3 Steps to Signing More Clients

Using Marketing Automation to Build Your Brand & Acquire New Clients

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Growth Hacker | Upshot

About the Author

Marian is a new business pro who has created growth for marketing and advertising agencies as well as B2B professional service firms. Marian brings experience and expertise in growth strategy, market and sales planning, product and services branding, content creation, and prospect engagement. On the client side, Marian has worked at several global brands, including Weber Grills, Nike, and Johnson & Johnson in marketing strategy, planning, operations and business development roles.

If you're reading this article, chances are that your agency is already using or considering a marketing automation platform to help your clients grow their funnels of customers or prospects and win more business.

Despite using it for clients, however, many agencies are still not using marketing automation internally to support their own business development strategies.

They've got their hands on the best tool for acquiring and maintaining new clients, and they already have a knowledgeable staff that's trained on how to work the platform – so why not take advantage of it?

Marketing automation is hands down the best tool for achieving the three "gets" that any agency needs in order to grow:

Get Found ⇨ **Get the Meeting** ⇨ **Get the Business**

Here are some of the ways in which marketing automation can drive each of these "gets":

Get Found

Marketing automation generates brand awareness with a broad and deep target audience of prospective clients by presenting your content and point of view (POV) to many more people than those in your rolodex. By doing this, you can also "test and review" the responses of various industries, sectors, stakeholder groups, and so forth – which in turn helps you refine and focus your business development strategy.

Nurtured leads produce **20% more sales opportunities**, according to a DemandGen Report.

Get the Meeting

As prospective clients move through the buying cycle and engage with your content, you can monitor behavior and serve up more relevant content to those who express interest. They already know a bit about you, and with the help of automated lead nurturing campaigns, you can draw them in closer and open the door to a deeper dialogue.

Get the Business

While marketing automation is pretty commonly used for the first two "gets," it's used less often for the last and most important one. After the first meeting(s) with a prospective client, she can be moved into a workflow with content that is specific to her needs and challenges. During the negotiating process, the marketing automation platform helps you monitor her activity so you can calibrate content and other interactions around the things that interest her most. This type of responsive marketing helps you keep the prospect engaged in a less direct, yet supportive and impactful, manner.

Smart use of marketing automation ensures that your agency stays top of mind with your prospective clients' decision makers while they're waiting for budget approval or the right inflection point to hire your agency.

