Roadmap to Marketing Automation

Alexander Körner

1 Setup, Scoping, and Readyness

Marketing automation is a technically supported marketing process that is often regarded as the technical backbone of disciplines such as inbound marketing, lead management, or content marketing. Marketing automation is oriented to the customer or buyer journey. It encompasses and links all market-oriented business units that operate along this path within the company (Fig. 1).

Setup

As a rule, successful implementation requires that the silo mentality of the business units, which can be found in many places, be broken down and that all affected functions be involved. This must be considered when setting up the project team. At the very least, marketing and sales should be represented in the project team right from the start.

The first task of this team is to develop a common understanding of the challenges, goals, and possible solutions. This is particularly essential for the interaction between marketing, sales. It is often the case that the initial situation is perceived very differently.

It is in the nature of a rather young discipline that breaks with many previous rules that central terms, contents, mechanisms of action, and possibilities are still interpreted very differently. Therefore, clarity or a common sense must be created from the beginning. This avoids later irritations and costly readjustments in the advanced project status.

A. Körner (✉)
b.relevant – Agile Digital Marketing Agency GmbH, Mainz, Germany
e-mail: a.koerner@b-relevant.agency

Fig. 1 Content, data, technology as the foundations of marketing automation. (Source: Gupta, 2015)
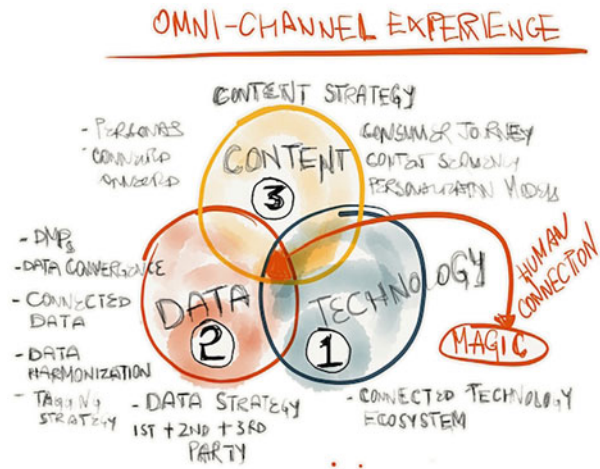
Scoping

If the setup is successful, the goals to be pursued must be defined together. Furthermore the team has to have a common idea of the impact of Marketing Automation. The range of applications for marketing and sales is very broad (see Fig. 2). For this reason, the team should select three of the possible goals, prioritize them, and align them with each other. Only then can a consistent set of goals be determined which increases effectiveness and avoids efficiency-robbing conflicts of objectives.

Beyond the explicit goals, it is important to find out what expectations the players from marketing, sales, and other involved areas associate with the project and what restrictions they see. It is also very important to identify any existing "red lines" that must not be crossed, otherwise this will result in showstoppers for the entire project.

Readyness

Before starting with the implementation, it is important to take a self-critical look at where the company stands with regard to the following success criteria:

- Mindset
  Marketing Automation is a data-driven, iterative process. Constant trial and error, measurement, and learning are the DNA of this approach. Classic, campaign-oriented long-term planning is not compatible with this. Marketing Automation maps a data-driven and insight-driven understanding of marketing. The philosophy and working method of "Agile Marketing," on the other hand, corresponds exactly to the requirements. In order to be successful with marketing automation, it is necessary to think consistently from the perspective of the target customer. Only in this way can the purchase decision process be optimally supported with relevant content.

Fig. 2 Marketing and sales
goals that can be supported
with marketing automation
(Source: Own presentation)

- Knowledge
  Beyond attitudes and beliefs, it's about tangible knowledge in areas that are
  critical to the success of the marketing automation program. Content marketing
  know-how can be considered a key factor. Relevant content is the fuel for the
  marketing machine. The marketing team still needs experience with process
  automation. Without experience in analyzing and interpreting data, it is difficult
  to extract the insights from the marketing automation system data that are
  permanently needed in the context of program management.

- Culture

  Marketing automation means constant trial and error and learning. A corporate culture that is fault-tolerant and positively embraces goal-oriented experimentation is a good match for this. Marketing automation stands for an integrated, cross-divisional process. The culture therefore also includes horizontal permeability, i.e., openness to and interaction with the neighboring areas of sales, support, and IT.

