RAAK

Marketing automation

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For companies looking to optimise their sales cycle, increase revenue and achieve better 'Return On Marketing Investment' (ROMI), marketing automation is the logical answer. You can initiate a series of automated actions based on a person's behavior or contact information. But for those taking their first steps in marketing automation, the idea of automating all those tasks and workflows in the sales process can be a bit overwhelming.

In this whitepaper, RAAK will show you exactly how to get started with marketing automation. Starting from scratch, we'll explain what the essence of marketing automation is, show you how to choose the right software platform and give you hands-on tips on how to implement marketing automation in manageable stages. All richly illustrated with examples from the real world.

Enjoy the reading.

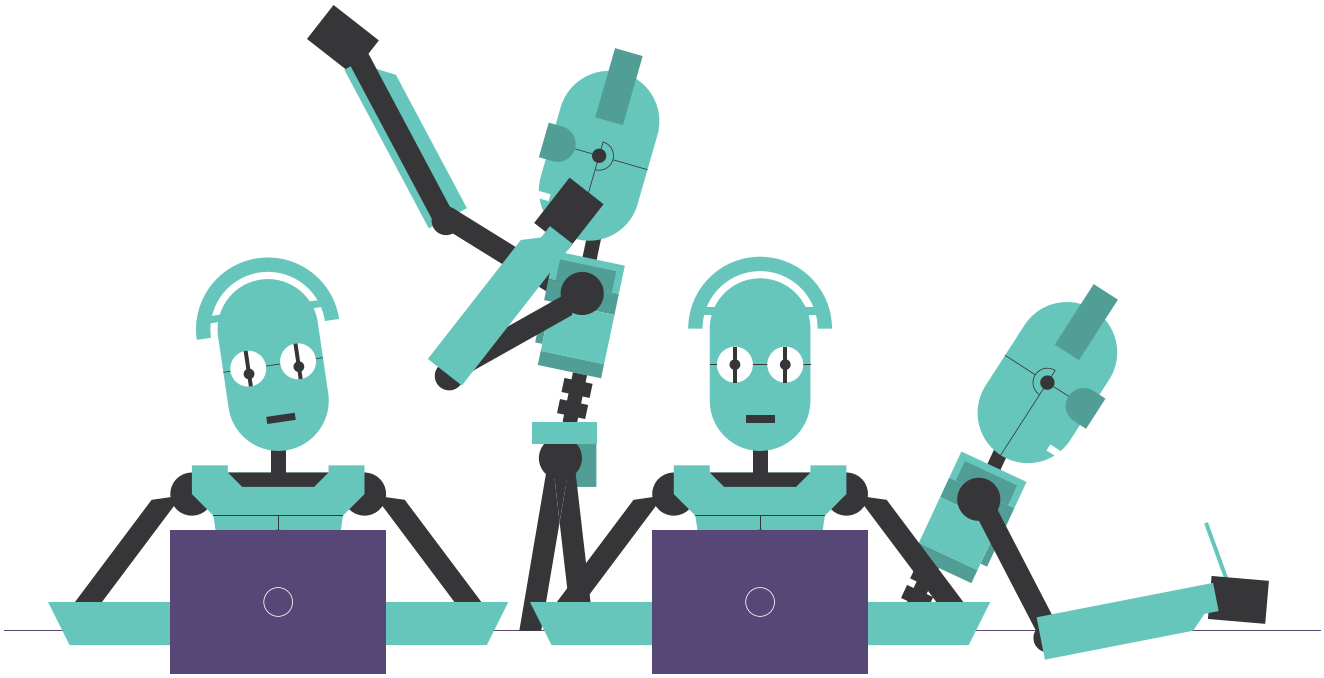
The RAAK team

1 Marketing automation in a nutshell

1.1 What is marketing automation?

Marketing automation helps you draw out and support the customer journey by means of automated dialogues. Combined with lead generation, it is the most efficient way to identify anonymous online visitors and convert them into qualified leads. You will find that it's possible to lead these prospects from the very first glimpse of their needs to an actual purchase, by following and learning to apprehend their behaviour.

Are you capturing (online) interactions with prospects or leads? Good thinking. This will enable you to set up extensive profiles effortlessly and will allow you to intervene creatively on the path followed by your visitors. They will automatically encounter relevant, high-quality content (like whitepapers, reports or exclusive discounts) at exactly the right moment. This establishes a positive connection with your prospects and yields better qualified leads for yourself.

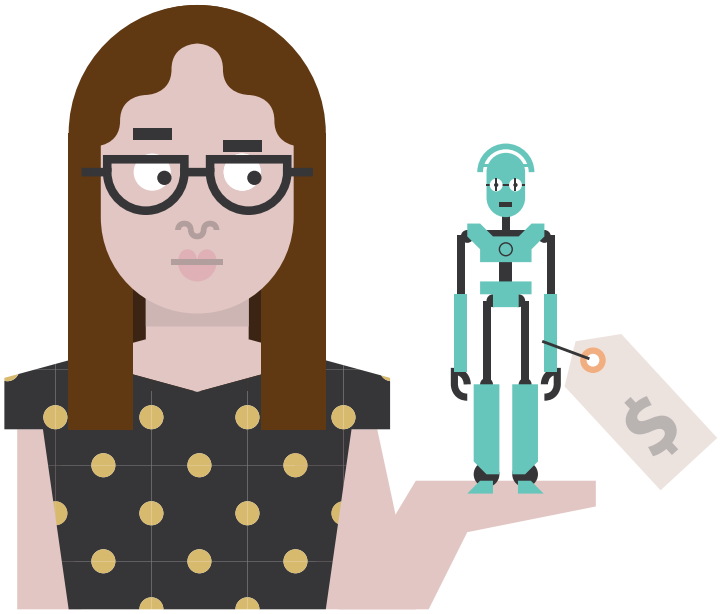


1.1.2 What are the origins of marketing automation?

Marketing Automation is one of the most fast-growing digital marketing methods. Even though it's been around for quite some time, the technique has only just claimed its rightful place in the spotlight. It owes its existence to email marketing programmes that already offered the possibility to address recipients with 'Dear <firstname> <lastname>'. Gradually, personalisation was extended significantly, to a level that not only the salutation, but the whole message can be adapted to the profile of your recipient.

