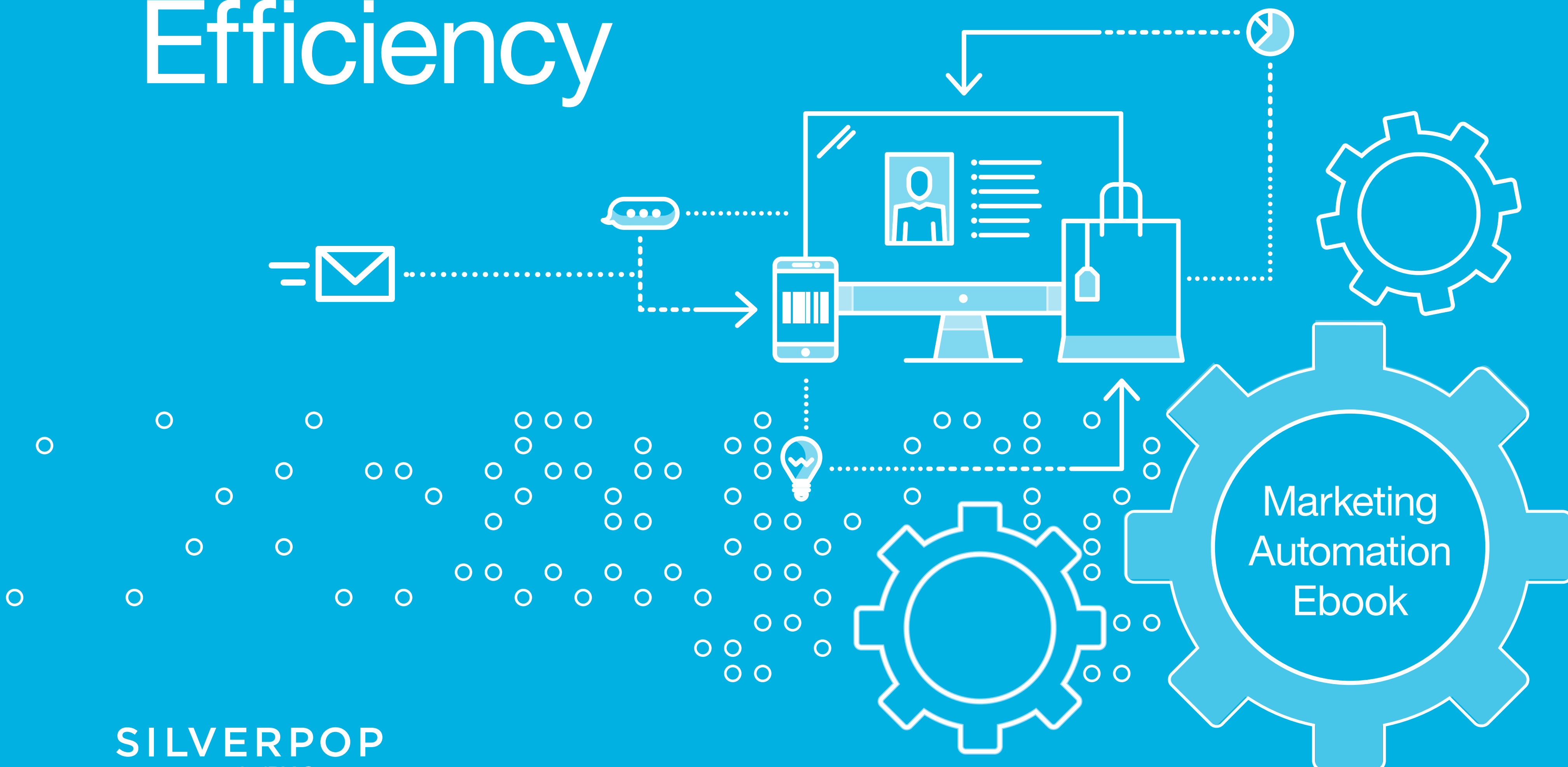
IBM **Marketing Cloud**

Best Practices for Marketing Excellence & Operational Efficiency



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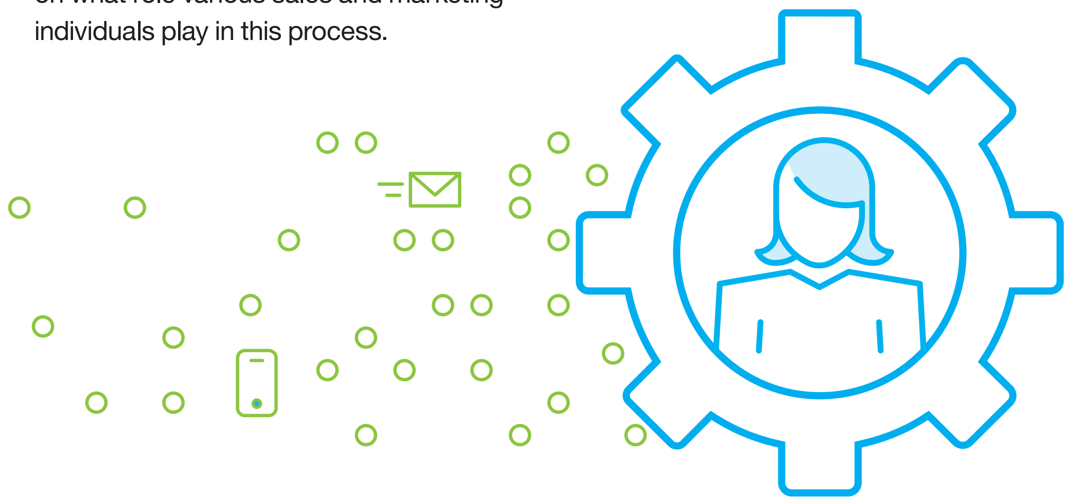
Marketing Automation Ebook: Best Practices for Marketing Excellence and Operational Efficiency

Usually when a company implements a new application, it's an all-or-nothing proposition. For example, when the finance department wants to move to a new general ledger application, it customizes and tests the application, runs in parallel for a billing cycle and then cuts over to the new application, fully utilizing all aspects of the system. Luckily, with marketing automation this doesn't have to be the case.

While marketing automation can drive a wide array of business optimizations, adopting them all at once could overwhelm your team and push out the time to launch and in turn require accompanying process changes. This is why many marketers are finding it's smarter to start with a few key features and gradually grow in sophistication over time. You can also choose to not implement key sections of the software for, say, six or nine months while you focus on increasing the efficiencies and effectiveness of other facets of your marketing automation installation.

With several aspects of marketing automation, you need to determine new workflows or processes. One example may include new ways of integrating sales into the lead scoring, routing and handling processes. To successfully implement new ways to track and manage accounts in the sales funnel, you'll need to get the demand generation team in alignment with definitions of the various stages of lead development as well as gain agreement on what role various sales and marketing individuals play in this process.

This alignment and agreement may take time to accomplish. You may decide you want to tackle these alignment discussions prior to installing your marketing automation system, or you may want to work on lead scoring, routing and pipeline reporting after you've implemented (and enjoyed the benefits of) other marketing automation capabilities.



Other elements of marketing automation require much less workflow integration between departments. Examples of marketing automation capabilities that may not require as much interdepartmental discussion and collaboration include landing pages, personalization, dynamic content, data collection and campaign automation. To evaluate the impact of implementing various aspects of marketing automation, consider the data and process flows that need to occur within your company. Many elements of marketing automation deliver increased efficiency and effectiveness within the marketing department and don't directly impact outside departments such as sales, customer service, billing or other company organizations.

