



What's the big deal about marketing automation?

The screenshot displays the Zoho MarketingHub interface for a specific marketing automation journey. The journey is titled "MA Demo 05 Cargo with Update Job Title" and was created on March 15, 2021, at 02:35 PM. The associated topic is "Marketing Automation".

Lead Information:

- Name: sandytape@cypruswm.com
- Trigger Type: Goal achieved
- Trigger Time: 03/16/2021 05:39 PM
- Current Stage: Under process
- Last execution time: 03/16/2021 05:40 PM
- Total time in program: 16 Hours

Journey Flow:

- IF/ELSE CONDITION:** Triggered on 03/16/2021 05:39 PM. Output: true.
- Cargo:** Triggered on 03/16/2021 05:39 PM. Total Opens: 1.
- IF/ELSE CONDITION:** Triggered on 03/16/2021 05:39 PM. Output: true.
- Job Title:** Triggered on 03/16/2021 05:39 PM. Total Opens: 1.
- MERGE:** Triggered on 03/16/2021 05:39 PM.

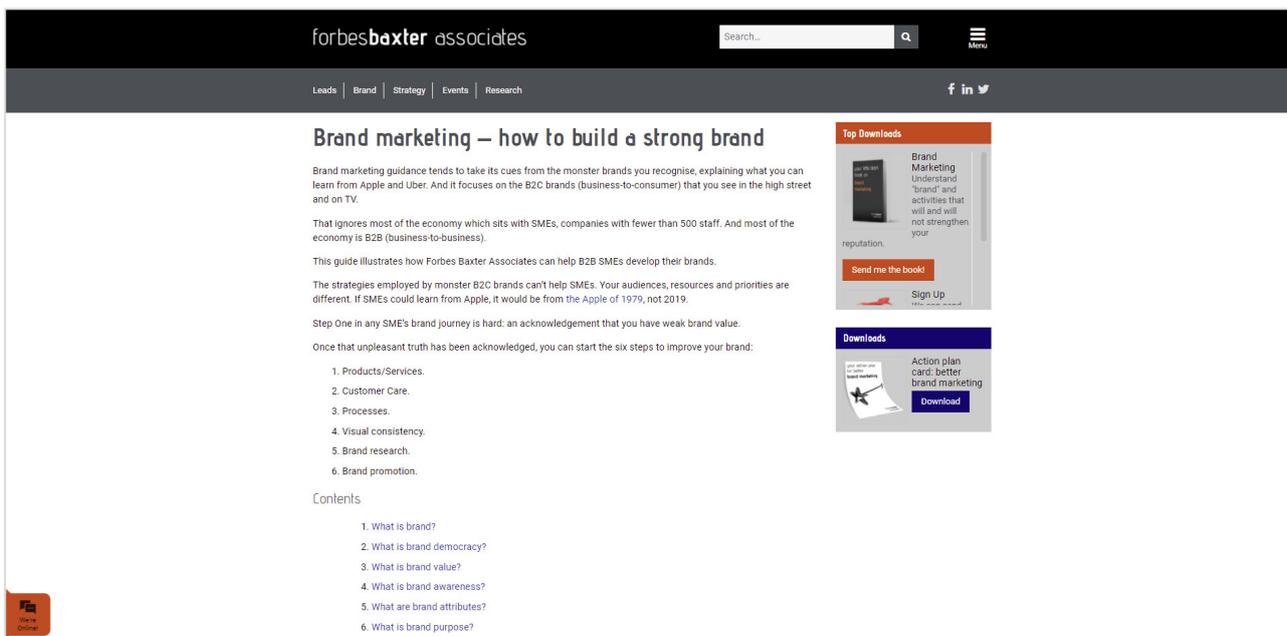
The visual flowchart shows a sequence of steps: a start node, a decision diamond, an email send step, another decision diamond, a second email send step, and a final merge step. Each step includes a completion timestamp.

What's the big deal about marketing automation?

