

# Top 5 Pitfalls in Implementing Marketing Automation

Helping Your Clients Avoid Common Mishaps & Optimize Their Results



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## About the Author

Jerry serves multiple roles at Biznet Digital, including Content Chief, Account Manager and Digital Strategist. With a focus on helping small companies make sense of modern digital marketing, Jerry offers content creation as well as consulting on content, social media, client engagement, marketing automation, and much more.

Marketing automation has been all the rage among digital marketers for several years now. At Biznet Digital, our clients include B2B and B2C providers, and they run the gamut of industries, ranging from retail to manufacturing to professional services. Most of them use SharpSpring, but we also provide consulting, strategic and tactical help to clients who've chosen to invest in other platforms.

Our agnostic approach allows us to work with several different platforms and has given us insight into the essential do's and don'ts of implementing marketing automation. **Our experience has taught us that, in the end, a marketing automation application is much like an automobile – a device intended to get you somewhere.**

And while the nameplate on a vehicle matters to a certain extent, ultimately, a bad driver is a bad driver no matter how great the vehicle is (and some 'drivers' should seriously consider an Uber).

With that in mind, [94% of agencies do report success in using marketing automation](#) to achieve important goals for themselves and their clients. So to help you avoid falling into that lone six percent, we've compiled a list of the top five marketing automation pitfalls we've encountered over the years. Some we discovered first hand, and others are mishaps we've seen clients undergo.

Our hope is to help others avoid accidents on their journeys to marketing automation success.

Safe travels.



## Marketing Automation Pitfalls

- 1 Not Understanding the Buyer's Journey
- 2 Shortage of Content
- 3 Committing Insufficient Time & Resources
- 4 Data Mistakes
- 5 Using Marketing Automation Like Traditional Email



## Not Understanding the Buyer's Journey

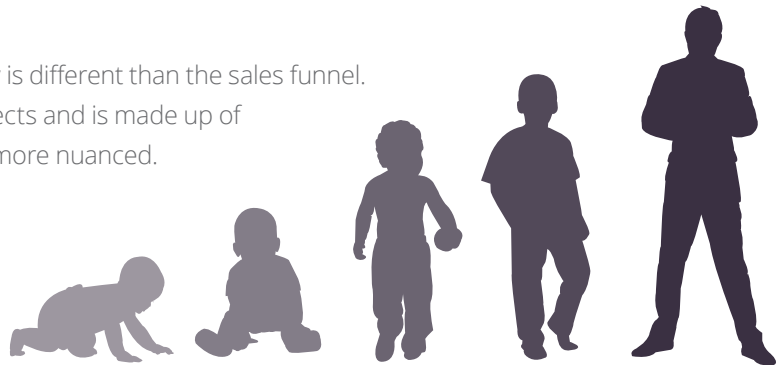
Every prospect that becomes a customer goes on a specific journey to get there. A surprising number of companies, however, still don't understand what that journey looks like.

This lack of understanding presents a major challenge for marketing automation success. Companies may have a general sense of the path buyers take. But many times, when we're implementing marketing automation for a new client and we ask them to put themselves in the buyer's seat, things get fuzzy.

Most companies tend to view the buying process from their own perspectives, when really it should be viewed from the customer's perspective.

It's important to note that the buyer's journey is different than the sales funnel. Whereas the sales funnel applies to all prospects and is made up of clearly defined stages, the buyer's journey is more nuanced.

Think of the sales funnel as the stages of life (infant, toddler, teenager, adult, etc.) on the way toward maturity, while the buyer's journey represents how each of us individually gets there.



*Think of the sales funnel as the stages of life.*

**Buyer personas** capture these nuances. When we develop personas, we capture more than just demographic information. We try to paint a picture of an actual person – his/her role, duties, challenges, biases, and pain points.

For example, instead of saying "Our customers are mid-sized auto parts manufacturers," we say, "Our customer (persona) is the engineering manager at a \$200 million dollar automotive plastic part manufacturer." We'll then get more detailed to identify the specific pain points and challenges this type of manager faces. We'll also sketch out the stages of his/her specific journey as we understand it, all the way from gaining awareness about the client's services to making the final decision.

Having clearly defined buyer personas improves the chances that your marketing automation efforts will speak to the individual needs of your prospects.

As in life, no two buyer's journeys are exactly alike:

### EXAMPLE 1

One of our clients sells predominantly to small companies, pitching to decision-makers who control the budgets and have the authority to spend money. The journey for this type of buyer is fairly straightforward and proceeds in a linear fashion from awareness to interest to consideration to sale.

### EXAMPLE 2

Another client sells a cross-disciplined financial management service targeted toward mid-level corporate managers. The buyers of this kind of service are not the sole nor final decision-makers; they must involve others in what tends to be a lengthy decision-making and approval process that requires a lot of justification, proof and supporting evidence. This buyer's journey is full of starts and stalls, sideways paths, a long decision process, prolonged delays, and actually includes several different personas.