In addition, using marketing automation can bring the marketing team even closer together because it can replace many disparate marketing systems. The integrated marketing automation platform improves the efficiencies and collaboration of the team and increases the quality and success of the entire marketing department's effort.

Companies should review all the capabilities and benefits that a marketing automation solution has to offer, assess the impact these benefits could have for your company, and develop a prioritized road map of which aspects you're going to implement and in which order. This ebook discusses many of the core aspects of marketing automation, including:

- Email
- Mobile
- Landing pages and data collection
- Scoring and routing
- Programs and campaign automation
- Data management and integration
- Reporting and analytics

For each area, we'll discuss the benefits and foundational, recommended and better practices for you to consider when implementing, changing or improving your marketing automation system.

"Foundational practices" are guidelines that the vast majority consider core to the vitality and the success of your marketing program.

"Recommended practices" aren't considered "must do's," but they're highly recommended for increasing customer engagement. "Better practices" are those techniques that more sophisticated marketers are deploying to help take their marketing initiatives to higher levels. While this list is comprehensive, it shouldn't be considered complete, especially given that technology is rapidly changing and portions of marketing automation are relatively new.

Tips for Implementing Marketing Automation and Achieving Outstanding Results
View the video

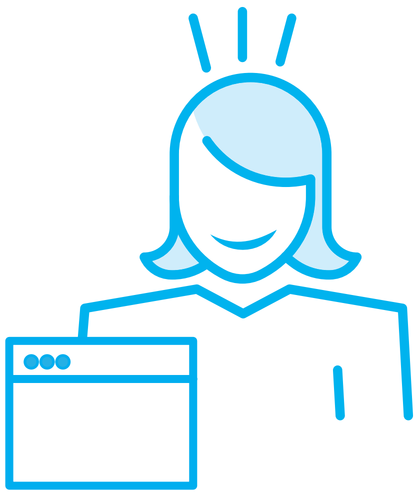
Email

Why are we discussing email in a white paper about marketing automation? Email is still the core activity and a central enabler of successful digital marketing. It makes it possible for marketing engagement to progress from initial awareness through final purchase and beyond. Without an effective email capability embedded within your marketing automation solution, you'll be relegated back to voice mail and in-person conversations—and we've all certainly moved beyond relying exclusively on those methods to engage prospects.

There's a wide spectrum of uses, sophistication and effectiveness in email marketing. Email can be used to communicate event invitations, new product announcements, limited time offers and more. It's also a preferred method of transactional messaging such as order confirmations, renewals, loyalty balances, application alerts, invitations and statements. Because email marketing as a standalone application has been available for years, there's a wealth of information on email best practices. These recommendations should not be minimized or ignored when embarking on a marketing automation initiative. Rather, they become all that much more important. The following sections should serve as a valuable checklist of best practices that should be considered to upgrade and improve this core, vital aspect of marketing automation.

Foundational Practices

- ☐ **Obtain permission.** In email marketing, permission is the foundation of a successful program, the first step in separating marketing messages from spam. While the common industry refrain "relevance trumps permission" is absolutely correct, it's difficult to achieve high inbox delivery rates and ROI without permission.
- ☐ **Offer a transparent opt-in process.** Subscribers must understand that they're being subscribed—and to what.
- ☐ **Keep it simple.** Make sure every email can be understood at a glance, providing compelling content with a combination of a great subject line, preheader, headline and image.
- ☐ **Make it easy to unsubscribe—and honor unsubscribes.** In most countries, making it easy to opt out of emails is the law.
- ☐ **Remove/suppress abuse complaints and hard bounces immediately—and never send to those recipients again.** If you don't employ these practices, your subsequent emails may not be delivered.
- ☐ **Avoid deceptive techniques.** Against the law in many countries, deception can also cause damage to your brand.
- ☐ **Authenticate your emails.** Doing so with SPF, DKIM and DMARC is becoming critical to increasing the likelihood that ISPs will deliver your emails.



Make sure every email can be understood at a glance, providing compelling content with a combination of a great subject line, preheader, headline and image.

Recommended Practices

☐ **Use clear, recognized "From" names.** Unrecognizable or confusing "From" names will get lost in the inbox.

☐ **Send welcome emails.** Delivering an immediate welcome email to a new subscriber can increase engagement much earlier in the relationship.

☐ **Utilize segmentation and personalization.** Targeting subscribers based on their demographics, interests and behaviors generates substantial engagement over non-targeted emails.

☐ **Design emails for preview panes and multiple devices.** Using single large images without background HTML, for example, will render as a large blank in emails and could greatly reduce click-throughs and conversions.

☐ **Use preference centers during opt-in and throughout the relationship.** Consider the preference center a repository for everything you know about each of your customers. Show them what you think they'd expect to let you know about them, and use the data in the preference center to tailor content and sending frequency.

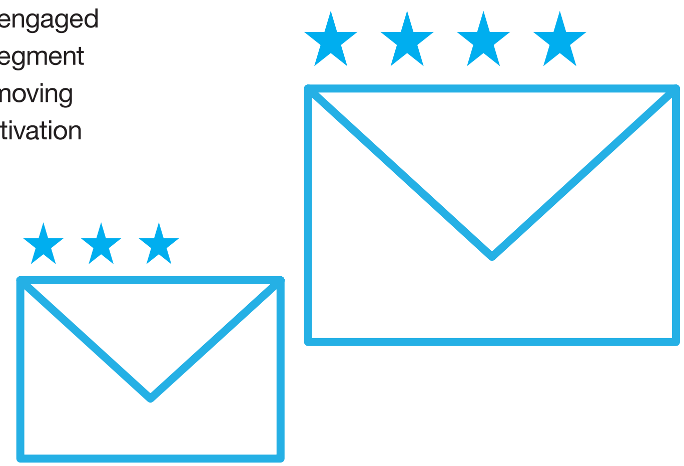
☐ **Practice good list hygiene.** Poor list hygiene will cause deliverability problems.

☐ **Test everything.** Testing is critical to determining which practices, content, offers, etc. will perform best.

☐ **Understand what devices are being used to open your emails.** Use a tool, such as IBM Marketing Cloud's Email Insights, to track device opens. Knowing your audiences' preferred device type should inform your email design strategy.

☐ **Define and identify inactive subscribers.** Identifying disengaged subscribers enables you to segment your database, potentially removing or targeting inactives for reactivation and reducing possible deliverability problems.

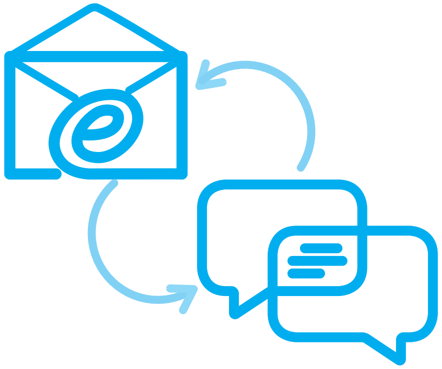
☐ **Incorporate "administrative" links within every email—typically in the footer area.** Including these links — unsubscribe, update preferences, change email address, contact us, etc. — in the same location in every email makes it easy for subscribers to take action.



Testing is critical to determining which practices, content, offers, etc. will perform best.