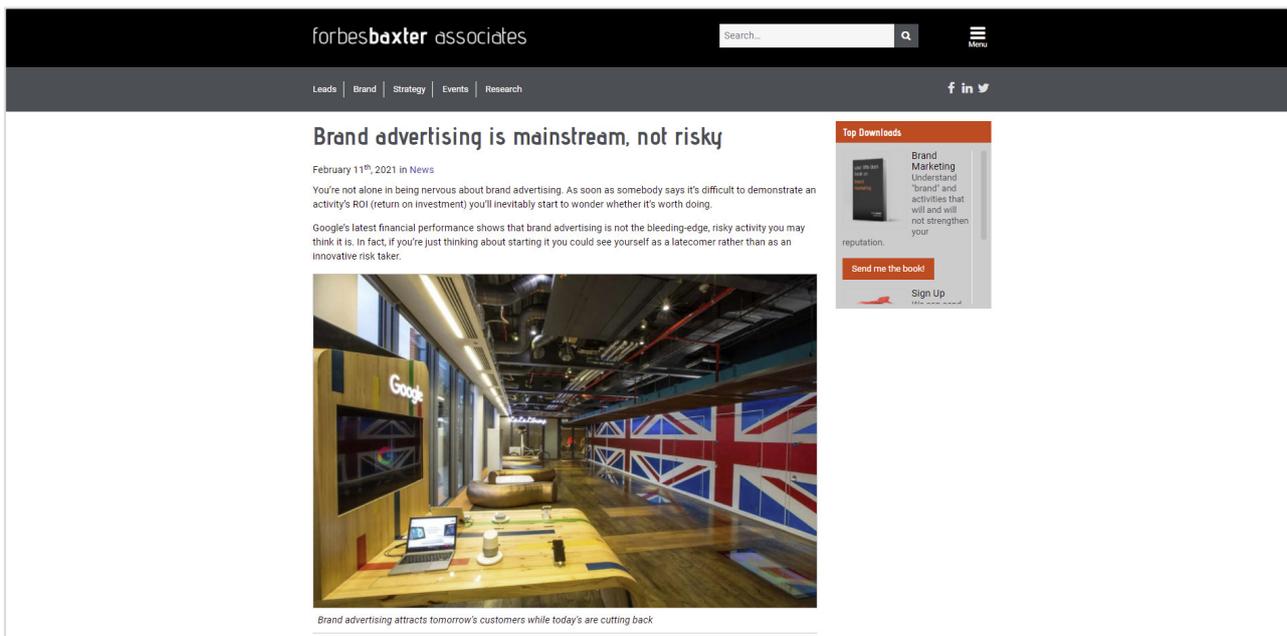
This is why marketing automation's such a big deal.

Think about your website. It's the single most powerful weapon in most business' sales and marketing armoury. Let's use our website as an example.

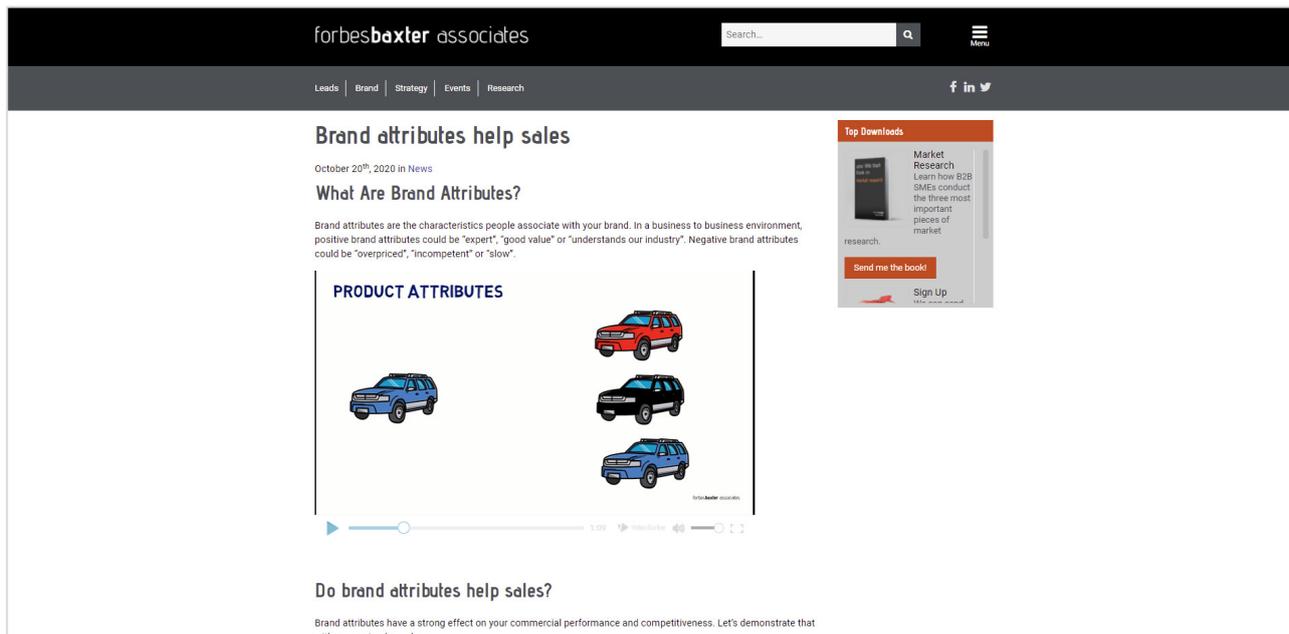
Imagine Joe Bloggs visits [this page about brand marketing](#).



