

Pitching Marketing Automation:

Overcoming Barriers and Engaging Various Client Personas



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For more than 20 years, Steve Gasser has been leading the team at Vivid Image, a digital marketing agency specializing in marketing, advertising and web development. Steve is also a certified social media consultant. Vivid Image uses marketing automation to grow the agency and serve clients in innovative ways. Vivid Image has been a SharpSpring partner for more than two years.

If your agency is already working with a platform such as SharpSpring, chances are you're already sold on the many benefits marketing automation can provide. What's not to love? Lead identification, robust analytics, time-saving automation of lead nurturing activities, a full-featured email platform, and so much more. So how do you transfer that excitement to your clients and get them to jump on board?

Getting your clients to adopt a marketing automation platform often comes down to two key things:

Breaking down barriers (reasons to say no), and identifying the key motivators that will make them view it as something they can't possibly live without.

This article explores the following in-depth:

The Barriers to Marketing Automation:

- The Rut
- The Comfort Zone
- Penny Pinching

The Types of Marketers You'll Encounter:

- Wanna Be Spies
- Overworked Dreamers
- Connectors of Dots
- Prove Its

Benefits of Marketing Automation:



Drive More Leads

More than just more. Drive relevant leads that convert.



Convert Leads to Sales

Close business by sending exactly the right message at exactly the right time using powerful, behavioral-based communication.



Optimize Your Spend

Double down on what works and axe what doesn't. Comprehensive reports make it easy.

The Barriers

We have found three primary barriers that clients have when we start talking about marketing automation. Understanding these barriers and how to overcome them is the first step in helping your clients achieve their unique goals with marketing automation.

The Rut

It's easy to fall into a marketing routine; using the same tactics, tools, communication methods, marketing mix, etc. that have been in place for a long period of time (maybe even years). This can especially be true if that routine is producing adequate results. Have you ever asked a client why they do something a certain way, and no one seems to know the answer? It's instinctive for us as humans to follow this path of least resistance, but that path isn't always the one that produces optimum results.

How to Combat 'The Rut'

Sometimes breaking out of the rut can be as simple as suggesting specific tactics clients can implement utilizing marketing automation. As an agency with intimate knowledge about all of the many features and ways to use an automation platform, it's easy for us to forget that clients may not be as familiar with these features or even fully know what's possible. It's our job to educate our clients on the possibilities and help determine how these tools can be best put to use for their particular business. Consider offering an audit or analysis of their current marketing processes to look for opportunities to improve using marketing automation.

The Comfort Zone

Much like the rut, the comfort zone can be a difficult place for a client to leave, except the comfort zone has more to do with fear than awareness. This client may seem agitated by or extremely hesitant to have a discussion about marketing automation or any new tactics in general. Maybe they are new to their job/company, or are currently understaffed, or have been disappointed by a previous attempt, or perhaps are just under a lot of pressure not to fail. In any case, the idea of breaking from the known to the unknown can be intimidating.

How to Combat 'The Comfort Zone'

Make adding marketing automation a really simple, phased-in approach that works to include the client at every feasible step. As a whole, marketing automation can feel a bit overwhelming to a client who is new to it. Breaking it down into a prioritized list of uses and how to implement them can make it less daunting and bring down a client's comfort level. One tactic we have used is to create an organized launch plan by month and by quarter to gradually step clients into the marketing automation process. It allows them time to adjust to new processes and keeps the learning curve at a very manageable level.

The Barriers (continued)

Penny Pinching

The best things in life may be free, but any marketing automation platform will certainly cost you money. Thanks to SharpSpring, you needn't offer up your arm and first born anymore in order to afford one, but your client may certainly have fears about what all this functionality is going to cost them.

How to Combat 'Penny Pinching'

You can certainly paint a picture for clients about all of the potential for future revenue generated, but a skeptical client may be looking to cover the more immediate costs of implementation. Look for potential cost savings. Is your client currently paying a monthly or annual fee for their email marketing platform? With an integrated email system within most marketing automation software, your client may be able to drop their existing email marketing platform and have the ability to do so much more. Or what about internal CRM systems? We sometimes find that clients can eliminate one or two additional services and streamline it all with a marketing automation platform. Another popular approach is to offer a free or reduced trial to lower the client's perceived risk. Being able to try out a platform before making a commitment can provide enough time to build value in the client's mind.

45%
COMFORT
ZONE

20%
THE RUT

STATISTICALLY SPEAKING:

Percentage-wise, this is how Vivid
Image clients generally break
down into these categories.

35%
PENNY
PINCHERS

What's My Motivation?