Better Practices

- ☐ **Employ a multipart email welcome series.** These typically deliver significantly greater results than single welcome emails.
- ☐ **Design emails for touch.** Touch screens are becoming ubiquitous. Designing for the “finger as mouse” is no longer optional.
- ☐ **Use responsive design.** Employ a responsive design coding strategy to help make your emails render correctly across all the primary devices your clients are using.
- ☐ **Focus early on inactives.** Waiting to attempt to reactivate unengaged contacts after six, nine, 12 months or more is too late.
- ☐ **Integrate with social networks.** Use email to promote your social network content and grow followers, and use your social networks to capture email subscribers.
- ☐ **Drive social via email.** Consider enhancing and extending your social networks by using email to draw visitors back into revisiting social engagement.
- ☐ **Distribute emails based on individual recipient engagement history or time zones.** Whether manual or automated, this approach can have a dramatic impact on engagement.
- ☐ **Bring transactional communications into your marketing automation platform.** Many businesses send email communications to their customers and prospects that are managed by non-marketing systems. Bringing these messages into your technology platform will allow you to better manage the overall communication and interaction with each individual and ensure that the email has the correct branding and content.
- ☐ **Use transactional emails to educate, cross-sell and upsell the recipient.** Each touch can be considered a branding and marketing opportunity.
- ☐ **Infer subscriber preferences based on their behaviors.** This will allow you to personalize communications, continue to refine and enhance your marketing database, and in turn further target and tailor each message.
- ☐ **Offer the subscriber alternatives during the opt-out process.** These typically include email change of address, frequency options, channel preferences, the ability to “Snooze” and more and can retain a sizable percentage of subscribers who were considering leaving your list.



Use email to promote your social network content and grow followers, and use your social networks to capture email subscribers.

Email Checklist

Whether you're an email pro or a novice sender, a diligent email checklist should be part of everyone's internal process.

Email Name ______________________________

Segment ______________________________

- -

Best A/B Tested Subject Line ______________________________

Target Send Date ______________ Actual Send Date ______________

Internal Approvals Received ☐ Admin Links ☐ Unsubscribe Option ☐

Multiple Device Form Factor Review (i.e. iPhone, Android, iPad, etc.) ☐

SPAM Check ☐ Social Options ☐ Snooze Option ☐Yes/☐No

Send Time Optimization ☐Yes/☐No Personalization ☐Yes/☐No Responsive Design ☐Yes/☐No

Notes: ______________________________

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CRM and Email Hygiene

A common challenge for marketers occurs when they first connect their CRM system or other customer database with marketing automation and realize they've collected thousands of email addresses over the years but are not sure if any of these people have actually opted in or subscribed. You may have lists of emails collected by sales reps, trade shows badge swipes or purchased lists. Below are some best practice considerations for dealing with stale data that's housed in your CRM system or other customer database:

☐ **Scrub Old Data.** Depending on the age of the data collected, recognize that to be successful, you may need to purge a large percentage of the email addresses. This old data can seriously hamper your ability to communicate with the people who want to hear from you.

☐ **Eliminate Invalid Data.** Purge email addresses that contain invalid syntax, such as info.company@com. Export the list into Excel and you will easily see pockets of bad data. Also, review or update those addresses that do not belong to an individual. Examples that fit into this category include info@company.com or sales@company.com. Other bad records that need handing include records where the address contains data such as aaaaa@company.com, 12345@company.com and asdf@company.com. Obviously, you'll want to purge these addresses from your database.

☐ **Evaluate Aged Records.** If you've tracked the date the contact email has been added and know it hasn't been modified in more than a few years, and you've not sent them any email, you should consider removing those records. These people have likely forgotten the one-minute conversation you had with them three years ago at your trade show booth. As a result, they'll likely consider your new and wonderful marketing messages to be spam.

☐ **Reactivate Dormant Accounts.** In your first several emails to your CRM database, prominently display the unsubscribe information at the top of your message. Include who you are, why you're sending them this message, how you likely got their email address and how they can change their preferences or unsubscribe. It may seem too onerous and isn't a regular best practice, but it will preserve your email reputation, allowing you to get started on the right path.

☐ **Automate a Reactivation Campaign.** Design a last-ditch win-back campaign in an attempt to re-engage dormant contacts in your list. Automatically put contacts into your reactivation campaign once there are no email opens or clicks within 90, 120 or another number of days of your choosing. Your reactivation campaign may consist of three to four emails with increasingly tempting offers and subject lines that are creative, fresh and different from your regular voice.

CRM & Email Hygiene Activity Log

Regular data hygiene actions will ensure that you're including the maximum number of contacts in your email and automated campaigns.

Evaluation Date	Number of Invalid Syntax Records	Number of Dormant Records	Action Taken

Mobile

With more than 6 billion mobile devices on the planet, consumers are leveraging innovative and highly functional mobile devices to become connected and empowered like never before. Digital marketers now are challenged with not only delivering perfectly timed, mobile-optimized emails, but they must also consider how to strategically incorporate automated push notifications, SMS messages and even Web push notifications into each unique customer journey.

Completing a journey map for how your customers interact with your brand can help give you a detailed holistic view into the flow of a user's experience and allows you to visualize the client-centered touch points. Once you've identified the activities in each phase of the buying cycle, it's much easier to slot in mobile. Maybe during the post-purchase phase, for example, it makes sense to add in an automated SMS transactional notification letting customers know their order has shipped.

Mobile is a rapidly changing and quickly growing area, so make sure you master the basics, expand into better and recommended practices, and continue to iterate and upgrade as your customers evolve.

Foundational Practices

Mobile Apps/Push Notifications

- ☐ **Offer a transparent opt-in and opt-out process.** Android subscribes users to push notifications by default, while Apple requires every iOS app to ask permission before sending notifications. Cover your bases and make sure you acquire explicit consent from users to send push notifications.
- ☐ **Clearly communicate and demonstrate the value proposition of push notifications.** Make a strong case for why the user should accept your notifications, and stick to your word — don't overwhelm your audience with irrelevant, unwanted messages.
- ☐ **Set expectations.** Define what type of alerts, messages and offers your brand plans to communicate through mobile push notifications.
- ☐ **Implement device-ready assets and content.** Differentiate your messaging by device specifications and different screens.

SMS

- ☐ **Establish what subscribers should anticipate.** As with push, communicate what customers can expect to receive in regards to both message content and frequency.
- ☐ **Provide real value first.** Every SMS campaign should provide your customers something valuable, whether it be exclusive information, a special offer, an appointment reminder, etc. Keep things fresh so your subscribers feel happy to be a part of your "special SMS program."
- ☐ **Capture data second.** You can gain information along the way, but don't make data capture your primary objective. Get to know your customers gradually, interspersing data capture requests with high-value messaging.
- ☐ **Be respectful of time.** Don't send SMS messages before 9 a.m. or after 9 p.m. to avoid annoying those who wake up late or go to bed early. You can request time zone information to better optimize your sending patterns.
- ☐ **Communicate opt-out protocol.** Let your subscribers know they can opt out of your SMS campaigns at any time.

Every SMS campaign should provide your customers something valuable.

Recommended Practices

Mobile Apps/Push Notifications

☐ **Encourage users to take action.** Nudge them to interact with and go deeper into your app. Also, consider incorporating links from within your app to your website, to download video and to connect with you via social.

☐ **Consider app-centric coupons.** If you're mailing or emailing out coupons, consider saving some coupons for redemption only within the app to encourage app engagement.

☐ **Offer a preference center to increase content relevancy**. Allow users to select what they want to receive and when, what they like and dislike, etc.

☐ **Personalize content.** Use segmentation to personalize mobile offers, messages and alerts. Also, schedule notifications based on user time zone and location.

☐ **Enable an in-app notification inbox.** This inbox enables you to send messages without interrupting users. Plus, these messages can be delivered even if a user hasn't opted into push.

☐ **Implement a strategy for inactives.** Define and identify inactive app users, and try to re-engage them or consider removing that segment from receiving push notifications (with previous notice). Evaluate using other messaging channels that can reach these users more effectively.

☐ **Measure your results.** Regularly track how mobile push notifications impact your marketing results.

