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SALES & MARKETING AUTOMATION SIMPLIFIED

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INTRODUCTION

As a business owner, one might get the notion that sales and marketing automation is something far fetched. But, considering the cost and other benefits of automating sales and marketing activities, businesses can customise the techniques of automation according to their requirements.

Sales and marketing automation can help put our business on autopilot mode.

Automation helps in forecasting the revenue and analysing the sales effectively.
The process helps in the prioritisation of prospects for the business and ensure the right level of resources are devoted to the most probable ones.

Will you buy your next car or phone from a cheesy salesman who is trying hard to pronounce your name correctly?

10 years ago, we used to buy and sell like this. Information Technology has changed the way consumers perceive information and take decisions. Consumers have become smarter and more aware. If you still plan to send out an army of motivated sales people trained to - ABC Always Be Closing- bad news, it doesn't work anymore.

The sales process is much more complex; and it requires you to attract, engage, educate and maintain an ongoing relationship with your customers.

A recent study showed that reps spend less than a third of their time actually selling — compared to a full 50% spent between administrative CRM tasks and searching for content.

A business certainly does not wish to be in a situation where the sales personnel are not being able to devote 100% of their effort in converting prospects.

How to use this book?

This book helps you with all the basic aspects of sales and marketing automation. It explains how the process benefits your business and what are some of the key strategies that you can adopt.

The book also highlights some real life examples of sales and marketing automation so you can understand how they apply to your business. Besides that, it also lists down some important tools that can be used for the process.

What is sales and marketing automation?

Sales and marketing are the two most vital operations of every small to medium enterprise. A carefully crafted combination of sales and marketing is essential for successful business growth.

Traditionally, sales and marketing have consumed a lot of dedicated resources. Small-to-medium organisations do not have sufficient resources and time to manage these two important operations so they end up wasting a lot of their time and money by following traditional marketing and sales processes.

Organisations find sales and marketing hard to develop, expensive to manage, and difficult to track which usually results in reduced revenue and profitability.

Marketing automation allows you to reach, attract and engage your target audience by automatically executing and managing marketing tasks/processes without any manual effort.

It streamlines, automates, and measures marketing tasks and workflows by saving time and money on manual processes. It also enhances operational efficiency by allowing an exponential increase in revenue.

Sales automation refers to automating your revenue generation process through tactics and tools that can track your customer behaviour and interaction along with monitoring your sales forecast and performance.

Sales automation allows you to have better visibility of your customer's needs, requirements and behaviours.

This means you will always know which customers are ready to buy, what information they require and when to approach them with the relevant information.
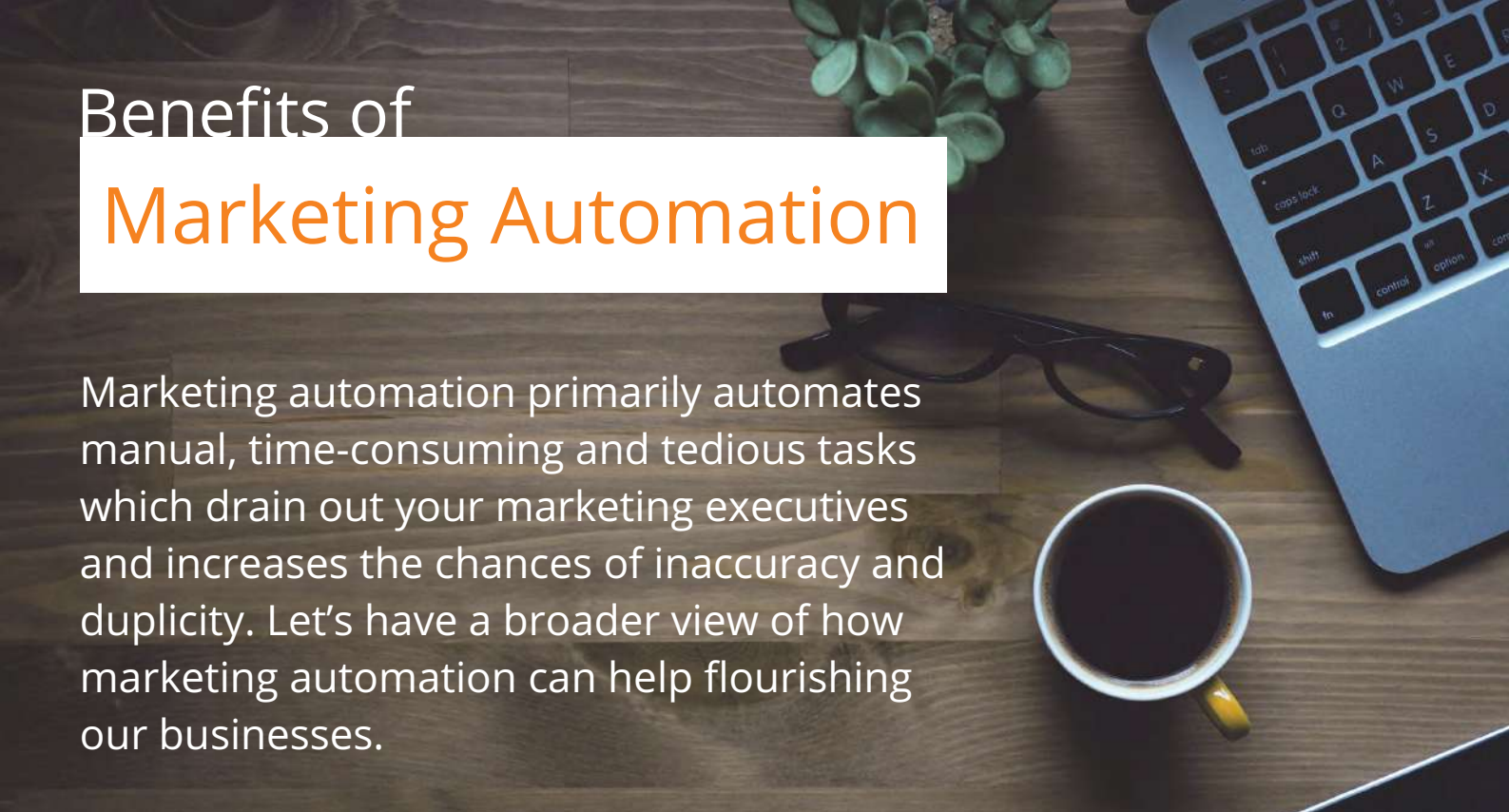
This information is automatically communicated to your leads through customised and targeted channels based on specified rules without any manual effort.

Sales automation allows you to cater to the needs, issues and problems of your customers even before they ask for it. It helps you to speed up your sales process and improves your customer service.

It gives your business an opportunity to automate the customer life-cycle (lead generation – acquisition – conversion – retention – loyalty), thus increasing sales revenue.

Sales automation includes automated lead generation and qualification, automated sales pipeline analysis, automated sales stage and probability analysis, automated competitor analysis, and automated real-time sales forecasting.

Sales and marketing are two completely separate processes but an effective automation requires a combined view of sales and marketing. In this book, we will take a holistic approach towards sales and marketing automation rather than treating them as two separate entities.

