



Leadgate
Online Marketing for IT

White Paper

Marketing Automation 101 - A beginner's guide for IT businesses

Thank you for downloading our beginner's guide!

More and more companies are using Marketing Automation to get the most out of their marketing efforts. This is not surprising, as automating your marketing can save your business time and resources by engaging with leads in a consistent way, increasing conversion rates and easily gathering data on what's working and what's not working.

But what is Marketing Automation? Simply put, Marketing Automation means creating processes that automatically perform marketing routines. By automating time-consuming and repetitive processes, you can save time. This allows you to put more energy into the areas of your organization that still require your (human) attention.

You can use various tools to create these automation processes, but email marketing software is the one that is most widely used. Other more advanced tools include platforms that can automate social media, SMS, websites and pay-per-click (PPC) advertising. These more advanced Marketing Automation platforms also allow you to capture lead data, reach out to these leads directly through various channels, and track their progress through the sales funnel.

In these aspects, Marketing Automation tools are also somewhat similar to CRM (Customer Relationship Management) software. The biggest difference between the two is that Marketing Automation software offers more ways to engage your customers. The biggest advantage is that you can tailor the content to the (potential) customer and their place in the sales funnel, or based on their preferences or previous behavior. This is what we call personalization.

Want to know more about Marketing Automation? How and when to deploy it? And how to choose the right software for your organization? Then you have come to the right place. You can read all about it in this beginner's guide: Marketing Automation 101.

The Leadgate Europe team

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Marketing Automation 101

- A beginner's guide for IT businesses

Strategy & goals

Do you know what you should be using Marketing Automation for? Or when and how to start using it? As it is not wise to start using Marketing Automation or building a lot of workflows when you don't have that much data or prospects yet, you should first take a step back and look at your marketing.

If you can answer 'yes' to any of the following questions, then it might be the right time to start automating your marketing:

- Do you have a stream of leads from various marketing efforts?
- Does the sales team feel overwhelmed by having to follow up leads through the sales funnel?
- Do you have an efficient, cohesive marketing message you want to convey through an organized, multi-faceted approach?
- Do you want a better way to track all marketing channels faster and more accurately?
- Do you want to find a way to convey your marketing message in an interactive and engaging way?

If you answered "yes" to any of these questions and you want to get started with Marketing Automation, it is time to set goals, since goals are an essential component of any marketing strategy. Only when you have a clear picture of the ultimate end goals for your organization can you create a strategy that will successfully meet your needs.

You can also use these goals as milestones, to keep an eye on whether the current process is leading you in the right direction. For example, you can visualize how you want your leads to progress through a campaign as one of your goals.