SMS

☐ **Monitor opt-outs per send.** To gauge content value, measure the opt-out and delivered rates for each outbound campaign. Determine which types of messages resonate with users and ones which cause churn. If you have an opt-out rate of above 5 percent, you should re-evaluate your content.

☐ **Consider the total mobile experience.** Optimize the customer experience by linking SMS messages to mobile landing pages that are designed for ease of use while providing you valuable customer data.

☐ **Promote your SMS programs in other channels (Facebook, Twitter, email and website) to encourage database growth.** Building a SMS database takes time, so don't be discouraged by slow adoption, especially if you've only been promoting it in a single channel.

☐ **Provide an incentive to join your SMS program.** A small discount on the next purchase or even just providing exclusive content can really make the difference in regards to higher opt-in rates.

☐ **Consider incorporating cross-channel campaigns that combine SMS and email.** If your customers make a purchase as a result of a SMS campaign, send them a mobile-friendly email thanking them for their purchase.

Use segmentation to personalize mobile offers, messages and alerts.

Better Practices

Mobile Apps, Push Notifications and SMS

☐ **Get visual.** Use rich experiences and configurable actions to continue a branded conversation with customers.

☐ **Combine multiple levels of messaging specificity.** Use broadcast, narrowcast and 1:1 notifications for different types of communication.

☐ **Define your brand personality.** Use a distinct messaging tone – one that relates to your audience – to create brand identity.

☐ **Combine mobile data with other information sources**. Capture mobile insights and integrate them with data from multiple sources (CRM, behavioral, analytics, etc.) for richer segmentation and targeting of future campaigns.

☐ **Use location as an opportunity for marketing.** Trigger personalized, real-time messages based on a customer's location.

☐ **Combine the mobile view of the customer with the power of analytics to drive value.** Use analytics and dynamic customer insights to learn about the mobile customer experience, including struggles, preferences, past history, interactions and location, to drive more contextual content through all digital channels.

☐ **Define a multi-touch plan to onboard new users and keep existing users engaged.** Guide new users to complete a series of steps so they can use your app in full. Maximize connection with your existing users, developing a cadence to communicate with them at regular intervals.

☐ **Create integrated cross-channel journeys and experiences.** Use customer journey maps and analytics to gain perspective, identify opportunities for improvement and build new mobile engagement points.

Combine the view of the customer with the power of analytics to drive value.

Mobile Worksheet

Use this worksheet to identify opportunities for improvement in your mobile marketing efforts.

Number of contacts in database: ____________________________

Number who have downloaded app: ______________________

Percent of overall database: _____________

Number of app downloaders who have accepted push notifications: _____________________

Number opted in to SMS program: ______________________

Percent of overall database: _____________

Growth rate of SMS program over time: _____________________________

Number of net new SMS subscribers per week: ____________________________

App re-engagement program? ☐ Yes ☐ No

Mobile app preference center? ☐ Yes ☐ No

In-app push notification inbox? ☐ Yes ☐ No

Types of push notifications currently sent (check all that apply)

☐ Broadcast ☐ Narrowcast
☐ 1:1

SMS program promoted via (check all that apply):

☐ Email ☐ Facebook
☐ Twitter ☐ Website
☐ In-Store

Average SMS opt-out rate ______________

Landing Pages and Data Collection

In many cases, landing pages and microsites are the first place that a prospective customer comes into contact with your company, so making a great first impression is paramount. Landing pages allow you to help your prospect focus on your offer and ask for them to take a specific action, without them getting sidetracked by all your main website has to offer. They also provide the ability for you to collect key information about the site visitor so that you can effectively market to them. Your marketing automation provider can host the landing page and Web form for you, or you can i-Frame the page into your existing website infrastructure.

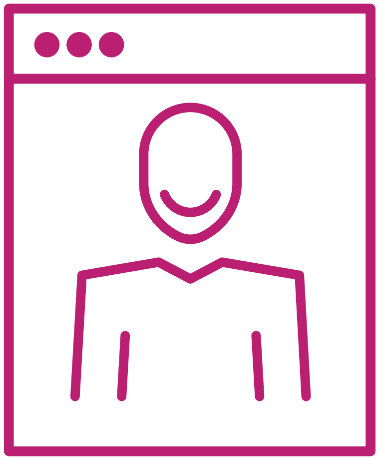
Foundational Practices

☐ **Make it easy for prospects to give you information, and ask only for the data you need.** Don't bog down landing page visitors by requiring them to complete lots of mandatory fields before they receive your offer. Initially, you should only request email address, first name and perhaps one more vital piece of data. This will allow you to begin your engagement process. You can ask additional questions later.

☐ **Immediately provide the promised content or value.** If a visitor comes to your page so that he or she can get your white paper or other content, deliver an immediate, automated thank you or confirmation page that includes a click to a download link. Don't make them wait for an email or force them to navigate to another area in your website to receive the information.

☐ **Minimize distractions such as extra navigation, animation or additional content.** Landing pages should be designed with one thing in mind: getting the visitor to accept your offer. Keep the creative and copy both crisp and direct.

☐ **Provide a preference center.** To increase engagement, use a preference center to allow contacts to declare their interests and how they'd like to receive communications from your company. This should include allowing your visitors to decide the communication frequency, communications method (e.g. mobile/ SMS or email) and subject areas of interest. Within the preference center allow for opt-out/unsubscribe. Your processes for opt-out/unsubscribe should conform to CAN-SPAM and similar laws in place for both your country and also in the recipient's country.

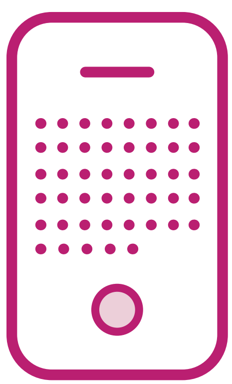


Landing pages should be designed with one thing in mind: getting the visitor to accept your offer.

Recommended Practices

- ☐ **Use progressive forms to gather intelligence over time.** Don't feel that you have to get all the pertinent data elements on one visit. You can use the progressive forms capability to collect the data over multiple visits. The solution is designed to remember data from one visit to the next, pre-populate a unique identifier such as email address to confirm the visitor's identity, and then only ask for additional, new information. You can specify the order in which you ask for data over subsequent visits.
- ☐ **Ask buyer discovery questions.** Use BANT (Budget, Authority, Need, Timing) and other related questions to determine where the contact is in his or her buying cycle.
- ☐ **Ask targeting or disqualifier questions.** For example, if you only sell in two regions, simply asking if they're in "Region A," "Region B" or "Other" will allow you to prevent those in region "Other" from getting added to your lead funnel.
- ☐ **Append additional data into the existing record for the visitor.** Don't introduce multiple records into your database when you use progressive form technology. Instead, add the additional data collected to fields in existing records.
- ☐ **Label the form submit button with an action-oriented call to action.** Doing this will emphasize the benefit and a sense of urgency of what you want visitors to do. Examples might include "Download Now," "Register for Event" or 'Request Additional Information."
- ☐ **Optimize forms for mobile.** Smartphones are likely the dominant way that people are interacting with your content. Make sure your forms are optimized for mobile and are easy to both complete and submit.
- ☐ **Use pull-down lists and/or radio buttons as often as possible.** This will help minimize typos, improve the quality of your database and increase the likelihood you'll get a response. Keep asking yourself: Have I made it as simple as possible for a visitor to give me their information?
- ☐ **Match branding and corporate identity.** Landing pages should mirror your company's standard design elements, tone and other brand attributes. Use language, color and iconography that's consistent with your other collateral, emails and website.
- ☐ **Include a second option.** If the offer requires a high level of commitment, consider a smaller, more subtle link to a lower-value offer for the site visitor who would otherwise abandon the form. For example, on a page where you're offering a request for a live demo, you could include a second call to action such as, "Not ready for a live demo? Click here to watch the two-minute overview."
- ☐ **Prepopulate fields.** Pre-fill any fields on a form with information you have in your database. This will reduce the site visitor or customer's typing and also give you a chance to validate the data.
- ☐ **Incorporate field validation to ensure cleanliness of incoming data.** If you can't prepopulate your form data elements with information already found in the existing database record, or if you don't provide radio buttons or pull-down lists, consider adding in field validation. By employing some combination of these three practices, you'll help ensure clean data is going into your database.

