8 Marketing Automation

What is marketing automation?

Marketing automation provides repeatable marketing processes, closed loop marketing analysis, automated multi-channel execution and customer segmentation. The goal of marketing automation is to transform raw leads into sales ready leads in a consistent and repeatable process and helps to bridge the gap between lead generation activities and follow up by sales.

Why do I need marketing automation?

Marketing automation enables marketers to fully understand, develop and implement strategic marketing plans. This delivers better educated and sales ready leads in an automated and repeatable process. Marketing automation also provides information across all phases of the marketing process including demand generation, lead management, lead scoring, lead nurturing, lead generation, and campaign analysis.

What marketing automation is NOT

Marketing automation is not simple lead generation, email marketing, or a CRM. It's much more than that. When marketing automation is combined with the right people and processes it delivers sales ready leads using a repeatable and automated process.

Marketing automation – Basic techniques

- Align marketing and sales to determine what constitutes a sales ready lead.
- Determine a score threshold that will indicate a sales ready lead
- Define key goals and metrics that define success

Marketing automation – Advanced techniques

- Assign lead scores based on rules assigned to activities data such as the online behaviors of anonymous and known visitors
- Set up alerts for the sales when certain lead score thresh holds are met.
- Explore multiple scoring scenarios to gain greater insights into a leads level of interest in different products or campaigns.

Marketing automation optimization

- Continually review scoring and criteria to provide the most accurate score possible
- Review score of won and lost opportunities to verify they were what was expected for top prospects
- Review leads with high scores that did not turn into opportunities. How could the scoring be improved?
- Review contacts online behavior to see if their actions are really demonstrating the best leads and are being reflected properly in the score.

Top Resources

Marketing Automation overview:
http://devnet.kentico.com/docs/onlinemarketingguide/ma_overview.htm
Marketing Automation Video Overview:
http://devnet.kentico.com/Videos/On-line-Marketing/Marketing-Automation-Overview-with-Kentico-EMS-7.aspx
Marketing Automation Demo:
http://devnet.kentico.com/Videos/On-line-Marketing/Marketing-Automation-Demo-with-Kentico-EMS-7.aspx

Automation quick start

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1. In **CMS Desk** select the **On-line marketing** tab click the **Processes** button and then click the **New process** button as shown in the following screenshot.
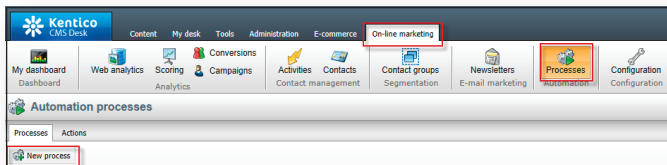
Tab name	Description
Processes	Used to create and manage marketing automation processes.
Actions	Used to create, edit and delete automation process action steps.

2. In the Processes screen in the **Display name** field enter **My Process** and then click **Save** as shown in the following screenshot.
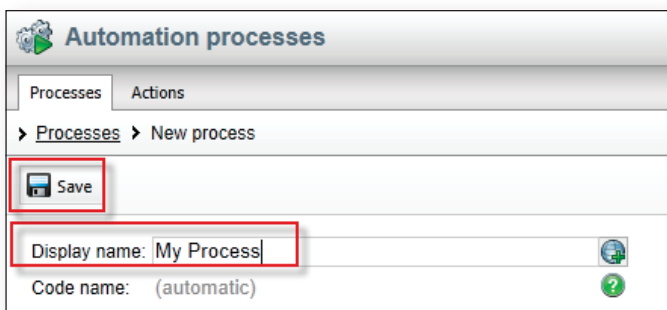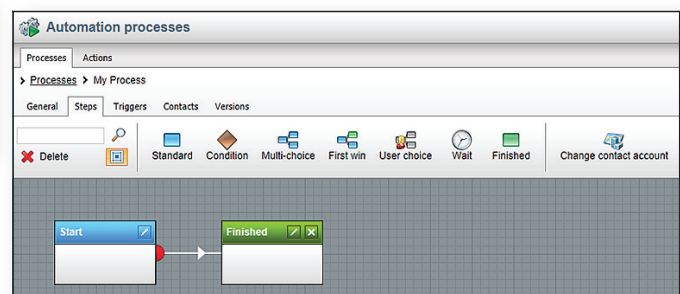

General

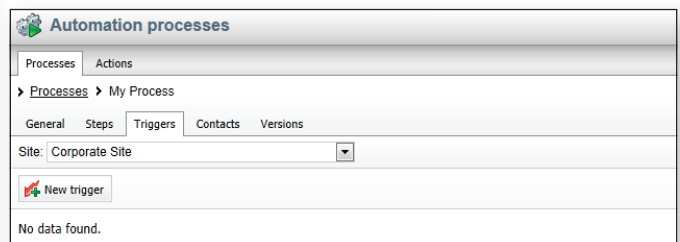Used to manage the general properties and process recurrence.

Steps

Used to design the automation process by dragging and dropping actions and items onto the process designer.

Triggers

Used to automatically trigger the marketing automation process at any point based on a specified condition or action.

Contacts

Used to manage the list of contacts that are currently active within the specified automation process.