



Discover What Marketing Automation Really Is And How To Get Started



Lauren Nagys

Smalley, Director of Marketing

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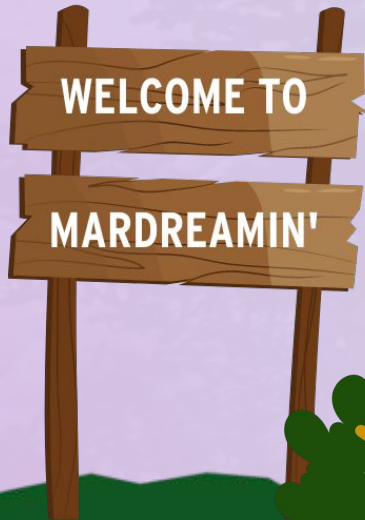
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Agenda



- **Preparation**
Why do I need a MAP?
- **Implementation**
How do I get started?
- **Optimization**
We have it, now what?
- **Success**
Can we “Set it and Forget it”?

Goals

#1: Feel prepared to start

#2: Implement with ease

#3: Learn how to optimize

#4: Prove the investment





A Short Story

About 10 years ago, I was working at one of the nation's largest online retailers. I was hired to implement an inbound marketing strategy for their commercial business unit.

On day one, I met with my manager and he said "We have this Pardot tool and no one knows what to do with it...can you start here?" Luckily, my previous organization was using Marketo so I assumed that I could just learn and figure it out.

I did eventually figure it out, and one of my first email campaigns yielded an \$150,000 order. This is the good news that came out of months of analysis, reading, troubleshooting and maybe even a few tears.



Step 1: Preparation and Selection

Identify Why You Need a MAP

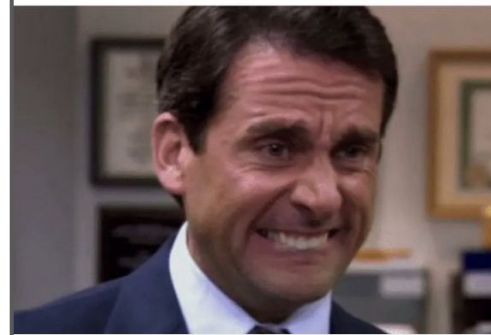
A MAP (marketing automation platform) essentially automates many of your marketing processes so that you can do more with less and work smarter.

Consider these areas:

- Time consuming and labor intensive
- Not performing well
- Poorly integrated or not integrated at all
- Too simplified and needs to be expanded
- Campaigns not built to target your audience →

"Our target audience is all genders aged 18-75"

Marketer:



Source: The Marketing Millennials
Credit: NBC Universal

What Does a MAP Do?

- ★ Measures and tracks online/offline marketing activities
- ★ Stores, segments and nurtures your entire prospect database
- ★ Includes asset creation for webforms, email templates, and landing pages



What Does a MAP Do?

- ★ Automates actions and trigger for operational workflows
- ★ Connects to external apps for full integration
- ★ Saves you time and money



Be the Champion

If you are involved with or are feeling the pain from some of these manual workarounds, be the champion!

This program can take an organization's Marketing operations lightyears ahead. Only one person needs initiate the start and follow the four steps to MAP success!



Lock Down Your Inbound Strategy

Before looking at a MAP (Marketing Automation Platform), make sure that you have a solid inbound marketing strategy.

This strategy will be the foundation for which the MAP structure will be built.

If you have one in place, it's a good idea to review again and make sure that there is alignment on the goals.



Lock Down Your Inbound Strategy



Source: Growth Hackers

Get Sales Involved

This step has to be done in order to have adoption and buy-in on the backend.

Meet with the Sales leadership team to share your goals and ask how a MAP could help them. When you present the business case to leadership, you will have a united front.



Build Out Business Requirements

You already have a head start from the previous MAP need exercise which can serve as an outline for this.

Tip #1: Do not rush this step

Tip #2: Do this step before you start looking at solutions

Tip #3: Build a roadmap with phases so a realistic plan is in place



Business Requirement Considerations

- What outside software or service do you need to integrate to?
- What native feature must be present? (aka the deal breakers)
- What future plans will happen at the organization that should be considered?
- How will CRM interact with the platform?



Consider Your Resources (Internal & External)

- Identify your budget
- Create a project charter
- Identify internal resources that you can leverage
- Fill the gaps and identify which external resources you will need
- Create a stakeholder analysis



Identify Your Solution

Use trusted tools like G2 or Capterra to easily compare features across many different platforms.

Select your top three choices and then contact the companies directly to receive confirmed pricing.



Build Your Project Roadmap

Now that you have a solution selected, let your legal team worry about contract review while you plan for the future success of the project launch.

Create Milestones at:

- 1 month
- 3 month
- 6 month
- 1 year
- 3 years



Build Your Project Roadmap Contd.

Here are a few good questions to consider:

- What features do you need to start using immediately?
- What software needs to be connected right way?
- What features look promising but will take time to prep?
- What evolution will take place in your inbound strategy?
- What goals should be achieved at each milestone?