Optimize forms for mobile.



Better Practices

☐ **Use hidden fields or URL parameters to store information regarding the campaign, offer and advertising source.** This will provide additional metrics to gain deeper insight into the effectiveness of your content and advertising.

☐ **Employ A/B testing.** Use it to determine the best imagery, offer tag lines and even the number of form fields.

☐ **Use an integrated data collection solution for trade shows and events.** This will allow clients (or employees) to easily capture visitor data and place it immediately into your marketing database. As outlined in the recommended practices section, use radio buttons, pull-downs and prepopulated fields wherever applicable. iPads or other tablets are easy to deploy and make show and conference data collection enjoyable and seamless. This same platform can also be a great way to increase opt-ins in a retail setting.

☐ **Allow visitors to sign on with their social IDs.** Instead of providing a blank form for your visitors to complete, consider giving them an alternative: Provide the option to allow visitors to sign in or opt in by providing their Twitter, Facebook, etc. login credentials. This will give you the contact information you need to initiate the marketing relationship — and make the sign-in process easier for your prospects.

Provide the option to allow visitors to sign in or opt in by providing their Twitter, Facebook, etc. login credentials.

Landing Pages Log

Eliminate all unnecessary navigation in order to drive the visitor to conversion.

Landing Page Name	Goal	Active (Y/N)	Launch Date	Deactivation Date

Data Collection Log

Maintain a stringent focus on collecting the most important information.

Data Collection Area	Page Name	Progressive Forms (Y/N)	Social Sign-in (Y/N)	Required Fields	Optional Fields

Scoring and Routing

Scoring and routing allow you to improve the quality of leads you're providing to sales and increase the relevancy of information you're providing to your contacts. In a typical scenario, marketing will generate demand for your solution and nurture the inquirers and leads until they're appropriate for a sales resource.

Scoring isn't just for B2B marketers, though, and it's not just for lead capture/assessment. Scoring can play a vital role no matter your marketing style. Think of scoring as dynamic segmentation. Values are always changing, and they can immediately reveal best customers, least-valuable customers and/or customers that might need a different level of service.

Scoring allows you to dynamically assign values to each contact and give you a true picture of your marketing pipeline. This numeric value can also be aggregated into a range that allows you to summarily communicate the status of a contact. A robust marketing automation solution will allow you to create your own scoring methodology tailored to the way in which your sales, marketing and other organizations classify accounts.

Foundational Practices

☐ **Select a combination of attributes you want to score.** Combining behavioral data (page and website visits, PDF downloads, button clicks, etc.) with demographic data will typically improve your scoring model and drive improved results, so keep this in mind as you're brainstorming what items you want to score. Then, think about what tools and tactics you'll need to implement to collect these, such as Web tracking (for capturing behavioral data) and progressive forms (for gathering demographic information).

☐ **Where possible, involve sales and other key stakeholders.** One of the key purposes of a lead scoring and routing initiative is to hand off or integrate sales or other channels outside the marketing department. To ensure that valuable leads aren't discarded or disregarded, it's vital that marketing and sales (and/or other interested parties) work together to define the criteria by which an inquiry becomes qualified enough for routing to someone outside of the marketing department. It's also important to document when and how leads are routed back to marketing if the company or contact is in fact not yet ready to engage with sales.

☐ **Determine your company's data sync preference.** Will all records be synced between CRM and your marketing automation database, or will marketing hold on to the unqualified leads for further nurturing? For companies that choose to sync all records, it will be important to create work flow rules and views in your CRM system to prevent unqualified or questionable contacts from being assigned to a sales rep.

☐ **If sales is not ready for an alignment exercise, still build a scoring model!** Marketers can gain tremendous insights and leverage scoring even if the scores aren't shared with sales. You can leverage the score or rank to target specific content offers or place individuals in nurture programs based on their buying stage.

☐ **Design with change in mind.** Lead scoring and routing implementations need to be flexible. It should be easy to adjust routing rules and alerts based on a changing sales organization. Additional behavioral-based rules should be added based on the submittal of information on a new Web page, landing form or other behavior.

Lead scoring and routing implementations need to be flexible.

Recommended Practices

☐ **Determine the importance of what visitors tell you versus what they do, and then weight your scoring model accordingly.** High-traffic sites with broad reach typically require at least an even balance of demographic and behavioral scoring methods, but might put more weight on demographic attributes to avoid the high volume of casual site visitors who are only there for free content. Niche sites with lower-traffic volumes can place more emphasis on behaviors and use demographic data to disqualify those that should likely never be leads such as interns, students, competitors or residents of untargeted geographies.

☐ **Develop different content for different points in the buying cycle.** Recognize that not all site visitors and email recipients are at the same point in the buying cycle. To increase relevancy, engagement and progress, develop content and offers that have the buying cycle in mind. For example, someone who comes to your website to learn more about your industry needs different information than someone who's comparing product features and functions for the last time before selecting a vendor partner. To help you achieve success in this area, develop buyer personas and document the customary stages of the buying cycle. Determine what you have to offer for buyers at these different phases and fill in the gaps where you may not have the appropriate deliverables to offer your customers and prospective buyers. Each offer should be associated with a buying stage and a score.

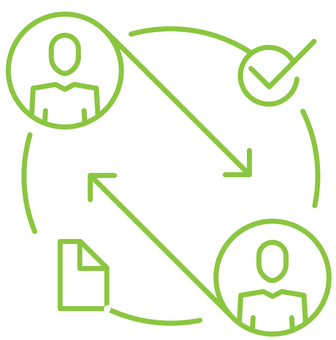
☐ **Leverage lead-ranking tiers.** Once you develop your numerical scoring system, it's helpful to group a range of scores into a ranking system. This could consist of hot, warm and cold; 0 to 5; or "A," "B" and "C." This will allow your sales teams to focus on what they need to do next and not nitpick individual numerical scores. For example, you can define that an "A" lead is a lead with a score greater than 90. For routing purposes, whether a contact is assigned a score of 90 or 94 doesn't matter; what matters is that sales follows up within an agreed-upon time.

☐ **Incorporate behavior into the score.** One of the best indicators of someone's propensity to purchase is behavior. These behaviors can include submitting a form, visiting a Web page or site, clicking on a link in an email, entering an automated campaign or program, downloading a file

Develop different content for different points in the buying cycle.

from a website, playing an audio file or video, clicking on a link in a website, and more. Consider assigning points in your lead scoring model if someone performs any of these steps.

