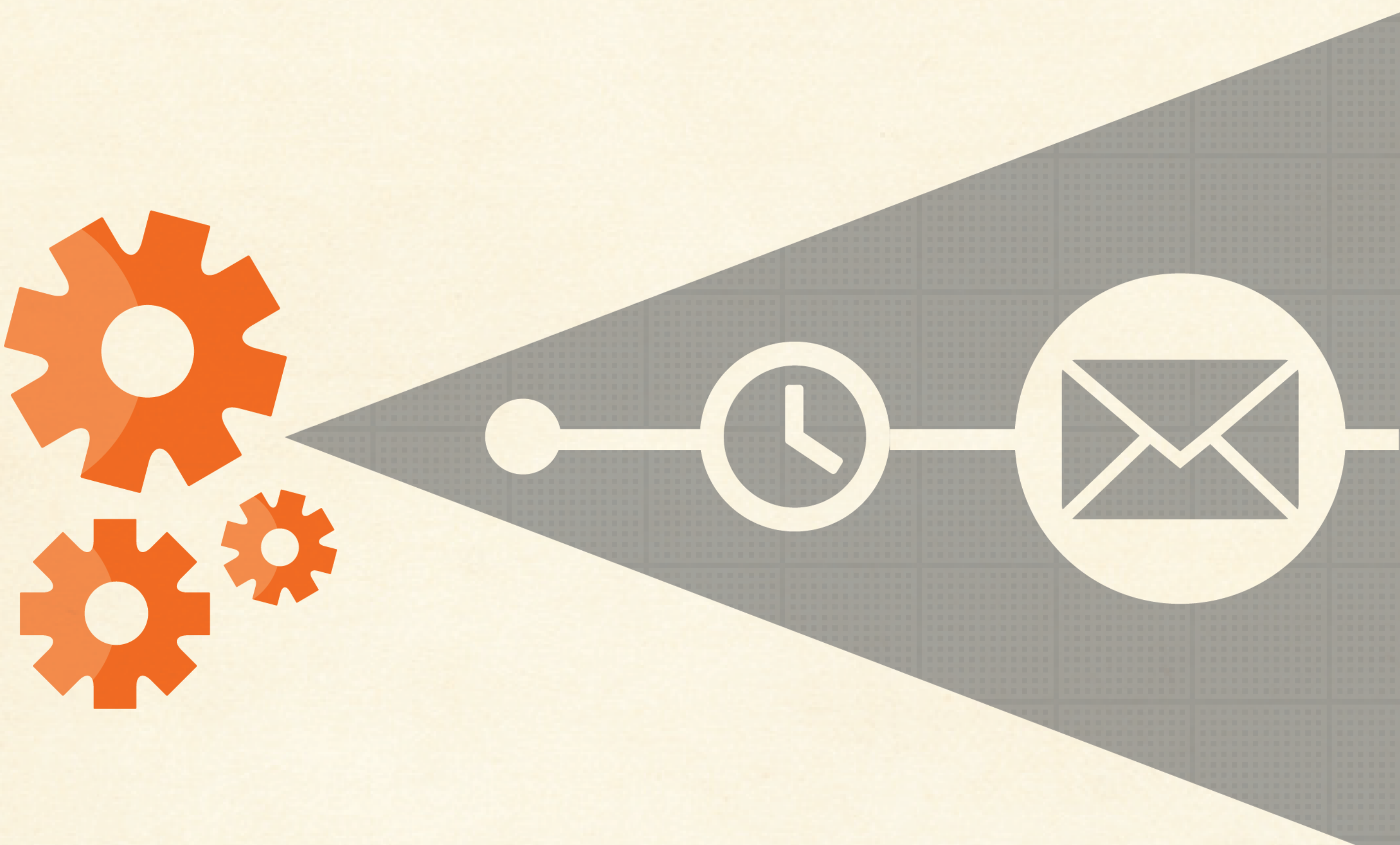
# How to Optimize Your MARKETING AUTOMATION

## A Hands-On Guide



HubSpot

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Getting the most out of your marketing automation system isn't easy. You need to wade through the jargon, features, and options to answer that one important question – how can this system actually help you meet your marketing goals?

In How to Optimize Your Marketing Automation: A Hands-On Guide, we'll help you build a plan for how you'll actually use marketing automation to nurture your leads with relevant, targeted messages that get results.


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# LIST SEGMENTATION:
## THE KEY TO AUTOMATION SUCCESS

One of the toughest challenges that marketers face is understanding who is in your database, how your contacts are different, and then deciding how to best market to them. The best place to start is by grouping your contacts by similar characteristics, and then building a strategy for each group.

Defining these different groups is the art of segmentation, and getting it right is no small feat. You need both a framework to do it properly, and the tools to actually put your segments to use.

