

# 9 steps

to implement  
marketing automation

## 1 Define your opportunity

Start by looking at the current business environment and identify any areas that can be improved. This means looking at the buyer's journey and noticing any areas where there is a lot of manual updates happening, people falling out of the buyer's funnel or any disconnect between information the customer needs and information they have.

### Buyer's journey

LIFECYCLE STAGES



CURRENT BUYER'S ACTIVITIES

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YOUR COMPANY'S ACTIVITIES

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OPPORTUNITIES FOR IMPROVEMENT

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## 2 Define your goal

Look back at your defined opportunities. Choose **just one** opportunity and set a specific goal the automation will accomplish. It should be a goal that is **SMART**. This will help you determine if the automation is successful once it's running.



OPPORTUNITY



One opportunity from step 1 goes here

GOAL

MEASUREMENT(S) FOR SUCCESS

## 3 Define your audience

Defining the audience(s) involved in reaching your goal will help you understand what channels are needed to build the automation as well as what data is needed about the audience.

AUDIENCE(S)

## 4 Define your channels

Channels are both places that hold your data and places that are used to execute your messaging. Your CRM, website, app, and email marketing platforms are all examples of channels that may be necessary when executing a marketing automation.

CHANNEL(S) THAT HOLD DATA

CHANNEL(S) THAT EXECUTE YOUR MESSAGE

## 5 Define your data needs

Think through what information you need to trigger an automation, segment contacts, segment dynamic content, provide notifications, utilize personalization strings, etc. Once you've identified what data you need, you may find that the data doesn't currently live where your marketing automation platform can access it. A big part of this step involves figuring out processes to get that data where it needs to be in order to be used in the automation.

DATA NEEDS

WHERE DOES THE DATA CURRENTLY LIVE?

WHERE DOES THE DATA NEED TO BE?

DATA INTEGRATION PLAN



## 7 Build communication pieces and framework

Now that you've done all the planning and figured out all the data—it's time to build it. This means actually building out automations to get the data where it needs to be and creating the triggers and crafting the communication pieces, such as emails, SMS messages, postcards and pdfs.

	PIECE 1	PIECE 2	PIECE 3	PIECE 4
COMMUNICATION PIECE DESCRIPTION				
WHO WILL WRITE CONTENT?				
WHO WILL DESIGN?				
WHO WILL DEVELOP?				
DUE DATE				

## 8 Test automations

Once it's built, you will need to run test subjects through the entire automation to make sure data is being managed the way you expect and the automation is triggered appropriately.

TEST NAMES AND CONTACT

## 9 Launch and continuously improve

Just because the automation has launched doesn't mean you should forget about it. One of the benefits of marketing automation is that if built to track the correct analytics, you will be able to monitor its success and make adjustments as needed to improve results.

PLAN FOR CONTINUOUS IMPROVEMENT

# Common automated campaigns

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WELCOME	Sent to a prospect or new member within 24 hours of joining. Consider including:	<ul style="list-style-type: none"><li>• Member login information</li><li>• Link to complete member profile</li><li>• Tutorial welcome video link</li><li>• Links to educational courses</li></ul>
CUSTOMER APPRECIATION	Show the love. Opportunities include:	<ul style="list-style-type: none"><li>• Anniversaries</li><li>• Special occasions</li><li>• Thanks for contributing</li></ul>
EVENTS	Think about how you want to communicate event information. Consider including:	<ul style="list-style-type: none"><li>• Save the date</li><li>• Initial invitation<ul style="list-style-type: none"><li>» Early bird registration</li></ul></li><li>• 2nd invitation<ul style="list-style-type: none"><li>» Register today – don't delay</li></ul></li><li>• Event information<ul style="list-style-type: none"><li>» What you need to know before you go</li></ul></li><li>• Thank you for attending<ul style="list-style-type: none"><li>» Your feedback is requested</li></ul></li></ul>
ENGAGE	Think of opportunities to follow up with your audience after they have taken action OR not taken action. Actions may be triggered by form submissions, web page visits, course completion, or clicking on a specific email link.	
NURTURE	Strengthen customer loyalty and provide added value throughout the buyer's journey. Subscribers' activity on tagged web pages can provide relevant information about their interests, informing their dynamic nurture campaign.	<ul style="list-style-type: none"><li>• Deliver membership/customer value</li><li>• Affirm accomplishments</li><li>• Recognize participation and interest</li><li>• Motivate future renewal/sales</li></ul>
WIN BACK	Gather your list of non-renewing or lapsed customers and develop a campaign to encourage them to come back. Think of the value that would most interest them. Make renewal as simple and easy as possible.	

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