The 5 quick wins of marketing automation

How to get the most from your MA investment

BRAND TO SALES™ ACADEMY

THE BRAND TO SALES™ AGENCY

INTRODUCTION

Before we begin...

At OG we like to think we know a thing or two about the world of marketing automation; some of us really do live and breathe MA (takes all sorts I suppose).

We want to help you nail one of the most powerful marketing tools there is, by sharing all that we have to offer. Let's break down the things we'll cover: the 5 quick wins of marketing automation.

CONTENTS

2

01

A/B (always be) testing

A/B testing literally means trying something out in more than one way: test exhibit A, test exhibit B, then compare the results.

Every message you send is an opportunity to learn more about the recipient, and you can't really do that without two bits of comparable content.

And email marketing is never an exact science; there are countless variables to consider. Some of which you can control (tone, colour, design), and some that you can't (reader having a bad day, too busy thinking about their new puppy).

3

This means they'll be a lot of trial and error in getting your content to really do its job. And the best way to start is by having two variations of everything you put out into the world.

The place to start is with the subject line of an email. Change the tone or phrasing to notably distinguish it from the original, see which gets you the most opens, and there's your answer. Use the best as a basis, and build on that with further tests until you've that messaging perfected.

And then test some more.

THINGS YOU SHOULD BE A/B TESTING

☑ Subject line

☑ Preview text

☑ Imagery

☑ Copy length

☑ CTA placement

☑ CTA wording

☑ CTA colour

☑ HTML vs plain-text

☑ Bullet points vs paragraphs

☑ Email template

☑ Email sender

02

Automated reporting

Woah cowboy, don't think that you've already got this MA thing on lockdown (too soon?) just yet. Marketing automation is an ongoing ~~battle struggle~~ part of a marketer's life, one that demands year-round attention if you want to get the most out of it.

And to circle back to our intro: 'year-round' obviously doesn't suggest 'quick win'. But automated reporting does.

Gathering data, collecting insights, and then acting upon your findings can be a fair ol' task. And once a workflow's in place, in can be easy to let it live its best life, firing off emails without any intervention from yourself.

The quick fix is to set up automated reporting emails direct to your inbox. This will give you a regular stream of learnings from which you can act on accordingly, meaning you'll never miss out on the info, and won't need to do the heavy lifting either.

Told you we know what we're talking about.

HOW A TYPICAL WEEK OF MA STRATEGY COULD SHAPE UP

MON   TUE   WED   THU   FRI   SAT   SUN   Repeat

Send

Report

Editing and the implementing of findings

Long-awaited roast dinner

03

Segmentation

Segments are a marketer's best friend, and an essential part of marketing automation. It's basically tailoring your content to an audience.

