



# MARKETING AUTOMATION FOR B2B

10 Best Practices Every Marketer Should Know and Use



# INTRODUCTION

## WHAT IS MARKETING AUTOMATION?

Marketing Automation refers to the process of automating a number of recurring tasks, with the aim of managing a high number of potential customers, identifying those who are most likely to engage further, and applying various tactics to increase their likelihood to convert. The term lead nurturing is often used interchangeably with Marketing Automation.

Marketing automation has entered the mainstream of marketing activity and companies of all sizes are taking advantage of the possibilities it opens up. There are many factors that drive this, with the most important being:



The need to deal with thousands of visitors and potential customers in a time and cost-effective way



The emergence of new and more sophisticated marketing software



The explosive growth of ecommerce



**AUTOMATION  
HUMANIZES MARKETING**

One of the most paradoxical facts about automation is that it humanizes marketing, as it allows practitioners to segment and initiate conversation with those who are most likely to become customers. That is the reason why so many businesses and professionals that have tried it agree on one thing: **it works!**

Unfortunately, many business professionals feel discouraged to try marketing automation, because they fear it requires a high degree of technical knowledge. The rise of new software has created a number of products, which are easy to use, even by experts lacking coding skills. However, those interested in trying lead nurturing still need to know how to structure their efforts in the most productive way.



This is where this whitepaper comes in. Its purpose is to present the foundational practices that assist professionals interested in automation, to get started without missing any of the basics. By using the techniques described here, marketers will find it much easier to achieve higher [return on investment](#) (ROI) for their campaigns.

Some of the best practices need to be implemented even before the marketer starts thinking about a campaign.

## BEST PRACTICE 1

### **There is enough traffic to feed the automation engine**

Marketing automation is an exercise in improving the performance of the middle of your funnel.



Before marketers start putting time and money into automation, they must be sure they have enough traffic at the top of the funnel. Lead nurturing campaigns can be costly, as they require investment both in human management time and automation software.

Without enough engagement to feed the automation engine, obtaining any positive impact from it will prove challenging. Moreover, by running it on a limited audience, marketers risk deriving the wrong conclusions about what works, because of the skewed results seen from working with a limited group of people.

## BEST PRACTICE 2

### **There is buy-in from management (including investment)**

It is crucial to get buy-in from management before a company engages in any automation activities. Without support and attention from senior management, automation will be treated as a side activity, which comes after other, more important tasks.

In order for this practice to be effective, various departments of the company need to be involved in it. Cooperation between marketing and sales, as a minimum, is crucial for the success of marketing automation.

Before starting on automation, marketers also need to have a good understanding of the basics. One of the best practices is to appoint an Automation Champion – a person who is educated on both basic and more advanced topics and techniques, and who is responsible for making decisions and pushing automation to the foreground of company operations.



That **Automation Champion** could also be responsible for researching, building up the case, and even making the decision on what software package will be used. Of course, different parts of the company need to participate in this process, as the selection of software will have an impact on other systems already in place (we cover more of this in Best Practice 4).

## PART II

## BUILDING BLOCKS OF AUTOMATION STRATEGY

A study\* by software provider SharpSpring shows that almost half of all digital marketers identify creating and implementing a robust strategy as the biggest challenge in marketing automation.

Creating a grand plan is a must when engaging in lead nurturing. All the time spent in this stage will be repaid in the form of better results and higher ROI from all automation activities.



\*All studies mentioned throughout the text can be found in the "Further reading" section at the end of the document.

## **BEST PRACTICE 3**

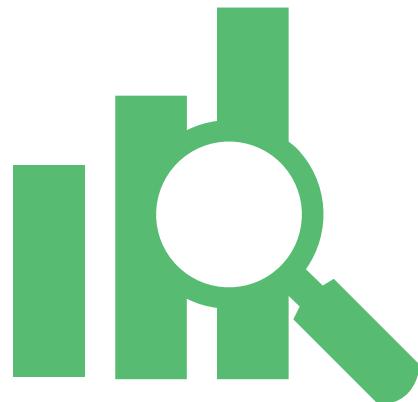
### **Having superior knowledge of the customer base**

The planning process starts with segmenting the existing customer base, in order to understand what groups of customers need to be targeted. For different products and services there are various types of clients, which require tweaks in the marketing strategy.