## Shortage of Content

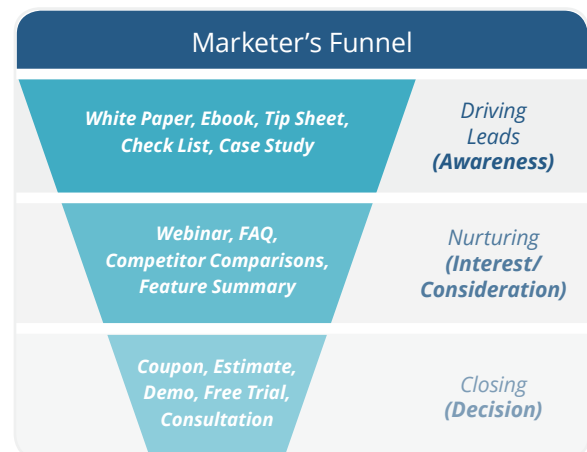
Not having enough content is a potential pitfall for any business, but it's made more acute when marketing automation comes into the picture. Why? Because marketing automation supports a longer-term nurturing process and requires a steady supply of customer-focused content in order to work at its best.

As opposed to traditional "spray and pray" email campaigns, marketing automation is focused on tailoring content to be responsive to the behaviors and activities of recipients as they progress through the buyer's journey. However, we find that many clients aren't prepared for the amount of content they need to support a multi-stage, behavior-based campaign.

The graphic below shows the different types of content best suited for each stage of the basic sales funnel. It's important to have an extensive library of content that you can pull from at any time, including case studies, white papers, competitive comparisons, photography, video, audio, infographics and more.

**Awareness** content is usually easy to generate, because it tends to be the "who/what" content that most companies already include in brochures or on their websites.

Where things get difficult is in the **interest/consideration** and **decision** stages of the sales funnel. As your prospects move through the funnel, their questions will become more specific, so your content should grow more targeted in order to address those questions. Our clients usually have one or two pieces of content for these stages; after all, they're currently engaging with clients who are at these stages and usually have a few pieces of this type of content.



What many clients lack, however, are variations of these content elements that can be used for when a prospect gets stuck at a certain stage and needs to be messaged multiple times. You don't want to send that prospect the same piece of information over and over again, so you need subtle variations on the content.

In addition to a lack of finished content, many clients also lack the staffing or, for lack of a better word, the creativity to know how they can leverage and repurpose existing content in new and engaging ways.

### There's a variety of things we do to help these clients, including:

- ✓ Conducting a content inventory. We catalog *everything and anything* that could be a content resource.
- ✓ Identifying subject matter experts within the company that could be used as resources for creating new content.
- ✓ Reviewing what competitors are doing.
- ✓ Identifying resources available from association or industry groups.

**In the end, content is king.** Having an abundance of it is ideal; having enough is essential. We have found that when clients lack content or the resources to create it, the quality of their messaging suffers and their enthusiasm wanes – both of which are dead ends for marketing automation success.



## Committing Insufficient Time & Resources

Good marketing automation is not automatic. It takes time and effort.

Think of all the messaging tasks involved: creating content, landing pages, workflows, emails and forms; strategizing and planning; managing lists and campaigns; and analyzing and tweaking. These tasks do not accomplish themselves.

As a marketing agency, we appreciate the time that's required to produce results with marketing automation.

Clients that are advertising agencies or that have in-house marketing teams don't need any convincing. They're used to generating lots of content on a regular basis and understand the work that's required.

But clients who are unfamiliar with marketing processes often underestimate the amount of required effort. This is especially true of clients who haven't done much prior advertising or marketing but are turning to marketing automation as a magical solution for increasing sales.

It's "automatic," they think.

*If only.*

### **Not committing sufficient time and resources introduces a multitude of challenges:**

- ➔ It undercuts the content pipeline – quantitatively, qualitatively, sometimes both.
- ➔ It slows down all of your processes.
- ➔ It can lead to client impatience and frustration.

This last point is worth talking about further. Many clients begin to salivate when they hear the unbridled promise of marketing automation – "Increase sales by 60%; increase conversions by 30%; increase your average sale by \$15." – thinking that they're going to see immediate results.

This can lead to impatience on their part when they don't see the results they want overnight. For B2C clients, quick results might be a somewhat reasonable expectation. It's also reasonable for B2B clients whose marketing automation goals are more short-term, such as increasing webinar registrations or attendance at events.

But B2B companies that have long sales cycles need to be reminded that marketing automation takes some time to work its nurturing magic. We tell clients it can take six months to a year to begin to see real results from marketing automation. It takes time to build up a history of behavior that can be acted upon. But once that data is available, the marketing automation possibilities are virtually endless.