1.1.3 Is marketing automation something for you?

We think it is. One of the main misconceptions about marketing automation is that it is reserved for big corporations and multinationals. But thanks to today's low-entry platforms, substantial investments are no longer the norm. Most marketing automation tools have become both affordable and accessible through their open source counterparts.



1.2 The advantages of marketing automation

Get more qualified leads and better insights for effective follow-up

One of marketing automation's key advantages is that it yields highly qualified leads. When someone visits your website for the first time, marketing automation lets you follow their behaviour by means of a tracking code. It even helps you identify anonymous visitors. Every page visit, every completed form, registration for an event or click in an email: you'll know. Evidently, this makes it easier to follow up on your leads effectively.

Improve your time management

Up to 30% of the time you spend on repetitive tasks will be put to better and more relevant use when you choose automation.

Convert leads into sales faster

Don't underestimate the effect of marketing automation on the sales process. Based on the information you have gathered, you can send out automated emails that offer content inspired by the recipient's behaviour and interests. And it might be worth your while to set up a lead scoring model, which will point you to hot leads with the highest sales potential.

Offer marketing and sales a powerful tool

Marketing automation systems often furnish specific tools to align marketing and sales processes. Professionals from both sides of the corporate spectrum will find them a breeze to work with. They help marketeers draw in leads with functionalities like dynamic forms, landing pages and automated workflows. Sales teams will find all they need to close deals and handle the follow-up of customers with pipelines, detailed reporting and account management.

Gain a better insight in your ROI

In conclusion, a solid marketing automation set-up will give you a clear insight in all things related to ROI and the flow through the marketing funnel. With high-level functionalities like tailor-made reporting, insight forms, Adwords & social media integration and workflow analysis you'll have all your statistics conveniently grouped in one place.

1.3 Let's get started

1.3.1 Set your business objectives.

You've made up your mind: it's time to draw out a marketing automation scenario for your company or organisation. But before you dive in, make sure you know what you need to reach the goals you have in mind. Get to know exactly who your target group is and set out the path you want them to follow throughout their customer journey. Write it all down in a detailed business case and clearly define your objectives. Those can be, among others

- drawing in more new customers
- improving customer satisfaction and retention
- managing time more effectively and efficiently, …

Implementing marketing automation demands thorough preparation. Our 6-step methodology is your proven recipe for success based on preparation, monitoring, evaluation and adaptation.

1. Outline your strategy
2. Define your buyer persona
3. Research the customer journey
4. Select the software platform
5. Compile the project team
6. Design landing pages and lead forms

a. Outline your strategy

When you ask people for the strategy behind the campaign they are setting up, you often get answers like *'I want to get a higher conversion rate'* or *'I want to boost traffic to our website'*. Perfectly valid objectives, but strategically speaking, they don't quite hit the mark.

Strategy serves to help you define, for instance, why it's best to use email as a communication channel. We at RAAK summarize all our strategies in one sentence, by adding three simple words: GET, TO and BY.

Get-To-By: our one-line strategy

In a nutshell, the GET-TO-BY principle makes you reflect on why you are using email marketing. Every word should be followed by a **short and well-thought sentence**. And when you blend the three words together, you will have your **one-line strategy**.

Let's see how this works.

GET: What is your main target group? Define the people you want to reach.

TO: What do you want your target group to do? Set out your main goal.

BY: How do you want to make your target group do want you want them to? Outline the actions you need to take to reach your goal.

A few examples

To illustrate the sheer simplicity of the method, here are 3 fictitious cases of how major brands would do it…

Zalando

The multinational e-commerce company that specializes in shoes, clothing and other fashion and lifestyle products, needs more traffic and conversions to boost their growth. This is how their one-line strategy could look.

GET: female or male online shoppers with an affinity for fashion and brands
TO: see Zalando as the no.1 online shop and build regular traffic to zalando.com
BY: sending perfectly timed and triggered emails with conditionally personalized content

Audi

The German car manufacturer that designs, engineers, produces, markets and distributes automobiles, uses email to acquire new customers and build a loyalty program for existing clients. Their one-line strategy could look something like this...

GET: business drivers and males aging from 25 to 60
TO: feel affinity with the Audi brand and build loyalty
BY: defining the right content and timing based on the buying cycle and customer lifecycle.

Immoweb

Belgium's largest real estate website needs traffic to their website to create a recurring mass, to which home sellers want to target their home for sale/rent. The one-line strategy they'd follow, could be along these lines.

GET: potential new home owners
TO: regularly visit Immoweb.be, thus creating a target audience for home sellers
BY: sending daily updates of new homes for sale or rent in their preferred neighborhood.

