



# Marketing Automation

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## I. Introduction

Marketing is a vital tool to the success of any business; but as the business grows, its customer base expands and evolves, with it the marketing strategies it uses grow in complexity.

As time goes on, a shrewd business owner will chase the latest marketing trends to further grow his company and give it an edge over its competitors and trying to stay in the forefront of the customer's mind. However, this leads to wasting a lot of time doing repetitive tasks, e.g. sending emails, putting up blog posts, moderating Facebook comments, etc. This time could be better spent developing and innovating. This is where Marketing Automation comes in.

### What is Marketing Automation? And why is it important?

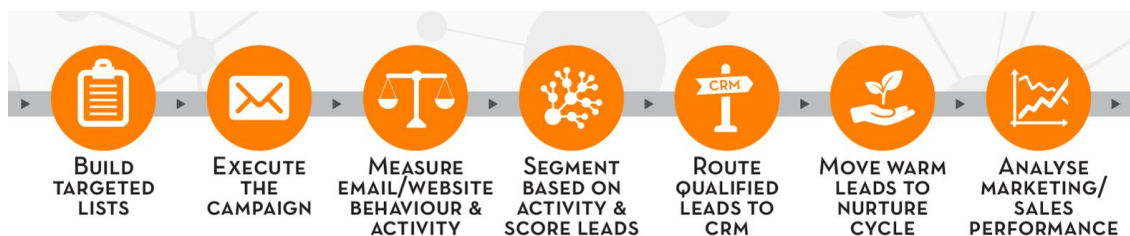


Figure 1. 1- "What Is Marketing Automation?", via [Smartinsights.com](https://www.smartinsights.com)

"Aside from being the latest buzzword, in simple terms marketing automation is the use of software to automate marketing processes, such as customer segmentation, customer data integration and campaign management." ~ Anthony Bagshaw. [1]

Marketing Automation is essentially using software to execute, manage and automate marketing activities. It's especially useful when automating manual and repetitive tasks such as email marketing, social media posting, and ad campaigns - not only making it more efficient, but also providing a more personalized experience for each of their customers. (Think personalized Uber or Careem emails with custom promocodes based on the customer's previous rides, or Google ads on every website one visits that are all about that one item they searched for at 2am.)

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## Automating Marketing vs Automating Manufacturing

Usually when one hears the word “automation”, it suggests industrial robots that can effectively and efficiently accomplish complex tasks, therefore rendering human workers redundant and out of a job. While that is the case in automating manufacturing processes, it's a little different when discussing marketing.

Marketing Automation software is designed to streamline and facilitate a marketer's job, not make the marketer themselves irrelevant. It frees up time and helps the marketer reach their goals faster, relieving them from worrying about minute details, and conserving the quality and authenticity of the work they're putting out.

## The Impact of Successful Marketing Automation

Marketing Automation a much-discussed topic, and justifiably so. Marketing Automation statistics compiled by [SalesFusion](#) proves its immense positive impact: According to **Ascend2's 2016 Marketing Automation Trends survey**, 71% of companies use marketing automation. Most of the companies that aren't using it plan to do so in the foreseeable future, as seen below in Figure 1.2.

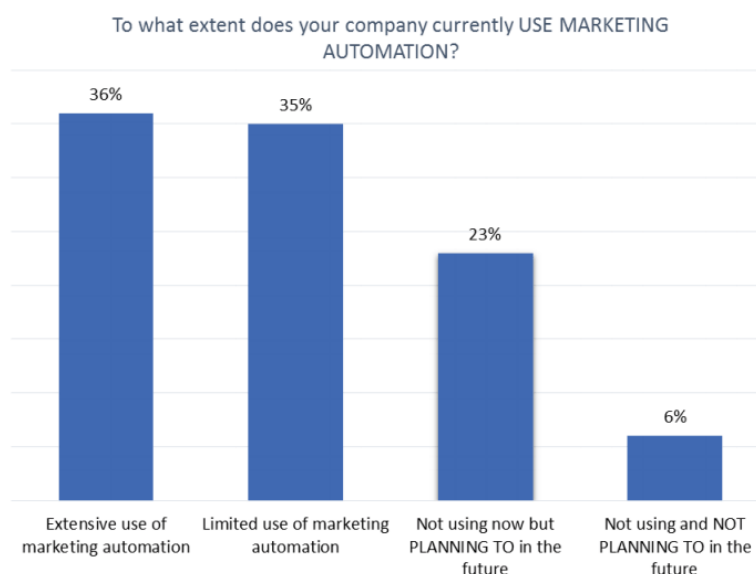


Figure 1. 2 - Marketing Automation Trends Survey, Ascend2 and Research Partners, February 2016

According to a study conducted by **Nucleus Research**, Marketing Automation drives a 14.5% increase in sales productivity. The study also found that companies using automation enjoyed an average 12.2% reduction in marketing overheads. [2]

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## II. The Three Categories of Marketing Automation

### 1. Marketing intelligence

Marketing intelligence is the external data collected by a company about a specific market it wishes to enter, to make decisions. It refers to the use of tracking codes to monitor customers' online behaviours. Marketers can analyse and identify patterns they will then use to create behaviour-based market segments. [3]

A great example of this is Amazon, or more popular in Egypt, Souq, which is also an Amazon owned company. Amazon was probably the first large enterprise to do this effectively. Amazon keeps a vast amount of data about its customers' past behaviours to improve the user experience by recommending additional items of interest, sending reminders, keeping them informed about price adjustments and more. This data isn't limited to past purchasing behaviour on Amazon or Amazon owned websites, they collect data about every product their customer searched for, every product description they opened, how long they spent on the product's webpage, products they searched for on Google or elsewhere, etc.

Google takes marketing intelligence one step further by creating the ultimate customer profile (as demonstrated in Figures 2.1.1 and 2.1.2). Aside from Iphone users, every smartphone has a google assistant and multiple google apps like Maps, Youtube, Keep, Drive, Photos, etc. which gives it access to the phone's camera, microphone, GPS, and personal files. Not only does the mega corporation save every single search entry the user makes, it also uses voice recognition software to hear and analyse what the user is talking about while interacting with people in the real world, through the phones' microphone which is always engaged. It saves the user's daily route, through GPS on the Maps app, registering the places they frequent the most. They compile all this data and analyse it into a user profile detailing their age, interests, likes and dislikes, their relationship status, psychological profile, etc. Google sells these profiles to advertisers who then either purchase Google

Ads, which are featured on virtually every webpage on the internet, or they advertise on social media platforms.