As a term that gets tossed around a lot, you probably have an idea of what segmentation means: breaking your audience into groups of like people. But it's good to take a step back and acknowledge all of the things that segmentation helps you do better. Your segments should be used to:

• **Define the topics and tone of the emails you send.** (Example: if you segment your database based on industry, the way you talk to your leads in different industries can be significantly different.)

• **Plan your content strategy.** (Example: if one valuable segment is under-represented in your existing database, you might create more blog content that appeals to that segment to attract more of those people to your website.)

• **Hone the messaging that appears on your website.** (Example: Why not show the most appealing call-to-action to each particular segment.)

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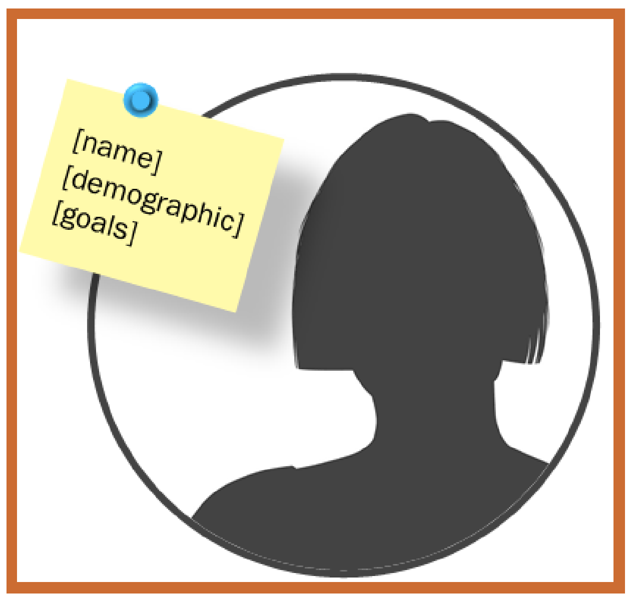
*These are just a few examples that marketers should think about. There are a lot more ways that you can apply segmentation to drive better results.*

# DIGGING DEEPER:
# BUYER PERSONAS & LIFECYLE STAGES

## The First Dimension of Segmentation: Buyer Persona

Buyer personas are groups that you define to represent the different buyers you commonly come across in your marketing and sales process. Your buyer persona might be defined by things like industry, company size, location, and other details. It's up to you to figure out what is most important.




## The Second Dimension of Segmentation: Lifecycle Stage

Lifecycle stage refers to where in the buying process an individual lead or contact currently is. It's a great starting point for segmenting your audience, because how you communicate with different contacts should be largely dependent on their lifecycle stage.

For example, the conversation you should have with a new lead who you know nothing about should be very different from the kind of conversation you might have with an established sales opportunity who is considering a purchase in the near future.

If you are just getting started with segmentation and already have some clues about the lifecycle stages of your leads, using lifecycle stage to segment is a good way to get started. We'll talk about how lifecycle stage fits into the larger picture in just a minute.


## Combining Buyer Persona & Lifecycle Stage to Define Your Segments

At HubSpot, after trying many different approaches on our own and with our customers, we've found that the most effective way to segment is by looking at these two dimensions together. In other words, we define segments based on lifecycle stage and persona.

This approach looks at who an individual lead or contact is (their goals, interests, demographics) and how they expect to interact with your organization (through lifecycle stage).

# EXECUTING
## YOUR SEGMENTATION PLAN

Once you've set up your personas and classified your leads, it's easy to start putting your new segmentation plan into use. There is a lot you can do with your personas, including ...

- **Create workflows to nurture leads of a certain persona**

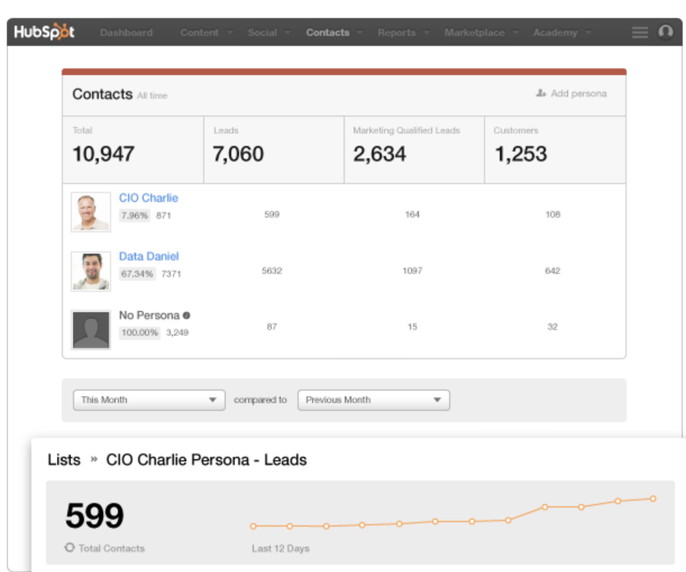
- **Create Smart CTAs or Smart Content to target what certain personas and lifecycle stages see on your website**

