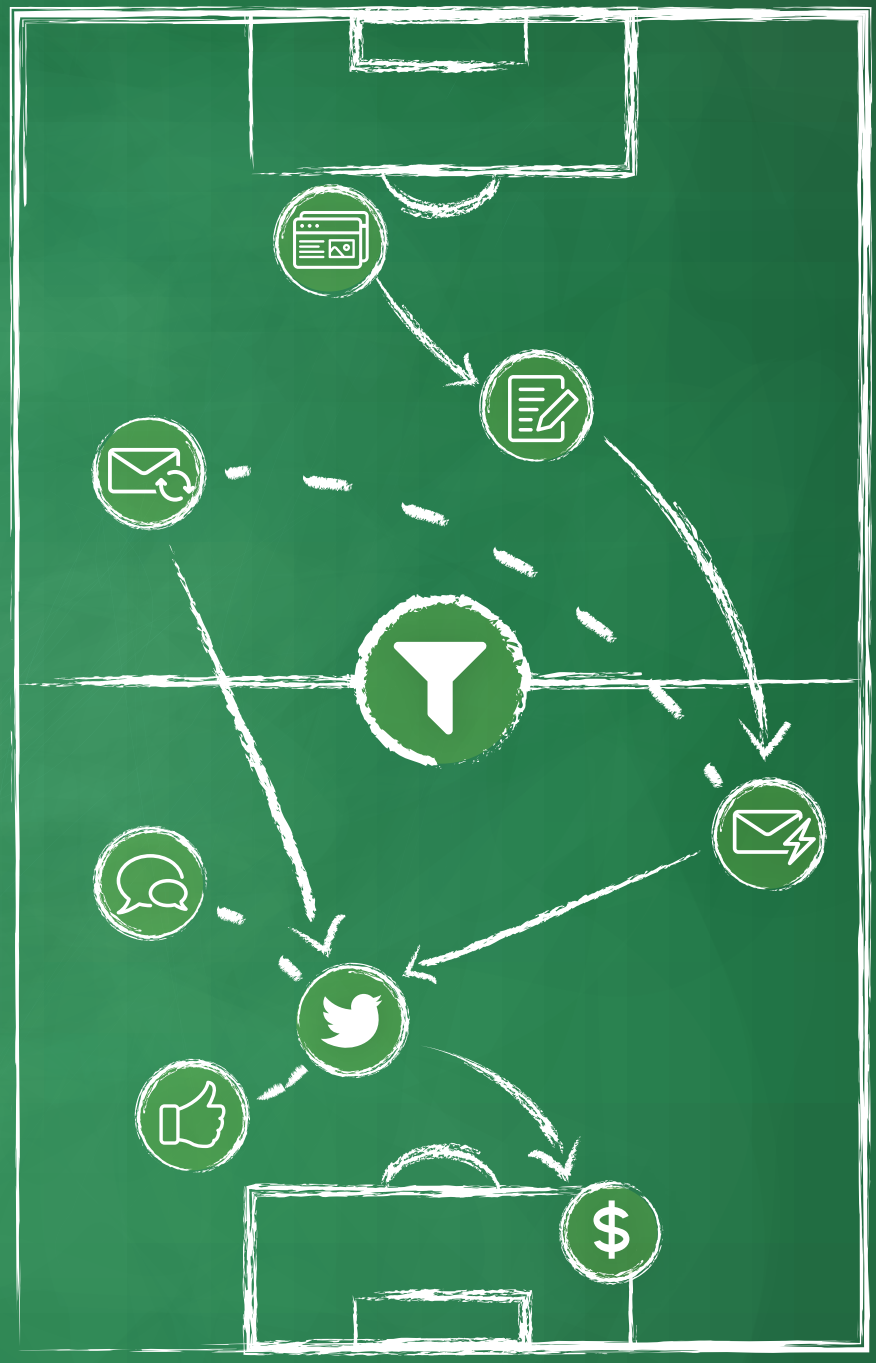
The Marketing Automation *Playbook*

The game plan your business needs to win conversions.



LEADGEN COMPASS®

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The *Power* of Marketing Automation

Becoming a Champion

Marketing automation gives you the power to generate more leads, drive more sales, and optimize your spend. It helps you target your customers with personalized communication based on their interests – so they receive the messages they actually want, not the messages you *think* they want.

Marketing automation platforms like SharpSpring make one-to-one conversations with large customer bases possible, so you can convert a bunch of spectators into a stadium full of loyal fans who will keep coming back for every game.

What Are the Marketing Benefits?

Marketing automation changes the way companies market their products to leads. The software offers a number of features to help you generate more leads and nurture them through the sales process. When used correctly, it can drastically improve your brand awareness, conversion of leads to sales and customer loyalty.

Additionally, marketing automation platforms are designed to work with your marketing strategies, so you can track the ROI of your campaigns to ensure you're maximizing your marketing spend.

With SharpSpring, you can:

- Track leads and engage them at critical points in the buyer's journey.
- Nurture leads with hyper-personalized email and web content.
- Build powerful landing pages that transform visitors to leads.
- Connect to hundreds of third-party platforms or build new integrations.
- Turn social media interactions into conversations that generate sales.
- Collect real-time analytics to capture and prove end-to-end ROI.
- And much more...

Marketing automation takes the guesswork out of identifying which initiatives are generating leads and sales. Once implemented, it can provide results and actionable insights within a matter of days.

What Are the Benefits for My Business as a Whole?

Marketing automation provides a wide range of tools and insights to optimize the efficiency of your business.

- Your sales team closes more deals in less time by focusing on leads that are actually ready to buy.
- Your marketing team can spend its time on higher-level tasks that can't be automated, like competitor analysis, content creation and campaign development.

In this playbook, we'll highlight the key benefits of marketing automation to show you how you can take your marketing and sales game to the next level.

Welcome to Training Camp

Mastering the Basics

When it comes to setting up your marketing automation platform, we think of successful implementation as something similar to winning a soccer championship. It may not be an easy journey – it requires time and commitment – but picking up the cup at the end of the season is a feeling like no other.