The essence of marketing automation is to have a conversation with the potential customers, based on their true individual interests and needs. This is achieved through the use of personalization, which will be covered in more depth in the following pages. However, the first step in applying this technique is to find out what groups (or segments) exist among the target audience.

#### **Marketing Personas**

Marketing personas use the information derived from the segmentation research. The goal of this exercise is to create a fuller and more realistic picture of the person targeted by the marketing automation campaign. When creating personas, marketers should strive to flesh them out as much as possible.

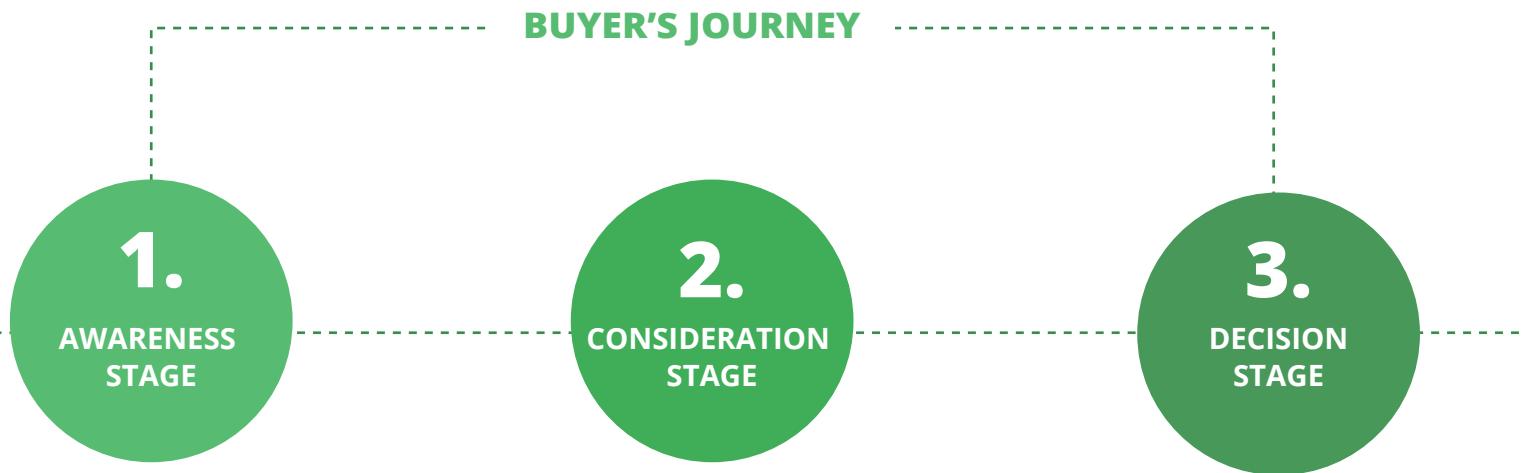


Existing customers are a good starting point for creating marketing personas. The information known about them can be complemented with customer interviews in order to draw a more detailed picture.

# WHAT IS A MARKETING PERSONA?

Marketing Personas are fictional characters that portray target customers. In a B2B environment, most often this is the person on the other end of the relationship, who has the responsibility of direct influence on making the decision to buy a product (or service).

Skilled B2B marketers look at who their key decision makers are and use information about their job positions, their seniority at the target company, their demographic data, their goals, pains, values, and fears. Based on all this they create an actionable portrait that not only includes basic information, but can also help make informed decisions on best ways and topics to influence and convert that target customer.



Another essential piece of information that business professionals need to know is what the buying process looks like for their customers. This allows them to consider what would be the best content to serve their customers at each stage of the automation process.

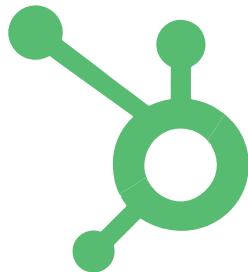


Having a good understanding of who their potential customer is allows marketers to offer a high level of customization and relevance to the leads they are working with in the marketing automation stage. This improves the chances of success of the automation campaign.

## ■ BEST PRACTICE 4

### Using relevant data and high degree of integration

Before marketers start using automation techniques, they need to audit and update their databases, to make sure they include only the most reliable information about their customers. The best professionals are very conservative with their data, removing obsolete entries and verifying they have permission to send messages to each entry on their list.