Apple does a similar thing through Siri, while Facebook creates its own profiles, which they also sell, and use them to hyper personalise the ads on Facebook and affiliated apps like Instagram.

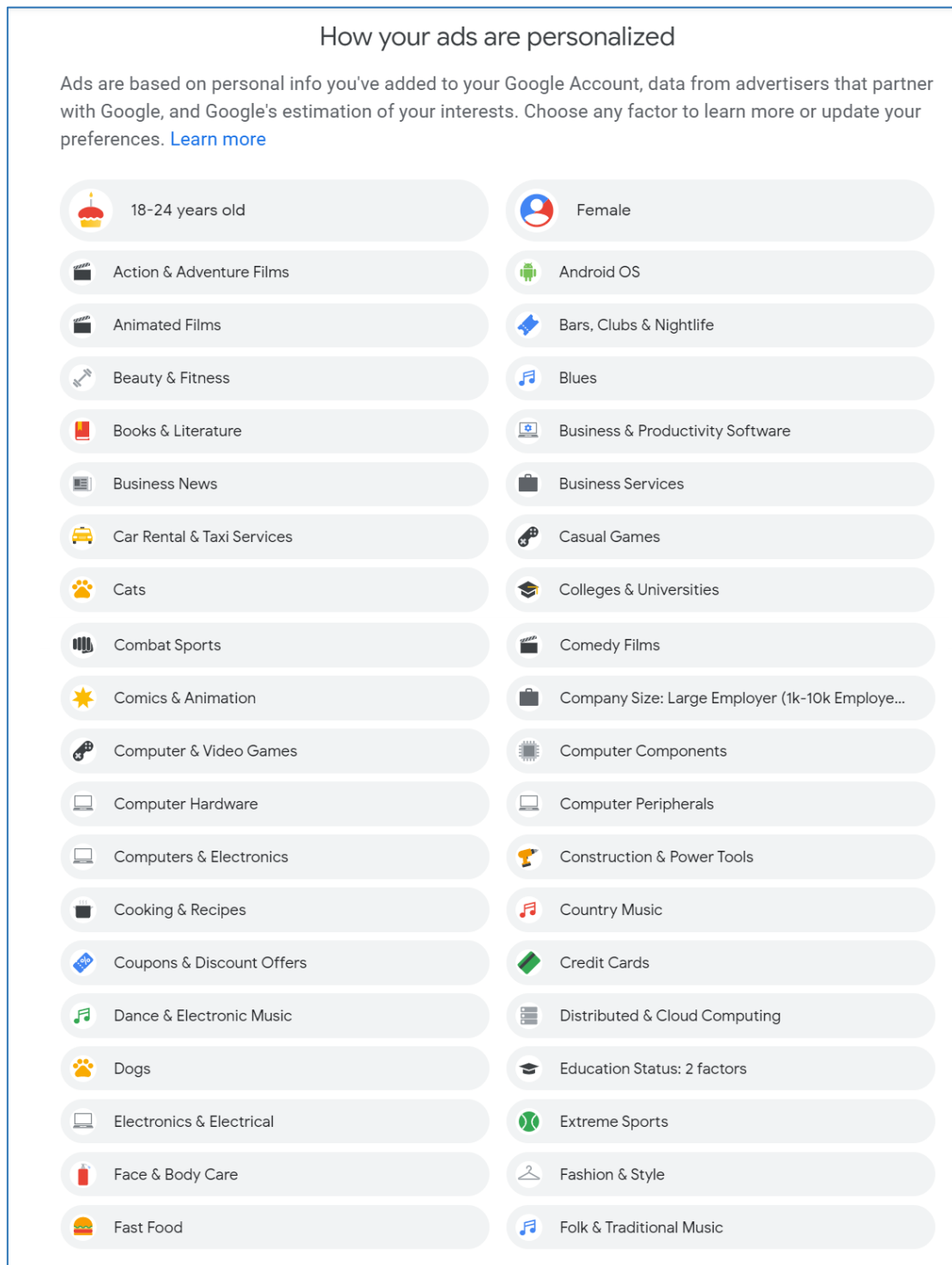


Figure 2. 1.1- My Personal Google Advertising Profile-1

















































 Gourmet & Specialty Foods	 Graphics & Animation Software
 Green Living & Environmental Issues	 Hair Care
 Home & Interior Decor	 Home Appliances
 Home Automation	 Home Furnishings
 Home Improvement	 Homeownership Status: Renters
 Indie & Alternative Music	 Jazz
 Luxury Goods	 Make-Up & Cosmetics
 Marital Status: In a Relationship	 Metal (Music)
 Mobile Phones	 Movies
 Music & Audio	 News
 Outdoors	 Parental Status: Not A Parent
 Performing Arts	 Pets
 Photographic & Digital Arts	 Politics
 Pop Music	 Price Comparisons
 Printers, Copiers & Fax Machines	 Product Reviews & Price Comparisons
 Rap & Hip-Hop	 Restaurants
 Rock Music	 Rugby
 Science Fiction & Fantasy Films	 Shopping
 Smart Phones	 Social Networks
 Standardized & Admissions Tests	 Travel
 TV & Video	 TV Comedies
 TV Documentary & Nonfiction	 TV Dramas
 TV Family-Oriented Shows	 TV Game Shows
 TV Reality Shows	 TV Talk Shows

Figure 2.1, 2 - My Personal Google Advertising Profile-2



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This method of mega data collection has caused controversy in the past few years as consumers are feeling as if they're under surveillance 24/7, like when they talk to a friend about a product they like and open their phone to find an ad for that specific product within 5 minutes of that conversation, leading to an eerier feeling of being stalked.

Another controversy is due to governments realising the value of these profiles, and the methods by which they are created in the first place, in surveillance. Whether that be of active criminals or a totalitarian government surveilling its citizens, and specifically, opposing journalists.

A famous example of this is Facebook selling its users' data to the Trump campaign during 2016's elections, *"So the firm harvested private information from the Facebook profiles of more than 50 million users without their permission, according to former Cambridge employees, associates and documents, making it one of the largest data leaks in the social network's history. The breach allowed the company to exploit the private social media activity of a huge swath of the American electorate, developing techniques that underpinned its work on President Trump's campaign in 2016."*  
~ NY Times [4].