Benefits of
Marketing Automation

Marketing automation primarily automates manual, time-consuming and tedious tasks which drain out your marketing executives and increases the chances of inaccuracy and duplicity. Let's have a broader view of how marketing automation can help flourishing our businesses.

- **M**arketing automation is an immensely time-saving approach. It allows you to schedule your social media posts well in advance, for weeks, for months, till the time you desire to publish posts in the future. You can also create campaigns that are already planned and schedule them ahead of time using apps like Hootsuite.

- **E**mail campaigns can also be scheduled for the future. This enables your marketing team to schedule and send emails to target customers at a particular time and date. Instead of sending emails manually to customers, you can categorise your customers and make lists of these categories and go ahead with your email campaign.

- **L**ess staff is required to manage marketing activities as automation provides you tools which can be handled by a single employee. All you need to do is provide basic training of utilising the tools optimally.

- **A**utomating tasks mean reports generated are also automated. Automatic generation of reports are high on accuracy and provide in-depth details. It saves you time as your employees don't have to prepare reports of their respective departments manually.

- **M**arketing automation is as simple as ABC, even for those who are not tech-savvy. With applications available on the web, you don't need to code everything but provide basic training to your staff to use the applications.

- **N**urturing your leads is no longer a burdensome task. Once automation is implemented, nurturing your leads is a cakewalk. Suppose, a visitor comes to your website and finds your content useful, he would want to sign up for your newsletters. Once he enters his details to sign up for the newsletter, he receives an instant welcome email from your side. In case he asks a question, an automated email reply can answer the query. If you own an eCommerce website, once a user signs up you can send him an email containing a discount coupon. This ultimately increases your sales.

- **M**arketing automation allows you to store all the data in one place which helps you reach out to your existing or potential clients easily. For example, a customer bought something from your website a month ago; you can send him an email with a discount coupon on the items of his interest to insist him to make a purchase again. Similarly, if a customer left your site without making any purchase and there are articles in the cart, you can offer him discounts to initiate the purchase.

Marketing automation can increase the effectiveness of lead generation and result in increased revenue. It not just saves you time and money but also reduces your workload by minimising repetitive tasks.

Benefits of
Sales Automation

Sales automation helps you put your business revenue on autopilot mode and helps improve the productivity of your sales process.

Automation helps in forecasting and analysing the sales effectively and efficiently. With automation of tasks for your sales process, your sales team can focus more on sales conversions. Here are some of the key benefits:

- **A**utomated sales reports help in tracking the productivity of the sales team on a periodic basis. You can customise the reports according to your business requirements. These reports include details of tasks done and the scheduled appointments with prospects. The outcome of emails and calls can also be easily tracked. The reports of each sales representative can be viewed and analysed against pre-defined benchmarks.

- **D**efining lead scores and assigning priorities to each lead is one of the most important aspects of your sales process. The leads which have the highest probability of getting converted will have a higher lead score while the ones with a lesser probability will have a lower lead score. You can automate the process of assigning lead scores and priorities to each of the leads. The automation process can be customised according to the criteria you define.

- **Y**ou can automate the task creation process for your sales team, based on predefined criteria. Some of the examples of the same include:

  1. Whenever a lead visits the pricing page.
  2. A contact fills out a demo request form on your site.
  3. To follow up when a contact's trial is expiring.

  With automated notifications, the sales representatives know what action to take when, saving time and effort in assigning tasks.

- **Y**our sales team needs different sets of collateral for varying prospects. There should be a centralised repository of all types of collateral that may be required for each type of prospects and business situations. Automated follow-ups can be setup to save time and effort in following up with prospects manually.

- **R**equesting clients for meetings can be a frustrating process. You can automate your meeting requests to ensure it saves precious time for your sales team. You can add customised meeting scheduling links to email templates to automate and simplify this process.

The Strategic Overview

Having an effective strategy for business marketing automation will certainly be helpful in the long run. Traditional approaches treat field sales and marketing as two different subjects which are not effective in sales and marketing automation. It is the journey of the customer from being a stranger to becoming a brand evangelist or ambassador. A thorough understanding of the business and its audience helps in building a strategy for automation that actually brings accurate results for the business.

Campaigns are automated based on the customer lead score and preferences. This helps in creating customised campaigns for different customer segments to bring out the best result from each campaign. The criteria for score preferences and messaging is predefined for successful automation.

The ultimate goal of the strategy is to get more conversions and build customer loyalty with a system that is inherently automated.

An effective sales and marketing automation strategy is built around the following framework:

Reach and Attract	Engage	Capture	Nurture
	Convert	Keep	Grow
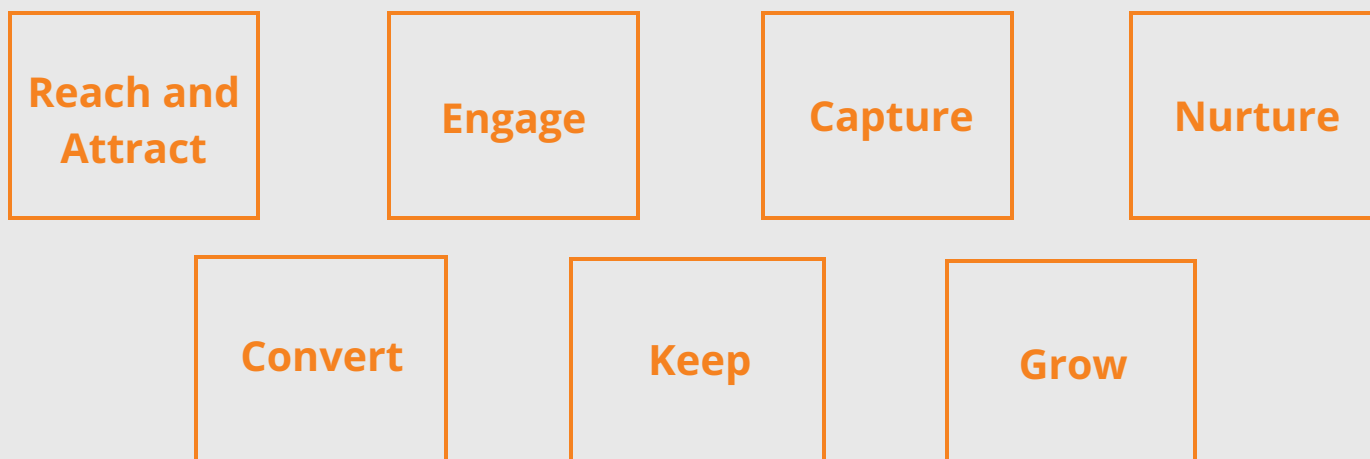
The People

Each person from your target audience is at a different stage in the sales and marketing cycle. We cannot treat a stranger and a customer equally while developing campaigns and approaching our audience.

An understanding of the stages would help you focus your efforts on creating the right messaging for the particular stage. The ultimate goal is to help our audience move to the next stage in the cycle and add to our revenue generation efforts.

Here is how we can treat each stage differently and get the best of the results:

Strangers

- Anybody who visits your website for the first time while comparing products and services is a stranger, to begin with. From here on, we need to get them to take an action with the help of messages that showcase the benefits of our products and services.