**ACCORDING TO HUBSPOT,  
MARKETING DATABASES DECAY  
NATURALLY AT THE RATE OF  
22.5% EVERY YEAR**

This not only prevents issues with deliverability and being labeled as SPAM, but also has the potential to improve key metrics, such as conversion rate and ROI, saving automation experts time, money and effort by allowing them to focus only on the leads that are most likely to be susceptive to their campaigns.

Bringing in information from external sources (such as social media), where possible, is also important. Depending on the context, such information can improve the knowledge about the target customer (going back to the previous chapter and the use of tools such as Marketing Personas) or give signals about the passing of a potential customer from one stage of the Buyer's Journey to the next.

Another essential step is to integrate existing solutions (Customer Relationship Management, Content Management System, etc.) to the automation tools used. This will, save time and ensure smooth cooperation between the teams responsible for lead nurturing and those who take over in order to convert



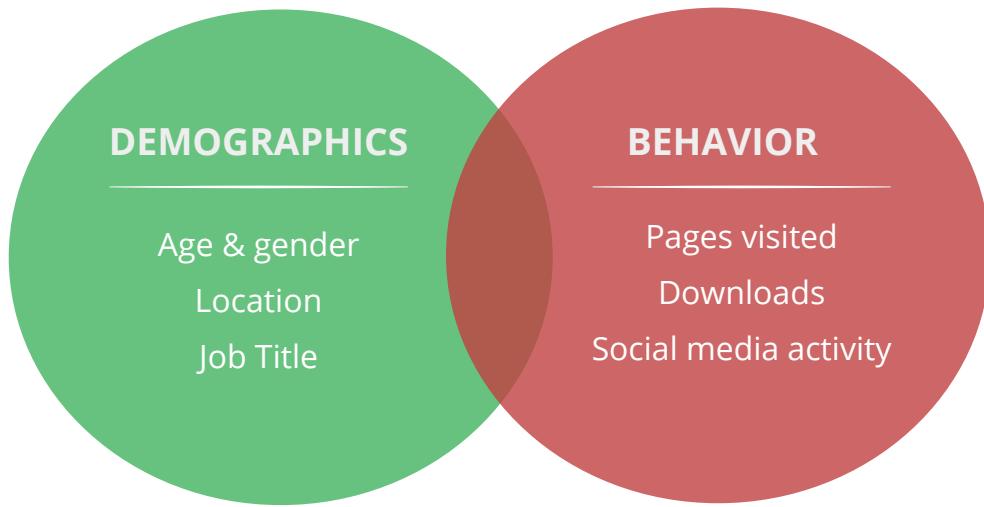
leads into paying customers.

## PART III **RUNNING MARKETING AUTOMATION CAMPAIGNS**

Marketing automation gives experts the chance to play with many small details, which can have impact on the final results. Before engaging in fine-tuning, however, it is imperative to know the most important aspects of running an automation campaign.

### **BEST PRACTICE 5** **Automation campaigns feel human and personal**

All the hard work marketers do in the early phases of their automation activities allows them to align their campaigns to the target customers. The most sophisticated professionals combine demographic data with behavioral input (i.e. how their leads interact with the brand across different channels) to understand what content would be most relevant.



Personalization is another important point, which should not be forgotten, when planning a campaign. Segmentation, and the information they have on customers, allows marketers to customize many aspects of the campaigns, including messaging, tone, content, etc. This creates a feeling of humanness in the mind of the audience and helps marketers fulfill the goal of starting a relationship with those who are most likely to become clients. Here is an example of personalization in action:

Hello Mark,

Thanks for downloading “Marketing Automation for B2B: 10 Best Practices Every Marketer Should Know and Use”. I hope that after reading it, you’ll have clearer understanding of what basic principles every lead nurturing program should follow.

If you are interested in learning more about winning new customers, check out this case study and see how an e-commerce company we worked with improved their lead generation rate by 158%:

[DOWNLOAD the case study](#)

Use of customer data and info about previous interactions helps build rapport.

Content offered is relevant to customers interests and stage in buyer's journey.

Clear, simple and compelling call-to-action.

I hope you find this resource useful. Also, please feel free to reach out if you have any questions.

