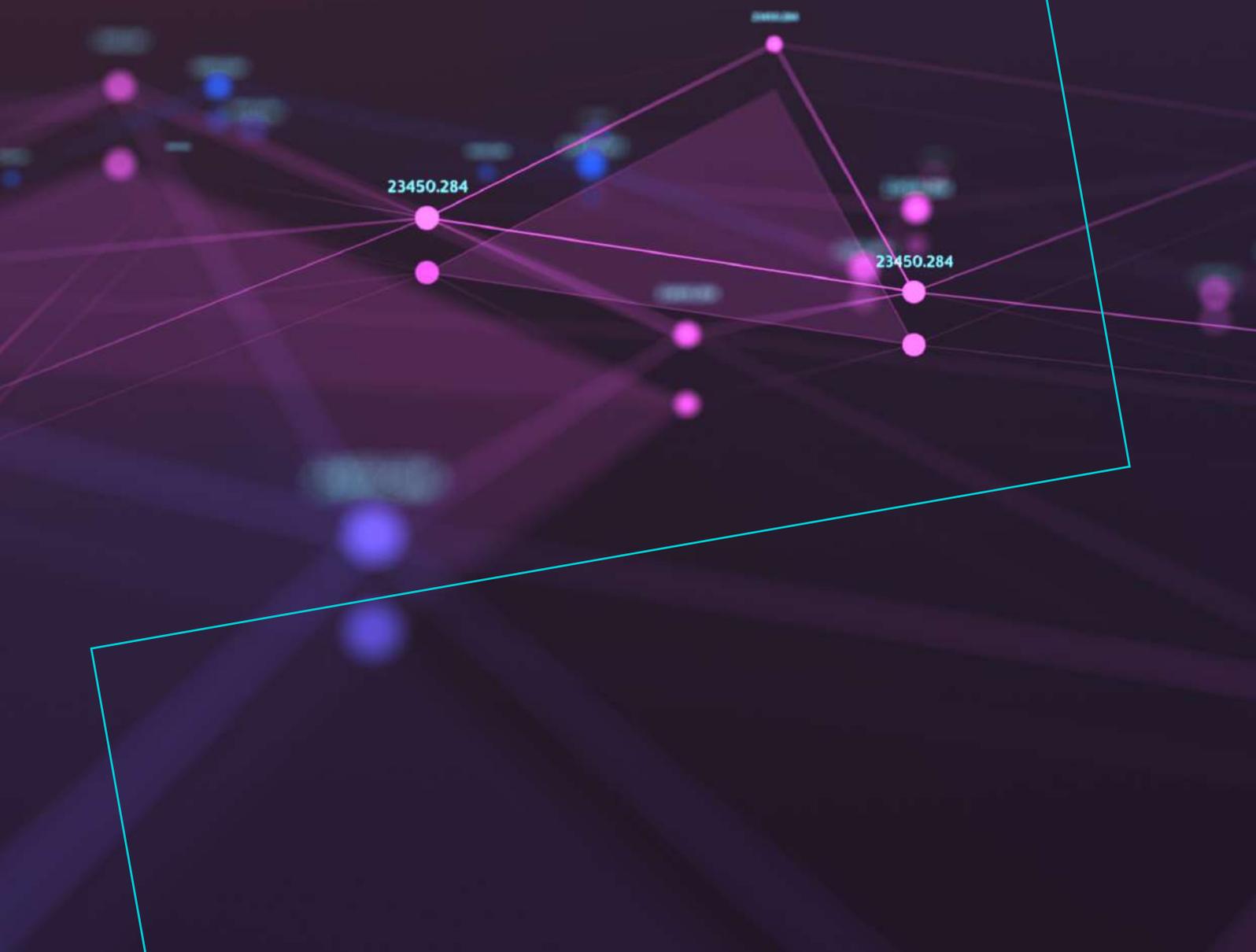


8 STEPS

to optimizing your marketing
automation strategy



Marketing automation refers to the combination of software platforms, technologies, data, and operations which are designed for marketing departments and organizations to automate repetitive tasks and market their brand across multiple channels more effectively.

If you are building out a new marketing automation strategy or you need to reinvigorate your existing one, the following steps will help you get started. These steps might seem simple or obvious but even so, if they're well executed, they can help you scale in leaps and bounds.



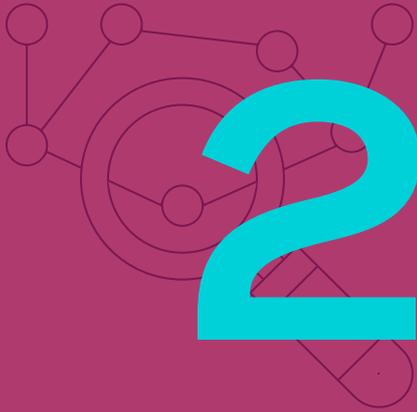
Know your audience

If you have been running your business for a while, whether you have analytics in place or not, you would likely be surprised by how much you actually know about your consumers: for example, which products or services they respond best to, which channels they engage with most, and when they tend to interact with and purchase from you.