- Top management buy-in

  As always with strategic initiatives, the support of top management is enormously important, e.g., to overcome cultural hurdles and achieve the necessary opening. The more top management views marketing automation as a strategic initiative rather than a tool decision, the more likely it is that the conditions critical to success will be created and the necessary changes initiated.

- Marketing Authority

  Marketing must have a high priority in the company to successfully introduce marketing automation. In medium-sized companies, however, marketing today often still plays the role of sales support. There, the marketing department is often still seen as a "coloring-in department" that is responsible for awareness and image at best. In order to initiate a strategic process, however, it must be assigned relevance and responsibility for customer acquisition. It is essential to turn marketing from a cost-into a sales engine.

- Marketing and Sales Alignment

  Marketing automation is based on the customer journey, which begins in marketing and ends in sales with successful customer acquisition. This requires close cooperation and constant coordination between marketing and sales. So that marketing can make a measurable contribution to success, e.g., in the form of qualified leads for the sales department. Common goals, processes, and key performance indicators (KPIs) are required for this.

- Knowledge of and access to target customers

  Successful marketing automation establishes a direct line to the end customer without jeopardizing established sales structures. Thus, sales partners are the recipients of the leads generated by business-to-business (B2B). Knowing the preferences of their customers is crucial for developing relevant content. The Internet affinity of the target customers is decisive for reaching them in the first place and for obtaining the data required to control the marketing automation program.

- Buyer Persona and Customer Journey

  In order to produce relevant content and offer it in the right context, the application of the buyer persona model and mapping to the customer journey is crucial. While the buyer persona model corresponds to the further development of the target group model, the customer journey is about the information and purchase decision process of the target customers or buyer personas. In combination, this results in model maps for marketing automation and content marketing activities.

- Complexity of the purchase decision
  The more complex and in need of explanation a product or service is, the more intensively a decision-maker must familiarize himself with the decision-making process and with relevant decision parameters. And the more he has to learn what a solution to his problem looks like, the higher the added value that marketing automation achieves. This is because with marketing automation, the decision-supporting content can be offered to the respective buyer persona at the right time in the appropriate context.
- Marketing and sales targets
  Marketing automation is not the right approach for every target picture. The higher the congruence with the goals listed above, the more can be expected from marketing automation.
- Marketing Communications
  If a company is already active beyond promotional communication, it will be easy to enter a buyer persona oriented communication characterized by relevance and utility, as the necessary change of perspective is easier to achieve.
- Technical ecosystem (Martech and Salestech)
  If a company already has a CRM or ERP system, then it can dovetail customer and transaction data with the marketing automation system. This opens the opportunity to track the customer's entire customer journey from orientation to purchase and setting up a closed loop. In this way, every activity of the marketing automation program, every touch point can be evaluated and predicted for its contribution to results and budget resources can be allocated where it will generate the highest return on marketing investment (ROMI). However, you only have a valid basis for the use of business intelligence systems if you have accurate data. The better the systems are networked, exchange data and interact with each other, and the more cloud solutions are used, the easier it is to integrate cloud-based marketing automation systems and achieve a new control center for your marketing.
- Marketing budget
  Marketing automation systems are inexpensive. A license is available for as little as a few hundred euros per month. However, the setup and operation of a marketing automation solution requires considerable resources and budget. The setup will not be accomplished for less than 20,000 euros, and it will be difficult to get anything going with less than 5000 euros per month for the ongoing operation, including content marketing and lead management.
- Team/Headcounts
  Experienced specialists are needed to implement marketing automation. The involvement of external service providers or a full-service provider is always the more promising solution when required employees cannot be procured at short notice to complete the team.
- Digital Maturity
  Fully integrated marketing automation is the high-end solution for marketing. Companies from the USA are writing one success story after another with it. However, they also have very different prerequisites than German companies.

Many of them lag considerably behind the required digital status quo. It is difficult to achieve great success with marketing automation if the fax machine is still in use for customer traffic at the same time.
- Industry and market environment
  Internationality, many market participants, providers, solution variants, and substitutes, coupled with perceived lack of transparency for solution seekers, indicate a strong need for information and orientation on the part of customers. In this context, marketing automation can play to its strengths.