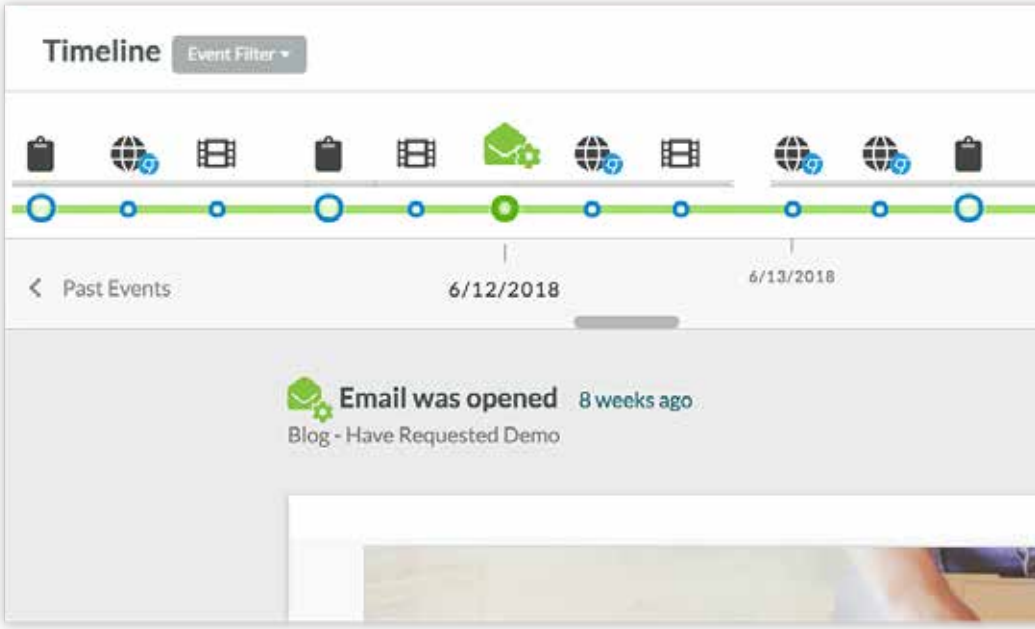
The same can be said for marketing automation. You have to put in time and commitment to ensure the platform will work to its full potential. Once it's set up, you'll have access to valuable data on your leads and be in a position to acquire new customers faster than ever before – so your business can come out victorious over tough competition.

Leads & Contacts

Keep track of all of your leads and contacts so you can focus on making your sales cycle more efficient. Just like any standard customer relationship management (CRM) system, a marketing automation platform can handle the basic data requirements for your contact lists, including name, email, company name, address, telephone number, etc.

Marketing automation goes beyond that by identifying behavioral trends and providing you with actionable insights so you can target your leads on a more personalized basis.

For example, SharpSpring's Life of the Lead feature offers an end-to-end picture of each lead's journey through the nurturing and sales cycles, including where they came from, which pages they've visited, and how they're interacting with your brand. It allows you to quickly see and act on a lead's interests, preferences, level of engagement, and other variables.



SharpSpring's Life of the Lead feature

Lists & Segmentation

A list is a set of customers or leads that you can group together based on similar interests or demographics. As your leads interact with your content over time, you can track their behaviors and add them to lists based on their preferences. As we saw in the sample workflow above, the more specific your lists are, the more personalized you can get with your content marketing.

Marketing automation allows you to link your email data, website activity and forms, so your lists update dynamically based on your leads' actions. As soon as a lead performs a specific behavior, such as clicking on an article link you sent, the platform will automatically add him/her to a list of leads with similar interests.

Dynamic Lists Based on Form-Fills

One of the simplest ways to start segmenting your lead base is by contact information. Create rules-based lists that update automatically as contacts meet list criteria, adding and removing contacts based on information you collect about them.

Forms are an effective place for gathering basic information. They can tell you what type of service a lead wants, what products a lead is currently using, where the lead is based, which company they're from, how they heard about you, and any other information you deem relevant from the outset. Armed with such insight into your contacts, you can easily segment your lead base into small, laser-focused lists for greater personalization and targeting.

Dynamic Lists Based on Behavior

While form-based lists are created using contact information, behavior-based lists are built from a lead's specific interactions with your content over time.

Here are some common interaction rules:

- Clicks a link in an email
- Visits XYZ webpage
- Has visited XYZ page but not ABC page

The main benefit of behavior-based list segmentation is that you are able to take a targeted list and turn it into a hyper-targeted list. If you can make your already personal communications even more personal based on exactly what a lead is doing, you'll drastically increase engagement and conversion rates.

Triggers & Filters

We just looked at dynamic list segmentation using contact information and behavior. Now let's take a look at how we can use triggers and filters to refine our lists even further and account for every single event that occurs in a lead's journey. Triggers kick off a workflow, and then filters further segment and target leads based on their specific actions and interests.

For example, if you want to follow up with leads who've opened an email containing a link to your website but haven't clicked the link, then you would create a list called "has opened the email" and set the automation to send the follow-up to that list. If they click through to your site on that email, this dynamically adds them to a "visits from email" list and triggers further automated actions.

Workflows

To win a game of soccer, you must develop a clear strategy for moving the ball toward the goal and scoring. Along the same lines, if you're looking to increase conversion rates for your business, you need to set up workflows to nurture leads strategically down the sales pipeline.

A workflow is a series of automated actions that trigger based on a lead's behaviors. For example, consider an online soccer apparel shop that offers discounts to students. If a customer identifies as college-aged and enters his/her school name when signing up for a store account, this automatically triggers a workflow that sends an email with coupons for all kinds of sports apparel for that school's soccer team.

Taking the workflow one step further, if a student uses one of the coupons to purchase a Manchester United jersey, then that triggers a subsequent action to send email ads and deals for additional Manchester United apparel, such as socks and hats.

Workflows are a core component of any marketing automation platform, enabling you to maintain control over the customer journey – from first click or call to conversion and beyond.

SharpSpring has a Visual Workflow Builder that makes it simple to visualize the buyer's journey. You can easily build and expand automation tasks, and combine them to create specific touch points along the buyer's journey that will make your leads much more likely to convert.