## 2. Business Development

Business Development is focused on moving potential customers from the top of the sales funnel (initial awareness) to the bottom of the funnel (ready to buy). This is done by segmenting and nurturing based on interests expressed by the consumer, scoring or qualifying leads based on fit and intent, and attempting to close based on a combination of behavioural and attitudinal measures.

Automated business development relies on email, social media, search engine optimization, and content marketing to work. This Before deploying these tactics, however, one need to: identify their leads and their characteristics, and develop a lead nurturing strategy, like inbound marketing. [3]



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## Marketing Automation vs Inbound Marketing

One of the top marketing priorities for marketers today is increasing traffic to their website, as they know that buyers and consumers are doing most of their pre-purchase research online, and they want their website to be the one they find when doing so. This is where marketing automation and inbound marketing come in.

**What is Inbound Marketing?** Inbound marketing is an online marketing strategy for drawing customers to a company's products or services via original content, social media, and search engine optimization. As opposed to traditional marketing techniques, it focuses on attracting customers through content and interactions that are helpful to potential customers and personalised to their needs—not interruptive, impersonal mass marketing campaigns. Potential customers find the company or the service through blogs, search engines, and social media, due to the content the company created to address the problems and needs of their target clients.

However, while inbound marketing refers to a marketing strategy as a whole, marketing automation refers to the software platforms designed to replace the repetitive manual processes with automated solutions, such as sending emails, scheduling social media posts, setting blog publish times, creating workflows, and more.

It's software that would be used to plan, organize, execute and analyze the inbound marketing program. Therefore, it facilitates and streamlines sales and exposure; because, in the end, the goal of marketing is to generate more revenue for the company. This can be achieved through a service like **HubSpot**.

The inbound methodology, as seen in Figure 2.2.1, is the idea that to increase revenue, traffic needs to be driven to the company website, attracting leads, and closing those leads to customers. Marketing Automation is a great tactic that allows companies to nurture prospects using highly personalized, valuable content that helps convert these prospects into leads, and turn those leads into

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customers, and hopefully those customers turn into promoters of the brand. [5]

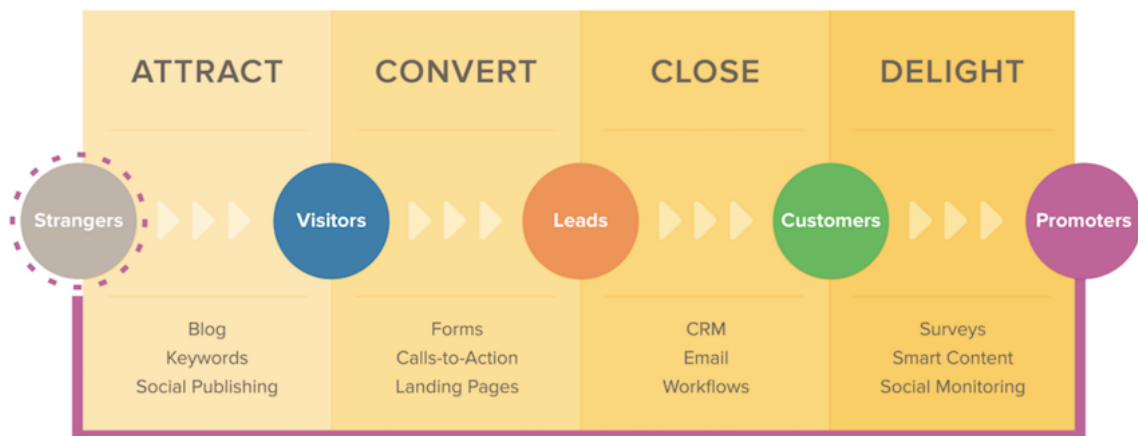


Figure 2. 2.1- Inbound Methodology, via HubSpot

### 3. Workflow automation

Workflow automation generally refers to internal processes like budgeting, the marketing calendar, digital asset management, etc. Processes needed to run sizable, complex marketing departments.

This category has been mostly used by large marketing brands, like Procter & Gamble, and General Mills, whose size and complexity takes great advantage of this technology.

However, in recent years, workflow automation technology has become much more accessible to small businesses and midsize organizations.

Software like Customer.io is a rules-based visual workflow builder that allows businesses to create high-performance campaigns in an easy to use drag-and-drop interface, so they can reach their customers whenever and wherever they are. [6]

Available actions include:

Email, push, SMS, webhooks, slack, attribute update, time zone match, True/false branches, multi-split branches, and many more.