- ☐ **Test the model.** Run real-life examples of leads or customers through the model you've created to see how they score. You can do this manually or use a spreadsheet to model your score. After you run a few test cases through the model, you'll likely find there are some adjustments you'll need to make.
- ☐ **Revisit lead scoring and routing processes regularly.** Lead scoring and routing can be a "set it and forget it" system, but that's not recommended. Instead, schedule get-togethers with key stakeholders at regular intervals to review all offers, visitor behaviors and new marketing initiatives to make sure you're scoring on all possible points of engagement. Also, meet with sales and other involved parties to review assigned scores and routing policies and gather lead-quality feedback. Make sure to adjust scoring systems to accommodate the dynamics of your marketing and sales environment.
- ☐ **Make exceptions to the typical route leads follow.** Allow "hand raisers" (site visitors who request to speak with sales) to bypass the scoring model and be routed directly to a rep.
- ☐ **Match leads to sales reps.** Leverage lead assignment rules to dynamically assign a lead to the correct rep based on product, lead score, geography, etc.
- ☐ **Get inside sales involved.** If a lead needs further qualification, consider leveraging an inside sales team resource before routing the opportunity to direct (or outside) field reps.



Make exceptions to the typical route leads follow.

Better Practices

☐ **Have specific, documented processes for lead recycling.** If a lead is routed to sales, and yet sales determines it's not yet a qualified opportunity, put a mechanism in place to recycle this contact back into your marketing efforts. Also, debrief with sales to determine why the lead wasn't qualified and make sure a score wasn't incorrectly assigned. Adjust scoring methodology as needed.

☐ **Incorporate lead nurturing into your marketing efforts.** Lead nurturing is a process that builds and maintains engagement and relationships with those prospects that aren't yet ready to engage a sales resource. Usually this consists of delivering relevant offerings and content such as white papers, articles, and event and webinar invitations. The lead nurture system can be set up within the marketing automation platform. Typically your lead score system assigns points to individuals who download content, click on website pages and/or attend webinars and events.

☐ **Capture behaviors from other sites.** Content that's embedded on your site, but plays from another site or routes the user to another site should be tagged in order to be captured and scored as behavior. A common example is a company's YouTube video that is embedded to play within a site page.

☐ **Provide two-way integration with your CRM system.** Because lead routing and recycling is such a dynamic process, routing with emails alone isn't recommended. Routing works best when it takes place between your marketing automation system and your integrated CRM system. That way the leads that are sales-ready will automatically show up in the same system that the sales reps use for the daily management of their sales process. Email alerts delivered from the marketing automation system to the rep is a good supplement to a CRM-based routing process.

☐ **Make it obvious to salespeople when they should act.** Leverage views, tasks and work flows in CRM to make it clear to sales reps when they should follow up with a lead who's taken a meaningful action. Provide the date of the marketing alert and an introductory note so reps get suggestions on appropriate steps they should take in following up.

Provide two-way integration with your CRM system.

☐ **Develop and gain agreement with service-level agreements.** The definitions and discussions on how leads are to be scored and routed have already been described as requirements in both the foundational principles and recommended practices sections. The optimal practice, however, is to document and enforce a service-level agreement for lead scoring and routing. This requires the joint teams to put the attributes of the lead scores and ranks in writing and agree to enact the specific workflow processes within a certain amount of time. For example, if a contact is assigned a rank of "A" because of his or her behavior and activity, then marketing must conform to an agreed-upon service level for routing those leads to sales within a specified period of time. Likewise, if a qualified lead is received by sales, sales commits in writing to contact the prospective buyer within "X" number of hours. These documented service-level agreements become the basis to audit effectiveness and policy conformance.

☐ **Use negative scoring to eliminate certain contacts from being qualified and therefore routed to sales.** Every company has individuals that are interested in your company but will never become a valid potential buyer of your offerings. Examples include individuals who work for competitors as well as students, consultants, members of the press or industry analysts. A better practice is to have individuals from certain website URLs or geographies omitted from your lead nurturing, recycling, scoring and routing processes.

☐ **Develop a system for identifying and routing the hottest leads.** A new lead for you might be your competitor's hot lead that's researching other vendors. Provide clear ways for these "blue birds" to raise their hand and get an immediate call from inside sales.

☐ **Consider multiple scoring models.** If you have different product lines with different sales and marketing processes, consider establishing unique scoring models and routing policies for each so that you're tailoring your activities appropriately. You may also want to establish different scoring models for different regions or geographies.

Consider multiple scoring models.

Lead Scoring Planning Sheet

Ask your sales teams what demographic or behavioral data they see as being important criteria in determining what constitutes a lead. Rank the variables in terms of importance.

Criteria	Importance A, B, C or 1-10	In Lead Model? (Y/N)	Criteria Type Demographic (D) BANT (Budget, Authority, Need, Timing) Behavior

Programs and Campaign Automation

Programs or campaigns provide capabilities to design and deploy automated processes that move contacts through repetitive marketing steps without the need for queuing, sending, or other batch or manual marketing efforts. Each automated program consists of rules for entering and exiting the program, decision logic (for example, if a contact has exhibited a certain behavior or has a certain value in his contact record, then he or she advances to a determined step; otherwise, do something else) and content elements.

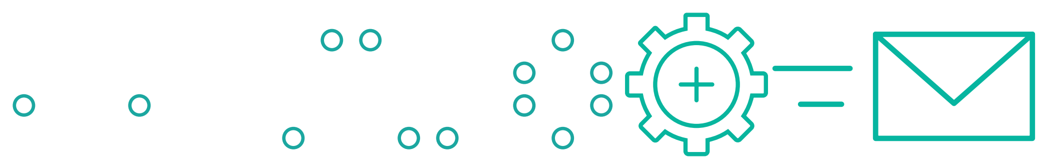
Automation can dramatically reduce repetitive workload in the marketing department and can also improve your results because as soon as a rule is matched, the communication (email, SMS, etc.) is sent. Nearly 80 percent of top-performing companies have been using marketing automation for more than two years.[1]

Foundational Practices

- ☐ **Define your audience.** Automated programs or campaigns are only going to include audience members that meet the entry criteria. In order to begin this process, you need to determine who you want to include. This definition should include database criteria such as title, industry, country or other fields. You can also elect to place contacts into your automation process when they meet certain lead score ranges or exhibit certain website or email behavior. Properly defining who will (and who won't) be included in an automated program is vital to your success, so take care in defining the rules for including and excluding contacts.
- ☐ **Consider campaigns that would help you proactively target and communicate to various segments in your marketing database.** Think of programs that allow you to invite participants to engage with you. Examples include upsell/cross-sell, buying cycle nurture programs, event marketing, and trial-to-purchase conversions.
- ☐ **Implement campaigns that help you respond to a visitor's action or request in real time.** Think of these as programs that wait for a visitor to take a specific action and then respond instantly. Examples include a webinar/event registration follow-up and an offer download follow-up that includes a next recommendation offer link.
- ☐ **Use automation for campaigns that will be triggered based on an important date or time frame.** Reach out to a contact based on something that happened in the past. Examples include an approaching free-trial expiration, lack of activity over a period of time, the contact's birthday, or their anniversary of becoming a customer or entering a loyalty program.
- ☐ **Consider having lead generation, lead nurture and customer-focused automation programs.** The latter can help you stay connected to existing customers, increasing loyalty and customer satisfaction.
- ☐ **Establish a program timeline.** You need to decide if the program will run indefinitely or for a determined period of time, what the timeline is for new contacts to be able to enter the program, and which program elements are date-relative. This means that the campaign step can occur relative to other steps in the program. For example, step 3 occurs seven days after step 2. Also, determine which program elements are date-sensitive. For example, if you have a webinar or show, those activities will most likely occur on a pre-determined date.
- ☐ **Pre-develop your content.** Once you recognize the need to automate a series of marketing activities, begin documenting the content that you need to support your efforts. In order to define the program, you don't need to have every campaign offer or element in final form (you can use placeholders for steps where content is forthcoming). However, pre-developing all the content prior to campaign launch will eliminate a last-minute scramble to fill a content gap.
- ☐ **Where possible, test your automation with a seed list.** This will ensure you don't have a segment of responders who are "stuck" in a step.

