

Guide & Workbook

PLANNING FOR MARKETING AUTOMATION



PREPARED BY
Marketing Copilot®

 **marketingcopilot®**
Find Customers. Keep Customers.



To be successful with marketing automation today and achieve digital transformation for the future, you need to:

1 ASSESS

- Are you ready for Marketing Automation?
- Do you have the data required to succeed?
- Do you have the content to back it up?

2 EVALUATE

- Determine what Marketing Automation tool is best suited for your business.

3 PLAN

- Build a plan for Marketing Automation Success.

ASSESSMENT #1:

Are you ready for Marketing Automation?

For each category, select the appropriate number. If you strongly agree, choose 5. The numbers between 1 and 5 correspond to your level of agreement, neutrality, or disagreement.

ASSESSMENT CRITERIA	SCORE				
Our revenue process is complicated. It involves multiple touches from marketing and/or sales with a prospective customer.	1	2	3	4	5
We understand that buyer behavior has changed and our target market wants several types of content to help them research and self-serve before they contact sales.	1	2	3	4	5
Our company requires more insight into the exact value that our marketing programs deliver so that we can quantify our investment.	1	2	3	4	5
Our customer base is larger than our sales team, so we can only develop personal relationships with a small percentage of the marketplace.	1	2	3	4	5
Many of our new leads aren't ready to buy from us the first or second time they meet us. They require nurturing.	1	2	3	4	5
We would reduce our cost of sales if we could develop other means of nurturing relationships with early stage prospects other than through sales team follow-up.	1	2	3	4	5

Data, not opinion, drives every decision we make in marketing.

1 2 3 4 5

We have the ability to generate personalized content for segmented prospects and schedule through auto-responders.

1 2 3 4 5

Our management team understands that 60% of the sales funnel is happening in the digital space and they allocate and plan for programs to support that new reality.

1 2 3 4 5

We realize that digital marketing is not a campaign, but a process and we are prepared to use marketing automation as a way to test and evolve our program, not just automate it.

1 2 3 4 5

Our customer base is larger than our sales team, so we can only develop personal relationships with a small percentage of the marketplace.

1 2 3 4 5

TO INTERPRET YOUR RESULTS, TALLY YOUR SCORE.

If you scored > 35, you're ready for marketing automation as a lead management tool.

If you scored 20 to 35, you're moving in that direction. You should consider confirming your lead management process and deciding how you could improve it by automating certain stages.

If you scored under 20, you may not be ready. But that doesn't mean you can't keep working to improve your lead management program.

Regardless of your score, there's good news: where you are now is exactly where you need to be in order to get more leads, get better leads and know how to develop content that helps a prospect in the sale process.

ASSESSMENT #2:

Data Collection Template for Marketing Automation Launch

Your answers below will determine your company's preparedness to launch marketing automation and will assist in ensuring you choose the correct tool to meet your goals.

DATA READINESS

BEST PRACTICE

Compile through current stats, how many leads you need to generate a month to hit your revenue targets for the year?

Many companies do not have clear goals established before embarking on marketing automation. In order to calculate roi, you need these numbers.

READY? YES / NO

How much are you spending to generate each lead? Gather dollar values.

If you don't have a ball park idea of what it costs to generate a lead in your business, you won't be able to budget or calculate roi on an investment.

READY? YES / NO

Collect your benchmark data in google analytics. How does the site perform today so you see results in 90 days.

Before looking at a new system, see what google data is telling you about how your web presence performs today. Benchmark that as before/after marketing automation.