See It All in Action

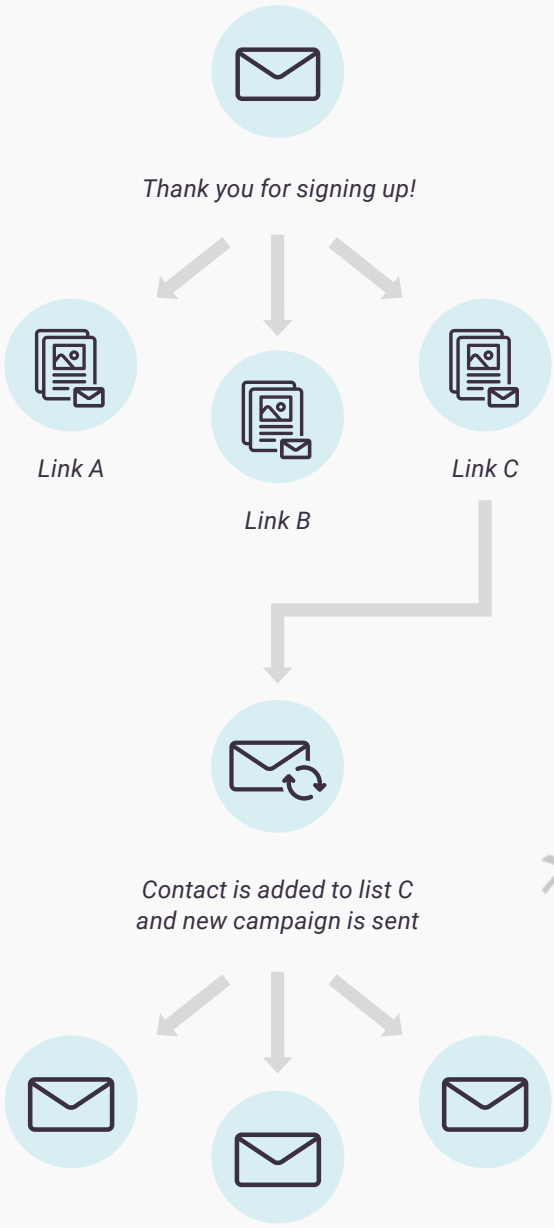
When starting something new, it's always best to learn the basics and then grow your efforts from there. Let's build out a sample campaign to walk you through a few marketing automation drills, so you can see how it helps improve on more traditional approaches.

Below is an example of a workflow for a basic email capture form. When someone submits the form – in this case to subscribe to a newsletter – the system adds them to a specific contact list, directs them to a "thank you" page, and sends them a welcome email offering links to additional content – all completely automatically.

The next part of the workflow shows what happens when someone opens the welcome email. This email thanks the reader for subscribing and offers up three links to different types of content that might be of interest. Depending on which link(s) the reader clicks on, the system automatically adds them to a list of leads with similar preferences. This list is associated with an entirely new campaign designed around the specific interests and preferences of its recipients.

By setting up automation rules based on your leads' interactions with your emails or website, you can easily continue this segmentation process until you've divided your customer base into as many lists as you want. The more specific your lists are, the more personalized and effective your communications will become.

This workflow is just one example of how marketing automation can improve the effectiveness of your marketing campaigns. In the next few sections, we'll dive into some of the other ways marketing automation can help you beat the competition.



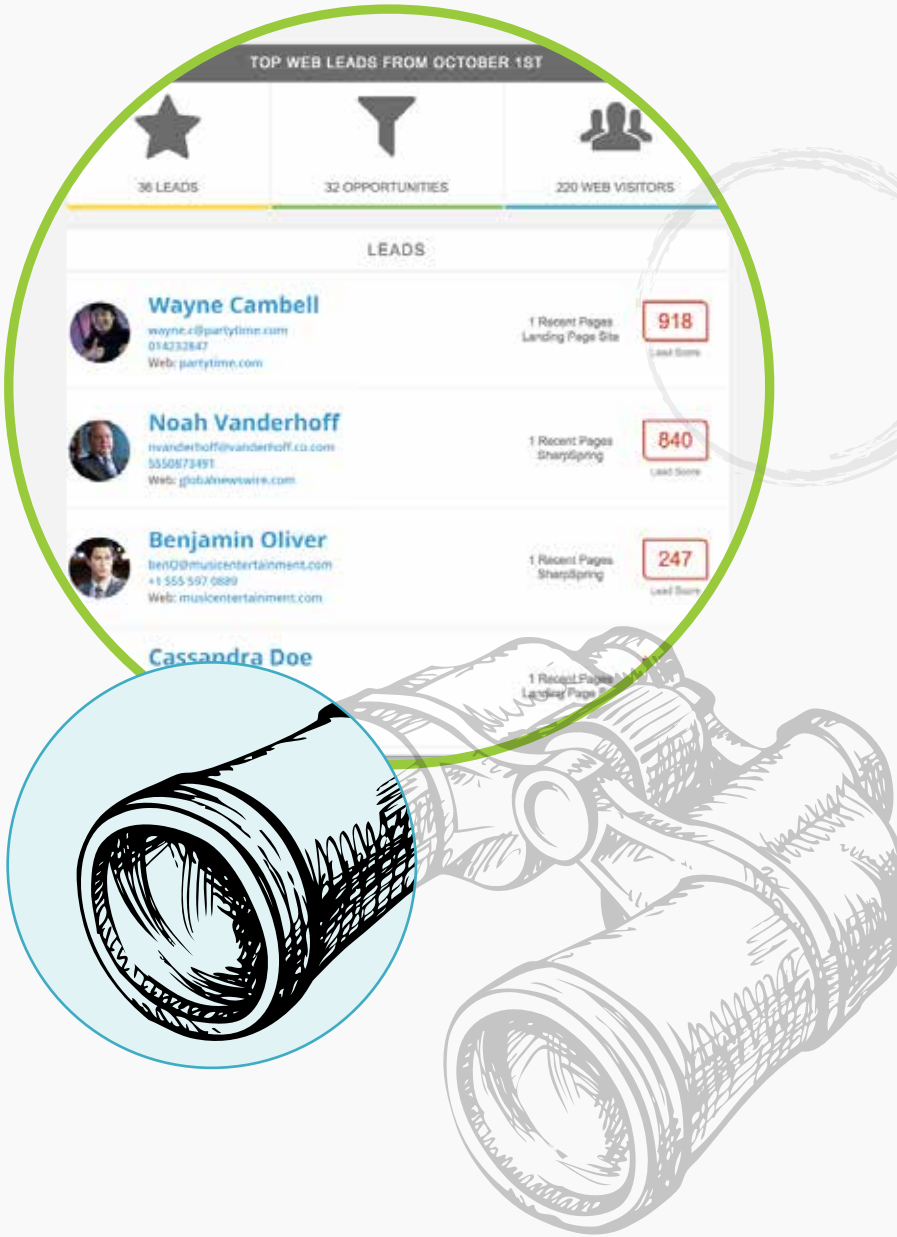
Scouting for Players

Prioritizing the Best Leads

Achieving success – whether that means winning the World Cup or driving your company's revenue to record heights – is all about understanding your resources and how to leverage them. In soccer, this means hand-selecting the best players and building a dream team.