Recommended Practices

- ☐ **Incorporate autoresponders.** Autoresponders are mailings that are triggered based on certain events and should be added as a defined step for campaign elements such as reminders and registration confirmations. This practice will dramatically increase the efficiency of the marketing staff. Autoresponders can also be a wonderful way to cross-sell and upsell add-ons such as suggested maintenance, extended warranty or additional training courses.
- ☐ **Follow up content requests.** When a site visitor requests content, a program can provide an automated follow-up mechanism by asking them if they would like to chat with a rep, promoting the next piece of content in the series, asking their opinion or inviting them to share the content on their social network.
- ☐ **Pay attention to timing.** Specify the times at which an automated program is allowed to send out email so that messages don't appear in contacts' inboxes while they're sleeping.
- ☐ **Use data from CRM to dynamically populate messages.** This personalization can improve engagement. Have the email reply address belong to the sales rep instead of an unmonitored mailbox, which might be perceived as impersonal.



Use data from CRM to dynamically populate messages. This personalization can improve engagement.

Better Practices

☐ **Use personalization and dynamic content.** Tailoring an offer by segment, industry or contact name will increase readership and success rates. Consider tailoring both the copy and the images based on fields in the database. In many instances, dynamic content only requires one email template, with the message then deploying in many different versions based on fields in your database. This can provide substantial increases in efficiency and effectiveness.

☐ **Provide specific programs that sales reps can use to add contacts to during their sales process.** Examples can include inflection points such as completing a meeting, demo or phone call. Program examples can include a 60-day introductory nurture or a deep-dive nurture on a specific product.

☐ **Weed out unqualified leads.** Set system rules that prevent unqualified contacts from receiving high-value offers and content.

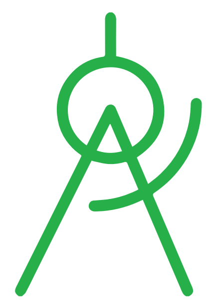
☐ **Weed out leads that are close to buying.** Leverage CRM opportunity information to prevent contacts at a high-probability deal state from receiving nurture offers.

☐ **Leverage relational table information.** Use relational table data such as products purchased, customer service calls, abandoned shopping cart and more to make the message content and timing match the contact's interest.

☐ **Create campaign templates that are simple to copy.** This will save you valuable time when implementing routine marketing tactics such as webinars and events.

☐ **Create campaign hierarchies.** Specify entry criteria within each campaign that removes people who are in a similar but higher-value campaign.

☐ **Leverage lead scoring rankings to remove people or add them to the appropriate programs.** This will help ensure that a higher-ranked lead doesn't end up in a general nurture program.



Consider tailoring both the copy and the images based on fields in the database.

Programs & Campaign Automation Log

Programs and campaign automation can improve the efficiency of the marketing department. Use this worksheet to summarize your automation opportunities.

Automation Function	Goal	Persistent or Event-Driven	Trigger or Entry Criteria	Exit Criteria	Supporting Content		
					Name	Name	Name

Data Management and Integration

Having an effective data management and integration strategy is fundamental to the success of digital marketing. We've all heard the famous Stephen Covey quote, "Begin with the end in mind." This adage is absolutely the truth when it comes to data. If you build and implement an effective data strategy, you'll get far more insight from your marketing data.

Often, companies let the pressures of deadlines relegate data management decisions to the back seat. It's far too easy to import one-off lists to fulfill a project need without considering a strategy and planning for integrating the list into a centralized persistent database. Resist this temptation by carefully considering the short- and long-term requirements for all data elements. Plan for and implement integrations to other systems including CRM systems, billing systems and product catalogs. Having a well-thought-out data strategy will contribute greatly to the improvement of your segmentation efforts.

Foundational Practices

☐ **Design and adhere to a single, persistent master database if possible.** A central marketing database will allow you to communicate with an individual across all marketing channels (email, web, social, location, mobile) and understand their interests and intent. Having a singular place that houses your database of record also enables you to take advantage of programs that track interactions over time such as Send Time Optimization.

☐ **Determine which data elements you want in your database and the proper format for that data.** Regularly run routines that validate the data for format conformance. If you'll never use a data field, don't import or maintain it in your database. For example, only integrate the fields from your CRM system that are relevant in marketing communication and business rules.

☐ **Capture and incorporate behavioral data for use across many marketing automation functions.** Behavioral data can include actions (clicks, downloads, views, opens) that a visitor took on your site or in your emails.

☐ **Always append new data to existing records and update existing data fields with newer data.** This will dramatically reduce the introduction of duplicates into your primary database.

☐ **Define who will have which types of data management rights.** Will sales have access and be able to update all fields in your database? If not, carefully define the rules for data access and update capabilities in your organization.

☐ **Map it. If two-way real time integration is required between systems, build a data map that defines each field and the integration requirements (one-way, two-way).** Determine which fields will have precedence if both are being updated.

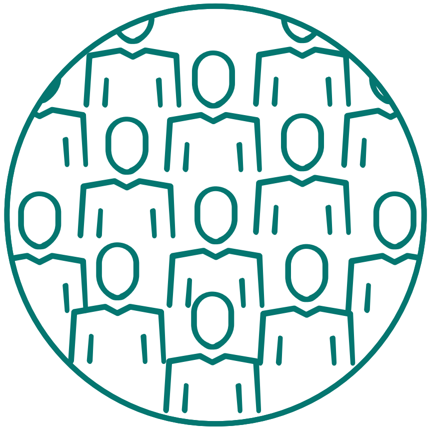
☐ **Decide between marketing automation and CRM.** If you're integrating with a CRM system, decide if all your records are going to be in both your marketing automation system and your CRM system or if your CRM system is only going to house selected records (e.g., only integrate the accounts where a contact has a lead score over a certain threshold).

Regularly run routines that validate the data for format conformance.

Recommended Practices

- ☐ **Implement Web tracking to capture and record all website visitor metrics.** This will allow you to gain insight into where your prospects are visiting, where they're clicking and engaging, and where anonymous site visitors take the time to identify themselves through a Web form.

- ☐ **Use queries instead of contact lists for ongoing programs.** Contact lists are static one-off lists that never change. Queries dynamically access your database and include all recent records, increasing your target audience and ensuring you're using the most up-to-date information.



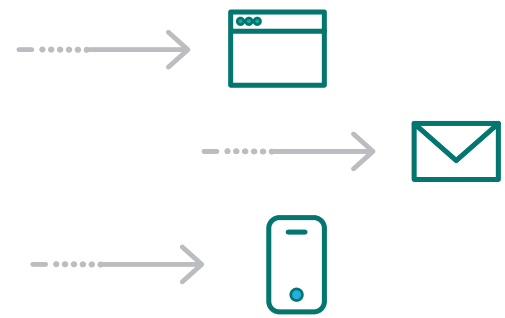
Queries dynamically access your database and include all recent records, increasing your target audience and ensuring you're using the most up-to-date information.

Better Practices

☐ **Incorporate relational tables to allow for the real-time use of related data.** Examples can include client billing information, product tables and support history. Plan for consistent integration of this data into your marketing automation system so that you're going to market with the most up-to-date and relevant information.

☐ **Give reps the power to add accounts into nurture.** If your CRM system is integrated with your marketing automation system, allow reps to add self-selected accounts from their CRM into a recycling or nurture program in your marketing automation solution.

☐ **Put external data to use.** Allow demographic and other information collected by sales reps or third-party data append tools to drive marketing programs, business logic and lead scoring.