This information will help you, as a starting point, to determine your ideal audience, products or services, and campaign timing.

Depending on the complexity or focus of your business, this might be more one-dimensional for a specific product or service or if you have multiple services and/or product lines, you might have different ideal audiences or “audience tiers” per service or product line.

Ideally, you want to start with the audiences, services, and/or product lines that are your primary focus areas and that will generate the most business for you. This is a great experimental opportunity to fine-tune your approaches before taking on more complicated niches. In other words, start with what you know before moving on to areas where you might have less experience or know-how. Alternatively, partner with someone to help you through any part of or the complete process.



Plan where to meet your audience

There are several components that may need to be considered during this step including:



Consumer experience (CX)

This relates to the principles, feelings, or emotions that you want the consumer to associate with your brand.



Journey design

This involves the types of interactions you have with your consumers and the ideal path (with positive experiences) following each interaction.



In-moment design

This is more specific to key moments and events where you respond to your consumer. While the customer journey entails a longer, linear storyline, in-moment engagements are much shorter and specific occurrences at a given point in time (although they also draw on your history – i.e. previous interactions your customer has had with your brand).

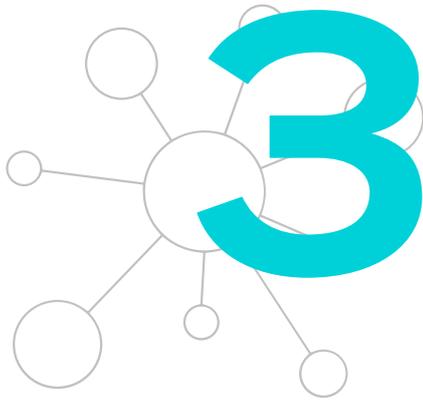
Based on what you know about your audience, you'll be able to outline how you need to (or plan to) meet your audience as they interact with you – from the initial point that they hear about you to the points at which you gain their interest, close a sale, offer post-purchase support, and, hopefully, secure further purchases.

Some of the key elements to consider in this plan are:

1. How are you going to interact with your audience (i.e. which marketing channels)?
2. What is the right conversation to have with them (i.e. what is the right content)?
3. What should the timing of your conversations be? This includes considerations around:
4. When is the right time to introduce an offer (i.e. recency/frequency)?
5. What is the right offer for them (i.e. offer management)?
6. When do you need to back off (i.e. consent/negative signals)?

The secret to developing an impactful program is thinking less about how much more you could achieve with digital and focusing on making it personal and authentic. If you were to meet someone for the first time and one of the first questions you ask them is deeply personal, it might not go so well. You need to give the relationship time to develop and, based on how they react (i.e. behavioral signals), respond with the same velocity and interest.

Of course, you want to nudge your audience, and that is where the experimentation comes in later to develop and optimize what the right levels and approaches are.



Organize and enhance your data



This step involves making sure that you have the right data to identify your audience and collecting the right signals from your audience in order to know when and how to engage with them.

This might involve various actions such as reorganizing or performing some hygiene on your data. You might also find that you have missing pieces of data or that you have not yet connected your data sources together.

Carrying out these processes could be a project on its own. The great news is that there are many services available to help you define a data strategy, physically manage your data, enhance it, perform identity services, and make it production ready.

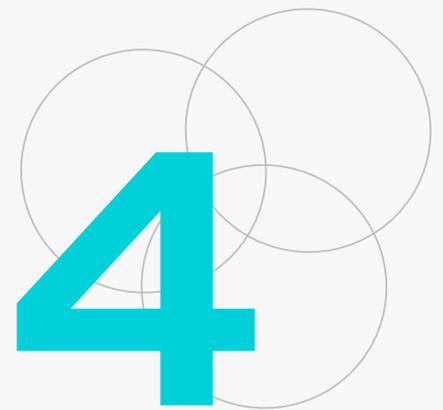
At this point, including data governance, security, and privacy management on your data will also provide opportunities for future-proofing and scalability.

Achieving “perfect data” is everyone’s ideal goal – but getting there is more of a marathon versus a 100-meter dash. If you first focus on the right data framework, you can start generating value from your data while you phase in your roadmap initiatives.



This is the stage where your research, plans, and data all come together. Based on the last round of technologies catalogued by ChiefMartech, there are now over 8,000 options.

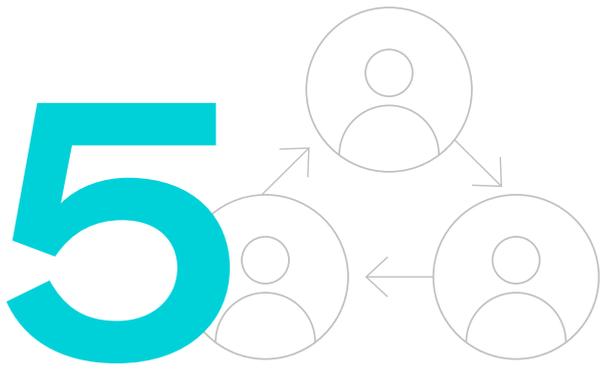
Ready your platforms and tools



Fortunately, not all of these are automation platforms and it is likely that your peers in your network would have a set of recommendations for you.