Present Your Final Business Case

Pull together all of your information and don't forget the following:

- Provide clarity on the long-term investment and complete a Total Cost of Ownership (TCO) analysis.
- Complete a ROI Analysis - Salesforce has a great online tool!
- Present your roadmap for the next three years
- Share examples on what the program will do to benefit the company within the first three months.

Tip: Include some examples from the Sales org



Preparation

This part of the project goes back to understanding your inbound strategy and assigning your resources.

DO NOTs

- Tackle asset building while you are implementing the MAP
 -
- Assume that the templates in the program will cover everything that you will need
 -
- Plan for the consultant to build everything that you need (if applicable)



...and Yes More Preparation

DOs

- Document every website form that the MAP will have to track
- Think about automation rules and build operational procedures for distribution and required action
- Create and have agreement from Sales leadership on the lead scoring model
- Work with your content team to build mockups for:
 - Website landing pages
 - Form completion emails
 - Email templates
 - Drip/engagement programs



Implementation Strategy

Ask yourself these questions:

1. Are you more hands-on?
2. Are you knowledgeable enough about MAP to lead on your own?
3. Do you have in-house IT or website staff that can help?

Managing the project in-house without a consultant can save you big bucks but only go this route if you can answer YES to all three questions above.



Step 2: Implementation



Clarify Project Plan

You already built your project plan but it's recommended to view it again prior to or around the same time as your project kick-off.

It's common for several months to go by between selection and kick-off so make sure to note any changes that need to be documented and added to the project.



Hello, my name is scope creep.

Prioritize

Implementation of a MAP has many moving pieces. Look through the project roadmap and prioritize key areas that need to be completed so that others can follow. Think of a GANT chart view.

Things to do first:

- Website code tracking
- Lead scoring model
- Connect third-party software

Start Building

Custom Form fields, Form handlers, automation rules, oh my!

The building phase will be one of the longest parts of the implementation. If you followed all of the areas in step #1, you should have a great head start and this will not be overwhelming.

Tip: Make a checklist of everything that you needs to build to get started.



Confirm Key Metrics

Review your metrics and start building out your basic reporting and dashboards within the MAP.

Make sure that what you need to measure after implementation is ready to track and built.



Start Testing.. Then Test Again

Once your website code, forms, form trackers, and automation rules are built. Start testing!

Enlist the help of your team to test:

- ✓ Website form trackers
- ✓ Native forms
- ✓ Landing pages
- ✓ Trigger/automation rules
- ✓ Promotional emails
- ✓ System emails (IT may need to whitelist the domain)



User Permissions and Access

Someone in your org needs to be the MAP admin. This user should also have familiarity with the CRM and how data needs to flow between both systems.

Approvals and creation for new users needs to go through this person.

User Training

Typically the admin should also lead the training for the other users.

Execute a training plan and get your users active in the system and clear on what role they will play. This should happen within the month leading up to go-live.

Salesforce launches Spring, Summer and Winter releases so keep your users up to date with new features.



Communicate the Launch

It's time! Go-live is around the corner and most of the hard work is complete.

Provide launch details to:

- The original shareholders or Executives who approved the project
- Your direct team
- Your cross-functional teams which can include Sales, and sometimes Customer Service and Quoting

Step 3: Optimization





This is not “Set it, and Forget it”

Although “automation” is in the word, the MAP needs to be monitored and supported as long as it is in use.

The admin or team of users needs to continue building in the program and utilizing all of the features in order to achieve the most ROI.



Data Cleansing

About every three months, a data cleansing practice should be in place so that the database is not filled with inactive or unmailable prospects.

Tip: Build automation rules for 0/negative score or inactive more than `_days` to make this easy



Rehash Strategy...Yes Again!

Am I tracking everything that I need?

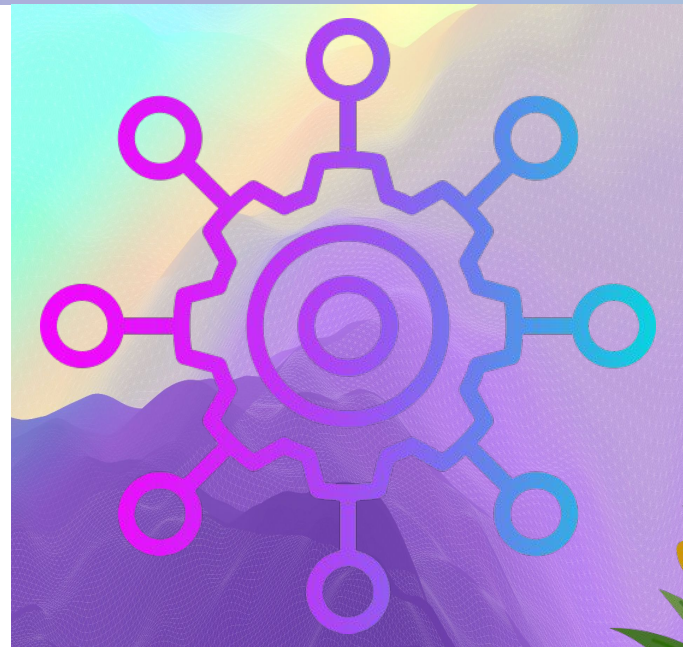
Does my program cover all levels of the funnel?