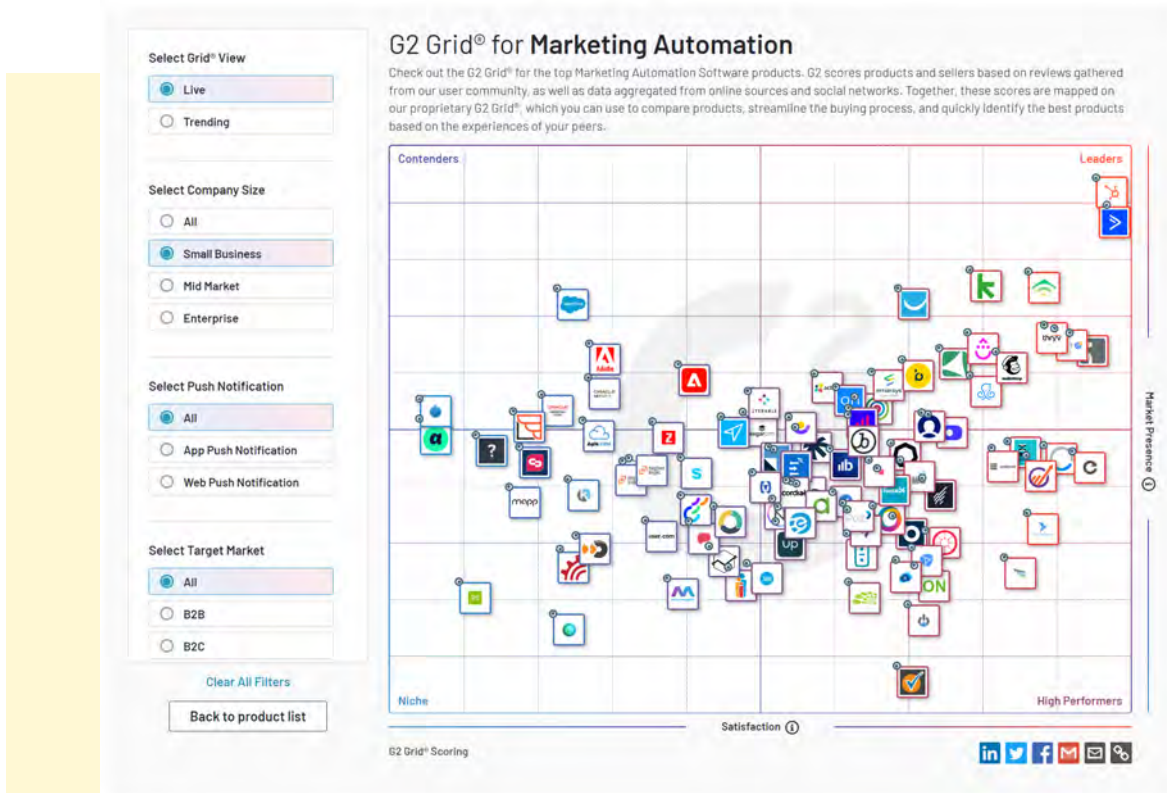
The goals you set for Marketing Automation will vary based on your personal business processes or marketing approach. For some IT companies, for example, that might be scheduling a demo; for another, it might be a purchase. Therefore, when thinking of your goals look carefully at what is or could be important to your leads.

Marketing Automation software

When you start looking for the right Marketing Automation software you soon find out that there are hundreds of different options out there. How do you choose the right provider for your organization? It is wise to compare the different software providers and first make a list of potential options.

- How big is your organization?
 - SME: less than 250 employees
 - Corporate: 250-1,000 employees
 - Corporate/Enterprise: more than 1,000 employees
- Are you targeting the B2B or B2C market?
- What functionalities do you need?
- What is your budget?

A good tool that can help you with this decision is the **G2 Grid for Marketing Automation**, which allows you to filter a large number of providers according to the size of your organization and the market you are targeting.



Two popular providers of Marketing Automation software are Hubspot and ActiveCampaign. Here are some pros and cons of these software providers:

Hubspot

Hubspot is ideal for small businesses without programmers.

- User-friendly and intuitive platform.
- The Hubspot blog contains a wealth of knowledge for businesses to learn more about online marketing.
- Hubspot is a complete all-in-one solution.

ActiveCampaign

ActiveCampaign is a powerful and easy-to-use CRM platform for Marketing Automation and sales. It is designed for small businesses with limited budgets, but also has features for larger companies.

Pros

- Easily build powerful automated workflows.
- Very affordable and has no start-up costs
- Automation sequences and campaigns for A/B testing.

Cons

- Steep price increase, as you build your list, Hubspot's cost increases dramatically.
- The marketing platform requires a minimum 12-month contract.
- Expensive for a small business solution.
- Limited customization options for dashboards.

For a complete comparison, check out this page by [Marketing Automation Insider](#).

5 benefits of ActiveCampaign

At Leadgate, we prefer using ActiveCampaign for many of our clients. It was one of the first players in the field of Marketing Automation, but at the same time it was not yet very well known to the larger public in the Netherlands. Read the following 5 advantages that explain why we prefer ActiveCampaign in most cases.

1. All in one

ActiveCampaign is an all-in-one program. All data of a contact, such as opens, clicks, received emails, lists, labels, completed workflows and visited website pages can be found in one place. Additionally, it has a fully integrated CRM system in which the creation of pipelines is just as easy as in Salesforce. No more switching between different platforms, but one overview of all data and activities of a contact.