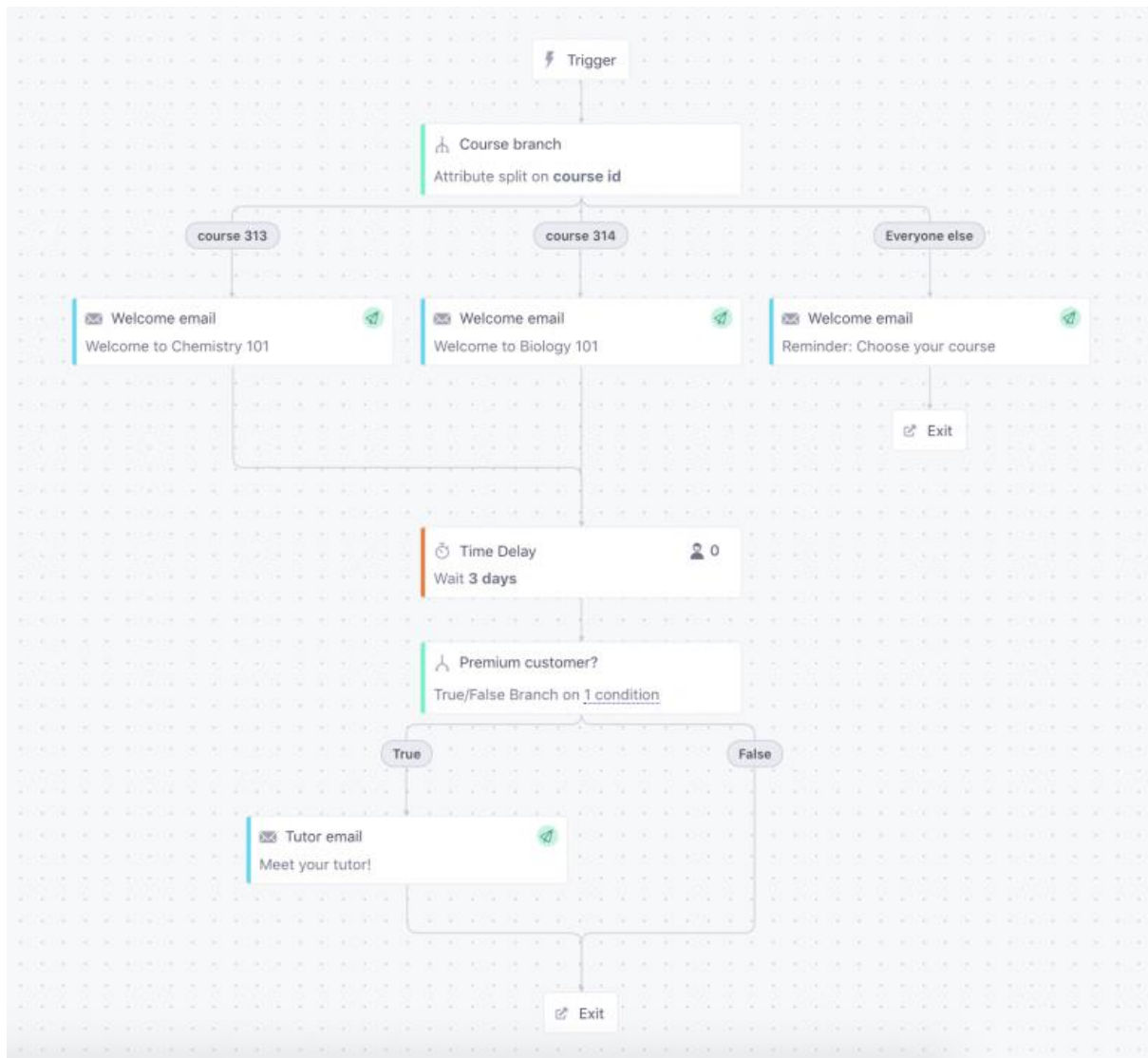


Figure 2. 3.1 - Customer.io Workflow Automation Software Interface

Still, the biggest benefit those businesses gain is from tools and processes available from marketing intelligence and business development.

Why? Marketing intelligence and business development focus on the top line\*, which is where most businesses need help today.

**\*Top line** – It's the revenues generated by a company (gross sales). No expenses are deducted out.

**Bottom line** – The bottom line is the income that is left after all expenses have been deducted (company's profit).

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### III. How and when to employ Marketing Automation?

Marketing automation is a great way of guiding potential customers through the company's website, social channels, and email to generate new leads, all while converting existing ones.

It can be used in the following:

- Social Media Marketing
- Email Marketing
- Lead Generation
- Lead Nurturing
- Metrics and Analytics
- Management Activities

#### Example: Email Marketing.

Many companies rely on emails to reach their customers and generate results.

There are two ways to go about this:

- The first one is to send successive blast emails to the entirety of the company's list of prospects and customers, anticipating that the email will engage a certain percentage of them enough for them to make the purchase.

This is akin to throwing a bunch of wet paper towels on the wall and seeing what sticks; it's ineffective, wastes time and resources marketing to people who might not be interested in product in the first place, and can annoy and drive away existing customers, instead of creating new ones. [7]

- The second way to go about this is using a marketing automation system. A great benefit of this technology is **"List Segmentation"**, meaning it allows for the delivery of relevant content to the right readers.

Marketing Automation allows the marketer to customize their approach for each customer, thus encouraging their leads through the entire buying process, delivering highly targeted, personalized messages that address their specific reasons they're reluctant to purchase.

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## What is B2C Marketing Automation?

The second email marketing method mentioned above is an example of B2C marketing automation. B2C meaning business to customer.

B2C marketing automation focuses heavily on acquiring and retaining customers, and customer spending. To succeed, marketers must understand their customers and be able to make data-driven decisions to keep them engaged with products and/or services.

B2C marketing automation is the process of software automatically sending campaigns to customers and prospects based on triggers the company defines. As opposed to one-time email campaigns that are created and sent to an entire list of people, automated emails are set up at the beginning and then sent out each time a subscriber meets a pre-defined trigger.

The value of successful B2C marketing automation is its ability to organize, optimize, and act on customer data; accelerating the company's growth, and helping optimize its overall strategy for maximum revenue.

### Case study: Goodreads

As an example, we can look at how Goodreads markets its authors' books through email. Here is what the basic automated email workflow looks like:

**Step 1:** send an email to download the latest published books by a list of featured authors to its users, targeting a specific genre they've previously expressed interest in.

**Step 2:** send a follow-up email to those who downloaded the books, marked them as "To Read", or "Currently Reading", noting the progress of those who started reading and encouraging those who haven't yet.

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**Step 3:** after those who were “Currently Reading” marked the books as “Read”, send an email with a curated list of book suggestions including books by the same author, or authors similar to them.

**Step 4:** Finally, when someone marks one of the books from the curated suggestion list as “To Read” or “Currently Reading”, the Goodreads team will get a notification so they can follow up with them (this person is positively responding to the marketing strategy and is now likely farther down the buying process).

This reduces the likelihood of a customer marking their emails as spam, therefore preventing them to market to that customer ever again.

## Other examples of B2C Marketing Automation

### 1. Welcome Programs

Automating customer onboarding after registration. Welcome emails are a great way to establish contact with the customer and leave a good impression. [8]

A friendly welcome email introducing them to the service and containing valuable tips on how to use said service are generally positively perceived.