Similarly, evaluating your leads is a key element to marketing success. Platforms like SharpSpring allow you to "scout out" and find the hottest leads, so you can efficiently move them down the pipeline.

How? Just like how Amazon suggests complementary products based on what you've bought before, marketing automation lets you target your leads with highly personalized communications based on their age, gender, interests, past purchases or any other specific details that are relevant. With this type of targeted marketing, you can focus on who's ready to convert while also sending more customized messaging to nurture those who aren't ready to buy yet – ultimately giving your salespeople those "dream team" qualified leads they're hoping for.

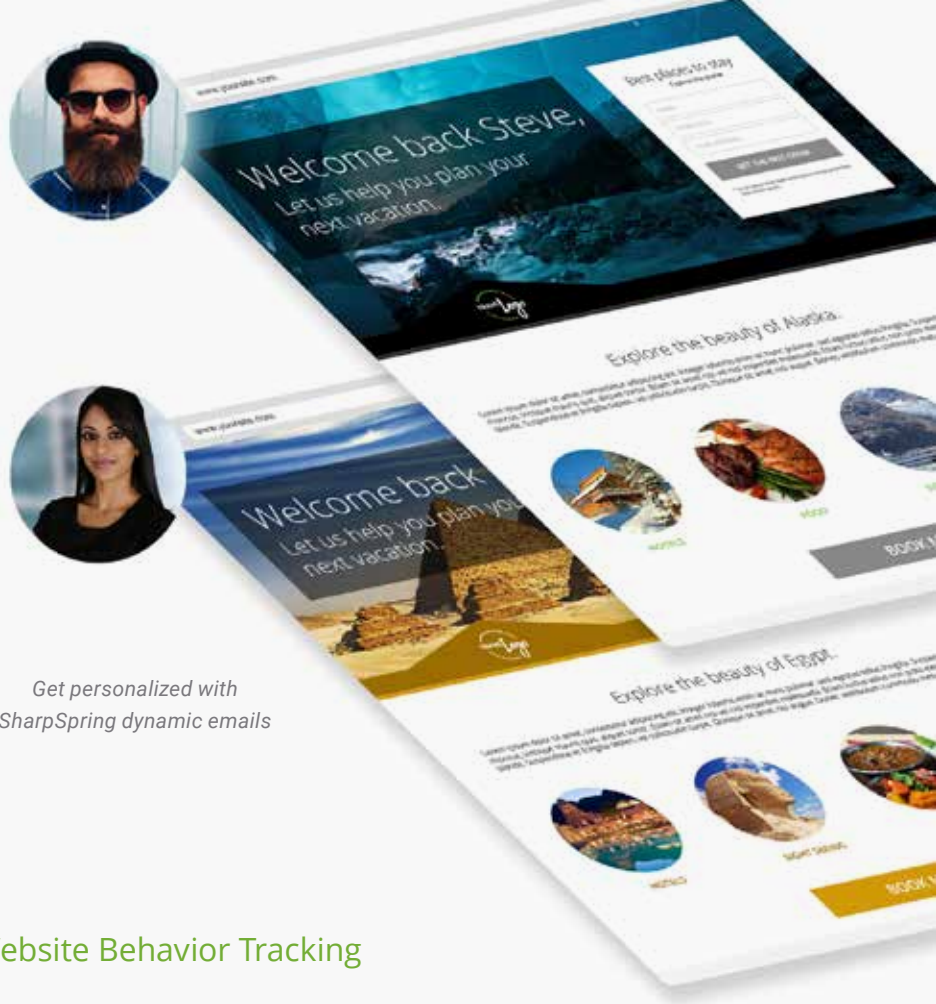


Email Behavior Tracking

Marketing automation goes beyond the capabilities of traditional email service providers (ESPs) like MailChimp and Constant Contact. Platforms like SharpSpring provide complete data on a visitor's activity after they interact with your email. This way you can track every page visit, form fill-out, content download and other actions that stem from your email campaigns.

Across all channels, you're able to learn a lot about the interests of your leads and customers based on how they interact with your content. Some may engage more with a certain format, such as white papers, videos or podcasts, whereas others might respond based on which medium you use to deliver it (e.g., email, social, web).

Once you have a better understanding of a lead's interests based on how they've interacted with your content, you can get even more personalized with dynamic email. With SharpSpring, you can create one email that will resonate with lots of different types of people. By swapping out entire sections, phrases, images, calls to action (CTAs) and more based on what you know about your leads, you can create emails that will convert at much higher rates.



Get personalized with SharpSpring dynamic emails

Website Behavior Tracking

You can also target leads based on their interactions with your web content. If they visit a particular page or take a specific action like filling out a form, your marketing automation platform will update your lists or lead scores to reflect any important insights and changes. It also allows you to set up workflows and trigger sales team alerts, or create emails to send to leads who interact with your website in a particular way.

For example, if someone visits your blog page and clicks on a post focused on one of your products or services, the system will dynamically add them to a list of other people interested in the same service. Later, it will send those list members an email offering tailored to their interests with a CTA, encouraging them to make a purchase.

Furthermore, just like you can create one dynamic email that displays different content depending on a lead's interests, you can also do this with landing pages. SharpSpring lets you easily swap out images, headlines and body text – without the need for a developer – so you can build a single page that resonates with different audiences based on who they are and what they're interested in.