And the easiest way to do this, the 'quick win' if you will, is with dynamic content. Dynamic content are ways in which you can personalise content, from how someone interacts with an image, through to their name popping up in a greeting.
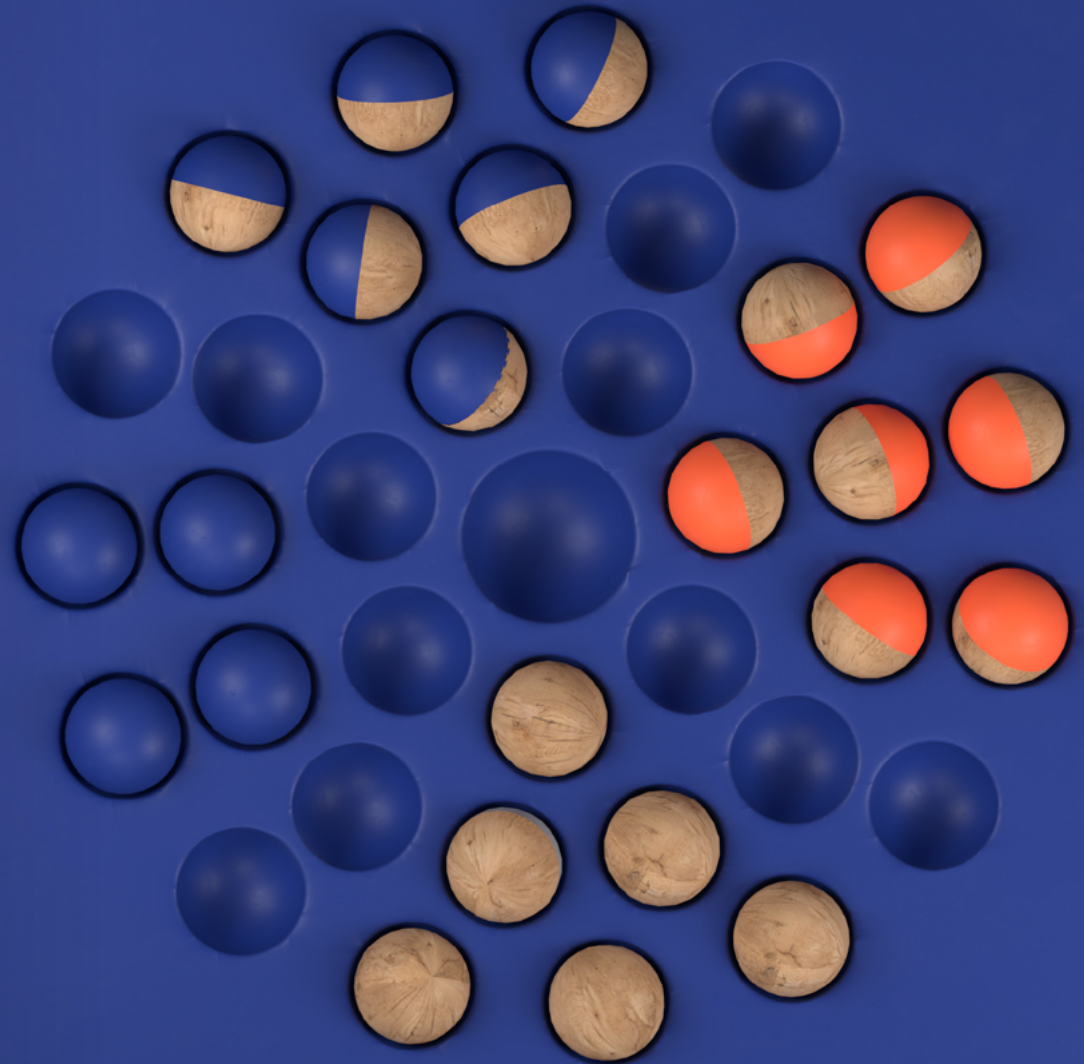
The important reason behind segmentation is no client or customer is the same, so why send them the exact same content? We all know they deserve better.

The two key ways in which to segment your audience are by relevance (sector, industry, relevance) and engagement (funnel stage). A lot of marketing automation platforms allow these different types of segmentation to be constantly updated by grade and score.

GRADING

SECTOR
Higher grade for most relevant

CONTACT DETAILS
More details the better, therefore higher grade awarded for more contact info

SCORING

EMAIL OPENS & CLICKS
More emails opened and clicked, higher score awarded

FORMS FILLED
More forms filled, more engaged they are, thus higher score

04

B-Sends

B-Sends are your coveted second chance, something hard to come by these days. So cherish them, and make sure you take advantage.

Workflows can be frustrating. Sometimes it feels as though you've just finished setting one up, and before you know it, your contacts have finished, and you need to start planning what to do with them next.

The quick win here is whenever you're building an email workflow, create a clone of every single email, and give the subject line a tweak. Create a rule to send the cloned email to contacts who don't open the original email.

This approach can double the lifespan of your workflows. Keeping your prospects active for longer allows you time to plan what to do with them next, helping to squeeze extra engagement out of every single asset.
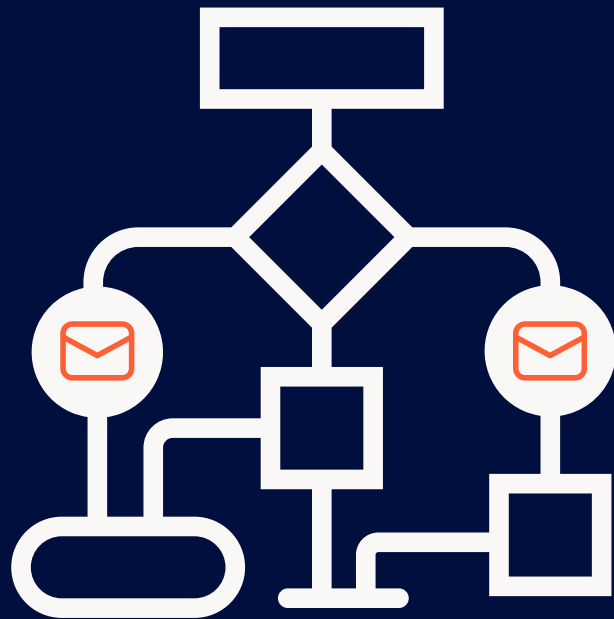
REMEMBER!
Someone not opening your email doesn't mean they're not interested. The door might have gone at the wrong moment, they could be having a bad day, so it's always worth getting that extra send in.