- Website popups and web forms along with relevant call-to-action buttons are used to attract visitors to fill in their details and move to the next stage.

Leads

- A visitor came on to your website, was impressed with the messaging and requested to be contacted or subscribed to your blog. We need to now figure out how to take his/her interest to the next level.

- At this stage, the customer needs to be nurtured with interesting messages - could be related to the product features or some interesting content from the blog that's useful for the customer.

- The sales rep at this stage also tries to understand whether the lead can qualify to become a prospect or not. This can be done with the help of an initial conversation with the customer to understand his requirements and see if we fit in as the best service provider in the situation.

Prospects

- In this stage, we know that the lead has a very high chance of a conversion. To prospects, we need to send out messaging related to product trials, offers, presentations, proposals and follow-up messages that can help them decide on becoming our customer.

- At this stage, the sales rep requests the prospect for a meeting and prepares for it to ensure she is able to convert the prospect into a customer.

Customers

- Many of your target audiences are already your customers because they have passed the above stages. We all know that retaining customers is as important as getting them.

- With existing customers, we need to ensure that they are not facing any issue with the products or services. Messaging to assure them of support helps in this stage.

- You need to remind your customer of the services, features and offers they can avail.

- New features and updates must be communicated to the existing customers to build trust and confidence. You can solicit feedback and rectify issues whenever required.

Return Customers

- You need to build loyalty for your products and services among your customers to achieve an incremental revenue stream from them, over time.

- You need to make your customers feel special for them to reach this stage. Some of the ways include sending out birthday wishes and offers, create loyalty and reward programs that provide benefits on repeat purchases and send out messages to upsell and cross-sell products and services.

Brand Ambassadors

- A loyal customer becomes a brand ambassador when she is delighted to be your customer and talks about it with peers and on social channels.

- Once you are able to engage with your target audiences successfully in the stages mentioned above, you see that some of your customers are actually your brand ambassadors, helping you to grow your business.

Sales & Marketing Automation

As a small or medium business enterprise, you need to first understand your business requirements for sales and marketing automation and then choose a combination of tools and customization to get the best results out of automation. Here are some key steps to follow:

- Define the list of activities that cover your sales and marketing process
- List down the processes that would be required to automate
- Create a budget for automating these processes
- Evaluate the options that best suit the budget and processes
- Select the tools that match your process and pricing requirements
- Work with an Agency to customise the tools according to your business requirements

The Tools

Backbone of an Effective Automation

Automation relies heavily on information. Automation is triggered by specific information and takes action on the basis of an information.

So, you need two things:

- A way to collect information (website, landing page, social media)
- A way to store information (database)

Smarter Website

A smarter website forms the foundation of effective sales & marketing automation.

Your company website is not just an online brochure that provides information about your company and contact details. Most small-to-medium enterprises rely on traditional marketing methodologies and referrals to drive new business, and their websites to serve as an online brochure where they display their products or services.

The basic premise of sales and marketing automation is a smarter website that is equipped to:

- To acquire new customers
- To engage the existing ones

A smarter website is a one that has got features of search engine optimisation pre-built in it and targets to reach out to the relevant audience. It helps you capture user details with ease and automatically add these to your email lists.

Another important feature of a smarter website is that it can analyse user activity and behaviour to develop more effective marketing campaigns for your business.

CRM Integrated with Smarter Website

The evolution of Customer Relationship Management (CRM) has taken a leap from its early days. It is no more a desktop based sales tool; we have a variety of versions of CRM like Cloud CRM, Social CRM, etc. Any organisation, whether a small or a big one, needs CRM to track, manage and organise its customer's details, activities and conversations. This helps the marketing and sales department of your company to understand the customers and their needs in a better way.

CRM integration with your website can be described as merging together your website and CRM where they work seamlessly. Integrating CRM with your website means bringing in more valued customer information into your CRM through your website. Let's have a better understanding of what a CRM and a website can together do for your business.

Lead Nurturing

A good CRM system helps you nurture leads and turn them into potential buyers. Once a customer lands on your website, you can capture his details through various channels like exit pop up or subscribe-to-newsletter. According to MarketingSherpa, 79% of leads never convert to sales if left un-nurtured. Lead nurturing generates 50% more sales ready leads at 33% lower cost, says Forrester Research. Sending informative emails to leads with solutions to their problems generates interest in them and improves your lead conversion rate.

You can monitor the results of all your email marketing campaigns. You can measure the number of leads through the website and landing pages, lead conversion rate, etc.

You can also analyse which segment of leads converts the most, based on their lead sources, industries, and other details. Apart from sending emails, your sales representatives can also make calls, fix meetings and further initiate deals with them and this cycle ends with deal closure.

Reduction in Admin Time

Most of the valuable time gets wasted in exporting the data from a website and manually importing into CRM database if the website is not CRM integrated.

Once you integrate both of them, it makes your tasks hassle-free. You save time; you save money and above all, you save manpower. It can be a tedious task exporting and importing data from your website to your CRM database. Reduction in admin time enables your employees to focus on the leads.

Increase in Sales

Because your data is up to date and accurate, it enables your sales department to interact with the customers quickly. Responding to customer's query as soon as possible results in better conversion rates.

Instant Access to Updated Data

Integrating your website with CRM enables you to have instant access to updated data. This data is accurate and there are lesser chances of duplicity. Accurate data helps to deal with the customer in the most appropriate way by previous interactions and precise data. Along with accuracy, the data is updated in real time which means you don't have to wait for updating of databases.

Integrating CRM with your website not just saves you time and money but also increases the efficiency of your organisation. Sales processes become quick, response time to customer's queries is improved and following up on leads becomes easy and efficient.

OTHER TOOLS

Landing Page

One of the essential tools for automating your business marketing campaigns is a landing page. Customised landing pages for each campaign and channel can be developed to track and analyse results.

Multiple landing pages ensure that the message and call-to-actions are customised according to the needs and preferences of the customer.

Landing pages can be optimised for each of the campaigns using techniques like split A/B testing, for better results.

Email Marketing Automation Tool

Email marketing automation tools help in automating customised campaigns to each of the customer segments in the relevant sales stage. The automation tool is integrated with the website or the CRM tool to capture the details of the users and send campaigns based on the relevant triggers. With a feature for A/B testing, multiple emailers are tested to bring out the best results from the campaign. The tools generate automated reports to track and analyse the campaigns effectively.

Social Media Automation Tool

You can automate your entire social media activities with social media automation tools. The tools send out a list of posts to all your social profiles at designated times in an automated fashion. Besides that, the tools help in analysing the results of the social media activities by analysing the reach, following, engagement, audiences and other such metrics to help you improve upon your campaigns. The tools also help in viewing and managing all your social media activity from a single dashboard.

Analytics and Heatmap

There are various analytics and heatmap tools that are helpful in understanding your audiences and their activity better. With the help of tools like Google Analytics, you can track the clicks and conversions of your campaign with utmost ease. You can understand which campaigns, landing pages and channels are giving you better results and which ones are lagging behind.
Heatmap tools are helpful in analysing visitor activity on the website and creating triggered campaigns based on this activity. The tools help in a detailed analysis of the clicks and movements of the website visitor on each of the pages.