Allow demographic and other information collected by sales reps or third-party data append tools to drive marketing programs, business logic and lead scoring.

Data Management & Integration Worksheet

Document your desired segmentation goals and the data required for marketing success.

Campaign Goals	Segmentation Needed	Fields Required	CRM	Data Source			
				Billing System	Product Catalog	Order System	Other

Reporting and Analytics

Reporting and analytics provide the foundation for improvement in all areas of your marketing efforts. Without a well-defined data management discipline, though, you may be missing key insights, or worse yet, arriving at the wrong conclusions because your data is either incomplete or inaccurate. Used correctly, reporting and analytics help provide the insights you need to improve marketing tactics, budgeting and ROI. Now, predictive analytics technology is available to handle the heavy lifting of determining what indicators matter for future revenue growth, attrition or other key business drivers. In addition, cognitive technology such as IBM Watson is emerging as a whole new approach to answering vexing questions.

There are three primary methods for reporting and analytics: Standard “out-of-the-box” reporting, extracting and manipulating marketing data into Excel incorporating pivot tables and report template frameworks, and performing multidimensional data analysis using analytics applications.

All methods can be used simultaneously to provide the insight you need.

Foundational Practices

☐ **Review each standard report provided by your marketing automation vendor.** Evaluate these reports to determine their usefulness within your department and among other interested parties. Also, review the campaign and pipeline reporting capabilities of your CRM system if installed. This will allow you to easily gain insights across the entire marketing and sales pipeline.

☐ **Determine ownership.** Who will run the reports, when will they run and to whom they will be distributed? Determine who will interpret the reports and share key findings.

☐ **Develop standard procedures.** Adopt a standard process to evaluate each report, interpret the data and make recommendations both within the marketing team and to other departments.

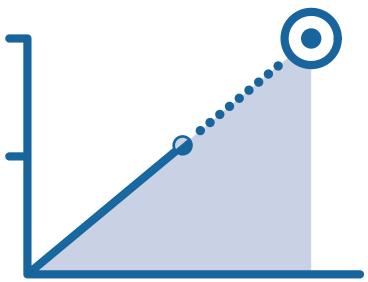
☐ **Track how your customers found you separately and distinctly from what they found.** This means that the offer should be tracked separately from the source. Examples of a lead source could be a pay-per-click ad, a tweet, an organic search, or an article in a publication. These are the places where the prospect first heard about you. This is a completely different measurement from the offer. The offer is what you develop to entice someone to take action. Examples of offers could be a white paper, and invitation to an event or Webinar, or a discount. To help you with your budgeting and resource planning, you need to consider both of these attributes of your leads.

☐ **An originating lead source should be maintained forever.** The originating lead source represents the first time a person ever responded to your company's information and took action. Over time, storing and analyzing this information will give you valuable insight into which channels (e.g., Twitter link, email link, trade show or pay-per-click ad) are the most responsive for your company. If you overwrite this originating lead source with subsequent visit information, you've lost the ability to use that critical information as the basis for future budgeting and planning efforts.

Track how your customers found you separately and distinctly from what they found.

Better Practices

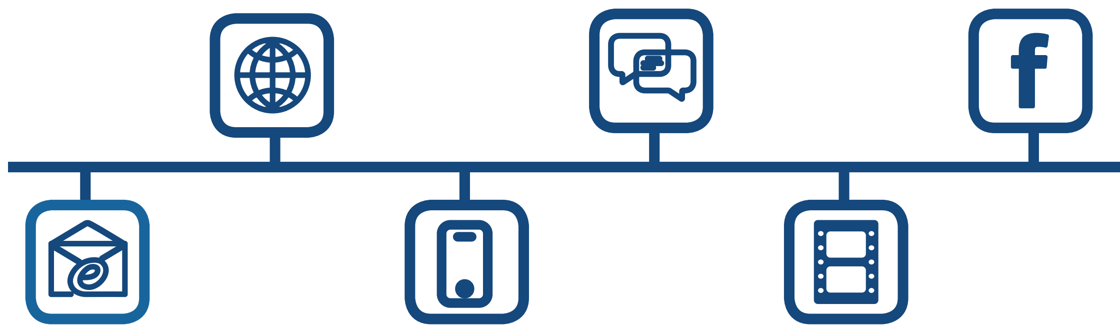
- ☐ **Regularly report and assess the performance of individual components of your marketing mix.** This includes individual mailings, offers and events.
- ☐ **Look for patterns you can act on.** Review trend information such as list growth and collateral/offer consumption to see if there is valuable, actionable insight.
- ☐ **Track and report on individuals as they move from anonymous site visitors to customers.** This "research-to-revenue" tracking and reporting will provide important insights that will allow you to assess both sales and marketing effectiveness.
- ☐ **Use an Excel plug-in.** If you want additional segmentation, statistics or comparisons that aren't found in the standard reporting capabilities of your marketing automation solution, consider using an Excel plug-in to extract the data from your marketing automation installation. From there you can slice, dice, sub-total and calculate a wide array of data elements to get you the insight you need.
- ☐ **Leverage snapshot metrics to track your progress by month or quarter.** This will help you identify strengths, weaknesses and areas for improvement.



Leverage snapshot metrics to track your progress by month or quarter.

Recommended Practices

- ☐ **Offer a dashboard view for the C-suite.** Consider implementing a Web-based, self-service dashboard or portal where executives and other key individuals can get metrics and performance information on a self-service basis.
- ☐ **Look at data on an account-wide level.** Although B2B companies market and sell to individuals, aggregating behaviors and results of actions (or non-actions) to gain an account-wide perspective is invaluable.
- ☐ **Make each offer a campaign in your CRM system if applicable.** This will allow you to see the contribution that each offer has across the entire marketing funnel.
- ☐ **Add an analytics application.** If you want multidimensional analysis or would like to assimilate large quantities of data out of your marketing automation system, consider the addition of a commercial multi-dimensional analytics application.



Make each offer a campaign in your CRM system if applicable.

Reporting & Analytics Worksheet

Make sure you have the time and resources to interpret the reports in order to adjust your execution and/or strategy based on significant trends or results.

Report Name	Who Runs?	Frequency	Who Analyzes?	Key Insights

CONCLUSION

When reviewed in its entirety, email, mobile, landing pages, data collection, scoring, routing, programs, automation, data management, integration, reporting and analytics offer a comprehensive suite of functionality that can dramatically improve the efficiency and effectiveness in the marketing department. Never before has this array of functionality been available to help marketers achieve and exceed their business objectives, but today's marketing automation technology puts all these tools at your fingertips.

Using this book as a road map can help you adopt a phased approach for implementing marketing automation and achieving outstanding results. Review where you and your organization are in the adoption of these core capabilities and gradually increase your sophistication in the functional areas of your choice. Moving from foundational practices to recommended practices and then on to better practices provides a practical guide for operational and business success.

Footnotes

1-Gleanster, "Q3 2013 Marketing Automation Benchmark," Aug. '13

Silverpop, an IBM Company, is a cloud-based digital marketing provider that offers email marketing, lead-to-revenue management and mobile engagement solutions. Silverpop Engage — the foundation of the IBM Marketing Cloud — uses customer data and individual behaviors, collected from a variety of sources, to inform and drive personalized interactions in real time. IBM Marketing Cloud powers the delivery of exceptional experiences for customers across the buyer journey by leveraging key data, providing analytical insights and automating relevant cross-channel interactions. As part of IBM Marketing Solutions, Silverpop helps make it easier to design meaningful customer experiences across applications, devices and time, accelerating today's results and tomorrow's ambitions. Silverpop is trusted by more than 5,000 brands around the globe. For more information, view our demo and visit silverpop.com.