Best regards,



**Alexander Kesler**

Founder and President

Office: [+1 \(617\) 965-0800 x800](tel:+1(617)965-0800x800)

[www.inSegment.com](http://www.inSegment.com) | [kesler@insegment.com](mailto:kesler@insegment.com)

**inSegment, Inc.**

300 Washington Street, Suite 850

Newton, MA 02458

Sender info is personalized and gives enough information if the reader wants to get in touch.

## **BEST PRACTICE 6**

### **Using more than one channel**

Too many marketers still think that automation equals email. However, the most advanced platforms give you the opportunity to engage and communicate with your audience across many channels and this should not be overlooked.

To take full advantage of the opportunities created by automation, marketers need to use all chances to engage with their audiences, including social media and conversations occurring on their websites.



## **BEST PRACTICE 7**

### **Knowing what information is needed and how to get it**

Before engaging in lead nurturing, marketers need to gather enough information on their leads, which will allow them to complete the nurturing stage effectively. The best experts in the field know the exact amount of information they need before they start and have everything necessary to collect it in place.



## Collecting Information

One of the best techniques is progressive gathering. Instead of asking the customer to provide all the information wanted in one go, it is collected gradually, during each successive interaction. This creates much less friction, thus lowering the frequency of customer abandonment (i.e. leaving the site without submitting information).

### Tools to collect

Knowing what information is needed allows automation experts to prepare landing pages, forms, email copy and other materials required to engage in data gathering.

There is a plethora of research-backed resources on best practices for each of these topics, so marketers do not need to reinvent the wheel when working on these assets.

## BONUS BEST PRACTICE: ASK EXPLORATORY QUESTIONS

Another good idea is to collect not only relevant demographic data, but also to ask questions, which help discern where in the buyer's journey each lead is. This practice helps place leads in the correct stage of the nurturing efforts, based on their current stage and needs.



## **BEST PRACTICE 8**

### **There is an inventory of high-quality content**

Content is the currency of marketers when it comes to automation. Collecting the highly coveted information of potential customers is subject to providing, in exchange, a stream of high quality and relevant resources.



Developing the content inventory should go hand in hand with the effort to create landing pages, email copy, and other collateral.

It is also very important to tie the offered content to the target audience, based on what is known about their background and stage in the buyer's journey. For example, a potential customer in the awareness stage is usually researching ways to fulfill identified needs, so she would require resources to educate herself: e-books, whitepapers, and research findings are all relevant content types to serve the prospect. On the other hand, someone in the decision stage is usually comparing available solutions – so feature tables, case studies, and comparison sheets will be much more useful to that lead in that stage of the cycle.

## **PART IV**

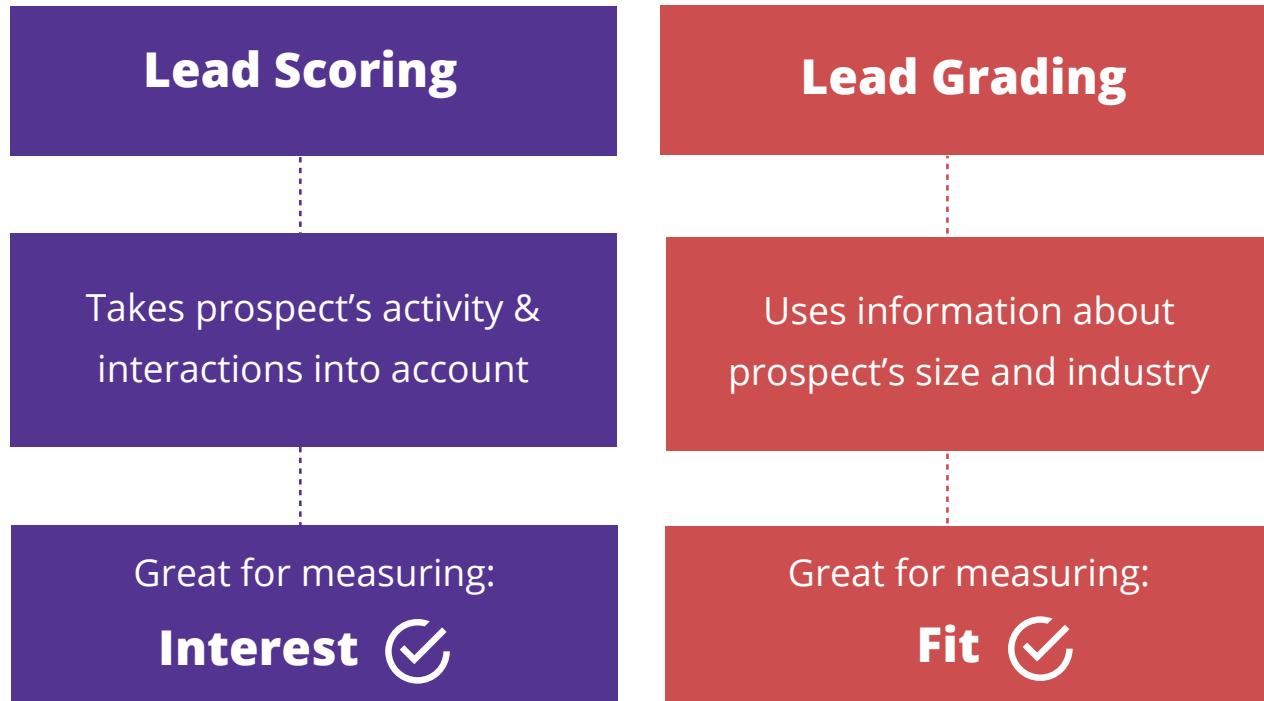
## **MAKING THE BEST USE OF MARKETING AUTOMATION**