Alternatively, there are various online community or panel-based software ranking websites or research companies, such as Forrester or Gartner, that publish reports ranking different vendors by capability.

If, however you need to ensure the best fit for your company, based on your specific needs, audience, budget, and future roadmap – you could work with a consulting partner to help you find the perfect match.



Organize your operations and team

Everyone should know what they need to do and how – in other words, you need an action plan in place. Of course, you don't want your marketing operations to feel like an ongoing fire drill but establishing clear objectives and ensuring that your team knows how to function in order to achieve those objectives is an important component in running a well-oiled machine.

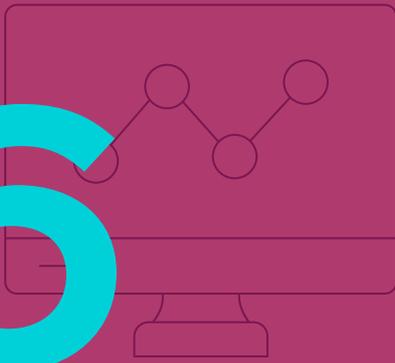
However, no machine will continue running without the right maintenance or fuel. And, in the case of your marketing operations, the better it is maintained and the more fuel it is given, the faster it is able to run (think: scaling your operations).

There are a few things your team needs to manage with your automation. Outside of the initial assets and processes needed to get started, there might be a range of experiments that you want to test in smaller cycles before you release them as part of your greater marketing engine. Ensure that your team members are clear on the vision and are organized to work together on achieving that vision.

'Ensure that your team members are clear on the vision and are organized to work together on achieving that vision.'



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Put an analytics framework in place

I love the quote: “You can’t manage what you can’t measure”. If you do all this work, but don’t know how it is contributing to your business – how do you substantiate the work, effort, and money spent on all these tasks? How can you be confident that the program performed or understand where and how to optimize it? More importantly – how can you request a budget increase to achieve even greater success going forward if you can’t demonstrate the success you’ve achieved to date?

Once again, this does not need to be overly complex. You just need to be able to show the impact based on the actions that are performed. Bear in mind that the measure of success is easier to gauge in some cases than in others. It is much simpler when there is a direct digital and immediate connection between the action and the impact (e.g. action: sending an email and impact: online purchase) than when the action is more disconnected and there is a longer “wait period” before the impact can be seen (e.g. action: test driving a vehicle and impact: vehicle purchase).

Once again, there is fortunately a wide range of tools and services to help you set up and manage your analytics framework.





Thinking, planning, and talking about all these initiatives is great, but putting them into action is better. After all, sometimes in trying to get the perfect program, data, or tools ready and organized, you can get stuck in a cycle of inaction. Define what is “good enough” to start with

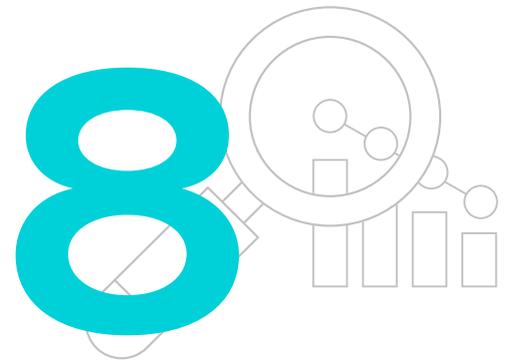
Get started!

In instances where you might be unsure where “near to perfect” might be for you, defining a roadmap of key milestones you want to grow or optimize is great. This will help you to stay on track in your efforts to achieve your ideal marketing automation engine.



Analyze and optimize

You might take a moment to celebrate once you’ve launched or optimized your marketing automation; however, the fun only really starts at that point. It’s important to understand how customers are responding in reality based on your available initiatives and analytics. Then, you’ll need to come up with fresh ideas to further or better engage them.



From this point, you can test different channels to reach your customers by tweaking timing, content, and offers. You may even reach new audiences or develop new products and services based on the conversations held with them.

Introducing or optimizing your marketing automation strategy by following these eight steps has the potential to save you time, streamline your processes, improve team cohesion, and ultimately to improve engagement with your consumers throughout the buyer’s cycle. Get started today.

About Acceleration

We enable the transformation of marketing organizations by building new data and technology-enhanced capability.

Our goal is to steward a step change from marketing which is fragmented, static and product-centric, to marketing that is orchestrated, agile and customer-centric.

Part of Wunderman Thompson, Acceleration employs 200 strategic marketing technologists globally.

For more information, visit www.acceleration.biz or reach out at filip.vonreiche@acceleration.biz
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