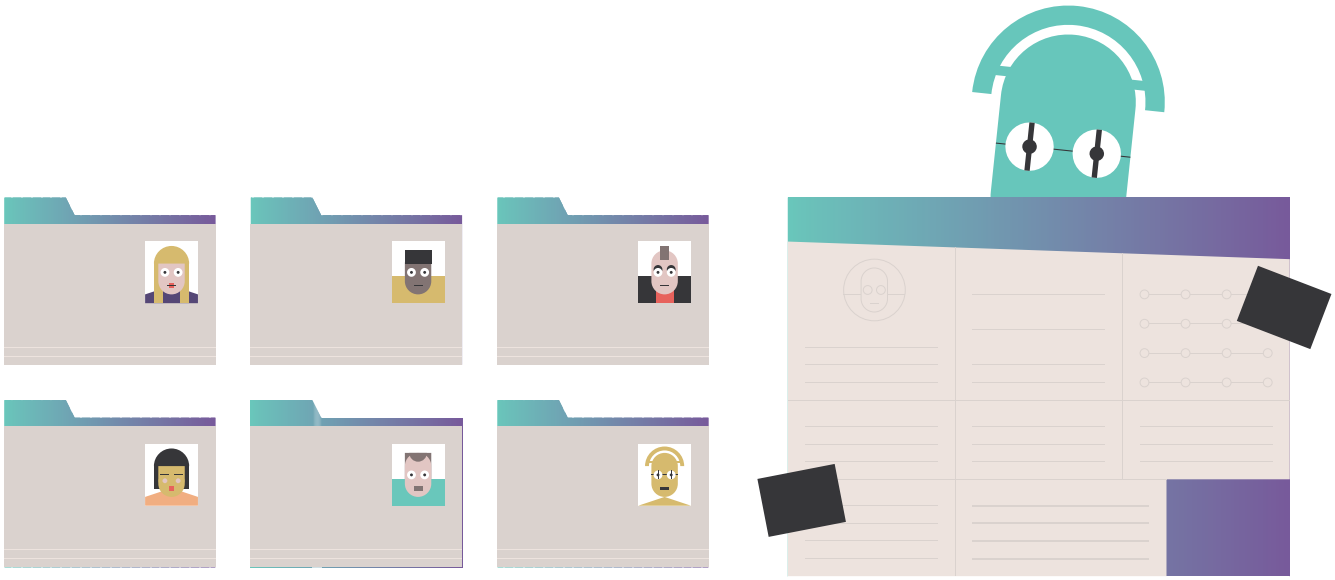
b. Define the buyer persona

A buyer persona is a fictitious, but research-based representation of who your buyers are. They are not merely descriptions of your buyers, but valuable insights into what they think, when doing business with you.

To get an insight in who your customers are, you'll need to ask (yourself) the right questions:

- What do your customers want to accomplish?
- Which goals, desires or doubts influence their behavior?
- How, where and when do they buy?
- Why do they make buying decisions?

This information is the solid base for buyer personas. It helps your marketing and sales teams to create content that is truly useful for your target customers.



Want to set up your own buyer personas?

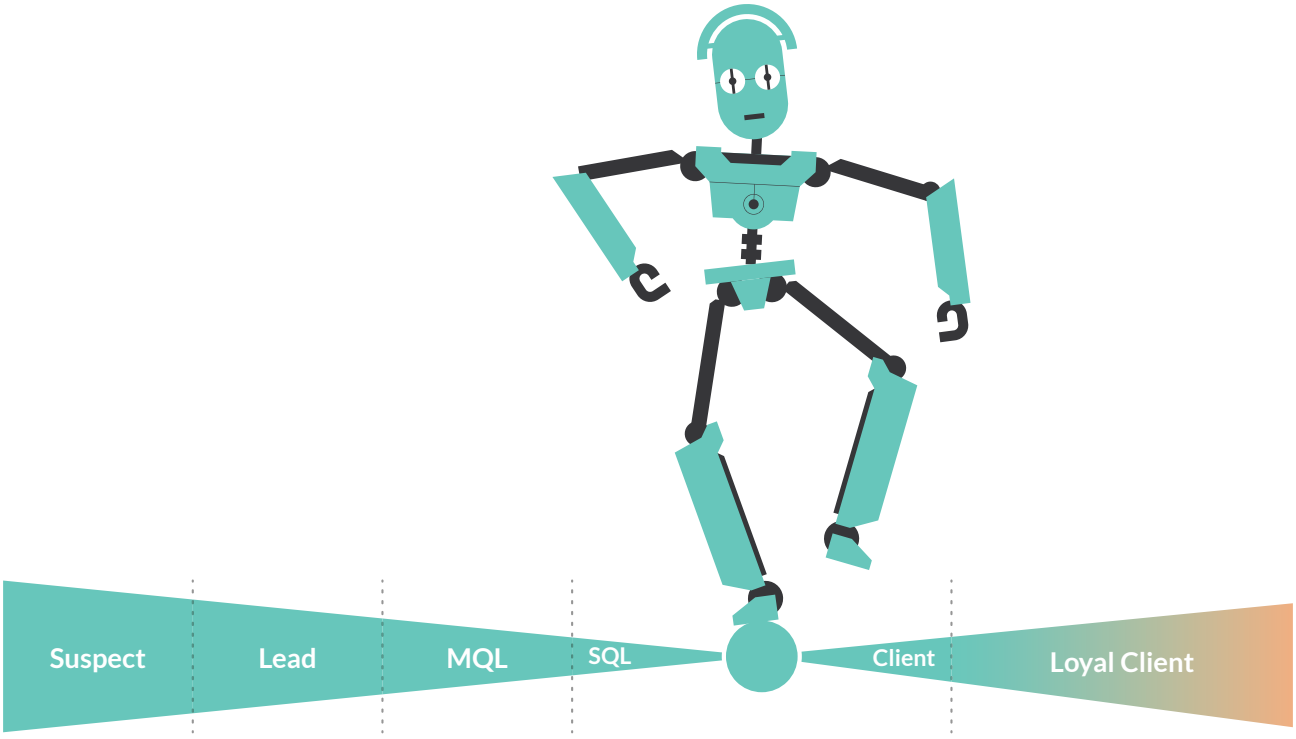
» Download your template here

c. The customer journey of potential customers

The customer journey is the core of any solid marketing automation plan. This is where you set out the full trajectory you want potential customers to follow, from anonymous visitor to loyal customer.