It can also include a first-time user discount code, which generates additional positive feelings and satisfaction towards the service and its provider. This is demonstrated in this example from Topshop. [9]

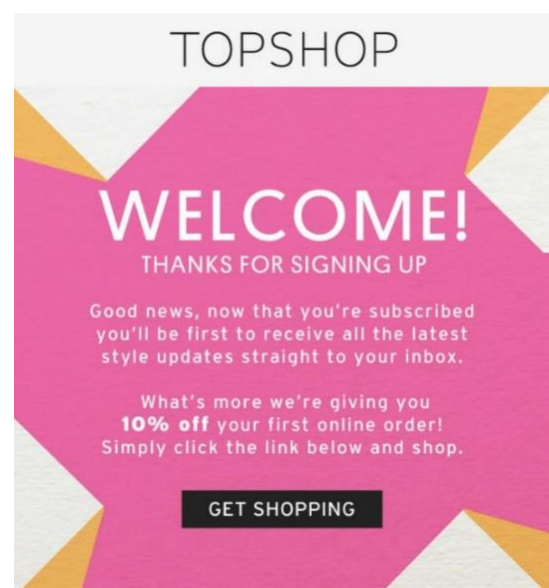


Figure 3. 1- Topshop welcome email, via TopShop

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## 2. Reminder Programs

Sending a reminder email is a great way to deliver important messages to the customer, it also keeps the company at the forefront of their mind so they're more likely to keep purchasing their products.

By sending reminders to people who opened the email but didn't click through and perhaps including an offer, the customer can be enticed to complete the purchase. If someone hasn't shopped a sale yet, sending them a reminder to take advantage of the free shipping or exclusive offers before they end, is a great motivator. [8]

A great example of this is Nissan, which collects the purchase date of their customers' cars, then automatically triggering a reminder email six months after the car was purchased to schedule the first service appointment. Maintenance fees after the car is sold account for a huge portion of Nissan's overall revenue, so this is an important part of their strategy. [9]

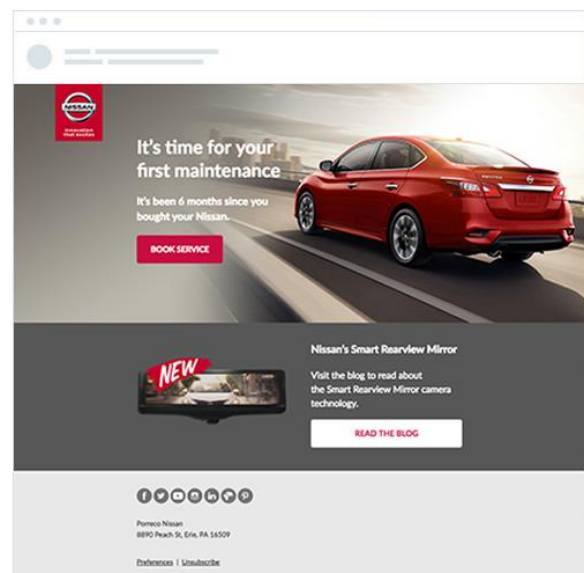


Figure 3. 2 - Nissan Maintenance Reminder email, via Nissan

## 3. Multichannel Programs

Creating multichannel marketing programs combining email, text messages, and social ads. To avoid spamming the customer, the same message isn't sent at the same time across all the channels. Planning and timing different campaigns together maximizes the company's reach without spamming the customers. [8]

Ride share apps like Uber and Careem employ this technique to reach their clients and notify them about promocodes or bundles or new services, first by sending a notification through the application itself, second by sending a text message, third by sending them an email.



Therefore, ensuring their customers sees their message and receives it positively.

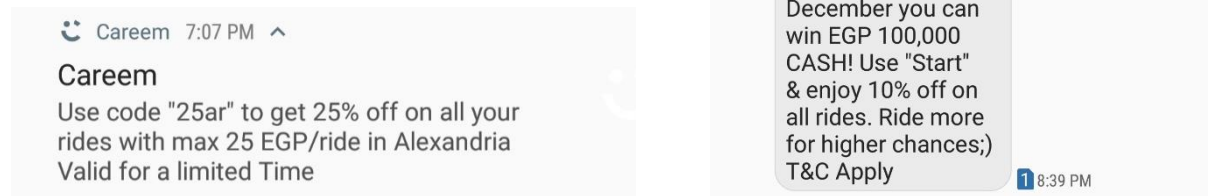


Figure 3. 3 - Careem Multichannel Marketing, through notifications and text messages

## 4. Win-Back Programs

Targeting customers after they've been inactive for a period of time to win them back.

If someone hasn't visited the site or made a purchase recently, companies can send them an email saying they miss them and recommend some products or fill them in on what's new since their last visit. If they've left something in the cart, send a reminder. Include other product recommendations in case that wasn't exactly what they were looking for. [8]

This is a strategy frequently employed by many companies including Otlob, a food delivery app, Amazon, and Souq. It is especially effective when used by Amazon owned companies given the level of personalisation of their recommended products.

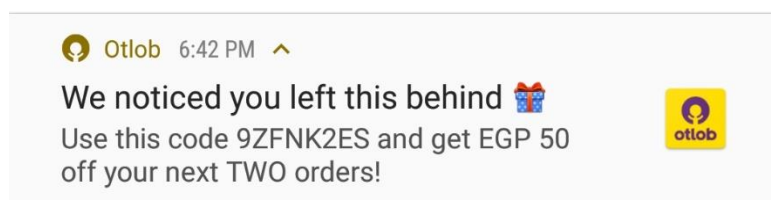


Figure 3. 4 - Otlob Win-Back Notification

## 5. Rewards Programs

Rewarding active clients regularly based on how much they spend, therefore binding them to the company, is a great strategy. [8]

Think Carrefour or Fathallah reward points program, or Shukran Cards.

## 6. VIP

Setting a VIP customers automated email chain is a great way to make them feel valued by the company through offering exclusive offers and discounts.

Sephora is a great example for this due to their VIB (Very Important Beauty) membership, earned after spending a certain amount of money at the store. VIBs receive emails notifying them of the exclusive VIB sales and the release dates of highly anticipated products. [9]

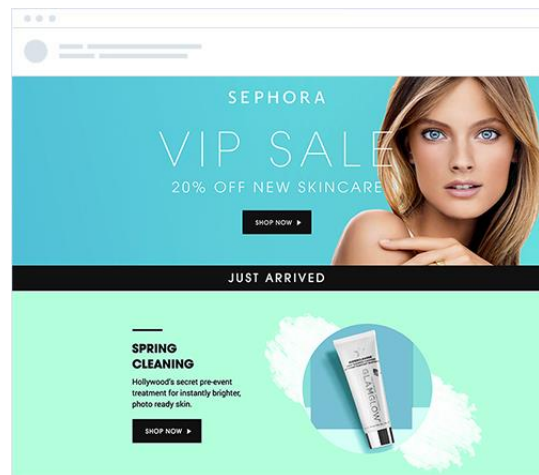


Figure 3. 5 - Sephora VIB Sale email, via Sephora

Another good example is Careem Gold, where customers who take more than 15 rides a month are considered VIPs and are more frequently sent promocodes.