The Anatomy of Automation

When we automate a process we need to understand how the process actually works. While we automate a process we define a set of triggers and actions that would be a part of the process.

Each trigger would lead to a certain action and so on. Strategically speaking, the most appropriate action has to be defined for each trigger to achieve the best of the results. Also, the time for each trigger and action is predefined to complete the criteria.

An automation consists of two main elements:

- A trigger
- An action

Trigger	Action
When	When
What	What

Trigger

A trigger is an activity that is the pre-condition for an action. Suppose a customer visits a website.

Now, we can use this as a trigger to show her a popup.

A trigger has two main properties.

1. **When**

   a. Time-based: On a specific time or date

      i. For example: last activity time, most recent visit, first visit, etc.

   b. On a record action: When a record is created, edited, updated or deleted.

      i. For example: when someone fills in a contact form, downloads an ebook etc. now the fields are updated in the database

2. **What**

 Automation is triggered when specific conditions are met. It is important to identify what those conditions are. It can be a combination of a lot of conditions.

For example:

       Condition A: City = Geelong
       Condition B: Time spent on website > 3 minutes
       Condition C: Visit= First time

       You can apply Booleans to conditions as well:
        Example: A + (B-C) or A - (B+C) etc.

Action

An action is taken when a trigger happens and a condition is met. We can define the time of the action and the action itself.

Action has two properties:

   1. **When**

      a. Instantaneous action
      b. Scheduled action

   2. **What**

     What actions does automation take.
     Here are some examples:

      a. Send an email/start a series of emails
      b. Allocate a task to internal team
      c. Update a field in the database
      d. Create a trigger for another application

Reach and Attract

It's important to establish an online business to be able to automate your business marketing.

You can use a variety of techniques to reach out to your target audience. Each channel would have its own set of activities that would help you reach out to your target audience effectively. Growing your network of prospects would improve the possibility of conversions and thus the revenue.

Website Optimisation

You can use your website to reach out to your audience by optimising it for search engines and ensuring that it ranks high on searches that are being done in your niche. The website structure is developed in such a way that you can ensure that this process is automated. It is important to understand how people reach your website.
There are 4 main ways:

1. Direct traffic:

When website visitors come to your site by directly typing in the site name it is classified as direct traffic. It is a result of the awareness of your business among users.

2. Organic:

When visitors type in a keyword on search engines and reach your site through search engine results, it is termed as organic traffic

3. Referral:

The traffic that comes on to your website from 3rd party sites is called referral traffic. This type of traffic could come from any site where your site has been mentioned.

4. Social:

The traffic that your website receives from social media channels is categorised under social traffic. This helps you understand the performance of your social media activities

Some of the key elements of website SEO that helps in reaching out to the target audiences effectively include:

- Well structured website content
- Contact forms
- Call-to-action buttons
- Social media integration
- Communicating the key features and services

Social Media Outreach and Automation

Having a social media presence on platforms like Facebook, LinkedIn and Twitter is an essential way to reach out to your target audience. Adding useful content to these channels on a regular basis would help you reach out to your target audience effectively. You can use social media automation tools to automate the content outreach on these platforms and save time and effort.

Capture

Each channel can be used to capture the details of your target audience. You can predefine the format in which you require the data along with customer segments.
Here are some use cases of how you can capture customer details:

Automate Database Capture From the Website

You can automate the process of capturing customer details from the website by integrating it with an appropriate CRM tool. As soon as a customer visits your website and fills in his details in the contact form, the database gets stored in the specified list in the CRM tool.

Let's, look at the process.

Trigger	Condition	Action
Website visitor fills in the contact form	He chooses a drop-down for inquiring a particular service say- 'Web Development'	The CRM automatically updates the customer database under the section 'Web Development Leads'

Tools required:

- Smarter website
- CRM

Popup at the end of a blog post

This is an interesting technique to capture database from the readers of your blog. You can set up a popup at the end of a popular blog post.

Here is the workflow:

Trigger	Condition	Action
The visitor reads a blog post on the website blog	He has completed reading the post	The visitor can see a popup that requests him to subscribe to the blog and submit his/her details

Exit Intent Popup

Many times the users are just comparing the services and hopping sites. An exit intent popup helps you get a visitor to fill in his details with an interesting offer.

Trigger	Condition	Action
The website visitor is about to leave without an action	The visitor is about to close the tab	A popup promoting a free trial of the product appears

Tools required:

- Smarter website

Slide In Scrolls

Whenever a user has scrolled a certain part of the website, a slide in subscribe box can be shown to induce the customer to fill in his details. Here is how this works:

Trigger	Condition	Action
The website visitor has scrolled a major part of the web page	The visitor is interested in the content of the site	A slide in subscribe box is shown to induce subscription

Tools required:

- Smarter website

Content Upgrades

Content upgrades are a useful way to reach out and get the users to share their details. You can offer a detailed version of a blog post as a PDF download by getting the users to fill up a form.

Trigger	Condition	Action
The visitor has read the shorter version of the post	The visitor needs to fill up a form to access the detailed post	A call to action or a popup induces the customer to fill in his details

Tools required:
- Smarter website

Home Gate

A home gate is a sort of welcome promotional message that is shown to the user as soon as they land on the home page. This induces them to fill in their contact details for providing them an with offer or a valuable piece of content.

Trigger	Condition	Action
The website visitor lands on the homepage of the website	Home page visit	A welcome message induces the user to fill in the form for a free product trial or an eBook download

Tools required:
- Smarter website

Ask for User Preferences

This is the best way to capture the details of prospects. You need to show a popup that asks whether the user is interested in receiving informative content and updates with the help of newsletters. If the user says yes then she has to fill in the details.

Trigger	Condition	Action
The website visitor visits the blog section of the site	The visitor is interested in receiving updates	A popup asks the user whether she wishes to receive the latest posts in her inbox. She has to then fill in her details if she selects a 'Yes'

Tools required:
- Smarter website
- Email automation

Social Media Campaigns

You can use the campaigns on social media channels for capturing user details for future engagement and conversion. You can create landing pages for each of your social campaigns and automate your list building activity from there. Here is an example:

Trigger	Condition	Action
A Facebook user clicks on the landing page for your Facebook campaign and fills in her details	She chooses a dropdown for inquiring a particular dropdown say - 'Mobile Development'	The CRM automatically updates the customer database under the section 'Mobile Development Leads'

Tools required:
- Social media automation

ENGAGE

Engaging with prospects and leads is a continuous process. Once you have the customer details, you can create customised campaigns based on their segmentation and preferences. You can send out offers and product related communication based on user preferences to ensure they are engaged with your brand. This would help you build brand recall and trigger conversions.
Here are some use cases of how you can engage with your audience:

Activating Inactive Users

The historical activity of the users can be used to send customised campaigns to them. Here is an example:

Trigger	Condition	Action
A website visitor or a customer has not engaged with the website since a month	Suppose the customer has visited the page of a particular product or service in the past	The email tool would automatically send out a customised e-mailer to win this customer back

Tools required:

- Smarter website
- CRM
- Email automation

Campaign Related To Lead Preference

While getting the users to opt-in for your lists, you need to give them a choice of the kind of messages that they wish to receive. You then need to automate a campaign based on the preference of the user. Here is an example:

Trigger	Condition	Action
A website visitor or a customer has signed up for your mailing list	The visitor wishes to receive interesting blog posts from you	Predefined blog post emailers are scheduled to the lead

Tools required:

- Smarter website
- CRM
- Email automation

Product Video Series

This is an interesting way to engage with your leads and make them aware about your products. You can send these at regular intervals. Here is the workflow:

Trigger	Condition	Action
A website visitor or a customer has signed up for your mailing list	The visitor wishes to receive email messages including videos	Schedule an email campaign showcasing the product feature video series

Tools required:

- Smarter website
- CRM
- Email automation

NURTURE

It is important to nurture your leads and ensure they turn into customers. Sending out custom messages to make them feel important can help the cause. Besides that, you can showcase your product benefits through interesting messages to get the desired results. Here are some use cases of how you can nurture your leads and prospects:

Reminder Campaigns

If you are running an offer or promoting an event then, you need to remind your users to make the purchase or participate in the event. You can automate reminder communication to those of your contacts who have not made the purchase or engaged in the relevant activity.