That leads them to [this page about brand advertising](#).



And then to [this page about brand attributes](#).

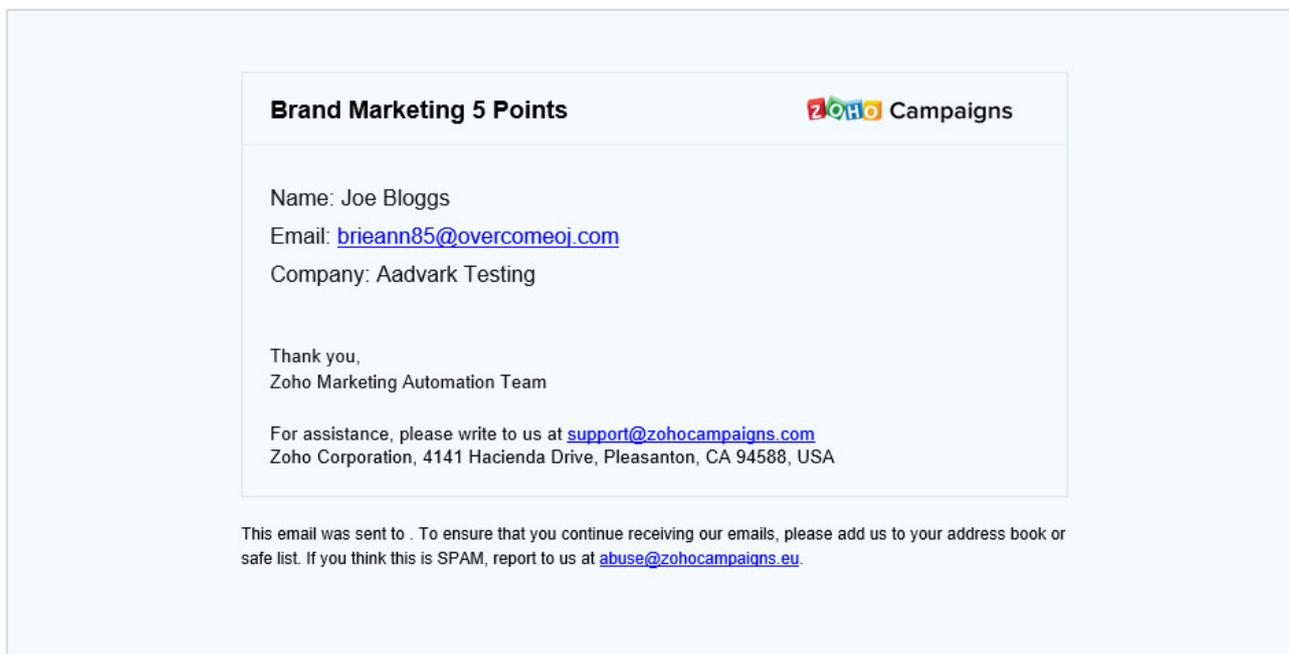


That's all very standard so far.

Marketing automation responds to website activity.

