. But one thing has remained the same – the *relationship* we build with a lead is ultimately what makes or breaks the deal. When a lead receives an email from a source they know and trust, they'll be much more inclined to open it, and marketing automation gives your clients the chance to build that trust.

If they create the perfect campaign, their leads won't even know that automation is being used. The goal is to lead people to believe that their sales team is taking the time to personally follow up or communicate new offers.

In addition to the personalization and improved open rates, marketing automation offers the ability to see what leads are doing 'after the click.' Clients can get insights into which pages a lead is clicking to and then modify their workflows accordingly, and they can even set automatic alerts that notify the sales team as soon as a lead seems ready to make a purchase.

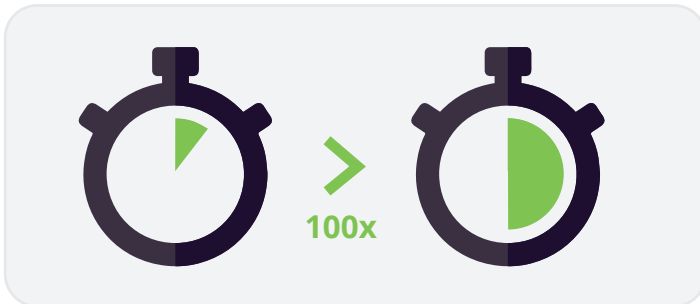


Sales Team Accountability

Imagine a world in which every lead was followed up with in a relevant and timely manner. If you're already using marketing automation for your agency, then you know what this feels like, but there's a probably a good chance that a lot of your clients are in need of some help in this area.

Speeding up cycles with marketing automation

Sales teams are typically great at closing quick and easy sales. Where they often struggle is when a sales cycle lengthens to weeks or months, or when they have a high volume of leads to handle. Marketing automation addresses both of these challenges and allows sales reps to close more deals.



With any sales cycle, both speed and persistence are key. According to InsideSales, if you reach out to a lead within five minutes of a given interaction, your odds of contacting them are 100 times greater than if you call after 30 minutes, and they're also 21 times more likely to enter the sales cycle. Yes, that's 21 times.

Marketing Automation Success = Personal Lead Nurturing + Real-Time Sales Notifications.

Use automatic alerts to get results

Marketing automation gives sales reps the insights they need so they can reach out to leads with exactly the right information at exactly the right time. Real-time behavioral tracking allows sales teams to keep track of leads' activities and interactions, so they can contact them at the optimal moments.

For example, your clients can set up automatic notifications to alert salespeople whenever a lead visits a pricing page, so they won't miss out on any opportunity to close a deal with someone who's already in the mood to buy. Other lead actions – such as visiting a product page or downloading a case study – can also trigger notifications for sales to reach out, or they can trigger automated drip campaigns designed to nurture leads with other similar content or product-related promos and discounts.

Marketing automation also provides robust performance analytics, giving your clients an end-to-end picture of their ROI so they can identify which sales reps are closing the most deals and which marketing campaigns are working most effectively.



Lead Distribution Effectiveness

Lead distribution is a driving factor in conversion rates, and the more optimized your strategy is, the higher your sales rates will be. If you have clients that are struggling with their lead distribution efforts, marketing automation is their best bet.

An easy way to see how effective marketing automation can be for lead distribution tactics is to look at lead distribution organizations themselves.

There's a variety of ways in which leads get passed to businesses: franchises, associations, buying groups and manufacturers, just to name a few. Lead distribution organizations like these each have a network of businesses or members selling products and services on their behalf, and they also have specific methods for distributing leads across that network.

The pitch is the key

Marketing automation is a game changer for organizations like these, since it gives them the ability to automatically manage and distribute leads based on lead behavior and other triggers. If you have any clients that are lead distribution organizations, how you position yourself on this subject when pitching to clients, however, is of utmost importance.

Most lead distribution firms have a home-grown way of assigning out leads, and they often don't see any need improvement. So if you try to pitch marketing automation as a lead distribution system, chances are they'll quickly shut you down.

The key is to present marketing automation to your clients as an end-to-end solution that will allow them to automatically distribute leads based on predefined criteria, nurture those leads down the pipeline, measure the results, and then re-distribute leads based on performance.

As for any of your other clients that might be struggling with distributing leads internally among their salespeople, the same concepts apply. Marketing automation helps them see how each sales rep is performing and then redirect leads to team members who are closing at higher rates or are better suited for certain types of sales.



Real Success vs Perceived Success = Accountability
Reward the highest achiever by number conversions.



There's Lots More Than Four...

Marketing automation is more than just the sum of its parts. It is a way to effectively use consumer data to drive every aspect of the marketing and sales cycles. It combines a range of tools into one seamless system that can be customized to fit the needs of any business.

In today's economy, marketing automation is vital for organizations of almost any size. Businesses want results and accountability, and a good platform provides all the necessary tools to achieve that.

The concept of marketing automation may seem abstract, but if you package it for your clients in a concise and relevant way, they'll quickly realize how much they need it.



Adding marketing automation to your agency's services can help you grow your business. Learn more about SharpSpring today.

Get a Demo



Since 2014, SharpSpring has provided top-notch marketing automation solutions to businesses around the globe. In the short time since its inception, the company has already rivaled industry leaders with its competitive pricing, agency-focused business model, and robust platform.

Visit www.sharpspring.com for more information.



Core Integrated is a full-service direct marketing agency based in the Chicagoland Area. Utilizing direct mail, targeted digital marketing and personalized email lead nurture, the agency provides a turnkey, multi-touch solution to help its clients reach and surpass their goals.

Visit multitouchleads.com for more information.