## 7. Product updates & launches

Product updates and launches are an excellent way for a brand to reach out to their customers, and to notify them what's new. Marketing automation makes this a very simple process.

Like this email from Apple introducing the iPhone 8, sent out to Apple consumers who have previously purchased an iPhone in the past. [9]

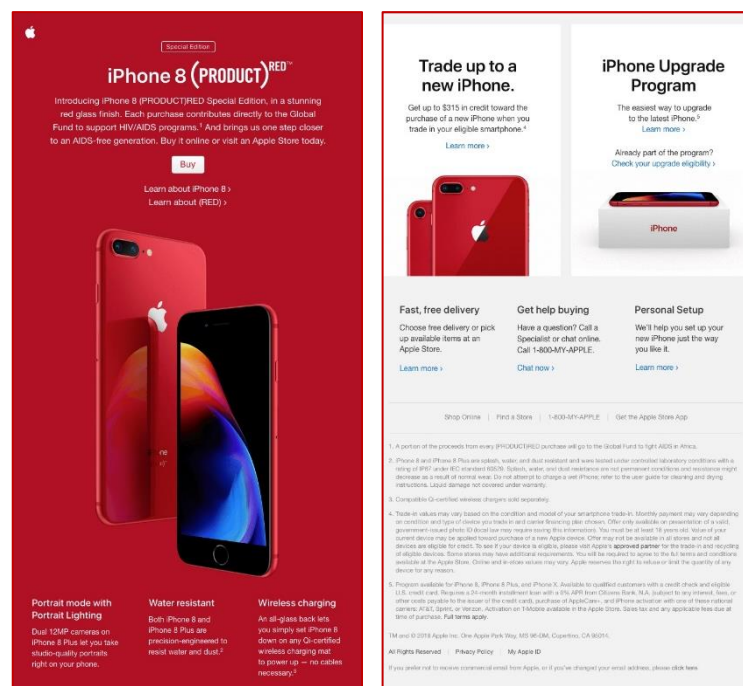


Figure 3. 6 - Apple's Iphone 8 Launch Update email, via Apple

## B2B Marketing Automation

B2B means business to business marketing. While B2B and B2C often have similar goals, they have unique approaches due to key factors like:

- The decision-making process
- Purchase frequency
- The customer lifecycle [10]

In most cases, B2B marketing automation handles tasks that would've gone overlooked or happened much slower if they had to be done by a live person. Using automated messaging and other automation tactics, the company can build relationships with prospects over time, helping them to get to know the company while proposing their products as a solution to their problems.



Figure 3. 7 - Difference between B2B and B2C Marketing, via WordStream

## Examples of B2B Marketing Automation Strategies

### 1. Automated Website Live Chat

A live website chat is a great way to capture leads that would be lost if they didn't have the option to ask questions and receive immediate answers.

Instead of employing someone to watch the live chat throughout the day and interact with customers, tools like Collect.chat give the customers a way to interact with the company automatically, connect with customer support reps if necessary, and learn more about the business and product. [11]

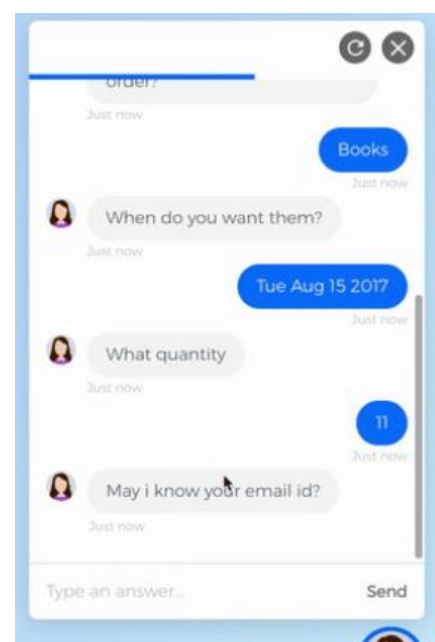


Figure 3. 8 - Collect.chat Widget

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## 2. Churn Reduction & Service Analytics

For any company with a monthly subscription for their product, churn is a serious issue. Churn is when a customer cancels their subscription. Reducing churn is essential to growing a stable, reliable revenue stream and growing the business overall.

There are a lot of reasons why customers cancel their subscription: They might not understand how the product works. Maybe they didn't find the product useful enough because they misunderstood some core functionality. Maybe they can't afford it, but they would be willing to buy it if its price was discounted.

By automating the process of asking questions to those that cancel their subscriptions, churn rate can be reduced in a hands-off way. This is a perfect example of tasks that are suitable for automation because handling this by-hand would be very time-consuming. [11]

An example of this would be Facebook's Deactivation Page, as they force the user to give a reason as to why they're deactivating before it allows them to, and it offers solutions for each reason.

**Are you sure you want to deactivate your account?**  
Deactivating your account will disable your profile and remove your name and photo from most things you've shared on Facebook. Some information may still be visible to others, such as your name in their friends list and messages you sent.

**Reason for leaving (required)**

- ☐ This is temporary. I'll be back. Automatically reactivate my account in 7 days
- ☐ I don't find Facebook useful.
- ☐ I spend too much time using Facebook.
- ☐ I don't feel safe on Facebook.
- ☐ I don't understand how to use Facebook.
- ☐ My account was hacked.
- ☐ I have a privacy concern.
- ☐ I get too many emails, invitations, and requests from Facebook.
- ☐ I have another Facebook account.
- ☒ Other, please explain further:

Please explain further

**Email opt out** ☐ Opt out of receiving future emails from Facebook  
Even after you deactivate, your friends can still invite you to events, tag you in photos, or ask you to join groups. If you opt out, you will NOT receive these email invitations and notifications from your friends.