We all know that "getting the business" is a complex sales process that takes time (the bigger the project, the longer the cycle) and requires nurturing. Marketing automation gives you the tools to develop a robust content marketing plan so you can effectively target your prospects – from the beginning of the buyer's journey all the way to the end.
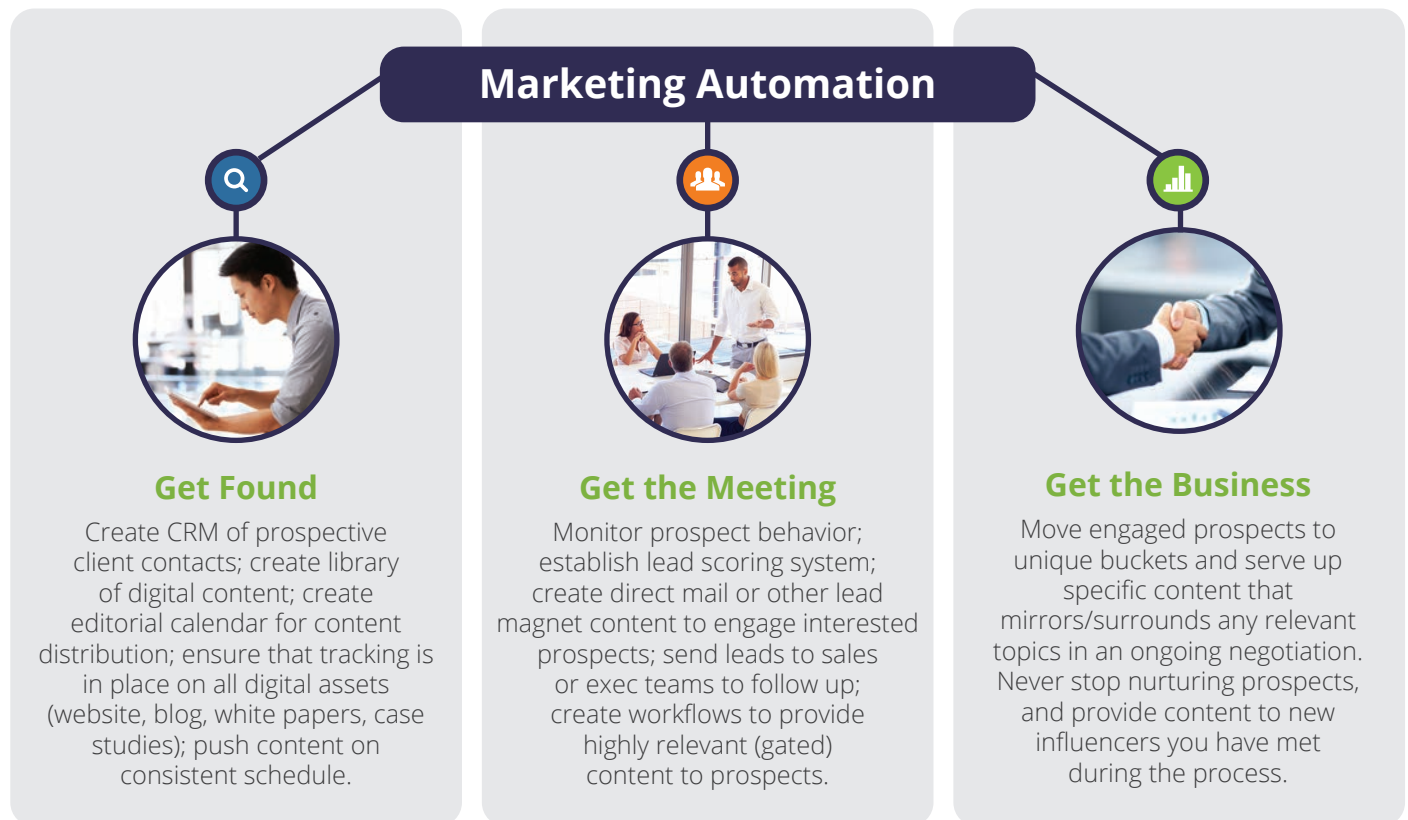
AWARENESS

EDUCATION

EVALUATION

TRIAL ENGAGEMENT

Companies that excel at lead nurturing generate **50% more sales at 33% lower cost**, according to Forrester Research.

Why are the "gets" so hard to get?

The CMO buyer's journey has changed dramatically since we launched 10 years ago, and many agencies are still catching up. It's no longer enough to have a rolodex of contacts. It's not enough to make calls (cold or otherwise). And it's not enough to send emails without a comprehensive content marketing plan.

B2B sales research shows that 80% or more of the new buyer's journey is passive. This means that in order to catch the attention of prospective clients, your content must be both prolific (lots of it, consistently distributed) and targeted (relevant to audience segments).

Marketing automation is the solution to getting prospective clients to go on the journey you want them to take.

Marketing Automation

Get Found

Create CRM of prospective client contacts; create library of digital content; create editorial calendar for content distribution; ensure that tracking is in place on all digital assets (website, blog, white papers, case studies); push content on consistent schedule.

Get the Meeting

Monitor prospect behavior; establish lead scoring system; create direct mail or other lead magnet content to engage interested prospects; send leads to sales or exec teams to follow up; create workflows to provide highly relevant (gated) content to prospects.

Get the Business

Move engaged prospects to unique buckets and serve up specific content that mirrors/surrounds any relevant topics in an ongoing negotiation. Never stop nurturing prospects, and provide content to new influencers you have met during the process.

What you need to get started

Below are the key components that you need to get started with a proactive marketing automation program for your agency:

The prospect list
- Accelerate prospect engagement by creating a list of prospects to fill your Top of Funnel.
- Segment your lists by:
  - Industry/sector
  - Stakeholder (e.g., CMOs get different content from managers).
- Categorized by approach:
  - Broader list for the Top of Funnel "pull" strategy (inbound marketing only = longer cycle to conversion, with broader reach).
  - Narrower/bullseye list for "push" strategy - Middle of Funnel prospects, targeted with outbound direct sales.