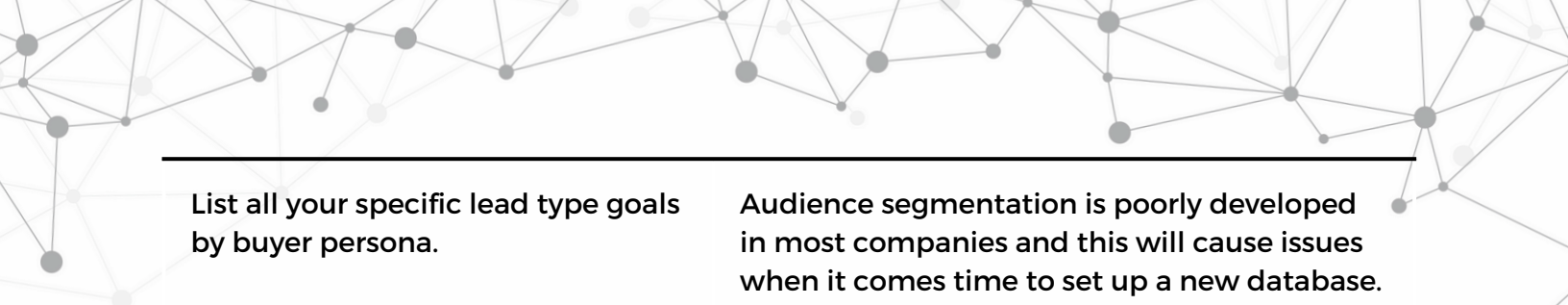
READY? YES / NO

Create your ultimate marketing dashboard. What data does management need to assess every 30 days to determine if marketing is performing?

You can't expect an ma tool to magically create the perfect management report without deciding what data they really need to measure results.

Do this before setting up software.

READY? YES / NO



List all your specific lead type goals by buyer persona.

READY? YES / NO

Audience segmentation is poorly developed in most companies and this will cause issues when it comes time to set up a new database. Get your map built for this data before setting up the system.

Document all your buyer personas.

READY? YES / NO

Much of the lead tracking that exists in an MA tool allows you to do lead scoring and track various types of visitors.

If you don't have a clear lead definition or understanding of the stages in the sales process, this becomes a wasted option in an MA tool.

Create a marketing automation roadmap by audience type and requirement.

READY? YES / NO

One of the great things about an MA tool is that you can send different campaigns to different groups within your list and learn about what type of content matters to them. If you just have a "big list" without knowing who's there and what stage of the buying process they are at, you are wasting this functionality.

Develop a 6-month content calendar for testing purposes.

READY? YES / NO

If you are not currently sending content and tracking it, you don't need MA yet, you need an email marketing platform. The best way to get an MA tool working is to develop a solid plan of customer-centric content you can map to the system and test.

'YES' RESULTS

If you answered yes 10 or more times, then you have what you need to hit the ground running. If you answered yes less than 10 times, you may need to collect some data before you decide on software **to ensure you are fixing the right problems in your marketing function.**

ASSESSMENT #3:

Content Audit Checklist

Marketing automation software is designed to add a layer of automation to your lead generation, lead nurturing and site behavior analysis activities. It is designed to save your marketing and sales team time, minimize the chances of leads failing through the cracks, automate lead nurturing processes and increase your lead conversion rate.

HERE'S THE PROBLEM...

Many companies lack the content required to map the customer journey properly into their marketing automation software. They not only don't have the right content but often are unsure about what they even need to set it up properly.

Marketing automation is not a glorified email marketing platform. It is a tool to guide the buyer through a series of steps based on their buying requirements that you can track and measure over time to understand if they are a sales-ready lead. Use this checklist to review how you are currently approaching the marketplace and what content exists in your business today.

REQUIREMENTS	BEST PRACTICE
☐ Value to Customer: You have product/ service proof points to prove the value you bring to customers.	Sometimes this comes in the form of a case study, but you have proven installations of your product or service in which a client agrees that there was a quantifiable outcome to implementing something.
☐ Ease of Use: You can articulate how your product/service simplifies the customer's business.	How someone will use your product/ service and the business benefits they derive is more important than what it is.
☐ Proof of Value Proposition: You have documented proof points that indicate the value you stated was delivered.	If you state, "we can save you 30% per year in your business because of the efficiency of our product or service," you need to be able to prove it and have a customer confirm it.