Now that you've broken down the barriers, how can you determine which aspects of marketing automation are most likely to hit your client's hot buttons? Understanding your prospect's motivation helps you cut to the point and sell the right features to the right client. If you stay focused on matching your client's goals to the available features, you create the strongest possible sales pitch.

In our experience, we've found that there are typically four main categories of marketers that we are pitching to.

Wanna Be Spies

Spies in this case are almost always sales people who want to know when a hot prospect visits, or c-suite execs who like to know which competitors are watching them. In either case, website visitor identification and lead activity is high on their priority list. They want to know who came to the site and exactly what they looked at. We've also found hiring managers to find a lot of value in these features (wouldn't it be nice to know if your prospect has done their homework before an interview?)

Overworked Dreamers

This type of client tends to have big ideas and high ambition, but is often lacking the time needed to be able to accomplish everything. They are hungry for ways to streamline processes and add efficiency, and are often the workhorses of the marketing team. For this client, the ability to automate any manual process or do more with less resources is going to be a key trigger.

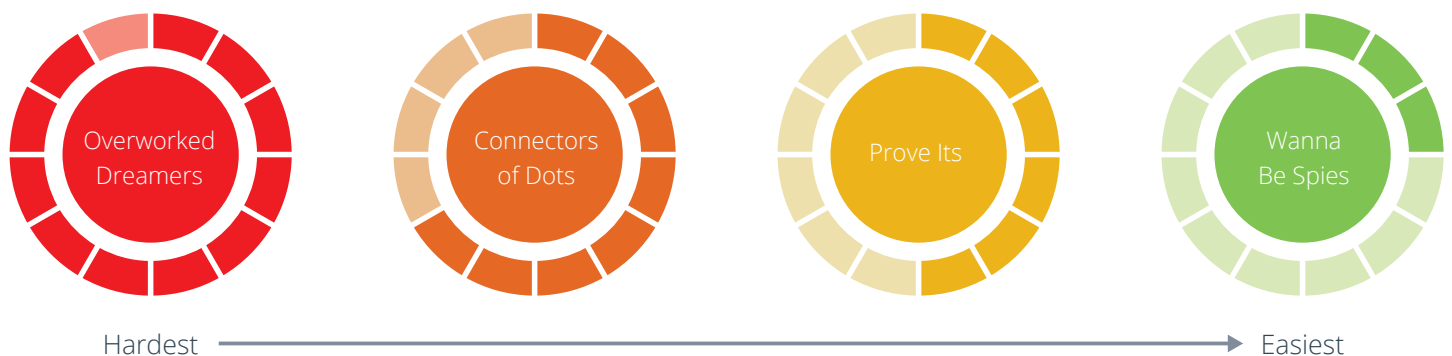
Connectors of Dots

The Dot Connector can be very similar to Overworked Dreamers – they typically see and understand how the entire marketing puzzle fits together but have no time to actually put it together. This person is almost always a marketing manager. Automation and lead nurturing options, such as trigger or drip campaigns can resonate well with this person.

Prove Its

Prove Its instinctively need justification for campaigns. They want to know what leads the campaign created and the revenue generated from that lead. They can tell you exactly what a lead is worth to their business or organization. This type of client salivates over analytical data and tracking, and is often a decision maker that must approve expenses or justify budgets. For this client, campaign tracking/analysis, CRM features, call tracking, and more can be of great interest.

The Rank: Hardest marketers to pitch to...



What's My Motivation? (continued)

Knowing these roles can also help you define the most appropriate level of involvement for each individual when starting the process. For example, Spies and Prove Its tend to want to be more hands-off and are likely to want more assistance from the agency. Overworked Dreamers want to contribute but lack the time, so giving them a small role is more appropriate. Connectors of Dots typically want to be a part of the strategy, but do less in the day-to-day processes.

At the end of the day, understanding your client is the key to selling automation and getting the yes you desire. Don't get lost in the vast array of features and possibilities; consider their individual motivation and goals when deciding what to pitch, and be prepared to nullify any potential barriers.



Adding marketing automation to your agency's services can help you grow your business.

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Want to hear more about Steve's experience in getting clients to adopt marketing automation?

View Recorded Webinar



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.



Vivid Image is a full-service marketing and website design agency based in Hutchinson, Minnesota with additional offices in Willmar and the Twin Cities. Vivid Image has been serving clients of all sizes from a wide variety of industries for over 20 years. Led by owner and chief evangelist Steve Gasser, the 17-person office employs specialists in fields such as graphic design, programming, social media, content writing, marketing strategy, search engine optimization and more. Vivid Image is a certified Google AdWords Partner as well. At Vivid Image, our goal is to help our clients be successful and find what makes them remarkable. Vivid Image has been an agency partner with SharpSpring for two years. Visit vimm.com for more information.