Content library (digital & analog)
- Emails that leverage 3rd party content (POV pieces).
- Blog posts & videos – long-read thought leadership from agency execs – hosted on your website and shared via emails/social media.
- White papers & webinars – educating the audience about relevant topics.
- Case studies
- Direct Mail - disruptive package that is sent to the "push" list as well as the highest lead scores from the "pull" list.
- Lead magnets to get attention and interest in meeting with the agency, such as research reports, mini-analyses or reviews, demo of new technology – offered as "gated content" through landing pages.

The distribution calendars
- Editorial calendar for content development and distribution – topics, placement, schedule.
- Social media calendar to support content distribution as well as to pull new prospects into Top of Funnel.

Workflows
- Content plans developed around industry/segment, stakeholder, lead scores - build the story as prospects show you what they are interested in and willing to engage with.
- Content plans designed to surround engaged prospects and their influencers during the negotiation process.

The secret weapon of marketing automation – lead scores

One of the most powerful tools of a marketing automation platform is the ability to attach lead scores to your prospects based on their online behavior. There are two key ways that we at leverage lead scores for agency clients:

1) To drive deeper online engagement through targeted workflows that deliver specific content to prospects based on their interests.

2) To identify the highest-value prospects from inbound and funnel them into an outbound sales campaign using a combination of direct mail and phone outreach.
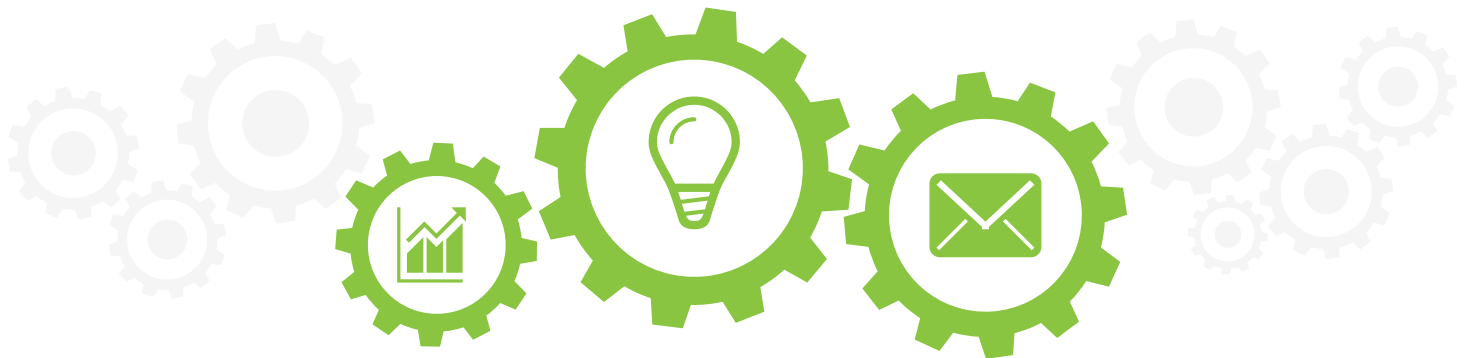
What are the benefits of marketing automation for your agency?

While it requires commitment and effort to implement marketing automation in support of your new business development strategy, it's well worth it. Some of the top benefits you'll see from using marketing automation are that it:

⚙ **Automates what are often "do it in your spare time" business processes – and forces your agency to have a proactive strategy.**

- Provides a CRM platform for prospect list and contact management.
- Allows for automated calendar events and event-triggered workflows.
- Provides regular reporting on prospect activity and sales activity.
- Offers analytics on the impact of your content as well as opportunities to "test and learn" so you can recalibrate as necessary.

⚙ **Encourages discipline in creating agency-branded content, intellectual capital, and distribution plans.**

- Provides a content library that all agency personnel can access.
- Houses all interactions with prospective clients in one central platform.