☐ Integration to Customers' Business: You have a documented explanation of how the product/service integrates into a customer's business.	Sometimes we call this the "before and after" document. Before our customer did "this". After we implemented our product or service, the customer now does "this".
☐ Ease of Installation: Your installation procedures are clear or you have documents outlining what a customer does "day one" when working with you.	People forget that after they sell something, it needs to be delivered. Not being able to paint a clear picture of "what happens next" is often a stumbling block in buying a product or of a service.
☐ Ease of Support: You have a clear definition of how you will support a customer during the lifecycle of the product/service.	When people are looking to buy something or hire someone, they want to understand how they will be supported after doing so. This is often a point they want to understand before they call a sales rep.
☐ Features and Functions: There is a clearly defined set of features or services you offer when a customer "buys" something from your company.	We call this the "offer" and it is a specific outline of what a client gets when they write you a cheque for something.
☐ Customer Testimonials: You have references to use in the marketing and sales process that will vouch for your value and can be used in written material.	If you are a new entrant in the marketplace, credibility matters.
☐ Pricing Model: You have a clear pricing structure, or ranges that indicate what you get paid and can publicly state this pricing model.	Once a prospect is engaged and thinks you can help them solve their problem, the next question they ask is, "how much?" When you provide the answer in writing, it can be a powerful tool to help you qualify people quickly either in or out of the sales process.

☐ Clear Sales Process: You have documented the steps in the sales process with a confirmed lead definition and qualification process.	Most companies rely on their network to generate interest and have not clearly defined how they sell or who they sell to. This makes it very hard for someone else to sell on your behalf, including new sales reps to your company.
☐ Lead Generation: You have a clear delineation between mild interest and a confirmed, sales ready lead with metrics and tracking that can be shared between sales and marketing.	Many companies do not delineate between where marketing ends and sales starts. There is often confusion about who is responsible for what, the honest definition of a sales-ready lead, and how many are required to hit the revenue forecast.
☐ Sales Pitch: You have a documented sales pitch that has been tested with prospects and proven to close deals.	Many people start their pitch with “what they do” making it really hard to get traction. You have to start with the problem you solve that is compelling enough for someone to stop and listen.
☐ Market Segmentation: You have a clear definition of who fits best and why, and you know where they are and how to reach them.	SMB is not a segment nor is one or more industry verticals. A segment is a group of well- defined people that your product or service perfectly fits. It must be focused or you won't have resources to properly target. Being everything to everyone will lead you to be nothing to no one.
☐ Competitive Analysis: You have a list of competitors or alternatives that people would buy instead of your product or service.	Don't forget that along with companies that look like you, there are other ways to solve a business problem. Do you have a deep understanding of the many ways to do something and what alternatives you come up against most?
☐ Competitive Analysis: You have a list of competitors or alternatives that people would buy instead of your product or service.	Don't forget that along with companies that look like you, there are other ways to solve a business problem. Do you have a deep understanding of the many ways to do something and what alternatives you come up against most?

☐	Collateral Materials: You have organized, branded documents that are used in the sales process clearly defining your product/service.	Many companies start their marketing program by creating product information. What do you have so far and what is outstanding to create?
☐	Support to your Distribution Channels: You have a defined process and documentation for people selling on your behalf.	If someone wanted to pass you a lead, what would the process be and do you have documentation that helps someone else sell on your behalf.
☐	Channel or Partner Strategies: You have identified people who can help you sell by referring you or reselling your product or solution.	Many people forget that a website is also for all of the people that exist outside your company that could assist in the lead generation process. How good are your materials or website in helping third parties with this process?
☐	Product or Services Training: you have training that you offer to new customers to ensure adoption of your product or service.	Training material is hard to create but powerful once developed. It confirms the level of sophistication of a company.
☐	Sales Training: You have documented and offer to new reps, training with respect to who to look for in the marketplace and what to say when you find them.	If you can't teach new people how to sell your product or services, you likely don't know who you are selling to or why.
☐	Sales Expansion: You have a vision and strategy for where your next target market will evolve once you get traction in the market you are now serving.	Understanding where the next group of prospects may come from is important to understanding if your value proposition is resonating with the market.