Is my lead scoring model working?

Data Integrations

Utilize as many of the third-party connectors that you can leverage to automate workflows and to track all data needed.

If an OOTB connector is not available look for a way to do this with tools like Zapier.

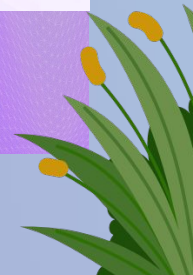


Compliance and Security

Everyone's favorite topic!

Email compliance and the organization's security requirements can and will change often.

The MAP is at the basic level a SaaS with a database and needs to be built and maintained with compliance and security in mind.



Step 4: Success



Case Study - Medium Sized Organization

Migrated from Hubspot to Salesforce Pardot and integrated the MAP into all Marketing Ops.

- ★ Tracking CMS native website forms from all eight language websites
- ★ Generated robust prospect database with almost 200 fields to segment the audience and better target
- ★ Built form handlers to collect necessary data and develop automation rules to assign, qualify, and email leads
- ★ Developed offline advertising nurturing engagement programs

WINS:

- Decreased visitor to prospect time by 16%
- Decreased prospect to MQL time by 56%
- Increased conversions by 5% YoY
- Automated hours worth of manual emails to 30 minute campaign launches
 - Sales territory introduction emails - 30% open rate!





Analyze Your Success

By now, your Opportunities should be rolling-in and hours of manual work is now being allocated to other more impactful things.

Review your dashboards and reports to see how campaigns are performing and what else needs further attention.



Communicate and Document Wins

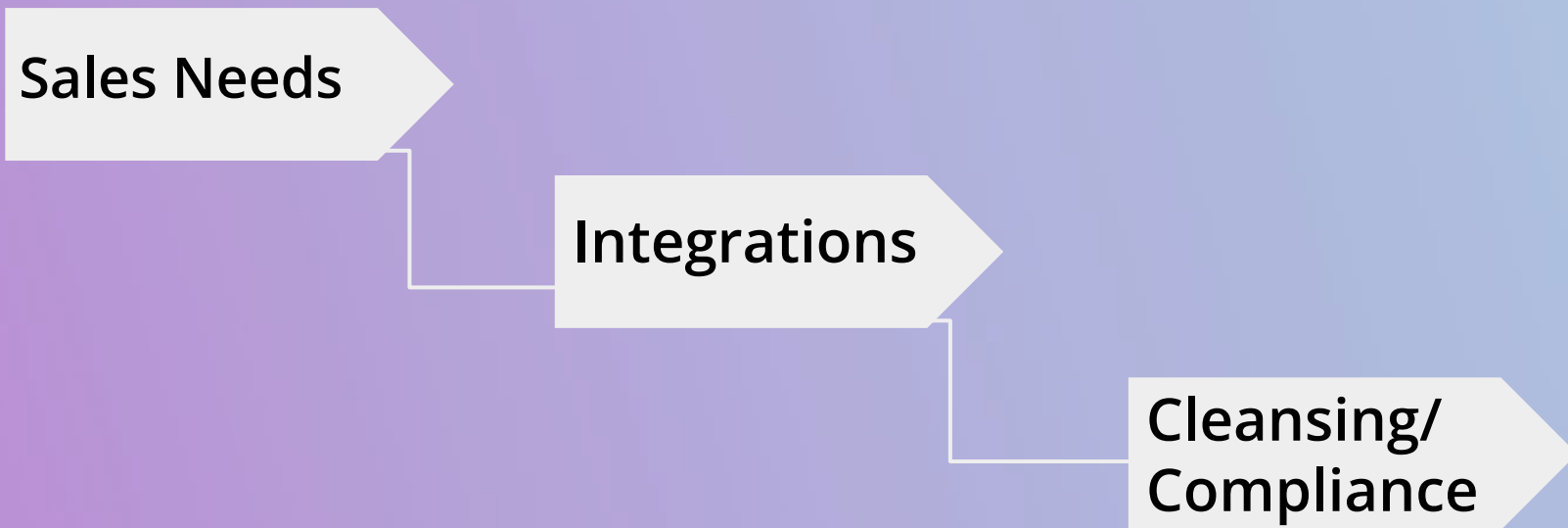
Implementing the MAP took lots of your time and investment.

After about three months, present to the Execs why this was a good decision:

- Who is actively using the system
- What you have learned so far
- When future optimizations will take place
- Where you have found time savings
- How you are helping Sales



Quarterly Reviews





Brainstorm How to Further Expand

Think of the MAP as a living, breathing being.

The more care, effort and creativity that you put into it, the more that you will get out of it.

Integrate its functionality and features into all of your marketing operations!



Get Certified

Now that you are a MAP expert (or soon to be), get certified and prove your skills.

This not only shows your dedication to organization's investment but also serves as an impressive badge to add to your resume.



Thank You!



Helpful Resources:

[Salesforce Inbound Strategy Guide](#)

[Salesforce Marketing Automation ROI Calculator](#)

[Pardot Trailhead Basics](#)

[Salesforce Marketing Engagement Cloud Certification](#)