⚙ **Maximizes your lead generation efforts.**

- Generates awareness of your agency among broad and deep audiences.
- Educates prospects about what you do best, allowing them the chance to "lean in" before you expend tons of energy on pitching to them.

According to *BtoB Magazine*, among B2B companies who already use a marketing automation platform, almost a quarter of them report that it has made fairly significant contributions to their demand creation and lead nurturing success, and almost half are enjoying moderate successes.

Top tips for success with marketing automation:

1) Commit to a long-term program.

- Set an editorial calendar (minimum quarterly).
- Build a theme/storyboard for your content.
- Make sure agency leadership and the business development team are all on board.

2) Develop your prospect list with care.

- Make sure your selected target audience is in sync with your best success stories and deepest subject matter expertise.
- Select multiple levels of stakeholders and influencers.
- Confirm accuracy of data (emails, titles, etc.).

3) Mix up the content so prospects don't get bored.

- Have a regular, long-form blog format.
- Offer shorter POV emails that leverage other experts/articles.
- Use both free and gated content – higher-value white papers and case studies should be gated.
- Add videos to gated content and nurturing workflows.

4) Support your content with social media publishing to pull new contacts into the top of the funnel and along the buyer's journey.

- Create a social media editorial calendar for driving awareness/education.
- Surround all long-form and gated content with tweets linking to the content or landing page.
- Push content via the LinkedIn pages of the agency and its executives.

5) Measure, analyze, test, recalibrate, repeat.

- Use all of the tools that your marketing automation platform provides. SharpSpring, for example, has various report functions, lead scoring systems, and analytics that can be used to determine what prospects are doing and which content is working best.
- You can test different subject lines, stakeholder lists, days, and times, and then recalibrate and optimize for maximum impact.

The Principle of 3 Touches

A quick way to accelerate awareness is by reaching a contact across three different marketing channels – both online and offline. A prospect that comes into contact with your content via three different channels will quickly build up a level of familiarity and trust that will make him more willing to open your emails, take your phone calls, and ultimately enter into a long-term working relationship with your agency.

A few closing thoughts – and answers to the typical objections:

Okay, so now you might be thinking, this is all well and good but…

• We don't have anyone dedicated specifically to content marketing – just lots of people doing bits of it in their spare time.
• It's not billable hours, and our client work takes first priority.
• How else can we use the platform, beyond showcasing our work?

Almost all of our engagements with agency clients start with these concerns. Our point of view – based on a decade of being on the front lines in the business of engaging the decision maker – is that if you want to grow your agency, you can't afford not to make new business a priority.

Marketing automation is the tool that takes some of the manual effort out of the process. Yes, it might be more labor-intensive to set the strategy and the upfront planning; however, on the back end it becomes a machine that ultimately frees you up to spend your time on what you do best – meeting with prospects and converting them into paying clients.
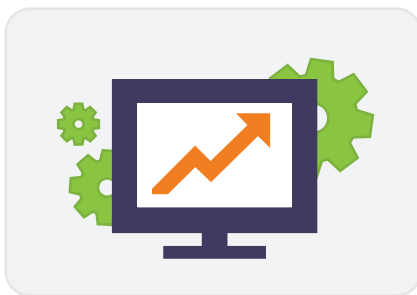
To paraphrase an old adage … if you want to grow your business and get new clients, you cannot be the "cobbler with no new shoes."

Take a page from what you recommend to your own clients. Once you make the decision to leverage marketing automation for your agency, you'll see your pipeline grow, watch prospects lean in and actively seek out your agency, and convert them to clients faster – thanks to the smart, strategic and consistent content marketing program that you can have with marketing automation.

Adding marketing automation to your agency's services can help you grow your business. Schedule time with a partnerships specialist to chat about your specific needs and see SharpSpring in action.

GET A DEMO

SharpSpring

SharpSpring is the marketing automation platform of choice for more than 1,500 digital marketing agencies and their 6,000+ clients. Since 2014, SharpSpring has provided its powerful marketing automation solution to businesses around the globe. In the short time since its inception, the company has gained significant market share from industry leaders with its competitive pricing, agency-focused business model, and robust platform.

Visit www.sharpspring.com for more information.