But, on this site, marketing automation is at work.

Because Joe's visited 3 pages about brand marketing - note: about **brand marketing**, not any three pages on the website - he's passed a threshold. So I get this alert by email.

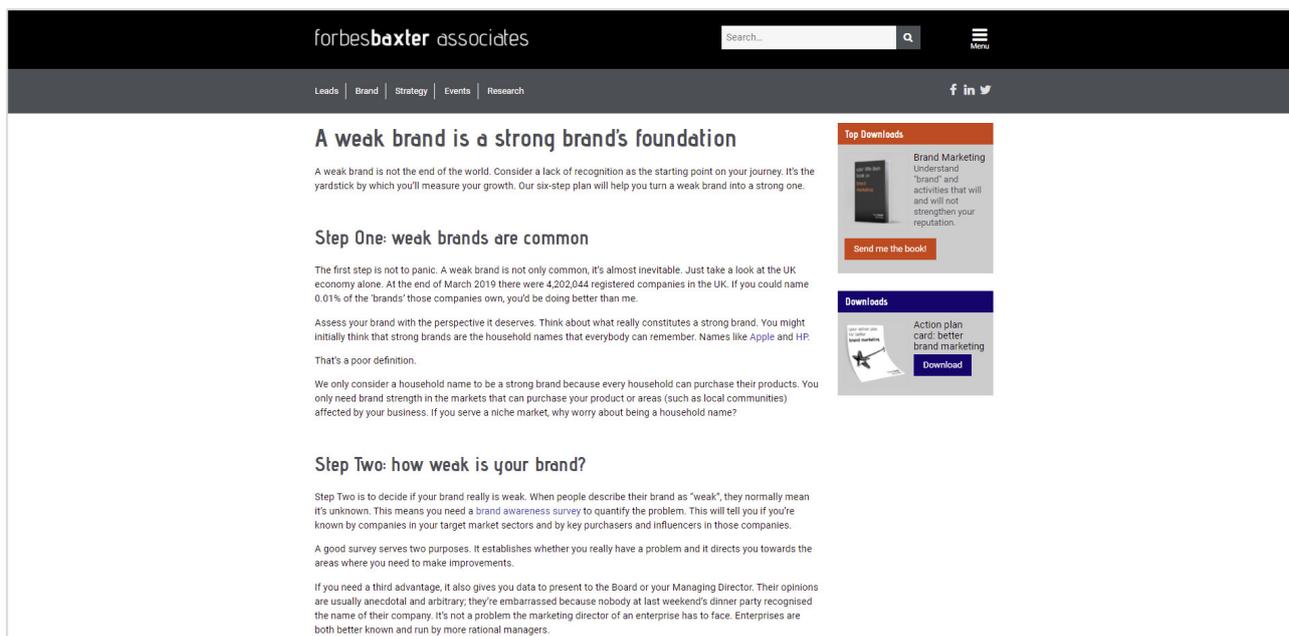


It could go to any of the sales team, of course, but I'm keeping this example simple. You may want your sales team to follow that up straight away.

Me? I'd send Joe an email. But I want it done automatically. And not just any email. An email specifically about brand marketing because I know Joe's interested in brand marketing. This isn't email spam. This is 100% on-message. This is the kind of thing that gets read and responded to. And I choose to make it a helpful message, not a self-promotion. I tell Joe about Mark Ritson's Mini-MBA in Brand Marketing.

That's the start of what marketing automation does for me.

Time passes and Joe visits [this page about weak brands](#).



But it's not all about visiting pages.

It's about what Joe does on pages.

So let's say he clicks on the NPS image in that page about weak brands to see it more clearly. That's an engagement signal we want to track.

brand fails to satisfy its customers. Not in the SME sector anyway, where budgets are too small to smother bad news.

This is probably the hardest part of brand marketing because people don't think it has anything to do with marketing, let alone brand. In one sense, they're right. It's just good business. But that's a definition that can apply to most marketing.

The goal in this step has to be to deliver exceptional products/services and exceptional customer care. "Good" isn't good enough. People don't talk about "good". People don't remember it. They don't recommend it. The way Net Promoter Score judges satisfaction is right on the money: in its scores from 1 to 10, only 9 and 10 are considered to be Promoters. Everything else is blah (at best).