05

Progressive profiling

Gated content is a great way to capture people's information and add them into your database, where you can market to them accordingly.

But once people are in your database where do you go from there?

Marketing works best when you can reach your customers on a personalised level. But in order to do that you need to know a lot about them, which the classic forms might not set you up for.
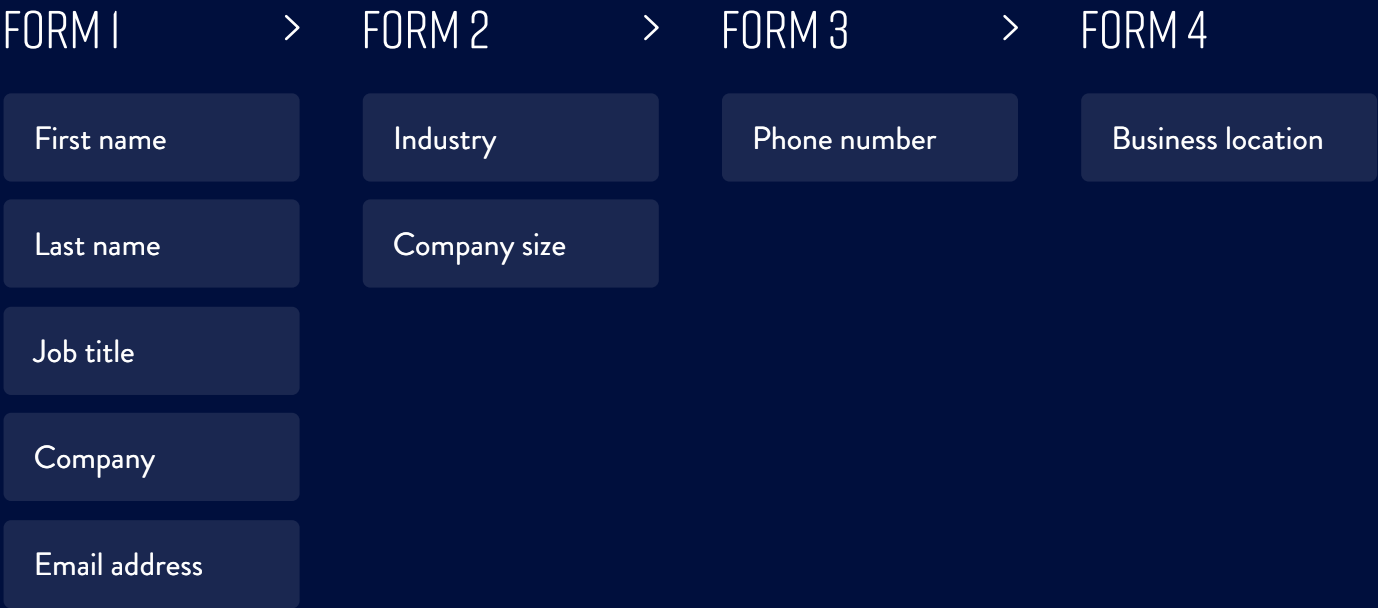
Enter progressive profiling.

PP can be set up on your forms in less than 10 minutes, and can help you learn more about your prospects when they fill in multiple forms.

The aim is to learn as much about your prospect as possible, and getting hold of incrementally higher value info, info that will guide your sales team.

To ensure it's as effective as possible, work with your sales team to determine the most important pieces of information, and plan for how to work that into your forms.

FORM 1 > FORM 2 > FORM 3 > FORM 4

FORM 1	FORM 2	FORM 3	FORM 4
First name	Industry	Phone number	Business location
Last name	Company size		
Job title			
Company			
Email address			

Ask us about an MA audit today

Speak to one of our MA experts

About the B2S Academy guides
The Brand to Sales (B2S) Academy guides are a way to share OG's internal B2B marketing expertise with the wider community. We're creating a series of guides based on the B2S curriculum; from strategy to inbound, lead generation and nurture.

These practical guides prepare marketers with foundational knowledge in all areas of B2B marketing, enabling a deeper understanding of each stage of an optimum B2B marketing campaign, and what's needed to drive true demonstrable success for a business and its products. The guides also feature best practice examples from our industry peers, and reflect current trends within different marketing disciplines.