**Deactivating Facebook does not deactivate Messenger**  
Your Messenger account will remain active unless you deactivate it from the Messenger app. Using Messenger will not reactivate your Facebook account. Your profile picture will still be visible in your conversations and people will still be able to search for you by name to send you a message. You will continue to appear to friends on Facebook in places where they can message you. [Learn More](#).

**Deactivate** **Cancel**

**I have a privacy concern.**

Please remember that you can always control the information that you share and who can see it. Before you deactivate, please take a moment to [learn more](#) about how privacy works on Facebook. If there is a specific question or concern you have, we hope you'll [let us know](#) so we can address it in the future.

Figure 3. 9 - Facebook Deactivation Page and an example of suggested action to avoid churn

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## IV. Promise vs Reality: Misconceptions about Marketing Automation

The promise of marketing automation is powerful personalized marketing like Amazon.com. Software that organizes a company's prospects data, then uses that data to provide those them with the right content and the right interactions at the right time to help close sales.

In this dream, the buyer gets a simpler sales process, one that has them in mind and doesn't ignore their needs, and the seller gets a cheaper and quicker sales process that results in better customers, somehow effortlessly. [12]

However, if it seems too good to be true, it's because it is.

The reality of marketing automation is that it's often misused, leading to underwhelming results.

Because of the popularity of marketing automation, a misconception has grown that marketing automation software can fix any decrease in marketing growth, including the need to generate new leads. This misconception leaves many marketers with complex tools to automate the middle of their funnel, but no solution for generating new leads to nurture in the first place. [13]

According to survey data gathered from G2 Crowd and Ascend2, two key observations have been made:

1. Results Don't Always Justify the Investment: marketers are finding that marketing automation often doesn't produce the results needed to justify the investment of time and money to set it up.

2. It's not used to its full potential: most marketers who invest in marketing automation become overwhelmed by the complexity of the software, so they don't fully set it up, and never take advantage of everything it has to offer. [12]



## Why do many marketers find problems with marketing automation effectiveness?

The previously mentioned surveys found that marketers found marketing automation tactics relatively ineffective for the effort they require, as illustrated in Figure 4.1. Why? Because many marketers mistakenly invested in this technology without building the marketing environment for it to deliver its best performance, lead awry by common misconceptions and myths.

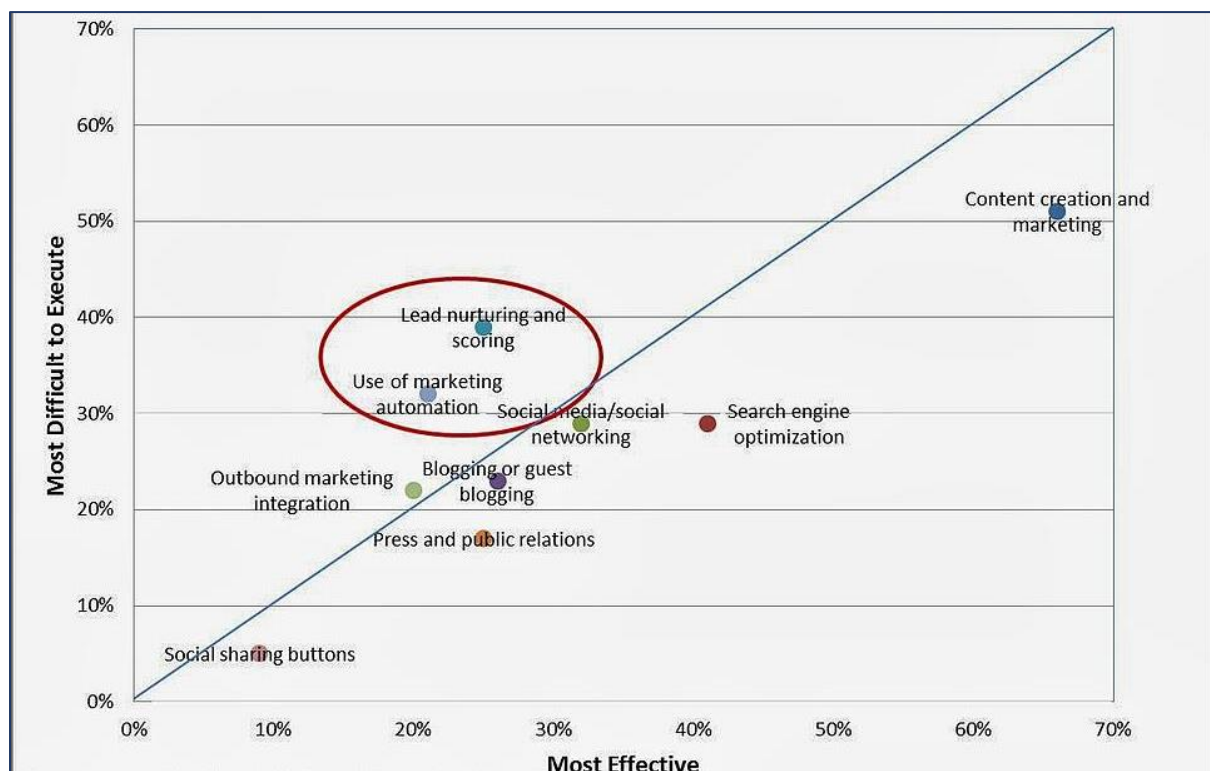


Figure 4. 1 - Effective vs Difficult, via Ascend2 and Research Partners, Inbound Marketing Report, 2013

## Effectiveness vs Difficulty

The first misconception is that marketing automation will act as the magical cure for lack of revenue. If a company sets up a marketing automation software before building up enough traffic and leads to automate, they're not going to get any value out of automated email sent to the small number of leads they currently have. The software would be much more effective if the company focused on augmenting the number of their leads. Marketing automation doesn't generate new leads, it simply streamlines the process.

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Many resort to tactics such as list buying to generate more leads to automate, which often doesn't work, for obvious reasons: People hate spam. Contacts that have no relationship with the company are unlikely to responding to a cold email.

This leads to a popular misunderstanding that marketing automation is essentially spamming people. While many choose to use (or more accurately, misuse) it that way, it doesn't mean it's the technology's fault. Spam is spam because of its irrelevancy, not because it showed up without warning in a customer's inbox.