NPS (Net Promoter Score) only sees 9 and 10 scores as promoters

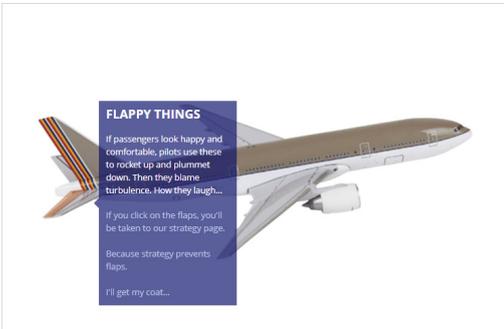
Step Three is a huge step for a lot of organisations. It can cover every aspect of everything the business does. Yes, the marketing department will be involved in making sure that visual branding is consistent on everything from advertising to product labelling to warranty documentation. The rest of the company has to make sure the products/services and customer care are as good as the marketing makes them appear.

This is a very contentious policy to propose. An Operations Director doesn't like being told by some arty-farty marketing type that poor manufacturing is responsible for the company's weak brand. Brand is purely the responsibility of the marketing department to people outside marketing.

Step Four: new brand attributes

Or he clicks on part of an image map to get more details about that product. That's an engagement signal we want to track too.

The plane in the picture below is part of the image map demo we use elsewhere on our website. Let's just focus on one part of it: the cargo bay just behind the wing. Click on that (in this demo, nothing will happen).



FLAPPY THINGS

If passengers look happy and comfortable, pilots use these to rocket up and plummet down. Then they blame turbulence. How they laugh...

If you click on the flaps, you'll be taken to our strategy page. Because strategy prevents flaps.

I'll get my coat...

In a couple of minutes, you'll get an email reacting to your click. In real life, we wouldn't send you an email. We'd just remember that you were interested in the cargo-handling capacity of our plane. It's another snippet of information that indicates your areas of interest. It's another snippet we can use to make sure our communications are relevant to what you care about.

Summary: Marketing automation combines web and email activity with stored data

The form at the top of the page asked you for a Job Title. It wasn't a mandatory field so you may have skipped over it. In real life, that wouldn't matter if you never looked at another web page and ignored our emails - you're not interested in buying from us.

But if you did visit lots of pages and clicked on email links, you probably like what you see. We'd want to know as much as we can about you. By now, you probably trust us enough to tell us more. So it would be a good time to ask again.

Our system has sent another email to anyone who didn't enter a Job Title. It's asking for more information about you.

In marketing automation, all these activities **are** tracked. And they're scored. 2 points for visiting a web page, 5 points for downloading something and so on.

Marketing automation triggers sales activity.

By now, I know that Joe's really interested in brand marketing. He's scored enough points to pass a second threshold. It's time for me to get in touch.

The screenshot shows a CRM interface with a navigation bar at the top containing 'CRM', 'Home', 'Leads', 'Contacts', 'Accounts', 'Deals', 'Activities', 'Reports', 'Analytics', and 'Marketplace'. The main content area is titled 'Brand Marketing 10 Points' and includes a 'Task Information' section with the following details:

- Task Owner: Steve Baxter
- Subject: Brand Marketing 10 Points
- Due Date: 21-09-2021
- Lead: Joe Bloggs
- Status: Not Started
- Priority: Normal
- Reminder: —

The 'Description Information' section contains a text box with the description: 'This contact has now reached the 10-Point threshold for Brand Marketing.' The 'Other Information' section shows 'Repeat: —', 'Created By: Steve Baxter (Tue, 14 Sep 2021 15:29)', 'Related To: —', 'Currency: GBP', and 'Exchange Rate: 1'. On the right side, there is a sidebar for 'Joe Bloggs Lead' with a 'Send Mail' button, contact details for 'Aadvark Testing' (briann85@overcomeoj.com), and a list of 'Open Activities' including the current task.

Automatically, a task has been created in my CRM system. It's telling a member of the sales team (me, actually) who to call and why to call. It's telling the salesperson what Joe's interested in. And it's all in CRM now. Because this is an integrated system. Our website is linked to our email marketing system and our CRM system.