## Data Mistakes

Data is the lifeblood of marketing automation, and it comes in a variety of forms, including:



Lead profile data



List data



Email  
performance data



Website  
visitation data



CRM/sales data

Messy or missing data in any of these areas can negatively impact marketing automation performance. The most common data mistakes we see relate to lead profile and list data.

Lead profile data is all the stuff you know about a lead (i.e., a contact). This includes serial number kind of information – name, title, email address, phone number – but can and should also include additional information that lets you round out a person's identity.

Companies that actively use a CRM often have deep and wide lead profiles. They are able to identify, for example, which products or services a lead has used in the past; how much he has purchased; which shows or conferences he's attended; and more.

The biggest driver of increased data marketing is "a need to be more customer-centric."

– Adweek

This kind of information goes a long way in helping marketers craft personalized messages that will resonate with their leads.

Many companies simply lack this kind of detailed information about their leads. Using progressive profiling helps to build out these profiles over time, but effectiveness suffers in the interim.

Custom fields are a great way to capture additional data about leads more immediately, and we use them extensively in all of the marketing automation platforms that we work with.



## Using Marketing Automation Like Traditional Email

The fifth and final pitfall we see companies succumb to with marketing automation is using it like a traditional email program to send regular drip emails or one-size-fits-all emails. We often see clients do this when they first get into marketing automation. It's a natural outcome of a walk-run-fly approach, so it makes sense.

But once our clients build a warehouse of user data, we strongly advise them to analyze that information to create behavior-based nurturing campaigns around common activities.

Likewise, we advise them to get onboard the automated train as quickly as possible, to make everything more efficient.

For instance, if a company that sends out a regular monthly newsletter notices that a particular subject area generates a lot of traffic each month, its marketing team should develop follow-up messaging around that topic and set up an automated email campaign targeting those who expressed interest.

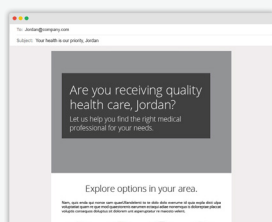
Another marketing automation feature that we encourage our clients to exploit is dynamic content. It allows you to develop content – from landing pages to emails and more – that changes dynamically based on the user's preferences and traits. The most obvious dynamic content example is a recipient's name. Company names are also a common dynamic element. But there are even greater possibilities.

For example, we have a B2C healthcare client whose website contact form allows visitors to indicate their area of interest, with up to six different possibilities. Rather than crafting several dozen different emails, we've built one email that dynamically inserts content according to the recipient's expressed interest.

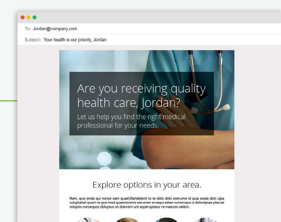
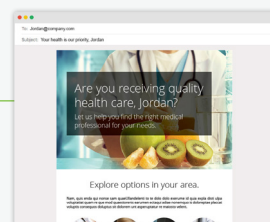
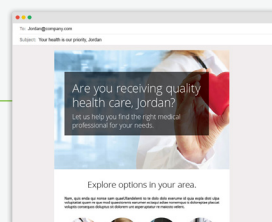
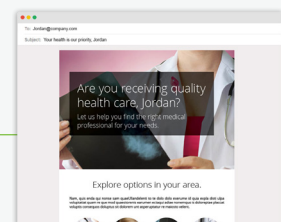
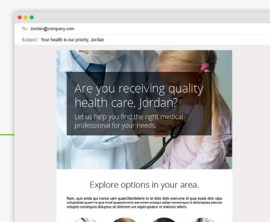
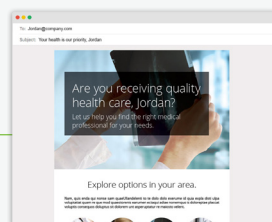
**"Personalized emails generate 6x higher transaction rates."**

– Experian Marketing Services

### DYNAMIC EMAIL



*One email dynamically inserts content according to the recipient's interest.*



We then trigger automated nurturing emails around those interests over the course of several weeks, just to let the prospects know we haven't forgotten about them.



While it's important to be aware of the potential pitfalls involved in using marketing automation, they definitely shouldn't discourage you from implementing it for your clients. The pitfalls discussed here are easily avoided if you are prepared to educate your client, set expectations and let them know where the speed bumps are located. The benefits of marketing automation far outweigh any of the risks or challenges, and knowing how to address those challenges should they arise will make it that much easier to get the results you want.

Happy and safe travels. Zoom, zoom!



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Visit [www.sharpspring.com](http://www.sharpspring.com) for more information.



*Since 1994, Biznet Digital has helped small and medium-sized businesses leverage marketing technology to grow and prosper. Biznet operates on the belief that digital marketing is more targeted, measurable and effective than traditional marketing channels, and it provides technology, education, personalized consulting and other marketing services to help its clients enhance the efficiency and effectiveness of their marketing and sales processes.*

Visit [www.biznetdigital.net](http://www.biznetdigital.net) for more information.