The big aim of marketing automation is to create leads, which are ready to become customers. In order to do this, marketers need to devise automation strategies, which include systems to classify and evaluate the level of preparedness of a lead.

Similarly, marketers also need to devise evaluation frameworks for their campaigns in general, so they can measure what works and what needs to be improved.

## BEST PRACTICE 9

### Using lead scoring and grading



One of the advanced aspects of marketing automation, lead scoring and grading is the bridge that connects marketing and sales.

#### Lead scoring

A scoring system enables marketers to assess how prepared a lead is to be sent to sales and be converted into a paying customer. Points are assigned based on behavioral data (actions taken) with a certain aim to be reached before a visitor is passed on to the sales team.

Negative points can be assigned to certain leads that are not likely to become customers, in order to avoid wasting time on them, no matter how many steps in the nurturing process they complete.

Creating a robust scoring system can be a challenging task, but it pays off when an equilibrium is found. Again, it allows both marketing and sales to focus only on the leads with the highest potential, thus increasing ROI.

## Lead grading

While lead scoring allows marketers to evaluate the readiness of each lead to be sent to sales, grading can be used to segment leads into different bands, based on how attractive each lead is to the business that is working on converting it into a customer.

When used together, lead scoring and grading allow managers to quickly identify those leads who are a) the best fit to their business; and b) in the highest level of readiness to be sent to sales for closing.

## Lead recycling

Sometimes leads are sent to sales prematurely. In this case, it is important to have in place a procedure for a prospect to be returned to marketing for "re-nurturing". In such cases, a review of the scoring framework should be conducted in order to optimize the scoring mechanism if possible.

## BEST PRACTICE 10

### Continuously analyzing and improving

When doing marketing automation, it is very important to collect as much information as possible about the way prospects use the content provided. This includes adding tracking information to your website, in order to measure the performance of various campaigns, and analyze what works and what does not.

Along with this, automation marketers also need to test and experiment every possible detail of their campaigns – headlines, calls-to-action and so on.



## Measuring success

There are many ways to decide whether a campaign has fulfilled its purpose. What metric a business chooses to measure success depends above all on the goals set for the marketing automation strategy.

For example, if the goal is to raise awareness about a product/service – the open rate and click-through rate (CTR) for the automation campaigns will be the most relevant metrics. On the other hand, if the goal is to produce new revenue flows, then conversion rate will be the key indicator to look at.