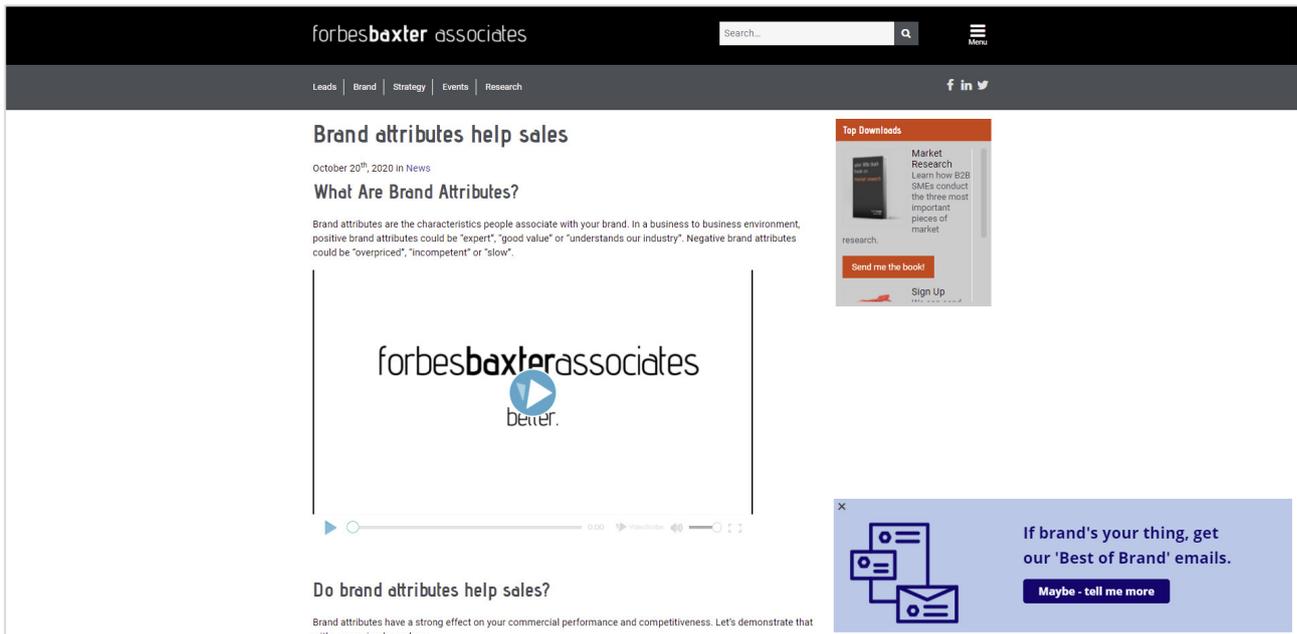
So that's how marketing automation helps turn website visitors into customers.

Marketing automation identifies anonymous visitors.