Game tip: Conversion buttons and offerings matter at every stage of the game. Sometimes they may fly slightly above the crossbar on the first try. But if you can get web visitors to fill out a form when they hit the field, you can use that valuable information next time to go for the goal.

Fully Integrated Social Media Management

When your marketing automation platform has fully integrated social media management capabilities, you can go beyond just publishing and monitoring your accounts and start turning social interactions into sales. SharpSpring offers all of the features you'd expect from a social management platform along with tons of powerful conversion tools you can only get when you fully integrate social with marketing automation.

You can filter conversations by hashtag, keyword and more to find out what people are saying about your brand, competitors and industry. You can automatically adjust lead scores based on social activity and capture those interactions in the Life of the Lead – making it easier to identify hot prospects and brand advocates. You can even kick off an automated series of emails with relevant content once a lead engages on social in a particular way, or you can notify the sales team if a lead seems ready to buy.

Behavior-Based Lead Scoring

Behavioral tracking is a critical element of lead scoring, as it provides you with concrete insights on where a lead is in the buyer cycle and approximately how likely they are to convert. Marketing automation lets you break down your interactions with leads, so you can zero in on the various nuances of their behaviors and figure out what it all means for your conversion rates.

For example, a lead who visits your homepage and then leaves is not as valuable as a lead who has visited different sales pages on multiple occasions. Someone who visits your homepage, subscribes to your newsletter, and reads one of your blog posts has less potential value than someone who visits your sales page, clicks a link in your follow-up email, and requests further information via a contact form.

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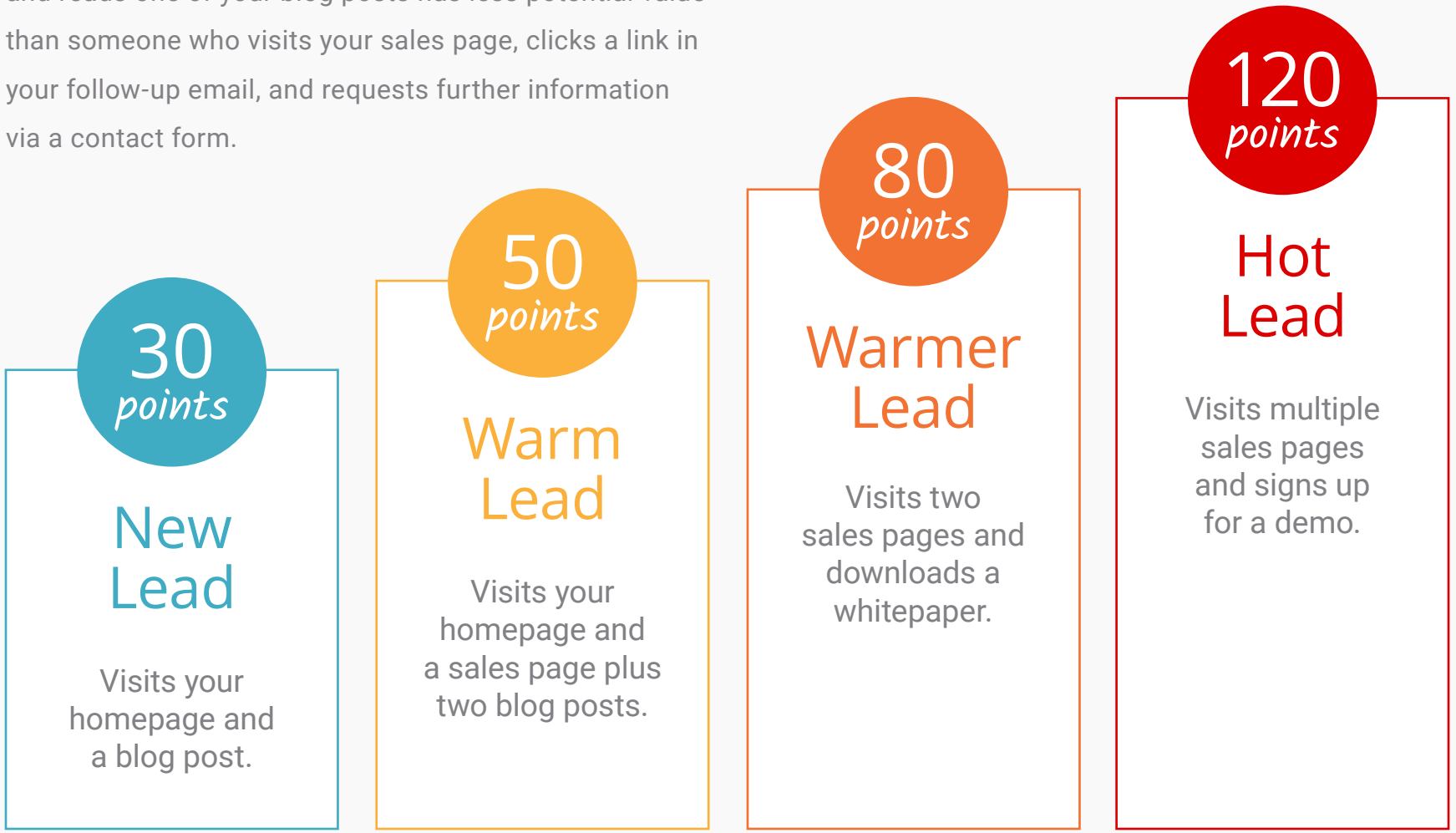


Being a Team Player

Integrate Your Winning Tools

Several factors are involved in becoming a soccer champion. The team should be managed efficiently, the players should be arranged optimally based on their strengths, and you need the right equipment to use in every game.

It's also important to be a team player – which is why SharpSpring's goal isn't to kick existing "players" off the field, but to work with the solutions you already have in place. We can also help fill in the gaps where needed (e.g., our built-in CRM).

In this section, we'll discuss how to leverage your CRM – whether you use SharpSpring's or a third-party tool – and how to integrate with other apps you already love.

Customer Relationship Management (CRM)

A powerful CRM is essential to optimizing your sales efforts. From pipeline management to reporting and beyond, a CRM makes it easy to manage your customer relationships. SharpSpring can synchronize with your current CRM to provide a smooth integration, or if you're in the market for a new system, SharpSpring has a robust CRM already built in. You can quickly import your existing contacts, opportunities and accounts, including all standard fields (name, email, phone number, company name, etc.) as well as any other custom fields you deem important.