2   Buyer Persona and Customer Journey

If one, like most companies, wants to use marketing automation in the context of inbound marketing and lead management to gain visibility and qualified leads, defining buyer personas and determining their customer journey are key tasks. While the buyer persona determines what, i.e., what content, needs to be communicated, the customer journey represents the step-by-step accompaniment of the leads through their purchase decision process.

Buyer Persona

The buyer persona concept is a further development of classic target group models. In contrast to these, the focus is not on socio-demographic characteristics of the target person, but on motives or needs as triggers for the purchase decision process. The core of the buyer persona approach is to determine the motives of the function holder, which could lead to the procurement consideration for a product.

Today, more than 80% of all purchasing decisions begin with an Internet search. The starting point for these searches is increasingly less brands and products than problem or need situations, which are reflected in corresponding search phrases. The challenge is to create context to appear in the search result set of Google & Co. and thus on the radar of the target customers. The starting point in the development of buyer personas are the most valuable customers, from whom one would like to acquire more. Step by step, the essential questions are answered for the following headings:

- Profile
  To whom does this buyer persona report? What is she measured by? Which are trustworthy sources?
- Trigger
  What business situation or change triggers the information and decision-making process that could provide the solution for the prospect?
- Success factors
  What added value does the buyer persona expect from the product? What would inspire them, what would disappoint them? What would be a disaster for them?
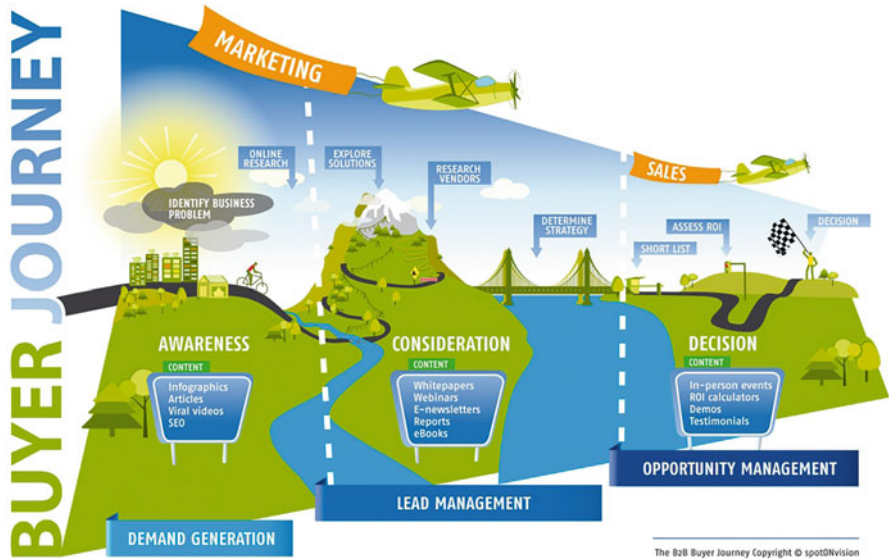
Fig. 3 Buyer journey. (Source: SpotOnVision)

- Barriers
  What attitudes or concerns might prevent the Buyer Persona from buying the specific solution? Why might she not buy it from this company?
- Decision criteria
  Which features and criteria of the solution does the buyer persona evaluate when comparing with procurement alternatives?
- Customer Journey
  What role does the buyer persona play in the decision-making process? Who else influences this?

The result is a clear profile of requirements in terms of content, orientation, and tonality of the content required for the respective buyer persona.

Customer Journey
The customer or buyer journey describes the journey of a buyer persona through the purchase decision process (see Fig. 3). It is the blueprint for the content (content) and process (channel, touch points) orientation of marketing and sales activities.

At the content level, the buyer journey enables conclusions to be drawn about when the buyer persona deals with which questions and which content can be used in this context to capture their attention and provide them with added value. At the process level, it outlines at which touch points you can pick up the buyer persona and on which channels (e-mail, social media, etc.) you should act with which media for

Fig. 4 Key needs and questions in the course of the customer journey (Source: Own presentation)

mats (white paper, infographic, app, etc.) in the respective phase of the customer journey (see Fig. 4).