Trigger	Condition	Action
A prospect has not chosen to click on your e-mail	The prospect had shown some interest previously in receiving updates or participating in events	An automated email is sent out to all those who have not taken any action yet

Tools required:

- Smarter website
- CRM
- Email automation

Campaigns On Multiple Channels

Automating campaigns on different channels can help you reach out to your audiences more effectively. You can use a different timing for each of the channels and schedule your campaign. This would improve the recall value of the campaign and improve conversion rate.

Trigger	Condition	Action
There is list of high opportunity prospects that needs to be converted	The set of leads which have been qualified as opportunities - are targeted through different channels	An automated campaign message is scheduled on channels like Facebook, Mobile(Text message or push notification) and email

Tools required:

- Smarter website
- Marketing automation

Subscriber Welcome

The blog subscription is an interesting method to capture user data and engage with them. Besides a new blog post notification that goes to the subscriber, you can also automate a welcome email message to all the new subscribers. This message helps you introduce your business while also build a relationship with the subscribers.

Trigger	Condition	Action
The website visitor subscribes to the blog	The welcome message is sent out to new blog subscribers only	An automated welcome e-mail is sent out with an introduction to the business. The e-mailer also mentions about how the company blog would be a source of useful information and updates

Tools required:

- Smarter website
- CRM
- Email automation

Campaign for Those Who Have Abandoned The Shopping Cart

Many times, customers visit your website add the product they like, to the shopping cart and leave. Engaging with these customers through customised messages would help you improve the conversion rate.

Trigger	Condition	Action
A customer has added a product to the shopping cart and left the website	The customer has added a pair of branded shoes on the shopping cart	An automated email message is scheduled to remind him of purchasing the pair of branded shoes that were added to the cart

Tools required:

- Smarter website
- Marketing automation

Webinar Promotion Campaign

Regular webinars are a useful way to showcase business expertise and engage with your prospects. A series of automated emailers helps get more of the prospects to register for the webinar. Here is an example of the workflow.

Trigger	Condition	Action
There is a set of prospects who have shown interest in understanding the product/service in detail	Each e-mailer is customised according to the user segment and stage of the campaign	A webinar e-mailer series is created and automated. The dates of the e-mailers are pre-defined. The initial e-mailers introduce the webinar and the later ones are reminders

Tools required:
- Smarter website
- CRM
- Email automation

Conversion Campaign For High Probables

You can create a lead scoring system in your website based on user activity. The scoring system gives a high score to those leads who have a higher probability to convert. These are then sent out custom messages and offers through an automated campaign.

Trigger	Condition	Action
A lead gets a high score in your system	The lead has interest in a particular service, say - bookkeeping	An automated email message offering him a discount on bookkeeping services is scheduled

Tools required:
- Smarter website
- CRM

KEEP

Sales and marketing automation helps you make your existing customers feel special and stay with you for longer. This helps in getting a recurring revenue stream without additional investment in business generation. Here are some use cases of how you can retain your customers effectively:

New Customer Welcome Message

A welcome message to a new customer is a very important part of customer relationship building and retention.
According to MarketingSherpa - ' The average open rate of welcome emails is 50%'. This is much more that the average open rate of other campaigns like newsletters and promos.'
Here how the welcome message works:

Trigger	Condition	Action
The customer signs up for your service or purchases a product	The welcome message is sent out to new and first-time customers only	An automated welcome e-mail is sent out with an introduction to the business. The e-mailer also mentions and assures about timely customer support, if required

Tools required:

- Smarter website
- CRM
- Email automation

Feedback Popup

Feedback popups are a useful technique for engaging with the audience on the website or the mobile. These popups are automated when the user completes a purchase or an activity. The popup can be used to gauge the overall experience of the user.

Trigger	Condition	Action
A website/app visitor completes a purchase.	The visitor has made the payment and has checked out	The visitor sees a popup requesting for ratings and feedback

Tools required:

- Smarter website

Transactional Campaigns

Every time a new or an existing customer places an order or signs up for your service, you need send out a confirmation regarding the same.

The confirmation can be used to thank the customer and provide them with valuable information/updates about their order.

Trigger	Condition	Action
A customer places an order	Suppose the customer ordered food from your app	A push notification would be sent out, confirming the order and its details along with the expected time of delivery

Tools required:
- Smarter website
- Marketing automation

Campaign For Those Who Have Provided a Negative Feedback

Once there is an automated feedback popup in place, there will be some customers who will share negative feedback of the service.

On the basis of the feedback, the customer can be sent out a customised campaign that gives an assurance of better service or provides an offer as a compensation for the trouble faced.

Trigger	Condition	Action
A customer has provided a negative feedback of the service	The negative feedback is about a specific problem faced such as 'delay in delivery of the product'	An automated email message can be sent out offering a 10% discount on the next purchase

Tools required:
- Smarter website
- Marketing automation

Reminder Campaigns For Subscription Renewal

Many a times customers forget to renew their subscription to the service. A series of automated e-mail messages to remind them of the renewal helps in improving the rate of retention.

Trigger	Condition	Action
The subscription payment of a customer will be due soon	There is one week left for the customer to renew his subscription	An automated email message can be sent out for reminding the customer of the due date. A series of such emailers can be sent until the due date of the payment

Tools required:
- Smarter website
- Email automation

CONVERT

It is important to get your sales reps to work on converting leads and potentials efficiently. Many of their tasks like following up with clients, booking meetings and creating tasks can be automated to save time and resources. The more productive the conversion process the higher will be the rate of conversion on a periodic basis.

Sales Representative Notification

Automated notifications to sales representatives on new leads help them in following up with them in a timely manner. All kinds of task notifications can be automated as well. These include - preparing for a sales meeting, sending proposals and quotations and so on.

Trigger	Condition	Action
A visitor has filled in the contact form on the website and the database in the CRM is updated	The website visitor is looking for a service say, 'Web Development'	There would be an automated notification and task creation for a particular sales rep to review the lead and book a meeting with the client

Tools required:
- Smarter website
- Sales automation

Automating Sales Follow Up Messages

The initial proposals that a sales rep sends to a new prospect can be automated to save time on sending it manually. The idea here is to create a template that can be sent out to all the new leads that get qualified.

