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# 10 Steps To Getting Started With **Marketing Automation**

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So the buzz about marketing automation and what the future holds for marketing in general finally got to you.

Now you are ready to start using marketing automation and are not really sure where to start.

Naturally, you want to learn how you can use it to strengthen your customer relationships, improve lead generation, build your overall brand and of course, boost that ROI.

We are not going to lie, marketing automation is pretty easy to use, but there are so many possibilities, it can be overwhelming when it comes to starting.

At this point, you probably have an email marketing strategy in place, and you likely have at least started using social media, even if it is to post photos of your staff.

You also are probably capturing some or a great deal of customer and lead data in a database or CRM system. If not, don't worry. Basically you have a few pieces in place for your online marketing but you haven't really found a way to integrate it all into one.

For many, this idea is a dream.

Well, with marketing automation software, that dream is now a reality.

The first step in building a truly effective online marketing automation program is to gain an all-inclusive view of your communication activities by integrating your email, mobile, social, CRM, and web tracking systems. From there, marketing automation software can help you streamline traditionally manual processes like customer segmentation, email marketing, and campaign management automatically and with winning results.

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*The use of marketing automation makes processes that would otherwise have been performed manually much more efficient and makes new processes possible.*

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## 1. Choose a Marketing Automation Tool or Vendor

The first step is to do your homework and find a marketing automation tool that offers everything you need and then learn how to use it. Most marketing automation providers have an extensive library of resources for beginning users. When doing research, sign up for online demos, use free trials and look at what resources are in place to help you. Basically kick the tires before you decide that it's the one for you. Think long term as well. Ask yourself if the product is innovating or just doing what everyone else does. Does it cover all of your automated needs when it comes to a full communication strategy?

## 2. Integrate your Existing CRM with your Marketing Automation Solution

Most organizations that are considering marketing automation, have been doing some form of data capturing. You need to be able to sync lead, prospect, and customer data with your marketing automation solution. With this integration, you'll be able to view all of your prospect activity from within your CRM, automatically assign leads to sales reps, and more. Without the ability to manage all of the data coming in, it will be hard to do a true multi-channel campaign using marketing automation. All of the triggered messages are based on real-time data that needs to be organized and accessible.

## 3. Use Trigger-Based Messages to Automate Simple, Recurring Emails

Now we start to have fun. Think of all the emails that you send that never really change. Those are the ones you want to automate first. Since welcome and thank you emails will be sent over and over again as you gain new subscribers and followers, they are perfect for testing starting out with automation. Experiment with trigger-based messages (in this case emails) that are sent automatically when a prospect takes a certain action, like downloading a whitepaper, signing up to your newsletter or even subscribing to your blog. Look over your entire process and pinpoint what kinds of messages you can automate. Feel a lot less overwhelmed?

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***What is a trigger-based message?** The key to marketing automation success is trigger-based messaging. They use the data collected and stored in your marketing automation system to send timely, relevant messages automatically.*

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## 4. Try Simple Email Personalization Techniques

Now that you have set up a few trigger-based emails like a simple welcome email, it's time to take the next step. It's time to get personal. Yes, it is possible to use personalization techniques with marketing automation. In fact, it is almost a must. The last thing you want is to come across as a robot. If you've integrated your CRM with your marketing automation platform, you have plenty of information you can use to start personalizing your communications, rather than sending a generic email blast to everyone in your database. It is as simple as adding a person's first name, or including in the subject line what they just downloaded. Anything you can do to separate the message from the masses is what you want.

## 5. Schedule Your First Social Media Post

You probably already have a Facebook page and Twitter account set up for your organization. Now you can use marketing automation to start making both immediate and scheduled social posts to these social channels. Best of all, it is from the same account as you just set up the triggered emails from. Just remember not to get so carried away with scheduled posts that you never check on your networks and add some "real person" posts. As mentioned earlier, your audience still expects a human on the other end of your social messages. The best way to mix real and automated messaging is to set up a few at the start of each day and leave a few parts of the day that you know you should go and read what's going and leave a post while there.

## 6. Identify the Contact Information that you Need to Collect

It all starts with data. If you don't have user data, you can't send marketing campaigns. What data do you want to collect? What data do you think you will need down the road? Start with first name, last name, and email address, and then go from there. But if you know you want to start sending text messages in the near future, you will need to ask for a mobile number. But remember that people don't like to feel interrogated at first or take more than 20 seconds to fill out a form. So limit your forms to the information you need to collect, rather than the information you'd like to collect. You can always gather more information later as part of an automated campaign.

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## *7. Integrate Analytics*

To go with your marketing automation tool, you are going to want to track all of your important metrics. Ideally this is integrated into a single system. But if not, do make sure you have something like Google Analytics set up. By using this data, you'll be able to see where your prospects are coming from and their conversion points at the individual level. This will help you plan what the next steps are and what messages should be used at each stage. If you are selling a product, you will better understand who is ready to buy and who needs more time.

## *8. Start Designing Your Forms, Landing Pages and Email Templates*

At this point you need to start building and designing all of your touch points. This includes web forms, landing pages and email newsletters created by sticking to industry best practices. Many automation providers offer implementation services that will walk you through creating these assets, from template design to the content you should put in each. Landing pages and forms are essential to lead generation, so it is important to build them the right away from the start. Forms, landing pages and to a degree, emails, are what will collect the data you need to grow your contact lists. Most marketing automation solutions also make it very easy to create each of these without having to know HTML or be a professional designer.

## *9. Insert Basic Tracking Codes*

In conjunction with having analytics set up, you will want to add tracking codes onto your website so you can start monitoring visitor and prospect activity. The information collected by your marketing automation system is the fuel that powers the marketing automation engine, so this is an important step to address as soon as possible. If they are signing up on a form on a certain page, you will want to know that. For example if you provide several products and services, knowing what one they were interested in, will allow you to properly nurture them using automation.

## *10. Build Your First Nurturing Campaign*

Yes, it's time to build that first automated campaign. This will be used to nurture your audience regardless of who you are targeting. New leads, current clients, fans, voters, employees, readers and more. Nurturing campaigns are a powerful lead generation tool that works by sending a series of "nurture" messages (email, text, voice, social media) to your prospects over time. Even the simplest nurture campaign can help keep your company top of mind, so your prospects are already familiar with your product or service when it's time for them to enter the buying cycle.



# You Are Ready

That's it, you are all set to get started with marketing automation.

No matter what you knew about marketing automation before reading this guide, you are now on your way to putting together an integrated online marketing strategy. In doing so, you will increase your efficiency, streamline your marketing efforts, and cut down on wasted time and energy. Keep in mind, these 10 steps are only the beginning. There is so much more when it comes to marketing automation.

Marketing automation continues to advance at a rapid pace, leaving marketers with plenty of tools and features to explore, and even more to look forward to in the future. Think big. Think outside of the box and think of new ways to let marketing automation advance your organization to the next level

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## About BNS AiO

BNS AiO is a leading provider of interactive and multi-channel communication software for organizations worldwide. The company's 360 Customer Flow Communication Platform is a feature-rich solution combining marketing automation, inbound marketing and interactive communication. BNS AiO provides organizations the ability to effectively reach customers on their preferred mode of communication.

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