- **Write blog content that caters to different personas & lifecycle stages**

- **Monitor list of contacts with certain personas & lifecycle stages on social media**

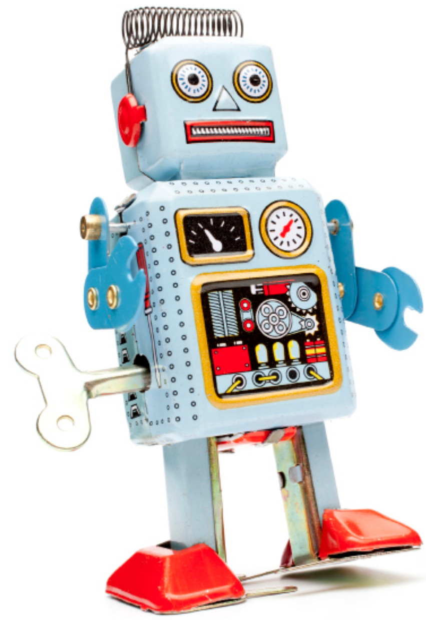
You can also use your personas to set your greater marketing strategy. Once your personas are set up, you'll be able to see the makeup of your entire contact database at a high level on your dashboard. Ask yourself, which persona buckets do most of my leads fall into? Which lifecycle stages? This information can be an easy way to prioritize your marketing efforts.

For example, if you've got a large number of early stage leads, you may want to focus your time on building nurturing workflows to move them along to becoming MQLs. If you have a lot of MQLs and very few earlier stage leads, maybe you need to spend time on blog content and an educational offer.



# THE LIMITATIONS OF LEGACY MARKETING AUTOMATION TOOLS

Look back at the last five marketing emails in your inbox. How many of them are generic and uninspiring, or way off the mark on who you are and what you care about?



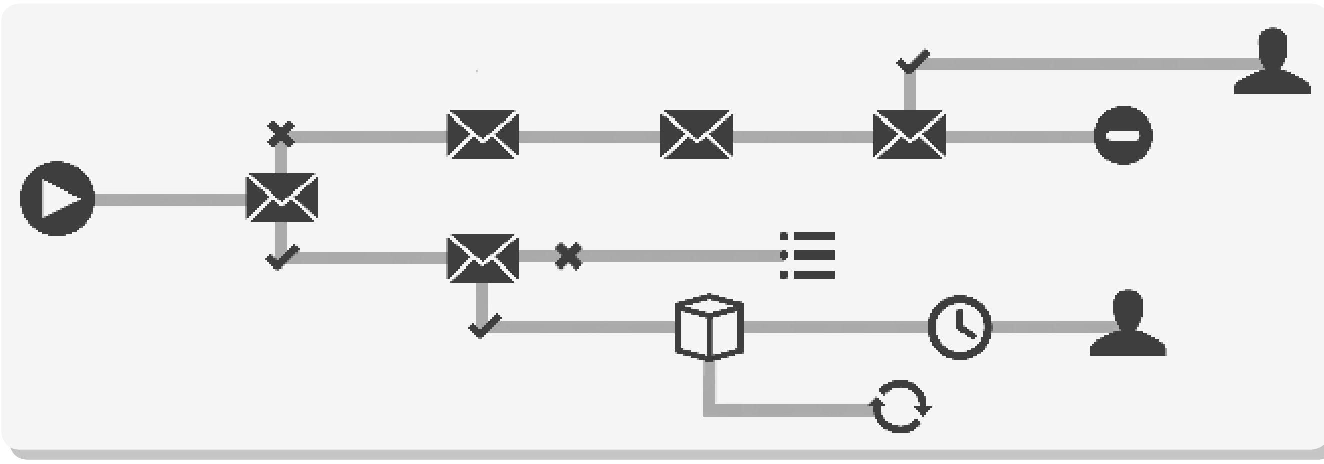
Everyone can relate to receiving bad marketing emails because bad marketing automation is so common. And it often isn't the fault of the marketer - they were set up for failure by flawed tools and a lack of guidance on how to use them. Here are just a few problems with most legacy marketing automation tools.

- **Legacy tools only work with one channel: email.** Their targeted message extends only to the inbox, leaving you with no way to deliver anything but a generic, uninspiring messaging on your website.

- **Legacy tools are designed for situational nurturing, not strategic nurturing.** Legacy tools take a reactive approach to nurturing leads based on their actions, not who they are and what they care about. Nurturing without context or strategy is little more than a sophisticated spamming operation.