Trigger	Condition	Action
The sales rep has reviewed and qualified the lead	The lead is qualified and the prospect is looking for a particular service, say 'Mobile App Development'	A customised introductory proposal on 'Mobile Development' would be automated to this lead

Tools required:
- Smarter website
- Email automation
- Sales automation

GROW

With the help of sales and marketing automation, you can easily manage your existing customer relationships and ensure they become loyal customers and brand evangelists. This will help you get word of mouth publicity for your business and a growing revenue stream which is automated. Here are some use cases of how you can grow the revenue from your existing customers:

Upsell and Cross Sell

This is a common technique of building loyalty for your products and services and getting existing customers to add to your revenue. Such automated campaigns to promote similar or complimentary products can be scheduled a few days after a customer has made a purchase.

Trigger	Condition	Action
A customer made a purchase	The customer purchases a particular product say - a t-shirt	The automated campaign promoting a newer t-shirt variety or jeans can be set up. This can be scheduled after a week or a month of the purchase

Tools required:

- Smarter website
- CRM
- Marketing automation

Happy Birthday - Date Based Automation

Wishing clients on special occasions like their birthday or anniversary or completion of a year as a client can be automated. Such campaigns are helpful for personalising the overall user experience and improving retention.

Trigger	Condition	Action
It's your client's birthday	The date of the birthday has to be captured in the client database	An e-mail campaign that wishes the client and expresses gratitude, is scheduled

Tools required:

- Smarter website
- CRM
- Marketing automation

Loyalty Program

Customer loyalty programs offer a point based system to benefit from regular purchases. Once a customer enrolls for such a program, you need to update them about the status of their points/rewards etc. These messages can be automated according the activity of the customer.

Trigger	Condition	Action
A customer makes a purchase	The customer is entitled to some reward points	An automated email campaign is setup to inform the customer about the number of points that were gained from the transaction

Tools required:

- Smarter website
- CRM
- Marketing automation

Ingenious ways to make your marketing automation look less robotic

When we use the term 'Automation', the first thing that comes to our mind is 'Robotic'. It sounds unemotional, machine-like and detached. The same is true with marketing automation. Seems like Tony Stark asking JARVIS to perform all the operations all by himself.

But, the good news is, we're far away from robotic apocalypse. Humans can control robots; so, automation can be controlled by YOU! Automation is not some artificial intelligence that will take care of marketing itself but just a handy tool to let you manage all your marketing activities with ease.

A marketer can send a million mails with just a click. But a good marketer is someone who understands his audience, studies the need of his target customers and then designs the content for the emails. This is where a company gets the attention of the people it is targeting.

Let us look at some effective ways to be a pro at marketing with the help of automation:

Creating Lists

Creating the list of your target customers is the primary step any marketer has to take. Buying already prepared lists is a big no-no. Create your lists, targeting specific customers. This will help you in getting qualified leads.

Campaigns

Take baby steps while creating campaigns. Start with a simple campaign and scale it up gradually with time. Planning campaigns for a long time and putting them into autopilot mode can be futile, as it's a dynamic market outside and you need to plan campaigns according to the on-going trend in the market. This will give you a clear picture of which campaign is working and which is not.

Nurture Relationships

The ultimate goal of any marketing campaign is to maintain existing relations while creating new ones. Delivering high and audience-specific content at the right time will enable you to get quality leads. Doing so adds a personal touch in your marketing strategy. You should not ignore your existing clients while building new relationships. A happy customer will bring goodwill to your brand image. Also, it's your existing clients only who will refer your services to others, increasing your revenue. Keep them happy, stay in touch with them too.

Out of the Inbox

Emails are useful we all know. But what next? Marketing through emails is not enough. People are socialising out there; you need to connect to them through other channels.

Social media is a powerful tool to get in touch with your leads instantly and personally. This is where you can get in touch with the audience in the most personal way.

Impeccable Content

Sending emails and sharing posts on social media is a way to connect with your audience. But what if your content is not impactful?

To keep your audience hooked up, your content should be gripping, interesting and informative. A reader will not be interested in your content if it's a plain Jane. Use graphics, good quotes, ask questions, generate curiosity and add a personal touch to your content so that the reader feels like you are directly interacting with them. It is imperative to understand the psyche of your audience. Errantly planning your marketing using automation will undoubtedly lessen your workload but will land you nowhere.

Your clients are humans, you are a human, so your strategy to reach out to your audience should have a human touch.

THE PROCESS

The process of sales and marketing automation begins with defining the objective of the campaign and the target audience. The next step in developing a workflow is to align the triggers and actions.

You need to also ensure that all the conditions for each of the actions is clearly defined.

Here is an example of a sales and marketing automation workflow:
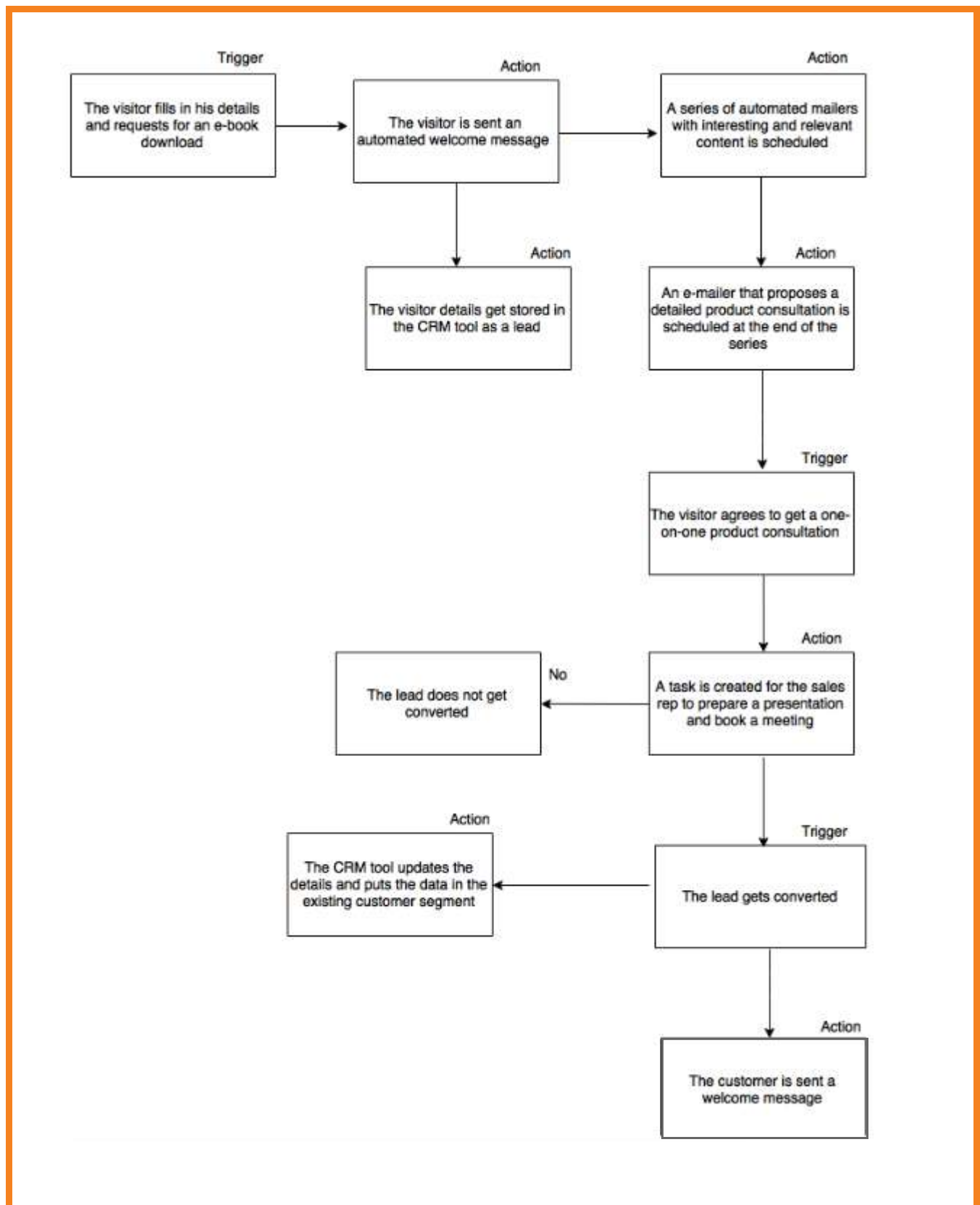
SALES AND MARKETING AUTOMATION TOOLS