If possible, all departments of an organization that have direct customer contact or customer knowledge should be involved in the development of the buyer persona and customer journey. In addition to marketing and sales, this also includes customer service and market research. Parallel customer interviews are a good way to validate the results of their work and gain additional insights.

3   Inbound Search Engine Optimization

Purchase decisions by target customers today begin self-determinedly on the Internet in places that the provider does not control and at times that he does not know. The potential customer thus flies under the radar and eludes systematic processing. This is why it is crucial for success to be findable when the target person is looking for content that is relevant to them in the context of their mostly motive-driven search. An inbound SEO analysis provides the answers to the questions of what the buyer persona is looking for, what relevant offers would be for them, and what chance the provider has of being found in this context. In the first step, the subject of this analysis is the analysis of the:

- User perspective
  What is important for the buyer persona? Which phrases or keywords does she use to search for it (relevance)?
- Brand Perspective
  In which context is your own company and its service portfolio currently located by search engines (authority)?

The second step is to identify the intersection of the two perspectives, the so-called content sweet spot (see Fig. 5).

Fig. 5 Content sweet spot as a result of the inbound SEO analysis (Source: Own presentation)
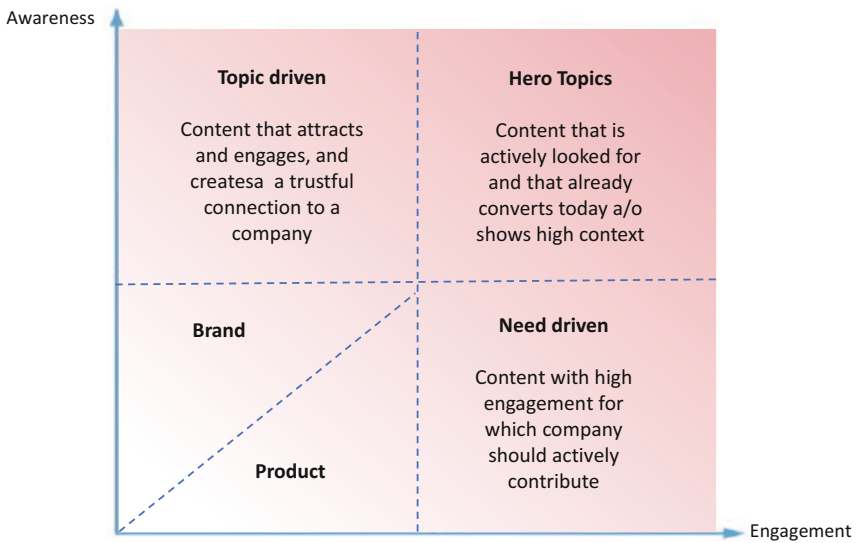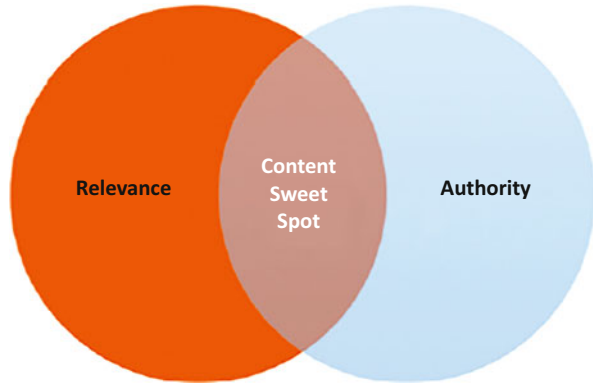
Fig. 6 The topic matrix (Source: Own presentation)

Content that addresses this area is equally relevant for the buyer persona and beneficial for the company's own visibility in the search result ranking. The inclusion of social media in the analysis provides additional insight into which content, topics, and content formats are shared and to what extent.

The result of this phase is the topic matrix. This provides a comprehensive overview of the topics in which the buyer persona is interested, the topics with which they are intensively concerned against the background of their needs, and where the existing content of their own company is to be classified according to this consideration of relevance. The topic matrix thus represents the basis and the guiding principle for the content strategy (see Fig. 6).