- **Legacy tools only pay lip service to social media.** True social media integration isn't just about icons in your emails or publishing to facebook, it's about leveraging timely insights to have more relevant interactions with your prospects.

- **Legacy tools ignore the person on the other end.** Branching campaigns are designed to trigger emails based on actions like clicks on links and email opens. They aren't built on a solid foundation of context about who a lead is and what they are interested in.



What does a click on a link or the open of an email really tell you about a lead?

At the end of the day, legacy marketing automation tools can be useful for situational nurturing, but they fall short in a number of key areas.

In a world of ever shortening attention spans and more power in the hands of the buyer, you need to take a strategic approach to nurturing that leverages context about your leads.

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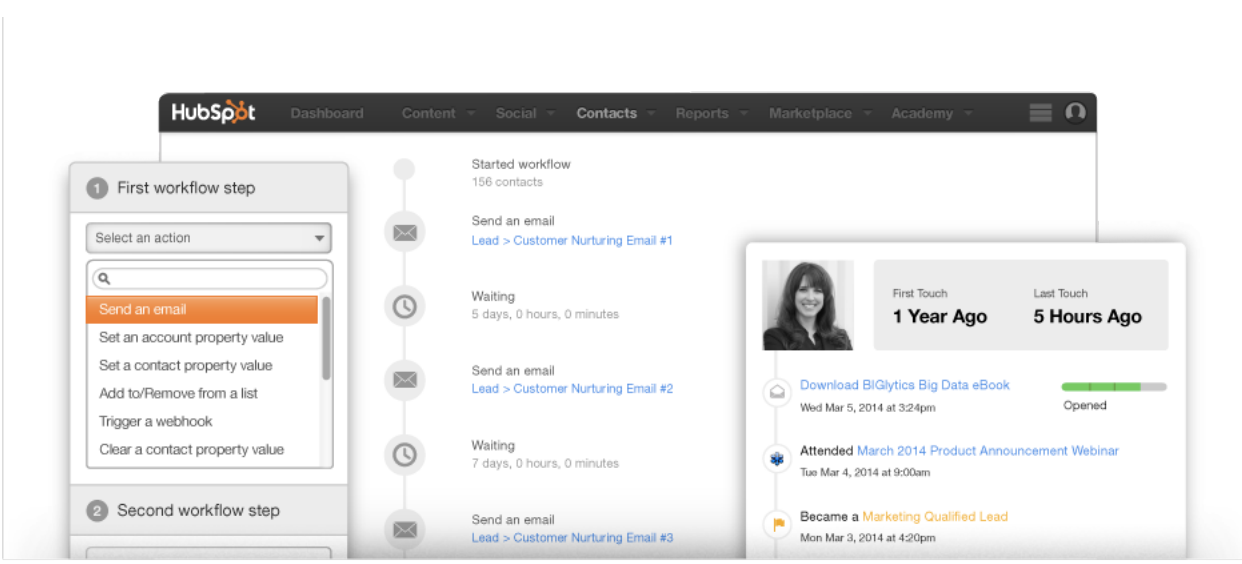
*In light of the problems with most marketing automation tools, HubSpot released Workflows in 2012. Workflows was designed from the ground up to leverage the power of automation, but still make it easy to deliver marketing people love. While Workflows is flexible enough to support almost any campaign strategy, let's take a look at a more effective approach to marketing automation using Workflows.*