Native & Third-Party Integrations

Integrations are a key component of SharpSpring, and we're constantly striving to expand our partner networks to include new integrations and functionalities. We work with all major form builders (e.g., Wufoo, Formstack, Gravity) and content management systems (e.g., WordPress, Drupal). SharpSpring also includes numerous native integrations, including SalesForce, Google AdWords, WebEx and GoToWebinar. You can use our open API to connect SharpSpring to any custom-built data system or third-party application. Or if you don't have a developer on hand, you can use Zapier or PieSync to easily integrate SharpSpring with hundreds of other platforms.

Integrations are a key component of SharpSpring, and we're constantly striving to expand our partner networks to include new integrations and functionalities.

Strategies to Score Big

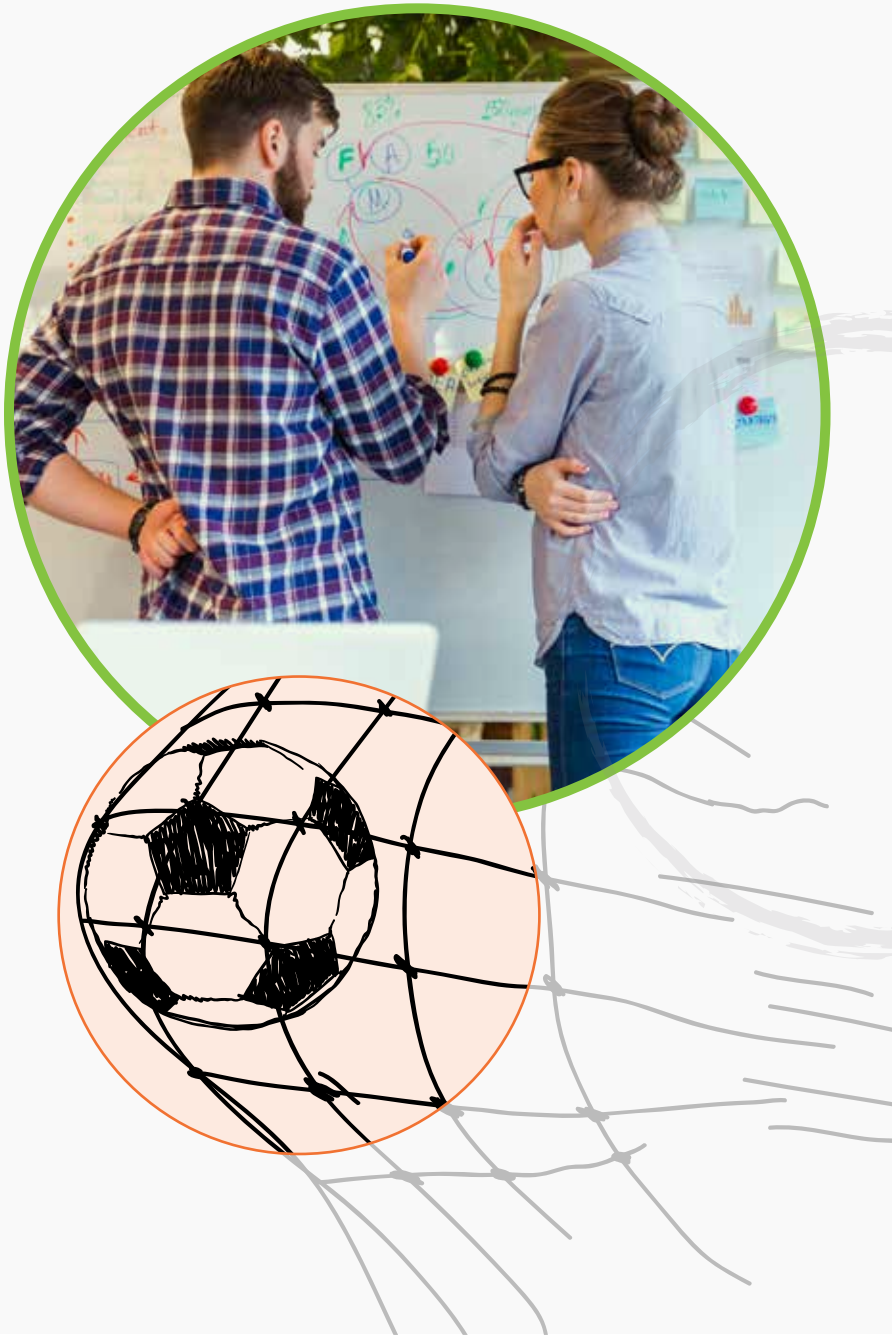
Building Campaigns That Convert

To score a winning goal, you need to take your shot at exactly the right time with precise aim. Scoring deals in the marketing game involves a similar focus on perfecting your aim – which means you need the perfect campaign in place to pull off the right moves.

A drip campaign is a series of marketing emails delivered incrementally over a period of time. Once set up, drip campaigns serve as an automatic way to stay top-of-mind with your leads, build brand awareness, manage relationships, and increase your sales rates.

Once you've outlined the particular email sequence, a drip campaign is pretty easy to create. You can build an educational email campaign designed to provide users with valuable and relevant information. You can build a campaign to nurture leads down the sales pipeline, sending them emails with calls to action and incentives to convert. Other types of drip campaigns include upselling and cross-selling campaigns, welcome and onboarding campaigns, campaigns geared at increasing brand awareness, and much more.