4 Content Marketing and Digital Strategy

With the development of the buyer personas and the customer journey as well as the findings from the inbound SEO analysis, the necessary elements for the development of the big picture, i.e., the strategic-conceptual core of a marketing automation initiative, are available. The content marketing and digital strategy essentially addresses the questions of how content is to be used for awareness and lead generation or lead qualification and which digital instruments are to be used for implementation (see Fig. 7).

The characteristics of such a strategy are individual. Accordingly, no general recommendations can be made. The following questions must be answered when developing your own strategy:

- Content
  When in the course of their customer journey does a buyer persona need which information? What grabs their attention? What answers their most important questions at that moment and lets them move forward in the purchase decision process?
- Marketing Automation System
  What contribution can profile- and behavior-dependent individualization of content and processes make to achieving the goals—or how can this be done in concrete terms?
- Content publishing and promotion
  Which distribution channels, such as landing pages, social media, and influencers, should be used to achieve maximum reach within the target group? How and with which promotion tools (e.g., Google AdWords) can momentum be
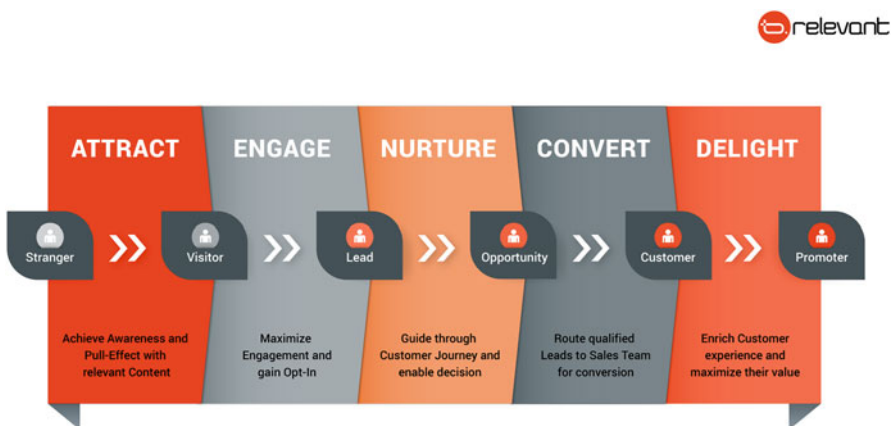
Fig. 7 The content marketing and digital strategy. (Source: Own presentation based on Hubspot, 2015)

quickly built up in the awareness building for the content and retargeting be carried out in the course of lead qualification?

- Digital platforms and tools
  What role should digital platforms (e.g., website), presences (e.g., own social media accounts), and instruments (e.g., newsletter) play? What contribution can they make in the course of the customer journey? How can they interact with existing marketing and sales activities (e.g., trade fair participation)?

Despite all the complexity and the tendency to counter it with a comprehensive strategic approach, it must always be remembered that marketing automation is an iterative process. It thrives on secured, continuous learning. The strategy should therefore focus on guiding ideas that can be validated and further developed during application.

5   Lead Management Concept

Lead management is essentially about the question of what makes a contact a qualified lead for sales. In detail, this involves three areas: the profile of a lead (lead profile), the insights that both the lead and the sales department should gain per customer journey phase (educational critical path), and the underlying lead management processes (see Fig. 8).

The next tasks are the step-by-step enrichment of the lead profile (progressive profiling), the evaluation of the lead profile to determine the lead quality (lead scoring), and for the specific use of content and the tools for knowledge-based qualification of the lead (nurturing). The lead profile determines what information the sales department needs to process a lead successfully and at what point in time. To start working on the profile together with colleagues from sales, it is a good idea to answer the following questions:

Fig. 8 Basics of lead management (Source: Own presentation)

Lead Profil

Educating Critical Path

Guidance for...
Profiling
Scoring
Nurturing
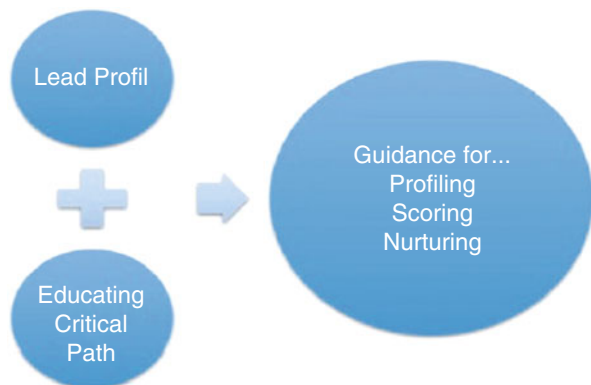
- What is the minimum set of information about the lead (e.g., person, company, project/product use)?
- What is the optimal set of information about the lead?
- Which parameters with which characteristics determine the value of a lead?
- Which signals or indicators turn a lead into a hot lead that needs to be prioritized?
- Where should the sales-ready lead be routed?