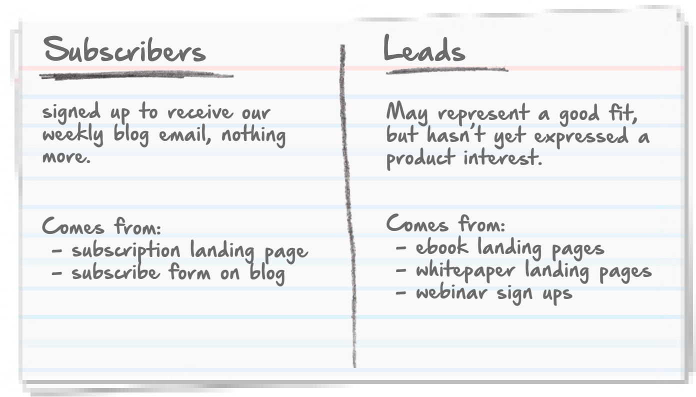


# WORKFLOWS:

# A 4-STEP APPROACH TO AUTOMATION

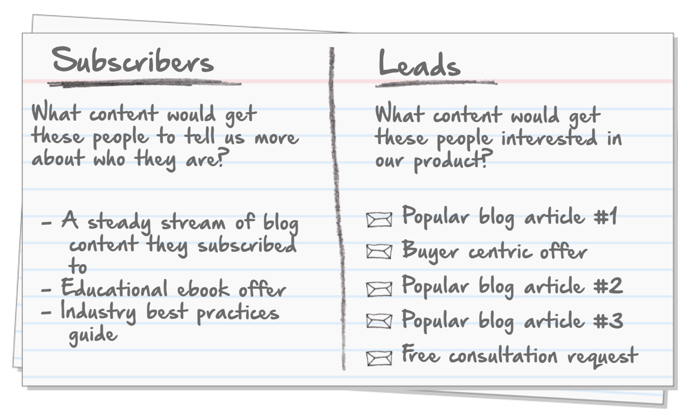
## 1 Step 1: Segment your leads

Marketing automation in HubSpot starts with segmentation. The most effective way to segment your database is often based on where your leads fall in the buying funnel (what we refer to as a lead's "lifecycle stage.") It's up to you to determine how many different stages you'll define; you can always start with just a couple stages and create more as you scale.




## 2 Step 2: Target email content

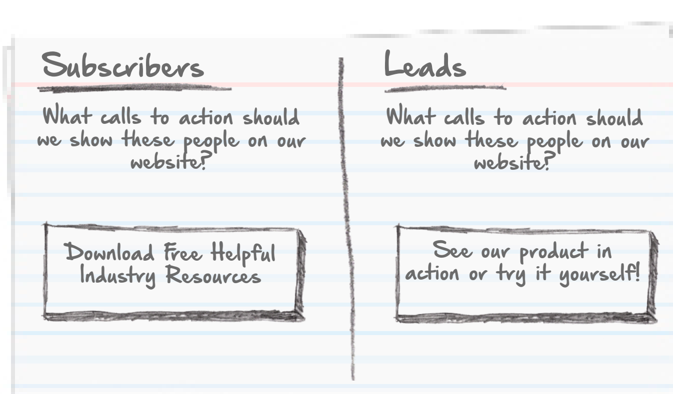
For each segment, you'll build a workflow that contains email messages that get sent at different intervals. The most effective workflows include a mix of useful, interesting content like relevant blog posts and call-to-action emails. The emails in each segment should gently push leads to move further down your funnel by demonstrating the behavior of the next segment.




## 3 Step 3: Target website content

Targeting your website content might seem far-fetched, but it's easy to do in HubSpot. Our Smart CTA tool recognizes which segment a lead is in when they visit your website, and shows them targeted calls-to-action to help move them on to the next stage.

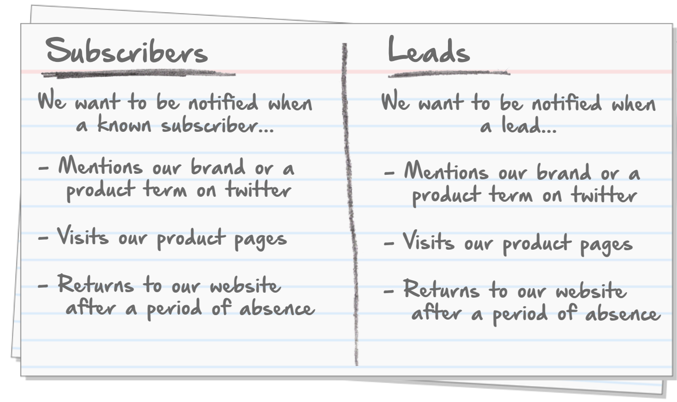
This gives you the opportunity to reinforce your message on every page of your website, instead of showing leads a generic, uninspiring message or a call-to-action to take a step they've already taken.



## 4 Step 4: Monitor social & website actions

On social media, HubSpot makes it easy to cross-reference the segments you created in step 1 with key terms you want to track. That way, if a lead mentions an industry or product-related term, your brand, or even the name of a competitor, you can be notified by email immediately.

It's also easy to monitor the actions your leads take on your website. If a known lead suddenly visits your pricing page, for example, you can automatically notify the lead owner with details on the lead so they can follow up quickly.




# Scaling & Improving Over Time

One of the best parts of Workflows is its ability to scale with you over time. When you first get up and running, you might choose to start with just a few different nurturing tracks - one for each of the three different lifecycle stages you use. Over time, you can easily divide your database into more and more targeted segments that deliver more and more relevant content and offers to your leads (at HubSpot, we also use buyer personas to target our campaigns.)

### HUBSPOT CASE STUDY: ALPHA SOFTWARE

Prior to using HubSpot, Alpha Software was sending one-size-fits-all email campaigns to all of these segments. Lacking the data and technology needed to segment based on industry or behavior, Alpha became concerned with the potential damage their generic communications could be causing.