The buying decision often takes several days. Most visitors probably won't be ready to make an immediate purchase. That's why it's wise to gradually 'feed' them useful information that guides them towards an actual purchase. This process of providing hot prospects with the right information at the right moment in time is called lead nurturing.

Before you head off on your marketing automation quest, be sure you've clearly mapped and wireframed the customer journey. It's the essential base to let software do the hard work of identifying qualified leads and adapt your communication to what they need.



Want to get started with you own marketing automation plan?

» Download your template here

Suspect

At the very beginning – 'top of funnel' – your anonymous visitors will be Googling their information in a fairly generic way. In most cases, they will find what they're looking for on landing pages or blogs. Getting in touch with anonymous prospects is a tough job. That's why your website should offer them primarily 'premium content'.

When visitors perceive your content as such, they will most likely provide you with information like their name and email address in exchange for relevant or unique content.

When this happens, your suspect transforms into a lead. Do keep in mind that you shouldn't ask too much personal information from leads, as this might put them off.

Trust is key. The less you ask of your visitors, the more and better leads you'll get. Later on in the funnel, you can subtly expand the collection of personal info and preferences. We call this technique *progrcssivc profiling*.

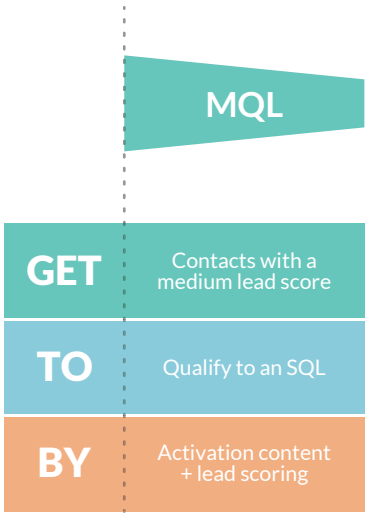
Lead

Now that you have leads, you can enrich your buyer personas with more specific content.

Based on click behaviour, it becomes possible to draw out a detailed profile of your leads. You'll get a better insight and you'll be able to adapt your communication to their needs.

Get to know which videos they watch, which blog posts they click through, which emails they open and which they don't...

Your previously anonymous visitor is now a lead, asking for more specific and detailed info. At this stage, offering whitepapers in exchange for personal details of preferential info works like a charm.



MQL

Your next mission is to convert your leads into marketing qualified leads, without treading into the pitfall of spamming them.

Storytelling is an effective method to consistently provide positive user experiences. As soon as your leads show genuine interest in you, offer them a new chapter in your story to further engage them.

This has two important advantages. Firstly, you prolong their attention span. Additionally, this helps you guide your leads towards a decision, step by step.

To determine if a marketing qualified lead (MQL) is ready to evolve into a sales qualified lead (SQL), you need to get started with lead scoring.

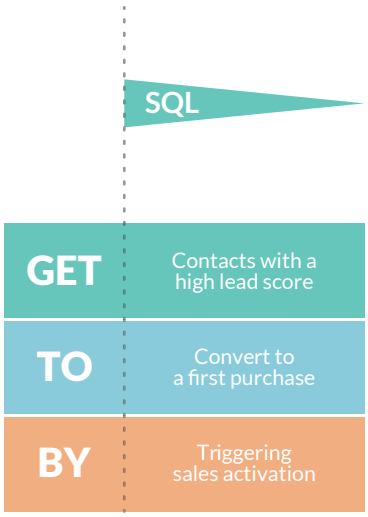
What is lead scoring?

Lead scoring helps you answer the question "When will my lead be ready to buy?". That connects it inseparably with lead nurturing. This mechanic helps you determine the exact moment to hand over a lead from marketing (MQL) to sales (SQL).

At this stage, timing is absolutely crucial. As a marketeer, you don't want your sales colleagues to follow up on leads who are not ready to decide. Many leads may be interested in what you offer, but some of them might be considering their options. In fact, they are still lingering at the top of the sales funnel. Having sales contact them at this time, could scare them off … for good.

Lead scoring means that you assign a certain value to every action by an MQL. Has a lead reached a predefined level of scoring? Then he/she is ready to be converted. The example in the table below shows you how it works.

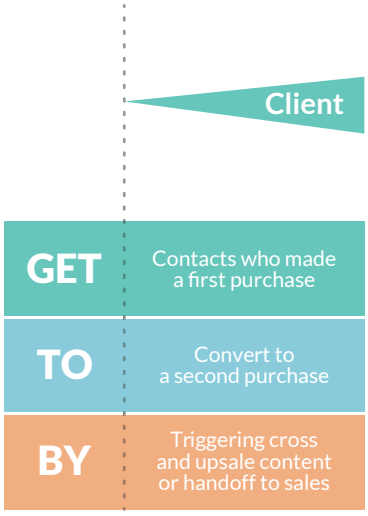
lead scoring example	
Click per web page	**1pt**
Subscription newsletter	**2pt**
Open newsletter	**3pt**
Click newsletter	**15pt**
Download whitepaper	**20pt**
Sign-up webinar	**25pt**
Sign-up seminar	**10pt**



SQL

The moment your buyer personas have been sufficiently 'fed' to choose a provider to fulfill their need – they now find themselves at the bottom of the sales funnel – they go looking for the information to make a final decision: user reviews, exact pricing, financing options, ...

As timing is crucial, it's imperative that your lead scoring is performed flawlessly. Leads who showed interest at first, but are still deciding, can be put off completely by a premature approach by your sales team. An accurate scoring will tell your sales department when to take action. Evidently, highly qualified leads will guarantee you a much higher conversion rate. The main advantage at this stage, is that potential customers already know what your brand or company stands for.