The Educational Critical Path, the success-critical insight process along the customer journey, is also best determined in the interaction between marketing and sales. The following questions help to gain the necessary insights:

- What, i.e., which topics, does the lead deal within which phase?
- From his point of view, what is interesting, what is important, and what is indispensable in the respective phase?
- Which aspects should the lead have necessarily dealt with in each case from the point of view of his own company?
- What specific questions should he have asked himself and answered with the help of relevant content?
- What information should he receive and process from our company and when?

If the results of the previous phase are available, one has the prerequisites to derive the following three levels of the lead management process:

- Progressive profiling
  As a rule, valuable content should be the so-called gated content, i.e., its download should require registration by the prospective customer. The customer journey consists of many questions that the lead is given the opportunity to answer with appropriate content offers. Each of these touch points opens the opportunity to further complete the lead's profile by asking customized questions as part of the next registration process. Knowing when the lead needs what information and what insights sales wants to gain in the same breath provides the blueprint for Progressive Profiling.
- Lead scoring
  Answering the question of when a lead is ready for sales is the task of lead scoring based on lead profile and educational critical path. In lead scoring, each profile characteristic (explicit characteristics such as name, e-mail, decision authority, etc.) must be weighted according to its relevance and assigned a quantitative value. The same applies to the lead's interactions (implicit characteristics such as opening an e-mail, visiting a website, downloading a content module), which map the lead's engagement.

If the sum of the ratings reaches a defined threshold, the lead becomes a marketing qualified lead and can be transferred to Sales for further processing (see Fig. 9). Experience shows that the final result cannot yet be achieved in the first impact. This can be understood as a qualified working hypothesis that is

Fig. 9 Lead scoring matrix (Source: Own presentation)
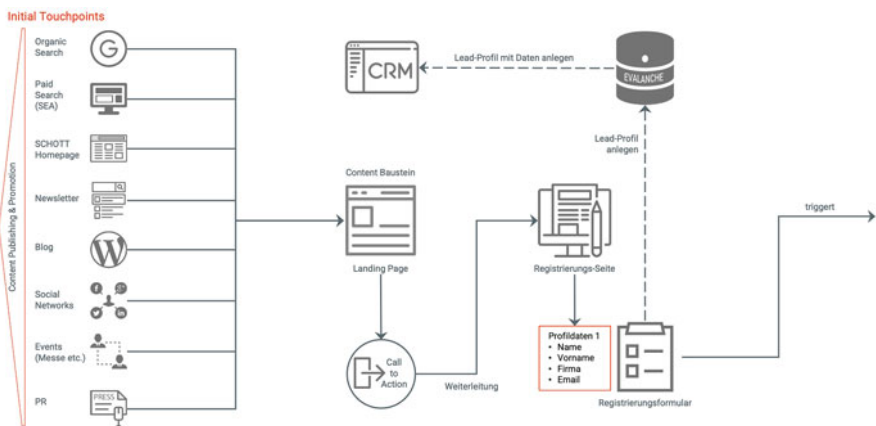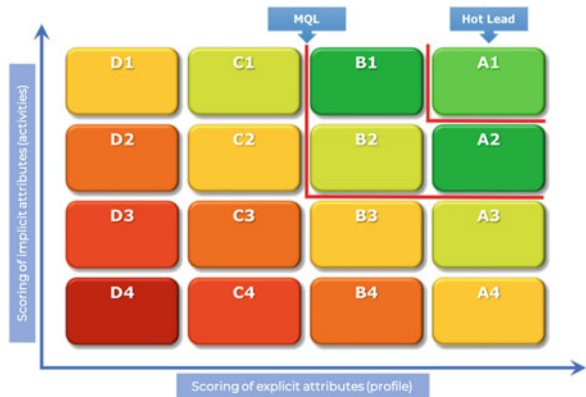
Fig. 10 Sample lead nurturing process (Source: Own presentation)

continuously optimized together with Sales. The joint learning process will lead to an increasingly accurate evaluation model that can be used to reliably determine the qualification status and the optimum handover time to sales.