2. Automation is key

Often the deciding factor in choosing ActiveCampaign are its automations or workflows. A workflow is a combination of triggers, actions and logic that automates marketing and sales processes. In this comprehensive and well-organized part of the software an easy-to-use drag-and-drop feature makes everything possible. From building simple workflows with only one step to specific workflows consisting of dozens of steps that revolve around certain actions and handling that a lead performs. Anything can be a trigger to run the workflow. And most important of all: it's organized. Using a mind map structure, you can clearly display in ActiveCampaign which actions should run when.

3. Endless integration possibilities

ActiveCampaign is specialized in email marketing, automations and sales automation, and therefore leaves the other tasks to their integration partners. This way ActiveCampaign can fully focus on its core business and you can still use all your favorite programs. ActiveCampaign can be integrated with more than 150 programs. These include: Drupal, Evernote, Google, GoToWebinar, LeadPages, LinkedIn, LiveChat, Salesforce, Zapier and WordPress.

4. Customer Experience Automation

A good marketing campaign relies on personalized content: the most personalized experience wins. This was the reason ActiveCampaign introduced Customer Experience Automation. Through this feature, each lead receives the right story, each has a unique experience and receives each message at the best time matched for them. Machine learning analyzes all the data collected and here determines the best time, content and route for each lead. Proper automation makes your business personal and unique in every way.

5. The ActiveCampaign Deals CRM App

With the ActiveCampaign Deals CRM App, you can access your leads, deals and notes from anywhere. The mobile app gives you insight into the leads that are in the different stages of your marketing processes. From the completed workflows to the received mails and opens/clicks: everything is in one clear app. The free app can be downloaded for both Apple and Android.



How do you get started with Marketing Automation?

When you are planning to start with Marketing Automation, it is advisable to start small and then build up from there. The following 6 steps will get you started.

1. Strategy and goals

You need to start by setting your goals and, therefore, your strategy. What do you want to achieve and what milestones will help you get there? Where is your focus? Do you want to acquire new customers, show demos or sell a product or service? Your marketing goals should be the starting point of your marketing strategy.

2. Customer insights

Then you look at what you already know about your (potential) customers: your customer insights. You can also use the customer journey as a reference, so you can see which steps someone is currently going through to get to your products or services. For every step you should collect as much information as possible, to determine where there is a need for optimization.

3. Create your campaigns

Based on the customer insights, start developing the campaigns. Determine in which step of the customer journey you want to implement or adjust something and which channels will you use to do so? Draw out the campaigns for visual reference.

4. Personalization and data

That personalization is an important part of Marketing Automation you probably already know by now. See what customer data you already have available that you can use for personalization. Be careful with this, however, as incorrect personalization can be counterproductive. For example, addressing someone with the wrong pronouns can quickly lead to the idea that the sender does not know the recipient at all. The trick is to understand what the recipient needs and to respond to that.

5. Building and automating campaigns

After that, it's time to actually start building the campaigns you've devised. Once you've built in triggers that start the campaigns, you're into Marketing Automation.

6. Reporting, insights, analysis, adjustments

Finally, you look at what your campaigns are achieving, analyze the insights and create great reports from them. With these results, you'll go back to the drawing board and look at how you can optimize your campaigns and make them even more efficient.

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About Leadgate

Leadgate is an online marketing agency focused on the IT industry. We offer IT organizations an innovative, comprehensive online marketing approach with high quality and guaranteed better conversion rates. We provide 'Marketing as a Service' to various IT companies such as manufacturers, partners, resellers and distributors with various marketing tools and services to enable a complete process for online marketing campaigns. With Leadgate as a partner you get the most out of your Marketing Automation campaigns.

Leadgate also helps building and strengthening your brand and the brands you run through:

- ✓ Creating a marketing & sales funnel
- ✓ Creating and executing an online marketing strategy
- ✓ Online advertising
- ✓ Optimizing your website
- ✓ Marketing your content
- ✓ Setting up social selling automation
- ✓ Digitizing your sales process

Do you work at an IT organization and are you considering outsourcing your online marketing? Then feel free to contact us without obligation.

Get in touch with us

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