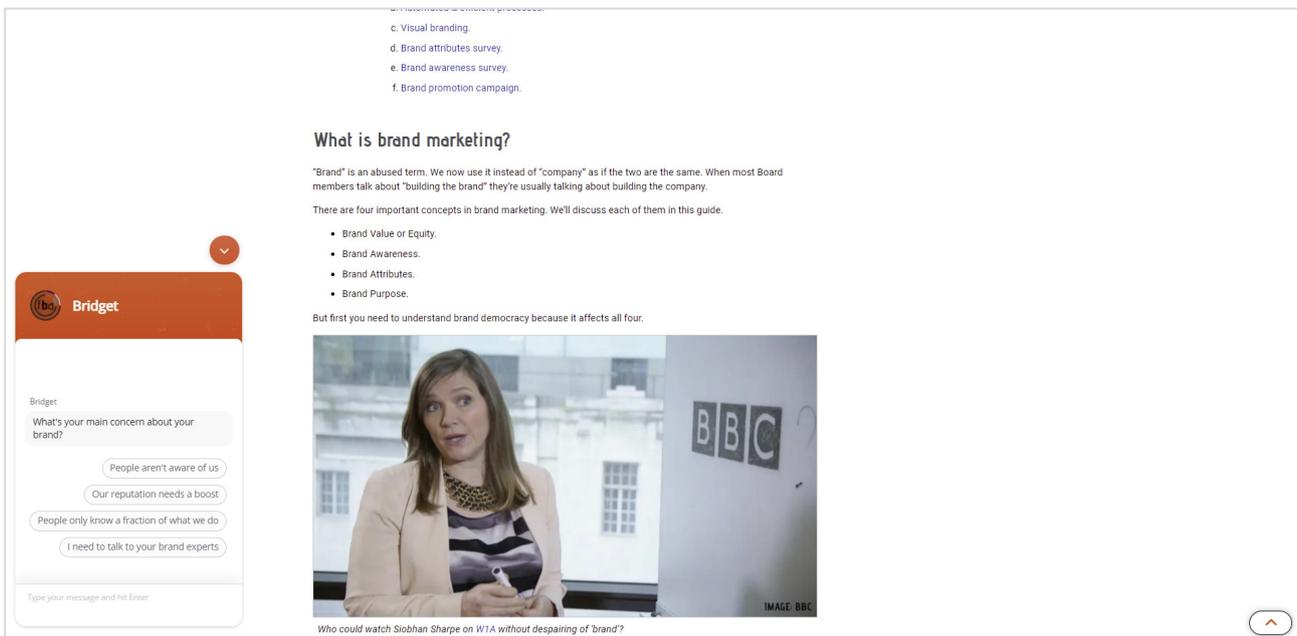
Before this works, of course, you've got to know that the anonymous visitor trawling through your website is none other than Joe Bloggs. How do you persuade him to identify himself? Marketing automation helps here too.

First, if Joe was somebody you knew of, try emailing him from your marketing automation system. Tell him what you can do for him. If he responds to the email, you can watch what he finds interesting on your website. And by the way, this isn't the type of creepy cyber-stalking 3rd party cookies used to do. This is just watching your own website. It's like a shop assistant watching what clothes you seem to like.

Secondly, if you Joe's totally unknown, you can use pop-ups on your website. If an anonymous visitor looks at three pages about brand marketing, use a pop-up to say "we've got lots of advice about brand marketing, do you want to see it?"



Or you can use a chatbot to ask the same visitor what their main brand challenges are. And the chatbot provides answers. And you find out who that anonymous visitor is.