*"We knew we were missing opportunities . . . the one-size-fits all emails were too basic for long-term customers and way too advanced for people who had just started with us."*

**David McCormick**
Director of Product Marketing, Alpha Software

**How HubSpot helped**
"List segmentation has made an enormous difference for us," said Dave McCormick. "By using HubSpot, we are able to better segment and target our communications. In addition to dividing by industry, we are also now segmenting and targeting communications by behavior."

see more case studies at hubspot.com/customer-case-studies >>

# AN EXAMPLE OF AUTOMATION IN ACTION: RUNNING WEBINARS

Webinars are a great way to generate new leads and move prospects through your funnel, but they require a lot of effort to pull off. Aside from all the scheduling and content planning that goes into a webinar, there are a lot of other marketing tasks you need to worry about in the lead up to, and following, your event.

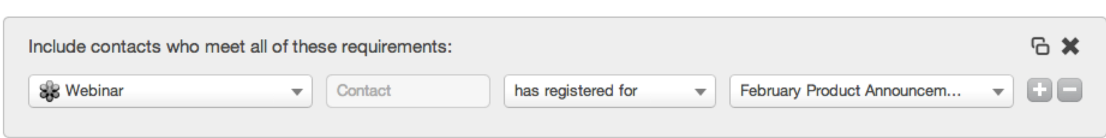
The good news is that HubSpot makes automating a lot of those tasks simple. If you use GoToWebinar, our HubSpot-GoToWebinar integration means you'll be able to automate nearly everything ahead of time. (If you aren't using HubSpot, GoToWebinar, or don't have the two tools integrated yet, **you can get started here.** Third party integration is a feature available to Professional and Enterprise customers.)

Here are four aspects of running a webinar that you can automate using the HubSpot-GoToWebinar integration to save yourself time and energy.

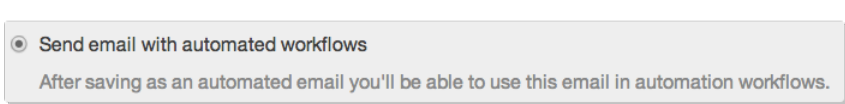
### 1. Reminder Emails

We all want to send beautifully designed, on-brand reminder emails in the lead up to your event. These reminders help make sure the folks who sign up for your webinar actually attend! With the GoToWebinar integration and date-based workflows, this is easy to do. Here's what the process looks like:

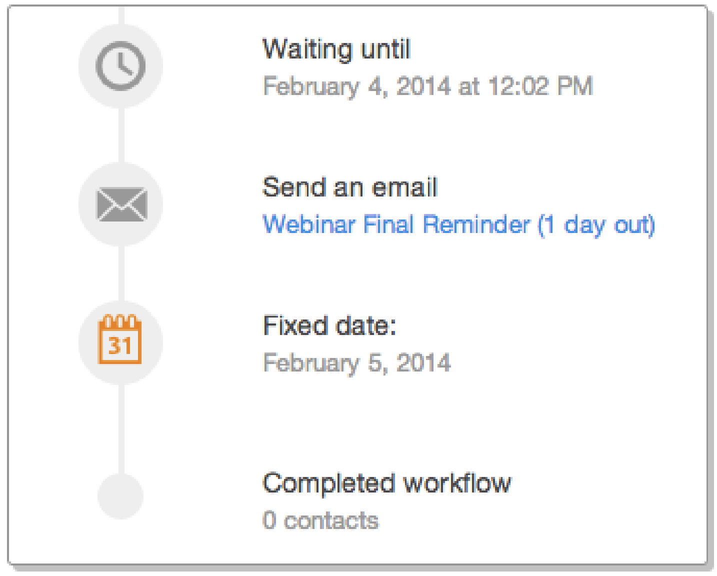
**A)** First, build a smart list of contacts who have registered for your webinar. Your criteria should look something like this ...




**B)** Then, build your email messages. This step is just like building emails for any email campaign in HubSpot. Select a template, fill in your content, and as a final step, be sure to select "Send email with automated workflows" on the sending tab.



**C)** Lastly, tie it all together with a date-based workflow. Create a new workflow, then select the “fixed date” option. When you set up your workflow, you’ll set up your steps before the fixed date of your event.




Once you have your list, emails, and workflow in place, you can trust that your reminder emails will be on autopilot. Now there’s no need to come back and import lists of new registrants each time you want to send a reminder. (One thing worth mentioning: Be sure to still send the unique join URL link from GoToWebinar. We recommend having GoToWebinar send this at the time of registration, and the day of the event. This is explained in the documentation.)

### 2. Nuturing Attendees

The HubSpot-GoToWebinar integration does a lot more than passing new registrations into HubSpot. In fact, you can segment based on attendance too.