TOTAL:



How did you do?

0-9 = STAGE 1:

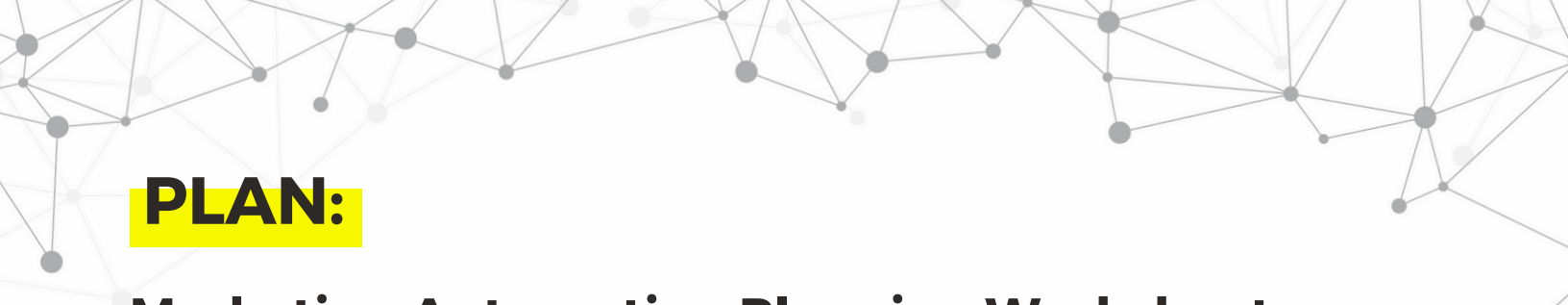
If you scored less than 10 Yes's on this checklist, you are in what we call, "brochure mode" or Stage One. You have your solution ready to go but you are lacking some important information about your buyer and what they will need to see to start their buyer journey. Your "self-serve" information is likely nothing more than a product brochure and won't really guide prospects to the next step in the buying process or to measurable conversion points where you can determine what they need and why they need it. This will make it very hard to map a process against your marketing automation tool.

15+ = STAGE 2:

If you scored 15 or more Yes's on this checklist, you are well on your way and could be using your content to start the buying conversation online automated by an MA tool. If you have not thought about value to customers and how this content could be used in email campaigns or blog content, then you have a great opportunity available to you.

PERFECT SCORE = STAGE 3:

If you scored a perfect set of Yes's on this checklist then you are likely generating lots of leads on your website today and keeping customers engaged through value-added content. Adding an MA will help you scale up your demand generation program. Well done! Now track and measure it all in your marketing automation platform.



PLAN:

Marketing Automation Planning Worksheet

SEGMENT CONDITIONS

ANSWER:

Which characteristics or behaviours are typical of this segment?

GOAL DRIVERS

ANSWER:

What would trigger a lead to move to the next segment?

TIP: This is typically the same as the “segment conditions” for the next segment to the right.

EMAIL STEPS

ANSWER:

What kind of targeted content do you want to email to this segment?

TIP: Your emails should be a mix of useful content and calls to action that push leads toward completing the goal.

WEBSITE CONTENT

ANSWER:

What targeting calls to action should this segment see on our website?

TIP: Your website ctas should be focused around moving leads toward completing the goal.

MONITORING

ANSWER:

What website actions or social media terms do you want to monitor for this segment?

LET'S CONNECT!

The Marketing Copilot® Team gives you access to a group of experts with thousands of hours of experience in B2B technology marketing, particularly within the Microsoft, MSP and HubSpot channels.

Our formula, developed over 15 years with over 200+ technology leaders, is not just pioneering — it's proven. We integrate seamlessly with your team, enhancing your sales and marketing processes and growing your revenue.

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The Company We Keep:

CORPORATE



PARTNERS AND ISVS



MANUFACTURING