If profiling and scoring are combined against the background of the selected strategy, the result is the lead nurturing process. This detailed process model of lead management must then be mapped in the marketing automation system (see Fig. 10).

6   Marketing Automation Setup

Tangible results are achieved from the start of the marketing automation setup phase. The setup can be divided into three action circles:

- the establishment of the marketing automation system,
- the elaboration of the set of tools, and
- the embedding of marketing automation in their technical ecosystem.

Setting up the marketing automation system includes, for example, creating users and their rights, setting up buyer personas and data fields, importing any inventory data, and mapping the scoring and nurture processes. The tools include landing pages (see Fig. 11), which are used to map the publication of content, registration, and the content consumption or download offer. Newsletter and e-mail templates, forms to be embedded in landing pages and websites, and the establishment of relevant social media presences are also part of the basic toolkit. In addition to marketing automation expertise, this requires above all experience in the development of web and e-mail objects.

The more the marketing automation system is integrated into the existing systems as the control center of marketing, the greater the achievable utility value. In the course of creating landing pages and web forms, it is obligatory to interlock with the content management system, which usually provides the technical basis for the website. In the second step, the marketing automation system must be linked to all systems that are used along the customer journey. These include CRM and ERP systems, but also business intelligence systems and social media and ad management. The goal should be to be able to continuously track and measure the entire customer journey of the lead from the first touch point (e.g., a landing page) to the successful conversion to the customer (customer status in CRM and ERP). Then it can be determined exactly which measure, which content, which process, etc. has achieved which value contribution. This makes it possible to allocate the marketing budget where it demonstrably achieves the highest return on marketing investment.

7 Agile Realization

Now that the strategic-conceptual foundation is in place and the lead generation and qualification machine has been built with the marketing automation setup, the task is to achieve the optimal output. Instead of developing a comprehensive concept and waiting for the output of the campaign after pushing the start button (linear process), marketing automation with agile realization enables and conditions a more promising approach (see Fig. 12).

In traditional marketing, the findings on the success of a campaign are only available at the end of the campaign or after a further analysis period with the help of market research. With marketing automation, the results are available in real time. This makes it possible to intervene in the ongoing process to optimize it. It also has an effect on planning and conception. Instead of a big bang, you start with small steps. Long planning periods thus become a series of short cycles that enable faster learning from the test results.

Marketing automation thus breaks with many traditional and familiar characteristics of marketing. New impact mechanics, a changed interaction with

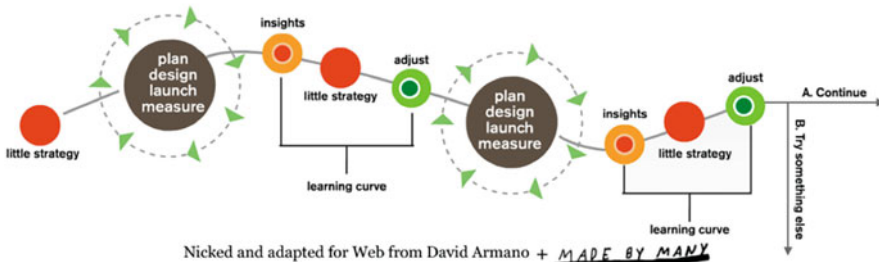**Fig. 11** Landing page mockup (Source: Own presentation)

Fig. 12 Linear vs. agile project management processes (Source: Armano, 2015)

other corporate divisions, and new expertise pose not inconsiderable challenges when embarking on this path. The roadmap presented here cannot exhaustively answer all the questions that arise on the path to greater marketing and sales success with marketing automation. However, it should make it possible to target the milestones that lead to success and draw attention to the biggest pitfalls along the way.

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Alexander Körner is the founder and managing director of b. relevant – Agile Digital Marketing Agency GmbH and a member of the board of the Institute for Marketing and Sales Automation. He has been working for years on the customer journey, which has been changed by the Internet, and its impact on marketing and sales.