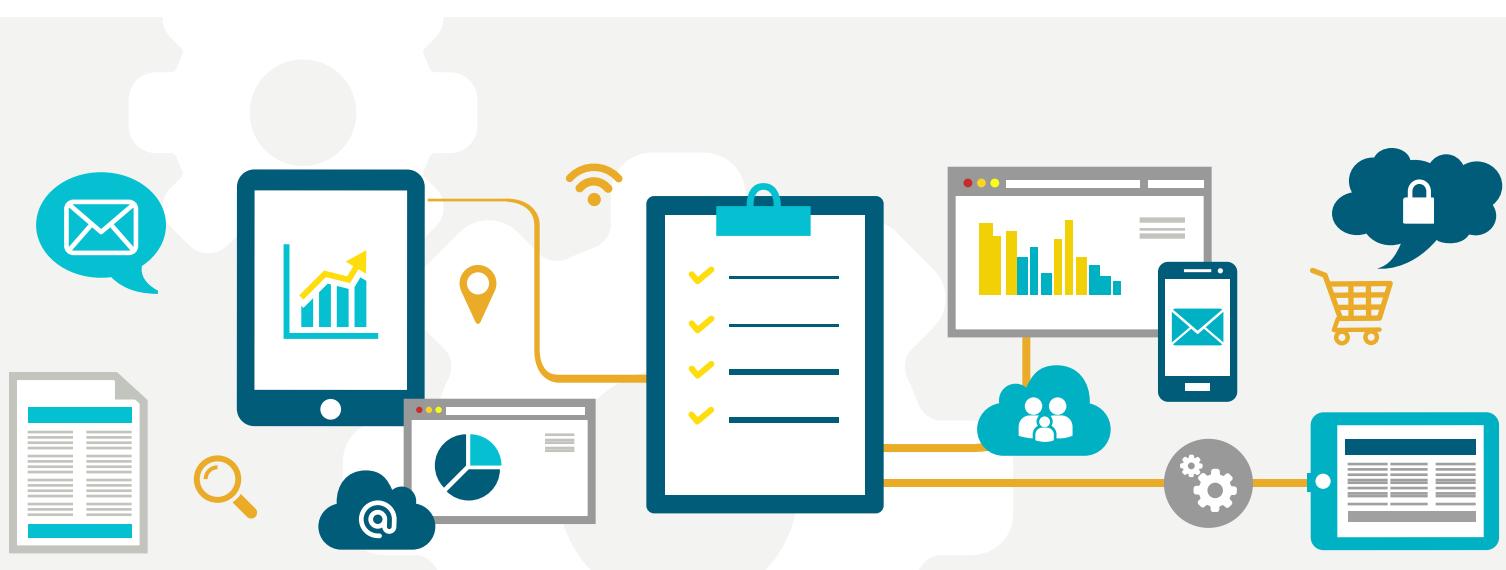
# CONCLUSION

The proliferation of marketing software and resources has made lead nurturing available to businesses of all sizes. Those who were quick to take advantage of it have already seen the benefits it can create. However, the investment automation requires, in terms of both time and money, makes it imperative that marketers spend time learning and applying the best practices in the field.

As with any other segment of marketing, those who apply a structured approach to their automation efforts see the biggest returns from them. This process starts with getting management on board, setting aside company resources, spending time getting to know the target audience, and strategizing how to reach it.

In the application of the chosen strategy, automation experts get personal with their audience and make sure they have enough quality content to nurture leads into getting them ready for closing by sales teams.

Finally, the most productive experts spend a sizeable amount of time analyzing and testing each aspect of their campaigns, in order to find ways to improve them.



The boom of content marketing and the increasing sophistication of software are clear signals that the use of automation will continue to grow. There has not been a better time for companies of any size and industry to take advantage of the possibilities this technique opens up.

If you are interested in marketing automation and would like to explore the ways it can help your business, please do not hesitate to get in touch with inSegment. We would be happy to provide advice and help you get started with your first automation campaign. Please contact us at [info@inSegment.com](mailto:info@inSegment.com).

## FURTHER READING



We have collected a number of resources that can help you delve deeper into the subject.

### An Introduction to Lead Nurturing

HubSpot

[Download here](#)

### Marketing Automation eBook: Best Practices for Marketing Excellence and Operational Efficiency

SilverPop

[Download here](#)

### Mastering the Art of Marketing Automation

Pardot

[Download here](#)

## ALEXANDER KESLER BIO:



Alexander Kesler is a visionary B2B digital marketer and has been practicing in the fields of technology, software, education and digital security, among others, for over 15 years. As the Founder and President of inSegment, Alexander leads a team of digital marketing experts and specializes in the areas of B2B Lead Generation, Content Marketing & Syndication, SEO & Paid Search, Conversion Oriented Web Development, Programmatic Media Buying and Direct Response Marketing.

## LET'S GET IN TOUCH!

**OFFICE:** +1 (617) 965-0800x800

**EMAIL:** kesler@insegment.com