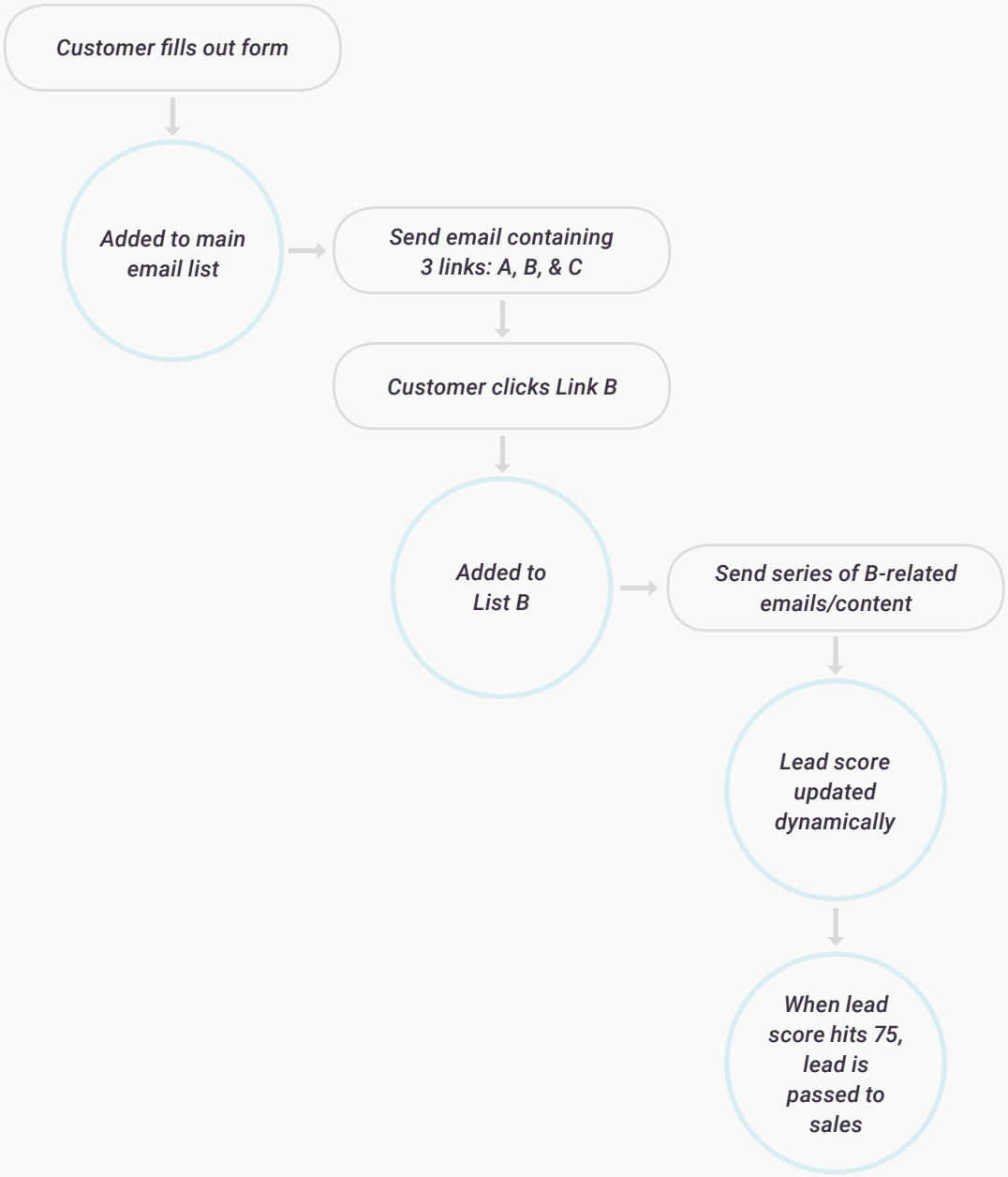
In this section, you'll see some examples of different types of campaigns and get a better understanding of how to build your own.