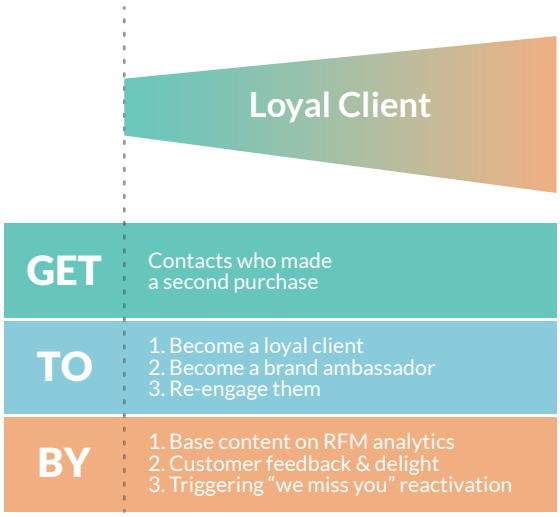


Clients

You've just turned an SQL into a customer. Well done. This is where a new level of interaction starts.

You've already convinced your contact with existing content on your website and opt-in content that you've sent them along the way.

Now it 's time to offer them follow-op content that matches their profile as much as possible.
Tell your customers how much you value their opinion and ask them to take a satisfaction survey. Or start a new communication flow , based on earlier purchases or products/services they've shown explicit interest in. This type of content can help you trigger upsale as well as cross-sale.



Loyal Clients

Marketing automation is highly effective to engage loyal customers in a long and fruitful relationship

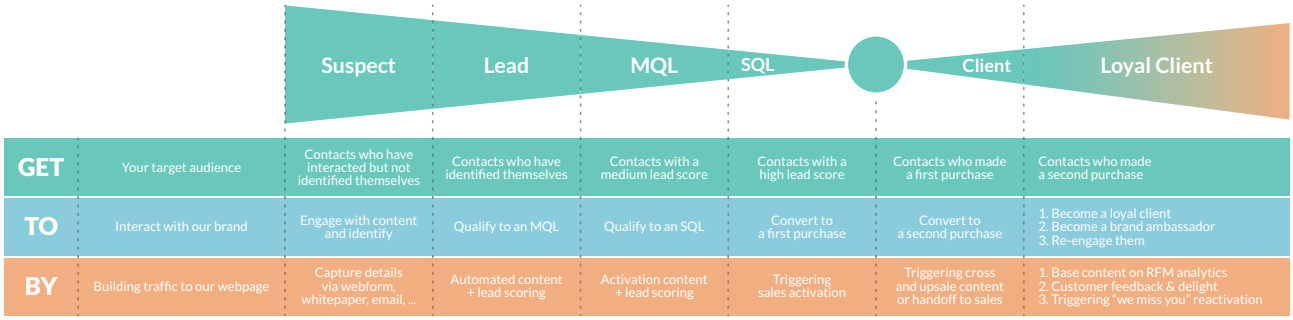
But as we all know, nurturing a relationship can be hard work at times. Be sure to reactivate your customers by keeping the fire burning with a special 'friends-only' offer or a personal birthday message.

This will keep your brand top of mind when your customers are ready for a new purchase.

Conclusion

When setting up a campaign, it's of utmost importance to keep your target group — or buyer personas — in mind at all times.

Everyone can draw out complex strategies. It is, however, much harder to bring back a strategy to its essence. Doing so will be worth your while. Use the **Get-To-By principle** to define your own one-line strategy to lead your contacts through every stage of the **customer journey** effectively.



d. Your marketing automation checklist

What do you expect from a marketing automation platform?

In today's market, there is a wide spectrum of tools to choose from, with Hubspot and Marketo as the two main protagonists. A wide spectrum which doesn't exactly make it easy for marketeers to decide. Here's a few criteria to keep in mind when you are on the lookout for a fitting platform to realise your marketing automation plans.

Number of contacts and management:

Personalisation is primordial. To build detailed contact profiles you need to gather a lot data. Make an estimate of the number of contacts you're aiming for and which information you'll be collecting about them on the platform. This will determine the budget you'll need to set up the platform. Be sure to shop around, as some platforms take the number of contacts into account, while others will charge you per email sent.

CRM:

A CRM system centralises your contact data, so that it's available and accessible at all times to personalise your campaigns. Some marketing automation platforms offer a built-in CRM module.

As a marketeer, you'll want to be able to monitor the behaviour of your marketing automation contacts. And your sales team will most likely manage those contacts, based on their position in the sales funnel. All that data can be put to good use for a strategy that's perfectly adapted to your leads and customers. It will help you set up customised automation flows to guide your contacts through the sales process effectively.

Tracking:

Some visitors can be reluctant to share personal information with you. The use of tracking on your website and in email campaigns will help you gather more information on them in a less-intrusive way. You can use this information to further personalise your communication.

A platform should offer you the possibility to set up automation flows based upon the behavior of your contacts.

Lead Scoring

The option to attribute a score to each contact and interaction will enable you to quickly identify hot leads. Depending on the email frequency, you will get a clear view on how your message engages its readers.

Use this score to set up automation flows that guide them towards purchase or conversion.

This scoring system will keep your contacts up-to-date. When you notice that a contact hasn't interacted with your emails or website for over a month, it might be a good idea to reactivate them or remove them from your database.

A/B testing

Marketing automation stands or falls with evaluation and optimization. That's why we advise choosing a platform that is equipped with A/B testing functionalities. This makes it possible to easily compare different versions of a campaign until you find the one that performs best.