We have reviewed some famous Sales and Marketing Automation tools to help you select the best one. Prices mentioned are indicative and we recommend you to check the prices on their website according to your requirements:

Hubspot

Price Starts @ $200/Month

Hubspot is a small business automation tool that has got 41.6% market share.
The tool is appropriate for small, medium as well large businesses. The tool can be used on iOS , Android, Web Mobile and Web. Hubspot is an automation tool that is well designed and easy to use. The other advantage of using a tool like Hubspot is that it offers a 7 day free trial. The tool provides features that can be accessed and understood easily. The extensive documentation makes it more user-friendly. Hubspot is an integrated system that helps you create email campaigns, landing pages, forms and call to action buttons. With this tool, lead nurturing campaigns can be created and analysed on the basis of user persona and behaviour. Some of the key features of Hubspot include:

- Social Media Management
- Lead Management
- E-mail Campaign Management
- Search Engine Optimisation
- Create and Manage Landing Pages
- Business Blog Management

- Campaign Reporting and Analytics
- Integration With 3rd Party Applications
- Database Sync and Management
- Schedule and manage Meetings
- Website Content Optimisation
- eCommerce Integration

Marketo   Price Starts @ $895/Month

One of the key strengths of Marketo as a Marketing automation tool is its integration with Salesforce. The tool is easy to implement, set-up and use. Marketo is suitable for medium to large business enterprises. The tool offers prompt support and a decent community to help the users. There are some aspects of this tool which require improvement like the landing page creator and reporting and analytics features. The interface is mainly drag and drop, but one has to learn the usage to be able to use it effectively. The email campaign editor in Marketo is easy to use and one can create and edit text and HTML email templates. The simplified contact search feature helps you manage your email lists in this tool, quite easily. With Marketo you can customize and edit your automation campaigns according to customer segments, with ease.

Some of the key features of Marketo include:
- Email Marketing
- Lead Scoring & Management
- Event Marketing
- Landing Pages and Forms
- Marketing Budgeting
- CRM Integration

- Lead Nurturing
- A/B Testing
- Campaign Cloning

Salesforce Price Starts @ $25/Month

Salesforce is a fully featured CRM software with a customised and user friendly dashboard. Salesforce is a tool that helps your business simplify and hasten the sales process. The tool helps with simplified contact management which helps in getting a complete overview of the user persona. You can easily track the activity of each customer and their past communications with the business. Salesforce lets you track the channel from which each lead has come. The tool assigns the lead to the sales reps on the basis of their communication and history. You can easily create instant quotes and send them to your opportunities to quickly close the sale with the help of this dynamic tool.

You can easily create sales and revenue forecasting feature of Salesforce to manage the targets and the performance of sales reps. The tool offers advanced reporting and collaboration features to analyse activities and improve productivity of processes.

Some of the key features of Salesforce include:

- Lead Generation and Management
- Sales Forecasting
- Opportunity Management
- File Sharing and Collaboration
- Reporting and Analytics
- Access On Mobile Devices
- Workflow Automation
- Customer Service Management
- Sales Performance Management
- Outlook Integration

InfusionSoft

Price Starts @ $199/Month

InfusionSoft helps your business with a host of marketing and CRM activities. The tool helps you simplify contact management by helping you to keep them in a single place. The tool helps in nurturing of leads from a variety of channels such as email, social media and offline. It has interesting eCommerce features such as invoicing, follow-ups after purchase and collection. The tool has an in-built email marketing platform with a simplified template builder. The tool provides a tagging feature to segment and manage your email lists easily. The platform helps you with easy integration with your website for capturing and storing data, as and when it gets created. InfusionSoft also helps with easy file sharing and collaboration for better workflow efficiency.
Some of the key features of InfusionSoft include:

- Drag and Drop Landing Page Creation
- Web Forms
- Social Media Marketing
- Lead and Opportunity Management
- Estimates and Payments
- Referral Marketing
- Email and Automated Campaigns

Zoho CRM

Price Starts @ $12/Month

Zoho is a customizable CRM software with a host of add-ons and integrations. It is a tool that is suitable for small and medium business enterprises. Zoho makes it easy to assign leads to sales reps and automate follow up reminders to clients. Zoho CRM enables data import using Outlook, CSV or Google apps.
Zoho is a suite of applications that includes accounting, helpdesk, recruitment and project management.

You can integrate with these tools from Zoho to automate systems and processes for your small business.
Zoho has some interesting features for marketing automation such as client follow-up and task reminders for sales reps.

Zoho helps you to save your prospect database in a single place and manage your leads effectively. The tool helps you manage your sales pipeline and create sales forecasts for your business. Zoho helps with customisable reporting and analytics for better planning and decision making.
Some of the key features of Zoho CRM include:

- Customer Service and Support
- Inventory Management
- Customer Analytics
- Third Party Integration
- Email Integration
- Manage Workflow
- Leads and Contact Management
- Multiple Users
- Social Media Integration
- Mobile Integration

IFTTT   Starts with a Free Version

IFTTT is a simple to use marketing automation tool. There are a host of recipes that one can choose with IFTTT. You can use premade as well as customised recipes with IFTTT. It is important to connect the applicable apps and channels while working on any of the recipes. You can also find public recipes created by other users.