To nurture attendees after the event, build a smart list of contacts who attended your webinar, and then create the emails and workflow to actually send the messages. After the webinar event, contacts who joined the webinar will be added to your list, and follow-up nurturing will kick off without you having to do anything. Not bad!

### 3. Following Up With No-Shows

Setting up “no-show” nurturing is almost the same as setting up attendee nurturing, and you can set this up ahead of time too. The only difference is your smart list and email content.

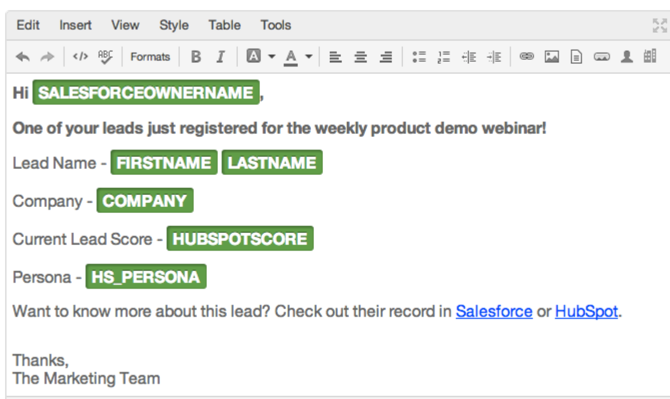
One idea for your follow-up emails is to send them a link to the recorded event! Just remember to drop a link to the recording into the email before the no-show campaign is triggered. (If you use the HubSpot-Wistia integration and host your recording on Wistia, you’ll be able to segment, score, and nurture based on folks who watched or didn’t watch the recorded version!)

## 4. Handing Off Leads to Your Sales Team

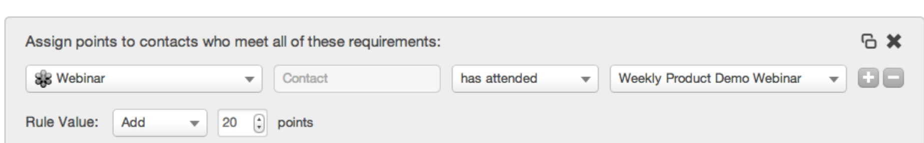
Last tip: Use the integration to pass new webinar registrants to your CRM system automatically for your sales team to follow up. If you are using webinars to generate leads, this is a no-brainer. If you have HubSpot integrated with your CRM system, your leads will likely pass over to your CRM system instantly.

Depending on your system, you may also be able to set rules that take webinars into account for when they should pass to your CRM system. Here's how you do this:

**A)** Send notification emails to your sales team based on webinar attendance. If your webinar is product-focused, or if registration in the webinar is a good cue that a lead may be ready to talk to your sales team, don't wait - let your sales team know the minute they register. Here's an example of a notification email you could send to a member of your sales team when one of their leads signs up for a webinar.




**B)** Use webinar attendance in your lead scoring logic. Depending on the type of event, attendance could be a good cue that a lead is well qualified and worth follow up. If you use lead scoring, you can increment a prospect's score based on registration or attendance easily.



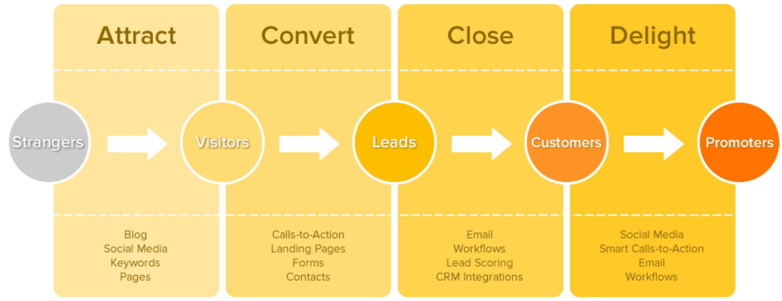

**C)** Finally, put webinar data right in front of your sales team. This doesn't require any work on your part - it happens automatically. When a contact registers for an event or attends an event, we'll put it right on their timeline in HubSpot. (If you use the HubSpot-Salesforce integration, your sales team will see it on the mini-timeline in Salesforce, too.)

All in all, automation can help save you the hassle of having to continually jump back into your webinar platform or HubSpot to trigger nurturing campaigns or move lists. It's a huge timesaver, and it lets you focus on what really matters in the lead up to your event: the quality of the content.

# THE BIGGER PICTURE

**Marketing automation is only one part of a complete marketing software platform.**

Chances are you've come across your fair share of qualifying questionnaires and sample RFPs that cover marketing automation in detail. But it's important to remember that marketing automation is only one part of a complete marketing software stack. This checklist will help you assess which critical components of an end-to-end marketing stack a given solution will cover.