Platforms that don't offer this option, limit the growth and the optimisation of your marketing automation activities. Even if it's possible to duplicate the flow, it will not yield a 100% reliable result. External elements like seasonal circumstances, can considerably influence the two versions.

Reporting

Detailed reports are critical in measuring the success of your marketing automation. Some of the aspects that can be measured and analysed:

- Opens, clicks and bounces
- Which links were clicked
- When exactly specific mails were opened
- How many people unsubscribed
- Which mails in the flow yielded the most subscriptions.

All this information is crucial to be able to evaluate your automation flow and implement the necessary adaptations.

Support

You want to stay in full control of your campaigns. So, to get the most out of the tools you use, you need a deep understanding of the possibilities and the limitations of the platform. Clear and comprehensive manuals will set you off on the right foot.

When the implementation becomes complex, you may need personal assistance. Don't be too shy to call in help whenever you need it.

Our Top 5 of automation platforms and their main benefits

Hubspot:

There's no way round it: Hubspot is market leader in marketing automation. It even has the right to claim the ownership of the term 'inbound marketing'. Hubspot is so popular that they've become synonym for marketing automation. Does this imply that Hubspot is the best solution for your company? It usually is. But not in all cases.

Hubspot is what we tend to call an "all-in-one marketing automation platform". Which means all necessary tools and channels are integrated in one marketing tool. When choosing Hubspot, tools like Mailchimp, HootSuite or Buffer become obsolete, as you'll have all the marketing instruments you need at your disposal. Hubspot makes it possible to blog, send out mails, post messages to social media, follow up on leads and manage all that from one and the same spot. It also offers CMS, integrated CRM and in-depth analytics.

Hubspot is a low-entry platform, which makes it easy to use, even for the less experienced marketer. Automating a flow, updating text and images on a web page or consulting in-depth analytical data: the interface is intuitive and user-friendly. If needed, Hubspot provides user training and 24/7 support.

+	−
Allows you to develop a solid marketing strategy on a limited budget.	Minimum contract duration: 12 months.
User-friendly interface and tools: easily manageable by marketeers, as well as CEOs and CMOs.	Monthly fees range between € 200 and € 2.000, depending on the number of contacts.
Transparent reporting and analytics built-in.	Some hiccups in a multilingual set-up.
Native CMS makes it possible to develop websites with dynamic content.	
Quick start: easy set-up requires little technical skills.	

Eloqua:

Is your company or organisation looking for a marketing automation platform with abundant integration, API and analytical features? Then Eloqua could be just what you're looking for. Because it offers integration, it is often seen as a quite technical platform. Be sure to have people with a technical background you can rely on when you consider Eloqua as marketing automation software.

Eloqua's main user group consists of B2B marketeers in mid-sized and large global organisations, who strongly focus on the automatisation of their lead generation process. The possibility to manage and analyse numerous campaigns simultaneously from one centralized platform, makes Eloqua immensely popular.

+	−
Eloqua's analytical features are detailed and crystal clear, even when you're running a hundred campaigns simultaneously.	Monthly fees range between € 2.000 and € 4.000, up to 10.000 contacts.
Data gathered in Eloqua is hosted in Europe. This offers larger corporations an extra level of security when it comes to privacy issues.	Eloqua aims at larger corporations with automated marketing flows. It only offers a basic SEO tool.
	For the technically untrained professional, implementation can be fairly complex.
	Minimum contract duration: 12 months.

Marketo:

Need marketing automation software that excels in email marketing and lead management? Then Marketo is a solid option for your organisation. The built-in tool to build and send emails is rich in features, like the possibility to do easy A/B testing. The powerful Engagement Engine helps you monitor the behavior of your leads in a jiffy.

Marketo also integrates seamlessly with most existing CRM systems, making it easy for professionals throughout your organisation to reap the benefits of the platform.

+	−
Abundant possibilities when it comes to set-up and multilingual features.	Monthly fees range between € 1.000 and € 9.000 euro, depending on the chosen package: email marketing, lead management, mobile marketing, customer-based marketing and consumer marketing.
Overall excellent support, even when you're not a client.	Choice between yearly and quarterly contracts.
Has a market place for apps and plug-ins.	Not an all-in-one platform, Marketo focuses on certain aspects, like email marketing. NO content tools available.

Pardot:

As a platform, Pardot aims at mid-sized to larger B2B organisations. That's why it has been built around marketing automation and lead management, hence the elaborate features focusing on database and follow-up. According to Pardot's business cases it owes much of its success to a devoted following in the software and technology market.

+	−
Easy integration with Salesforce, as well as other CRM systems.	Even if the monthly fee is crystal clear (price range between € 1.000 and € 3.000 euro), Pardo's pricing model is far from transparent. For example, extra costs apply when you're sending out mails to more than 10.000 contacts.
	Minimum contract duration: 12 months.

Sharpspring:

Sharpspring targets itself at marketing agencies with a rebrandable model coupled with actionable reports and support. It also helps small and mid-sized companies start conversations that lead to conversions with 'after-the-click' tracking for personal messaging and better follow-up.

+	−
Very user-friendly interface. Relatively easy to set up.	Focus on small to mid-sized companies only
Excellent lead management and database segmentation tools.	Limited possibilities for multilingual set-up.

e. Putting a team together

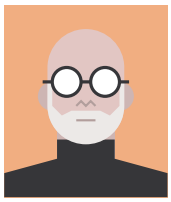
Every company or organisation that sets off on its marketing automation journey asks itself the same question: who will be our marketing automation champion? As we already explained, technology is not the main issue. Getting people aboard with a solid set of skills and just the right mindset is key. Successful marketing automation is built upon these strong profiles that every organisation needs.

The team

To let the marketing automation process run smoothly, it's important to select every team member with the utmost care.