You can stall existing recipes and create new ones with this powerful tool. IFTTT enables a business to connect any two services with a single recipe. You can also create and manage your IFTTT recipes with the IFTTT mobile application. Any recipe created in IFTTT first goes in for a test and then becomes live after a while. Some of the key features of IFTTT include:

- Social Media Automation
- Create Custom Triggers and Actions
- Integrate with Other Applications
- Manage from a Mobile Device

Zapier   Starts with a Free Version

The tool makes automated functions easier to implement, without much technical knowledge. The functions so created have a similar trigger and action structure of IFTTT. As IFTTT calls them recipes, Zapier calls them Zaps. The other advantage of Zapier over IFTTT is that one can connect with 3 or more services. The tool features Auto replay in case of functions that fail to work due to API related reasons etc. Zapier's key focus is on a business audience who are looking to improve productivity with automation. Zapier has another interesting feature which suggests Zaps and relevant apps. The tool helps in simplifying Zap management by helping you put them in a folder.
Some of the key features of Zapier include:

- Manage Triggers and Actions
- Google Calendar Integration
- Zap Automation
- Dashboard For Activity Review
- API Maintenance
- Repetitive Tasks

Wishpond

This is an interesting cloud-based lead generation tool with a host of features. Wishpond lets you build customised landing pages for your business with an easy to use landing page builder.

The builder features a variety of landing page features to choose from. The tool also provides features like personalising the landing pages for the users and hosting the landing pages. Wishpond also helps you build popups and forms to capture user details for future campaigns.

You can control your popups using the trigger and action control mechanism in the tool. The tool also helps in automated lead collection and management. You can automate email campaigns using lead scores in Wishpond.

The tool also helps you to create contests on social media channels like Instagram and Pinterest.

Some of the key features of Wishpond include:

- Responsive Landing Pages
- Website Popups and Forms
- Marketing Analytics
- Automated Email Campaigns
- Social Media Integration
- A/B Testing
- Lead Scoring and Management

SugarCRM

Price starts at $40/Month

SugarCRM is a very helpful tool for managing customer relationships and automating marketing campaigns. You can automate and manage client database with this tool and run triggered campaigns with the help of email integration. The tool also helps with management of important client documents and tracking of previous client activity. The tool helps in easy sales collaboration and estimate generation. With advanced reporting and analytics features the tool helps in forecasting sales and planning future marketing activities. It is a user-friendly tool that helps you track sales and marketing performance of your team and communicate internally.

Some of the key features of SugarCRM include:

- Client Management and Support
- Sales Force Automation
- Database and Lead Management
- Document Management
- Collaboration
- Reporting and Analytics

Insightly

Price starts at $12/Month

The CRM tool is known for its reasonable price and some really useful features for small business customer relationship management. The tool helps you easily manage your contacts and opportunities in a single place. It also has additional features such as third party integrations and project management. The tool helps you manage your email campaigns and reports with an easy to use and simplified interface. You can add custom fields and information to your contacts and manage customised campaigns for them with Insightly. The tool provides social media integration and can be managed from the mobile application as well.

Here are some of the key features of Insightly:

- Lead and Contact Management
- Automated Address Book
- Managing Calendar and Events
- Task and Project Management
- Sales Opportunity Management
- Third Party Integrations
- Manage On The Go

Pipedrive — Price starts at $12/hour

The CRM tool is a reasonably priced one and has features to help small businesses manage their sales and marketing effectively. The tool lets you easily manage and customise your sales pipeline. You can automate your web form data collection with Pipedrive and manage your leads and opportunities with ease. You can schedule activities in Pipedrive and sync them with the relevant deals in your account. The tool integrates with your email and you can receive, view and manage your deal specific emails from your Pipedrive account. You can manage your sales rep performance by tracking the deals they are working on and converting. Besides that, you can easily integrate Pipedrive with Mailchimp and bulk export all your contacts from here. Some of its other features include integration with Zapier and Google maps along with mobile management.

Some of the key features of Pipedrive include:

- Sales Pipeline Management
- Contact Management
- Third Party Integrations
- Multi-Lingual
- Manage On The Go
- Reporting and Analytics

Mailchimp — Starts with a Free Plan

This is one of most popular email marketing tool for small business. Mailchimp helps small businesses with simplified email creation and campaign management. Some of the other interesting features of this tool include A/B testing and custom popup forms. The tool comes with a free basic plan for small businesses, but it does not include analytics features. The tool also features social media integration.
Here are some of the key features of MailChimp:

- Customised forms
- Third Party Integrations
- Campaign Automation
- Social Media Integration
- Real-time Reporting and Analytics

Campaign Monitor — Price starts at $9/month

Campaign monitor is an easy to use email marketing tool for small and medium businesses. The tool is backed by powerful analytics and also features automated unsubscribe. You can build and schedule your customised email campaign with an inbuilt template feature of Campaign Monitor.

Here are some of the key features of Campaign Monitor:

- Responsive Templates
- Automated Email Marketing
- Reporting and Analytics
- A/B Testing
- List Segmentation
- Social Media Integration
- Personalised Campaigns

Hootsuite

Price starts at $9.99

This is one of the most commonly used platforms for social media automation for small businesses. You can create a list of social media posts and schedule them with Hootsuite on multiple social channels. Hootsuite also helps with detailed reporting and analytics of the different social media profiles of your business. With the Hootsuite pro plan, you can add up to 50 social profiles for automating your content propagation efforts. Setting up and using the tool is quite simple as well. You can add multiple streams to view your newsfeed, mentions, and conversations on different platforms. This helps you manage your entire social media from a single dashboard.

Some of the key features of Hootsuite include:

- Manage Multiple Social Media Profiles
- Advanced Analytics and Reporting
- Schedule Social Media Content

Buffer

Price starts at $10/month

Buffer is a commonly used social media automation tool used by small businesses. Buffer allows you to schedule your posts on multiple social media channels. The tool features extensions for Firefox, Chrome, and Safari, helping you to share interesting post links directly from your browser to your social profiles. With the paid plan you can automate your posts on up to 12 profiles on buffer.

Some of the key features of Buffer include:

- Social Analytics
- Schedule up to 100 Posts
- Detailed Statistics and Comparison
- RSS Feed Connection
- Manage From Mobile Device
- Team Collaboration

TOOLS SNAPSHOT

Tool	Key Features	Business Type	Starting Price
Hubspot	Marketing Automation	Large Businesses	$200/Month
Marketo	Marketing Automation	Large Businesses	$895/Month
Salesforce	CRM and Sales Automation	Medium & Large Businesses	$25/Month
InfusionSoft	CRM	Large Businesses	$199/Month
Zoho CRM	CRM and Social Media	Small & Medium Businesses	$12/Month
IFTTT	Social Media and Customised Automation	All Business Types	Free

Zapier	Social Media and Business Automation	All Business Types	Free
Wishpond	Lead Generation	Small and Medium Businesses	$65/Month
SugarCRM	CRM and Collaboration	Small and Medium Businesses	$40/Month
Insightly	CRM and Project Management	Small Businesses	$12/Month
Pipedrive	Sales Pipeline and CRM	Small Businesses	$12/Month
Mailchimp	Email Marketing and Automation	Small and Medium Businesses	Free
Campaign Monitor	Email Marketing and Automation	Small and Medium Businesses	$9/Month
Hootsuite	Social Media Automation and Analytics	Small Businesses	$9.9/Month
Buffer	Social Media Automation and Analytics	Small Businesses	$10/Month

Sales and marketing automation is not a one-time task but a continuous process that helps you grow your business in the long run. You can automate your revenue and reduce costs of sales and marketing considerably with the right automation strategy and tools. Utilizing the services of an expert agency for consultation and execution would certainly help get better results.

Thank you for reading this book. We certainly hope the information provided here in, helps you grow your business.

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