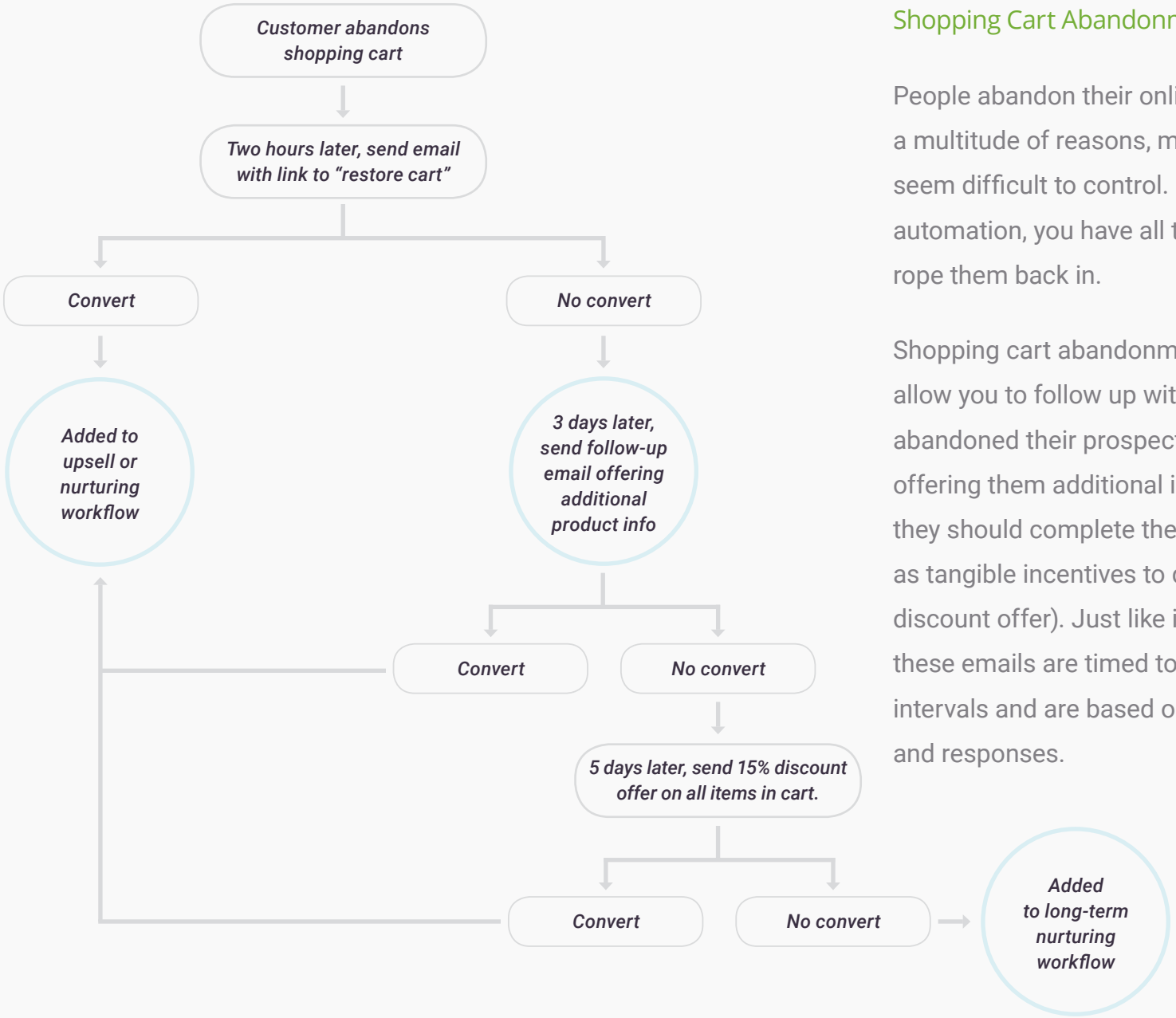


Email Nurturing Campaigns

Email nurturing campaigns are the cornerstone of marketing automation. They help you nurture leads down the sales funnel, dynamically segment customer lists, and spread brand awareness – all while delivering exceptional end-to-end ROI. Simply put, nurturing campaigns are all about sending people exactly the right information at exactly the right time.

An email nurturing campaign is designed to engage leads with relevant content and frequent calls to action, pushing them to take the next step in the sales cycle. This type of campaign is ideal for longer-tailed sales cycles, as it enables you to maintain a high level of engagement and momentum over time. By combining this with lead scoring, you know exactly when to pass a lead from nurturing to your sales team.





Shopping Cart Abandonment Campaigns

People abandon their online shopping carts for a multitude of reasons, many of which might seem difficult to control. But with marketing automation, you have all the tools you need to rope them back in.

Shopping cart abandonment campaigns allow you to follow up with customers who've abandoned their prospective purchases, offering them additional information on why they should complete the transaction as well as tangible incentives to do so (e.g., a 10% discount offer). Just like in any other campaign, these emails are timed to go out at specific intervals and are based on the lead's behaviors and responses.

Onboarding & Welcome Campaigns

From the very first moment a new customer signs on with you, it's important to be attentive. Welcome and onboarding campaigns allow you to provide customers with helpful and relevant content right from the start, guaranteeing improved customer satisfaction and retention rates for your business.

Basic Drip Campaign Worksheet

Check out this easy-to-use template for creating drip campaigns. Once you get your ideas organized, it's simple to build it out in your favorite marketing automation platform.

Drip Campaign for _____

Campaign objectives _____

Email 1 Subject	
Email 1 Content	
Email 1 Trigger	
Email 1 List added to	

Email 2 Subject	
Email 2 Content	
Email 2 Time delay	

Email 3 Subject	
Email 3 Content	
Email 3 Time delay	

Email 4 Subject	
Email 4 Content	
Email 4 Time delay	

Keep Your Teammates in the Loop

Unify Sales & Marketing Teams

Imagine if you had the world's top soccer stars at your fingertips, and you could select 11 of your favorites to play on your team. You'd be sure to win every single game, right? Not so fast. No matter how good each individual player is, if they're not all on the same page, you'll never be able to keep the ball on the opposing side of the field, let alone score a goal.

Similarly, successful marketing isn't just about having the right resources and charming your audience with personalized messages and ads. If your marketing and sales team are uninformed and out of sync, they won't be able to perform at an optimal level.

Marketing automation gives your sales and marketing teams full visibility into what the other is doing. It allows you to engage and nurture your leads with relevant content, moving them through your pipeline and their buyer's journey, while alerting salespeople when leads are ready to buy – so your team can ultimately score the deal.

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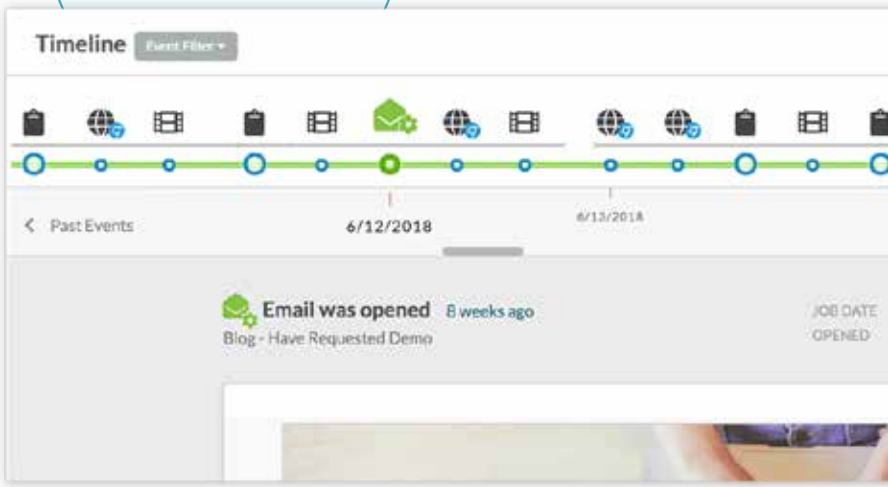

Automatic notifications alert salespeople whenever a lead does something noteworthy or shows increased interest in making a purchase. Upon receiving a notification, a salesperson can swoop right in and target the lead at just the right moment.

By focusing your efforts on the leads that are most likely to buy, you'll save your company time and money and achieve higher conversion rates than ever before.

And to make things even better, marketing automation offers reporting and analytics to help you track the end-to-end ROI of your marketing efforts, so you can prove which campaigns are working and improve those that aren't so hot. SharpSpring offers actionable metrics and insights every step of the way through your campaigns, so you can always be sure you have your eyes on the goal. You can also customize your reports to include metrics that matter most to your business. So, whether you're presenting results to your clients or to your CEO, SharpSpring gives you all the data you need to measure your current campaigns and accurately forecast future performance.

The benefits of marketing automation are endless, and we hope this playbook has opened your eyes to the possibilities and resources available to your business.

Are you ready to take your marketing game to the next level with SharpSpring? Sign up for a demo, and start scoring today.

Drive More Leads
Convert Leads to Sales
Optimize Your Spend

GET A DEMO