CEO/Business development manager/Marketing director

Defines measurable goals and a strategic plan to achieve them.



Creative director

Draws out campaigns that grab the attention of your contacts and get them engaged with your company or brand.

Copywriter / Translator

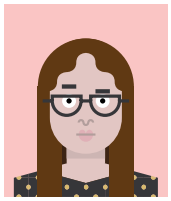
Has the skills to get your message across, with action-triggering words.

Designer

Translates the creative ideas and copy in web design with one goal: to generate as much response as possible.

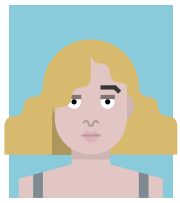
Web Developer

Takes the web design as a solid base and builds a strong, intuitive website with an interface that excels in user-friendliness



Tech pro

Implements the website and manages it flawlessly once it goes 'live'.



PMGT manager

Sets up and manages your emails, landing pages, image bank, etc.

You can also outsource some or all of these jobs to an external task force, like RAAK. Based on carefully selected data, insights and best practices we develop marketing programmes tailored specifically to you target group(s). A broad knowledge of and a yearlong experience with marketing platforms and our in-house studio make us a full-service partner for all your marketing automation email marketing projects. The result: a better brand experience, stronger engagement and a higher conversion rate.

Sales

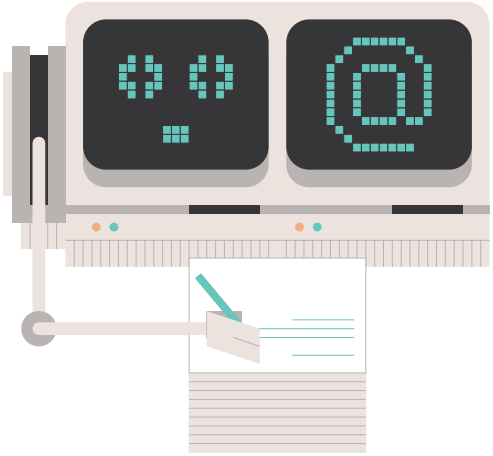
When you roll-out your marketing automation in a structured way, you will be providing you sales team with more qualified and sales-ready leads than ever. So, by all means: get your sales force involved and set up a lead management programme.

2 Setting up your first automation workflow

2.1 What is an automation workflow?

A marketing automation workflow is a series of automated actions (sending emails or SMS, updating a contact attribute, moving a contact to a new list, etc.) that are triggered by certain conditions or actions taken by your website visitors.

2.2 Email marketing flows to get started with



2.2.1 Welcome email

The first contact that you make with a lead is essential for converting them into a customer further down the road. In marketing speak, we call this onboarding. When a new client signs up on your website, it's the best opportunity to forge a strong connection at a time when they are most interested in your offering and message.

With marketing automation, you can easily automate this welcome message and have it sent to any new client immediately after they sign up on your website.

Welcome emails lay the foundation for your customer relationships and give you the chance to introduce yourself, all while learning your customers' needs and preferences.

To be effective, your welcome message should:

- Make readers want to explore more about your business or content
- Encourage engagement with future email campaigns
- Guide the reader on the next steps they should take

2.2.2 Birthday email

Birthday emails are one of the simplest automation workflows to set up for your business. If you already have the birthdays of your customers stored in your database, all you need to do is create a birthday email template and set up a workflow to automatically send it to your contacts on the date of their birthday according to how it's stored in your contact database.

This workflow can help you strengthen your customer relationships while also driving more sales on your website – all with very little investment on your end.

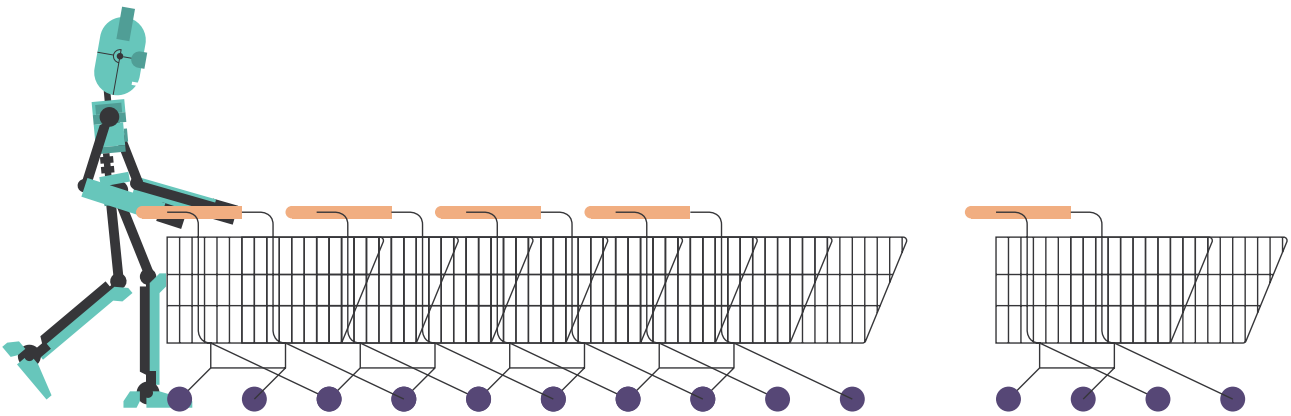
To ensure that your birthday email doesn't come off as overly promotional or intrusive, it's important that you differentiate the content as much as possible from your other marketing communications.

To achieve this, the two most important best practices that you need to follow are:

- Offering a gift
- Personalizing the email content to the recipient

2.2.3 Shopping cart abandonment

It's never a good thing when shoppers leave the stuff in their shopping cart behind and head out the store without buying. On the positive side, an abandoned shopping cart holds a lot of useful information for companies doing e-commerce. You can use that shopping cart to trigger an email flow to remind the shopper what's in their cart and what they're missing. Convince them to make the purchase with an extra discount or a coupon for a next visit.