Another common myth is that it's set up once then it's done. Marketing automation needs constant care and awareness for it to work effectively. Too many companies think they can let their automation do all the work. As established previously in this report, Marketing automation works as a supplement to the sales strategy, helping to set a plan for the path ahead. It's not meant as something that can be set and forgotten; it doesn't replace the marketer.

Moreover, customers are more likely to engage with the brands that engage back: if the company posting thought provoking content without responding to their audience's thoughts, all they're doing is provoking them. They'll then be more likely to ignore the rest of the company's content. [14]

Instead of investing to get a small improvement on a modest lead flow, it's better to put the time and money into top-of-the-funnel tactics like blogging and social media that can generate significant net new lead flow, then follow up with marketing automation that's part of an integrated marketing platform. [12]

Good marketing automation plays both sides of the coin, leveraging automation for what is needed, while responding to prospects and productively interacting with the audience. Automation is not the end-all-be-all of content publishing, yet it's an important way of supplementing the existing content strategy, reducing the workload and streamlining practices for better success with quality leads, not just an empty quantity. [14]



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## Limited Usage vs Full Potential

The other reason marketing automation was found to be ineffective is that it's rarely fully taken advantage of. Data from recent studies by Holger Schulze, Aberdeen, Winsper, and Gleanster indicates that many marketers are only implementing basic email functions in their marketing automation platforms. A summary of this data is illustrated in Figure 4.2. [12]

	Winsper	Gleanster	Aberdeen	Schulze	Average
Email	100	100	100	91	98
Nurture	80		63	93	79
Analytics	49		70	100	73
Landing pages	53	65	88	82	72
Scoring		57	56	73	62
Web tracking	29	82			55
Social	14	47			30

Figure 4. 2 - Survey Summary, 100 indicates the feature most frequently used

This can be due to two reasons; first is that most people are used to ineffective marketing (hence the comparison of spam and marketing automation), companies are unfamiliar with or unwilling to venture into other channels that can be utilized with marketing automation like social media, landing pages, lead generation activities, management activities, and much more. [14]

The second reason is a lack of research before investing. Once the company starts actually using marketing automation software, they realise how difficult marketing automation can be. Many marketers are finding the hours of setup and training required aren't worth it, so they limit their usage at email marketing. [12]

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## V. The Dos and Don'ts of Marketing Automation

The following are a few tips that should be considered as a company implements this new tool into their strategy. This will outline what should and should not be done with marketing automation. [7]

### **Don't automate current processes without first making sure they're effective.**

A great first step when integrating marketing automation into the marketing strategy is to automate everything the company already does. Nonetheless, one needs to first revisit their goals and make sure they're not executing strategies that don't make sense for their customers or prospects.

### **Do integrate marketing automation with inbound marketing strategy**

Inbound marketing is about providing valuable content that aligns with customers' needs and interests. Marketing automation should enhance the communication, as it can provide the content they need, at the exact time that they need it.

### **Don't blast or broadcast general messages.**

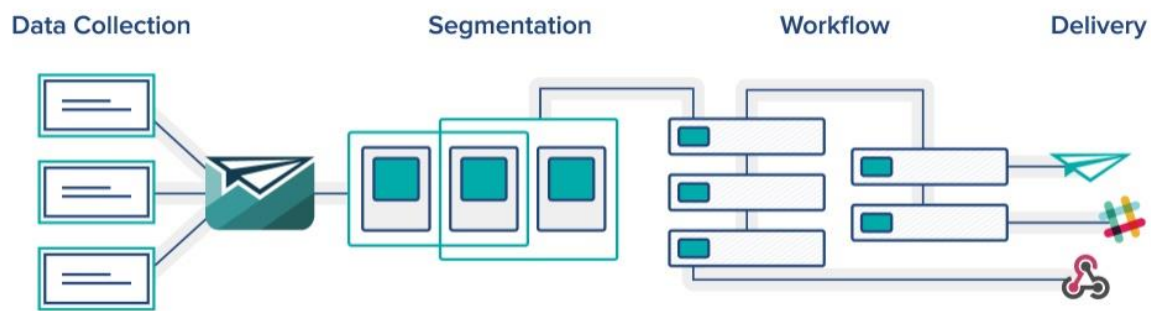
With marketing automation, there is no need to send a general, broad message to the entire contact list that will end up getting deleted because it's not relevant, when messages can be personalised messages and sent only to those who would be interested.

### **Do send personalised and specific content to a narrowed audience.**

Provide the content that people are looking for. With software like Customer.io, the company can send targeted messages to their customers, crafted based on how they interact with their business. It integrates with the company website or app and triggers actions by adding in predefined rules. Essentially, it makes personalized

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messages simple. Other features include A/B testing, conversion tracking, customer profiles, and in-context conversations. [15]



*Figure 5. 3 - How app data moves through Customer.io*

### **Don't forget about current customers.**

So many companies are focused on generating new leads and revenue, that they forget about their current customers: The group of people that already have an affinity for what they are selling, and most likely want to buy more.

### **Do set up customer engagement campaigns to keep current customers happy.**

It's much easier to sell to someone that has previously purchased from the company. Keeping current customers engaged is an essential piece of growing the company. Nurture those relationships by sending segmented, customer-only content, that will educate and encourage them to continue to come back to the company.

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## VI. Conclusion

### Can Marketing Automation Deliver What It Promises?

Marketing Automation is a great tool, but it's a sophisticated, complex technology, and it requires a high level of understanding. To avoid making the same mistakes other marketers have made, one needs to ask themselves the right questions before investing in marketing automation: [12]

- What's the goal of the marketing automation investment?
- Are all the customers they need to sell to in order to hit their revenue target currently in their database?
- Are they getting enough new leads each month for marketing automation to have an impact on their funnel? If not, what is their plan to generate those leads?
- What kind of marketing automation campaigns can their staff currently support? Are they prepared for the software setup, training, integrations, campaign planning, content development, and ongoing management required?
- Have they tested the marketing automation platform they're planning to use?

When the myths are disarmed, it's obvious that marketing automation is a great way to improve business. The company needs to be well versed in the best practices before they take it on—a step far too many businesses ignore. Marketing automation can be a fantastic tool to help a company nurture leads across multiple channels (not just email), then prioritize the right leads for sales to engage. [14]

But it's not a universal remedy, and it's not right for many companies; Marketing automation is just one piece of a greater puzzle, and it needs constant care in order to flourish.

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