# Marketing automation plan guide

## Project scenario

Friska is planning to launch a new line of deodorant products targeted at active individuals who value performance and sustainability. The company aims to leverage marketing automation to scale its campaign efforts and maximize customer engagement and sales. As Friska’s digital marketing analyst, you are in charge of designing an implementation plan of a marketing automation tool to support the development of a scalable marketing campaign.

## Step-by-step instructions to analyze the campaign’s information

### Step 1: Analyze the product details.

The new deodorant line includes a range of scents and formulations designed to provide long-lasting odor protection for individuals with active lifestyles. The products are formulated using natural ingredients, are cruelty-free, and cater to eco-conscious consumers. In addition, the deodorants are packaged in eco-friendly and recyclable materials.

Do you think the new product aligns with Friska’s target audience? Why or why not? Write your answer in the space below.

| ***New product audience alignment*** |  |
| --- | --- |

### Step 2: Analyze the target audience profiles.

The target audience profiles for Friska’s new product are as follows:

**Fitness enthusiasts:**

* **Age:** 25- to 40-year-olds
* **Demographics**: All genders, urban dwellers
* **Interests**: Fitness, sports, healthy lifestyles
* **Pain points**: Seeking effective odor protection during intense workouts

**Outdoor adventurers**:

* **Age:** 18 to 35-year-olds
* **Demographics**: All genders, nature enthusiasts
* **Interests**: Hiking, camping, outdoor activities
* **Pain points**: Needing long-lasting odor control in challenging outdoor environments

**Eco-conscious consumers**:

* **Age:** 20 to 45-year-olds
* **Demographics**: All genders, environmentally conscious individuals
* **Interests**: Sustainable living, ethical consumerism
* **Pain points**: Seeking natural and cruelty-free personal care products

Is anything surprising to you about the target audience profiles? Is there anything about the target audience profiles that you expected? Write your answer in the space below.

| ***Target audience insights*** |  |
| --- | --- |

### Step 3: Analyze the existing marketing channels.

Friska’s existing marketing channels include:

* **Website:** An e-commerce website where customers can browse and purchase products
* **Social media:** Active profiles on platforms such as Instagram, Facebook, and X, with an increase in followers
* **Email marketing:** An email list of subscribers who have opted in to receive updates and promotions from the company

What are the benefits of these marketing channels? Write your answer in the space below.

| ***Marketing channel benefits*** |  |
| --- | --- |

### Step 4: Analyze the campaign objectives.

Friska’s campaign objectives are:

* Increase brand awareness for the new deodorant line among the target audience.
* Drive website traffic and generate leads through effective lead generation strategies.
* Nurture leads and convert them into customers through personalized and automated email campaigns.
* Maximize customer engagement and loyalty through relevant content and personalized offers.
* Measure and optimize campaign performance based on key metrics, such as conversion rates, engagement rates, and revenue generated.

Do Friska’s campaign objectives align with its overall marketing goal? Why or why not? Write your answer in the space below.

| ***Campaign objectives*** |  |
| --- | --- |

## Step-by-step instructions to design the marketing automation implementation plan

### Step 1: Project objective and strategy

**Define the project’s objective**: What specific goals will the marketing automation implementation plan help to achieve? Examples could include increasing lead generation, improving lead nurturing, or enhancing customer engagement.

**Develop a high-level marketing strategy**: What is the overall approach to achieving the project’s objective? Examples could include personalized email campaigns, targeted social media advertising, or automated lead nurturing.

Write your answer to the two questions in the space below.

| ***Project’s objective*** |  |
| --- | --- |
| ***High-level marketing strategy*** |  |

### Step 2: Select a marketing automation tool.

Research and evaluate different marketing automation tools such as HubSpot, Marketo, and Pardot based on features, functionality, integration capabilities, and pricing.

Which marketing automation tools did you research? What did you discover about each tool that stood out? Write your answers in the space below.

| ***Marketing automation tools researched*** |  |
| --- | --- |
| ***Analysis of marketing automation tools*** |  |

Select the most suitable marketing automation tool for Friska based on the company’s specific needs and budget.

Which tool is most suitable for Friska? Write your answer in the space below.

| ***Chosen marketing automation tool*** |  |
| --- | --- |

### Step 3: Campaign planning

**Define the target audience for the campaign**: Who are the ideal customers for the new product line? What are their demographics, interests, and pain points?

**Develop buyer personas:** Create detailed profiles of the target audience segments to guide campaign messaging and personalization efforts.

**Determine the campaign channels:** Which marketing channels such as email, social media, or website will be utilized to reach the target audience? Identify the primary channel and its role in the campaign.

Write your answers in the space below.

| ***Target audience*** |  |
| --- | --- |
| ***Buyer persona #1*** |  |
| ***Buyer persona #2*** |  |
| ***Marketing campaign channel and its role*** |  |

### Step 4: Content creation and personalization

**Create engaging and relevant content for the campaign:** Develop compelling messages, visuals, and offers that resonate with the target audience.

**Personalize campaign content**: Identify ways to tailor the messaging and content based on buyer personas’ needs, customer preferences, and previous interactions.

Write your answers to the prompts in the space below.

| ***Engaging and relevant content #1*** |  |
| --- | --- |
| ***Engaging and relevant content #2*** |  |
| ***Tailoring messages*** |  |

### Step 5: Workflow automation

**Identify key campaign workflows**: Map out the automation workflows and sequences that will be used to nurture leads, deliver personalized content, and track customer interactions’ metrics.

**Define automation triggers and actions**: Determine the specific triggers such as form submissions or email opens that will initiate automated actions such as sending follow-up emails or assigning lead scores.

Write your answers to the two prompts in the space below.

| ***Campaign workflow and sequence*** |  |
| --- | --- |
| ***Automation triggers and actions*** |  |

### Step 6: Data integration and analytics

**Determine the data integration requirements:** Identify the necessary integrations with CRM systems, email service providers, or other relevant internal marketing, finance, and sales tools to ensure seamless data flow and campaign tracking.

**Define key performance indicators (KPIs)**: Determine the metrics that will be used to measure campaign success such as conversion rates, engagement rates, or revenue generated.

**Develop a reporting and analytics tracking framework**: Outline how campaign data will be collected, analyzed, and reported to assess the effectiveness and optimize the campaign.

Write your answers to the three prompts in the space below.

| ***Data integration requirements*** |  |
| --- | --- |
| ***KPIs*** |  |
| ***Reporting and analytics tracking framework*** |  |

### Step 7: Create a presentation for stakeholders.

Now that you have gathered and analyzed data, you are ready to develop your marketing automation plan to share with stakeholders. Download the [Marketing automation plan slides template](https://docs.google.com/presentation/d/1k4J1BBrR1-HCc7lWqU64y2chXTB5tYkRE8uCXMJh5mk/copy#slide=id.g298dc039146_0_299) to organize your plan and findings for each step under *Step-by-step instructions to design the marketing automation implementation plan.* Customize each slide as if you were going to present it to stakeholders. Include additional slides where needed. You can add speaking points to the notes section and even practice giving the presentation to stakeholders by speaking out loud. This will help prepare you for when the time comes to present a marketing automation plan for a real product.

When you’re ready, go back to [the assignment](https://www.coursera.org/learn/advanced-tools-for-digital-marketing-analytics/assignment-submission/JKDIU/marketing-automation-plan) to complete the reflective questions.