2.2.4 Sending a newsletter or periodical emailings

Just about every marketing automation platform offers email marketing features. It will not only register email clicks. It also enriches that information with data about clickthrough behavior on the website and through other emails, and turns it into a detailed user profile. When you segment your contacts based on interests and behaviour, it becomes easy to further personalize the content of your newsletters. This makes your emails not only highly personalised, but tailored to the individual subscriber's needs and expectations as well.

2.2.5 Event communication

Collect email addresses gathered during events like trade shows, congresses or workshops in your marketing automation system. It's an ideal starting point to set up a nurturing programme with information related to the event. Kick it off with a thank you mail to all participants or visitors to your booth. Once you're in, ask them to opt in and stay updated with the latest news, fresh releases or new products and services, …

2.2.6 Up-sell or cross-sell existing customers

Linking your CRM with your marketing automation platform allows you to create customer segments based on previous purchases or information requests. Use that knowledge to set up email campaigns to promote related products or useful add-ons and accessories.

2.2.7 Support onboarding procedures

Support new users by means of well-constructed email campaigns. Tailor your emails to their specific needs and behaviour. It's a proven method to get users acquainted with a new system or product. Why not set up a series feature-by-feature emails to highlight every individual aspect of your product in a dedicated email. Highly effective!

- Notice that a user has 'gone to sleep'? Send them an email as a wake-up call, explaining all advantages your product or service holds in a linked online tutorial.
- Does a specific aspect of your product prevent the customer from musing it? Send them a dedicated mail on that topic.
- Is a user reaching the end of his trial period? Set up a promotional email campaign to convince the free user to engage into your paid programme.
- Trial user not willing to pay for your service or product? Send them an email with a special, limited offer to convince them or ask them to complete a short survey on their decision.

2.2.8 Topic workflow – page views or content offer downloads

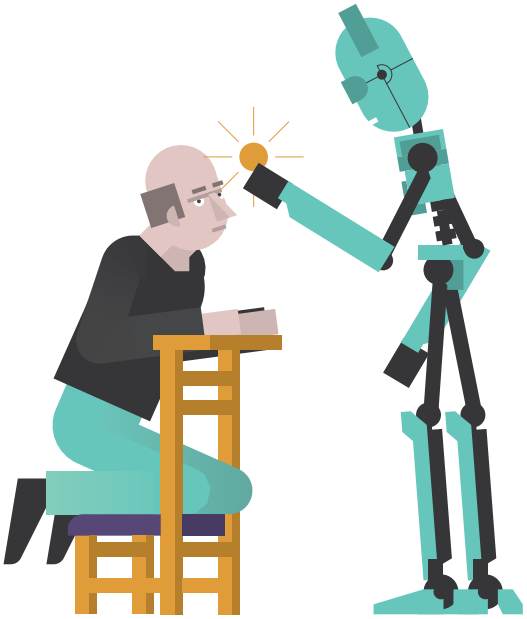
Create a workflow for each industry-related topic you are writing content about.

2.2.9 Engaged contact/evangelist workflow

Compile a self-updating, dynamic list that holds all contacts who engage with your brand of products. Trigger criteria for this list:

- High number of visits to your website
- High clickthrough in emails, replies to social media posts or form completions.

As these contacts already have a clear affinity with your brand or company, they will most likely share your content.



2.2.10 Lead nurturing workflow

Once a contact has downloaded or streamed a number of your top-of-the-funnel marketing offers — like e-books and webinars — they will probably be ready for the next level. Set up a workflow to guide those contacts further into the marketing funnel.
When you sense that those contacts are ready to turn into leads, send them messages that contain middle-of-the-funnel content. This might be helpful to upgrade them to MQL or to create new opportunities in the sales process. Keep them happy by 'feeding' them valuable content like case studies, free reports or member-only sneak previews.

2.2.11 Blog subscriber welcome workflow

Set up a flow to make new subscribers feel good about their decision: repeat all the advantages of their subscription, hook them up with most-read articles or surprise them with an exclusive 'new members only' offer.

2.2.12 Re-engaging inactive contacts

Wake up sleeping contacts with a smart re-engagement workflow. But be sure to check a few aspects, before you get the flow started.

- Last form submittal of the contact
- Last website visit
- Last registered click in an email

Make the content of this workflow as valuable and relevant as possible, so your inactive contacts gets interested again: an exclusive offer or a one-week discount coupon might be just what that contact need to be drawn to your brand or product again.

2.2.13 Past purchases

Communication with customers doesn't end after their first purchase. Especially if your product or service portfolio holds much more sales opportunities. Use that first purchase to draw out a workflow and introduce your new-found customers to other, related products.

2.2.14 Customer happiness workflow

Define a 'customer happiness' scoring model. Set up a workflow for customers that already have their own score and reward them with exclusive content, special offers or interesting discounts. And be sure not to neglect your unsatisfied customers. Engage them in a flow of their own and lead them towards a better customer experience. It may be useful to ask your customers for feedback and offer a reward in return. Indispensable to build your own Net Promotor Score.

2.2.15 Upcoming purchase reminder workflow

Does your contact database contain clients who show cyclic buying behaviour? Activate a new workflow every time they are ready to make a new purchase (i.e. new supply of coffee cartridges, new contact lenses, paid periodical subscriptions, ...).

Read this far? You're all set to go.

Well done. You've discovered how to draw out a strong strategic plan, define the right business objectives and detailed buyer personas. You're ready to make a first selection of automation platforms and eventually pick the one that best fits your needs. And you can put that task force together that will help you take your first steps in marketing automation successfully.

RAAK

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