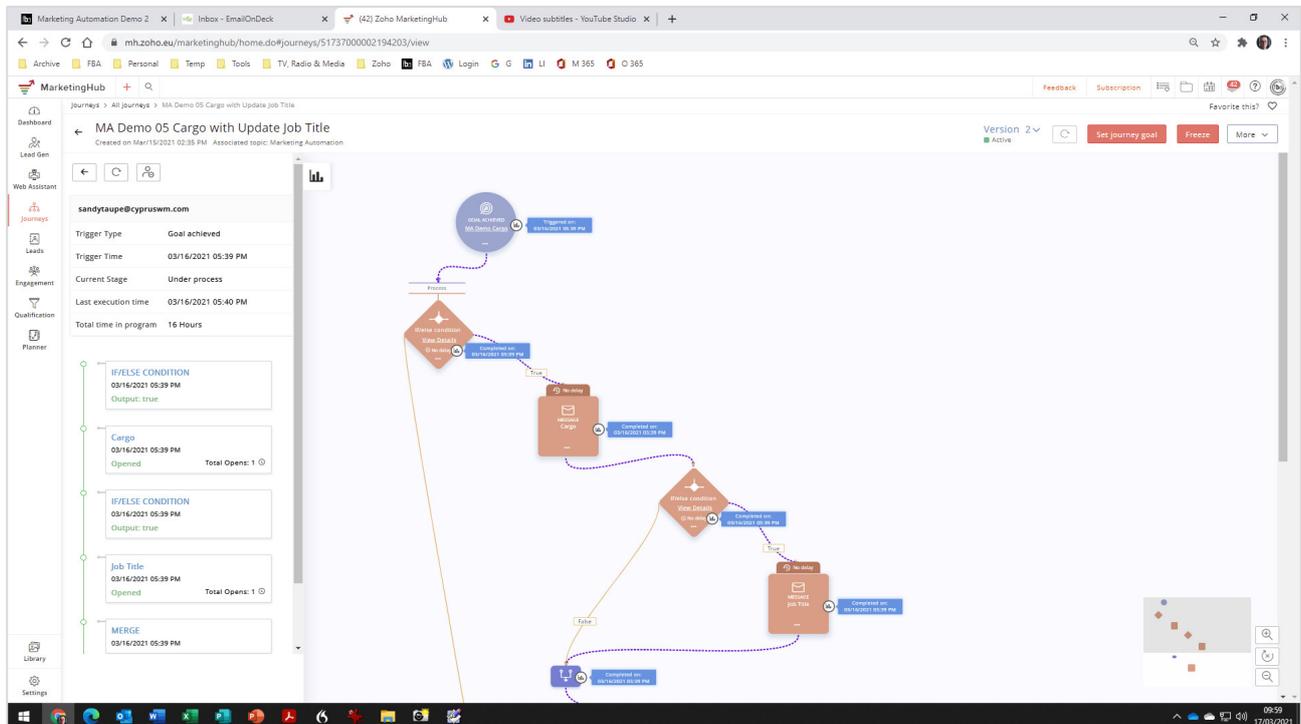


These are all different aspects of marketing automation at work.

Marketing automation improves your email.

But that's not all. It's email management too.

Email is the most cost-effective marketing tool. With marketing automation, you can add a new lead to your prospect list and they'll automatically get emails, all properly spaced in time. And it'll track what your prospects do in response to that email. And when you have a new idea for an email, it gets added to the automatic sequence. With tracking.



So marketing automation turns anonymous website visitors into customers.

And it improves your email marketing.

And it responds to sales data if you connect it to your sales ledger (that's a topic for another day).

And it does it all automatically.

That's why it's such a big deal.

Life without marketing automation sucks.

Compare that to life without marketing automation.

You've still got a website.

You've probably still got the scars from the bill for the redesign.

You've spent months optimising content to attract new visitors.

So numbers are going up.

And...

NOTHING.

It's activity without advantage.

All those visitors are anonymous.

You're not making money out of it.

It's the most pointless marketing activity you've ever undertaken (and the competition for that title is tough).

Look at your emails too.

You'd prefer a proctologist's appointment to repeating the agony of creating your first ten emails.

But you created them. And you sent them out.

What results did they get?

YOU HAVE NO IDEA.

You can look at click-through rates but that tells you nothing really.

What appointments did you get?

What calls do you have to make?

What deals did you land?

It's not going to persuade you to create another ten emails, is it?

In the absence of marketing automation, your website and your emails are lost in the wilderness.

The bottom line

If you're the MD, you're wondering what you get for your marketing budget. Why shouldn't you slash that budget next year?

If you're the head of marketing, you're wondering how long your job's going to last.

It could all be so different.

Next steps

1. The DIY route. If you want to put marketing automation into action, you need:
 - a. We do everything described here using [Zoho One](#), a suite of apps that can basically run your entire business. The three specific apps you'd need to look at are [Zoho Marketing Automation](#) for the website tracking, pop-ups and email management. And [Zoho SalesIQ](#) for the chatbots. And [Zoho CRM](#) for the CRM. It costs £80 per user per month. You could also use [HubSpot](#), [\(Pardot\) Salesforce](#) and a host of other platforms but they cost a whole heap more.
 - b. You need to categorise the events you want marketing automation to track. So, for example, every web page about brand marketing needs the word "brand" in its URL. If you're lucky, they already do.
 - c. You need to setup fields in your marketing automation system to hold scores on the topics you care about. For me that's brand marketing, lead generation, etc. For you, it'll be different.
 - d. You need to tell marketing automation how to score events on your website: 2 points for visiting a web page, 5 points for downloading something, etc.
 - e. Then you need to setup the thresholds and their associated actions. When somebody reaches 10 points, an internal alert; at 15, an email; at 25, a follow-up task in CRM.
 - f. And you need to create 'the content': the web pages that visitors want to see, the emails they'll be grateful to receive, and so on.
2. The Assisted route. If you don't have the time, people or system to do this yourself, well, that's what we're here for. Give us a call. We're surprisingly friendly.

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