## **Attract:** tools to help you drive new visitors to your website

- [ ] Does your platform make it easy to for multiple stakeholders to create website content like blog posts? What SEO tools does your platform offer to help us optimize this content for search engines (e.g., keyword research & tracking capabilities)?
- [ ] What are your platform's social media capabilities? Does your platform give me the ability to create, schedule, and publish social media posts? What does your platform do to ensure I'm sharing content in the most advantageous way?
- [ ] Does your platform have the ability to track and attribute pageviews and actions to a visitor before they convert on a landing page? How is that information organized? Does your platform have any kind of IP lookup capabilities?
- [ ] Does your platform have any additional SEO capabilities, such as the ability to track link popularity, or offer any kind of website and content optimization auditing?

## **Convert:** tools to help you turn visitors into leads

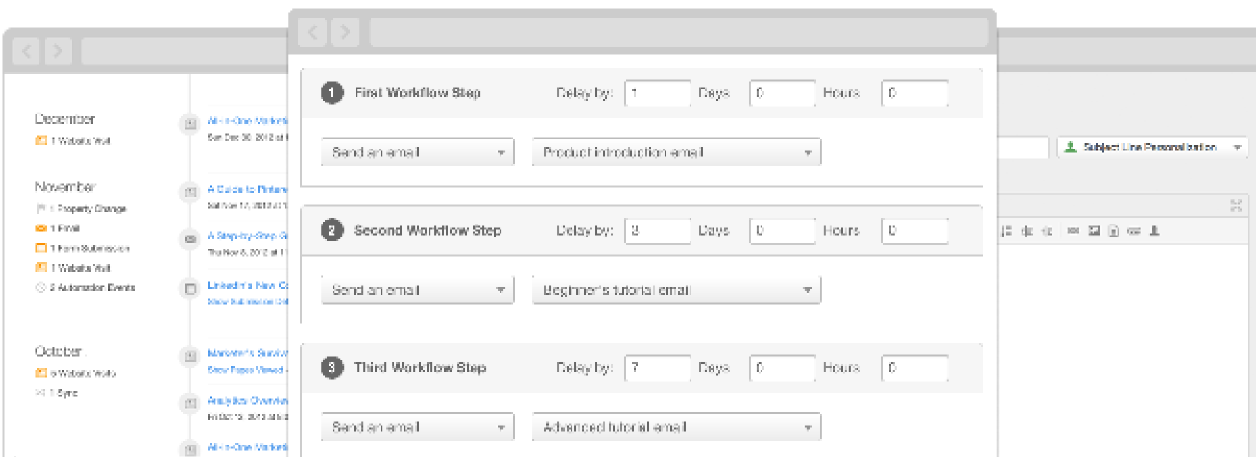
- [ ] How easy is it to create new landing pages within your tool? Does it require any technical or design expertise? To what extent can a non-technical user customize the content of the page, the form, the thank you page, and follow-up process?
- [ ] How many templates does your platform offer? Are they internally built, third party, or a combination of the two? What is your approach to mobile optimization for landing pages (e.g., responsive design?)
- [ ] How easy is it to create new forms for use on landing pages or external website pages? Do your forms feature progressive profiling? How easy is it to set up? Do your forms check / validate against misspellings or common spam email domains?
- [ ] How does your platform accomplish bridging users from our website to our landing pages? Can a non-designer create, export, and AB test call to action buttons that link to landing pages from our webiste or from email content?

## **Close:** tools to help you turn leads into customers

- [ ] To what extent does your platform allow for deep segmentation of our database? Can we segment based on criteria such as how a particular lead found our company, form or CRM properties, pageviews, analytics events, etc?
- [ ] How easy is it to build email content in your tool? How many templates does your platform offer? Are they internally built, third party, or a combination of the two? Are email templates mobile optimized?
- [ ] Does your platform offer a way for us to maintain targeted messaging across our entire website in addition to in email? Can we personalize website messaging based on where a lead is in relation to our funnel? How easy is this to set up?
- [ ] What are the listening and notification capabilities of your product? Can we receive notifications when leads take key actions in social media or on our website? Can those notifications be triggered only for specific segments or groups of leads?
- [ ] What tools does your marketing platform offer to help us facilitate the hand-off of leads from marketing to sales? Is there an interface that my sales team would have access to? How is it priced, and how easy is it to use?
- [ ] How easy is it for a new, non-technical user to create all of the components necessary for a nurturing campaign (email content, triggers, nurturing flows, landing pages, etc?) What is the average time to implementation of nurturing?

# Marketing automation is only one part of HubSpot's inbound marketing software.

HubSpot brings together all of the tools you need to attract, convert, close and delight customers, including marketing automation. See all of our tools, learn more about inbound marketing, or talk to a specialist today.

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