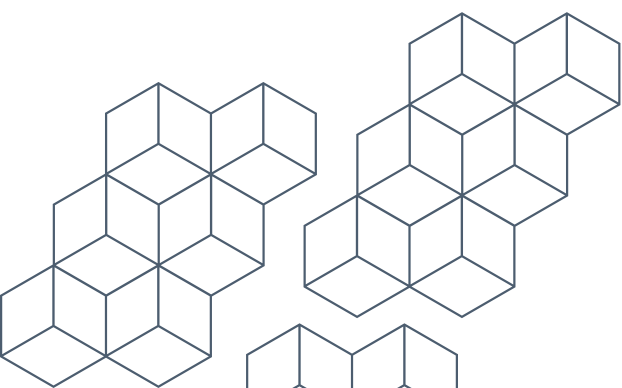


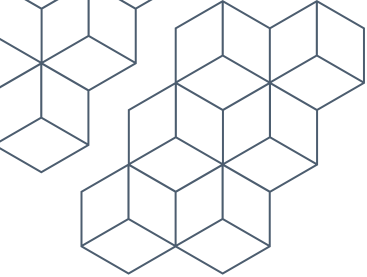


# Getting Marketing Automation Ready

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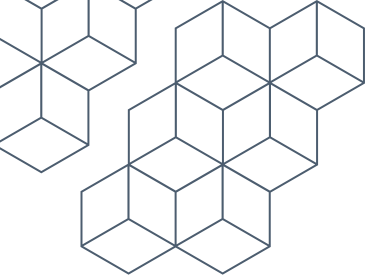
## Intro

In order to get the most out of your marketing automation tool, whether you have purchased marketing automation or are in the beginning stages of thinking about making the investment, you'll want to also invest in an entirely new way of going to market. What you are about to embark on in this helpful handbook is the methodology - and really the movement- behind marketing automation. It is more than a tool that gets you conversions. It is how you market to the entire membership lifecycle from prospect to member and member to advocate.

## Transformation Versus Operational Efficiency

First we want to define what marketing automation is not. It isn't a tool to merely achieve operational efficiency. It is a whole new movement and way of going to market. When your organization does finally decide to adopt a marketing automation tool, what you don't want to get stuck doing is using it to save time to automate your marketing tasks. While it will by design create some operational efficiency, it should be about a complete inbound approach to the full prospect-to-member lifecycle for the association. Then, what the organization ends up saving in time should be applied to more strategic campaign planning using greater and greater insights.

What we typically see within the association is a simple three email drip campaign with delays in between. They're set up ahead of time, so there is some automation to it, but there is no learning and branching based on behavior. Conversely, when associations start integrating data, collecting intel across a multitude of channels, and creating rules that branch into varying journeys in the workflow, we start to see true marketing transformation in action. If you are incorporating all of these elements, then you are transforming the way you go to market.



# Marketing Automation Versus Email Automation

Hopefully we are driving home the notion that marketing automation isn't just about marketing with a new tool, it is a paradigm shift in philosophy around the way you communicate your brand and membership promise. Another way to understand the capabilities behind marketing automation is comparing your traditional email marketing tool versus a marketing automation tool. Understanding where email automation ends and marketing automation begins will help you to successfully leverage each tool respectively to drive your entire recruitment and retention goals.

## Email automation

Email automation is completely list driven. You will segment based on buying behavior, demographics, email preferences, and membership status, but you are starting out with a list of known subscribers. The needs of the association require associations to fulfill their membership promise with both their content and community. Then through leveraging personalization and segmentation, as you are making every effort to give your members relevant information they want to see, you will have built an engine for retaining and delighting your membership.

## Marketing Automation

With marketing automation, instead of starting with a list, you are starting with content. It's a totally different mentality and philosophy. When you go to market with your Lead Magnet that you gate behind a form, you are practicing the inbound methodology. As you share this piece of content across all of your channels to attract net new leads, you are also beginning to learn about your audience. As leads interact with your content, they must give you their email address and any persona revealing fields you include in the form. With this approach, you are learning about who this lead is, so that you can funnel them into a persona-led journey that gives them more thought leadership and branded content about your organization as they progress in the buyer journey with you. Because you are giving them all of this free content and not really asking anything in return, you begin to build a level of trust.

Along the way as you are attracting new leads you are scoring each lead based on key behaviors that indicate greater engagement with your content. Lead scoring is a quantitative way to measure qualitative leads coming into your funnel and is an inherent feature of marketing automation. Part of the process is also about disqualifying leads that don't make sense for your offer and organization. Not everyone that you attract is a good fit. As the lead scoring and your workflows become more fine tuned, you will find you have a marketing and sales driven process that produces more qualified leads. Marketing will pass on the sales qualified leads or SQLs that are really worth giving a human touch to close the deal.

With marketing automation, the approach is centered around acquisition. It is true inbound communication where it is more of a one-to-one experience. Marketing automation also delivers reporting on your full digital footprint, which means greater attribution of what drives conversions. Lastly, marketing automation gives you persona-building, lead scoring, and greater flexibility with building landing pages and forms.

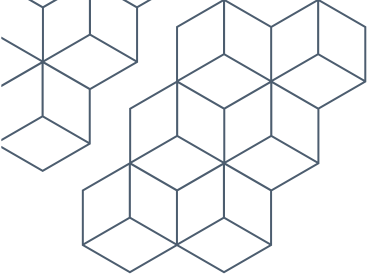
To bring it home, you are going to use each tool with a different approach. For email marketing it is retention-focused. Email marketing is inherently outbound communications. You are sharing industry knowledge and value to your members as part of your product and promise. With email marketing it is a high-volume of contacts you are reaching with one key message. Your newsletters and upsells are part of the messaging.

At this point you might be asking what are the types of communications that would go out of each tool. How do I implement this two-tool, two-pronged approach in my marketing? We've outlined in below in a helpful chart:

Marketing Automation	Email Marketing
Awareness campaigns	Member onboarding communications
Member recruitment campaigns	Renewal communications
Campaigns to upgrade freemium member packages	Promotion of relevant programming
Campaigns converting customers to members	Member Newsletters
	Sponsorship Communications

Remember that member welcome and onboarding communications is all about hitting the inbox. When you need specific communications getting to your members, then you need an email marketing tool. This comes into clearer perspective when we frame it against your sponsorship communications. When you have to report out open and click metrics on a sponsored banner it becomes increasingly imperative that the message reaches the inbox.





## Preparing for Marketing Automation

It is a good idea to have a few key foundational principles mapped out before embarking on a marketing automation tool in your organization. As strategic partners that work exclusively with associations, we have optics into the association world. That has resulted in our understanding in the pitfalls associations can fall into when organizations are adapting a new platform and not necessarily adapting principles behind the platform.

### **Do you have the right roadmap?**

What will set you ahead is having the right roadmap. Not only do you want to drive the adoption of a new marketing automation tool with goals of driving conversions, but you will need a clear vision for how you will get there and a realistic timeline. It will take time to onboard onto the tool. It will take time to build out your personas and map out content to your buyer's journey. It is not something that is going to happen over night or even after six months. A realistic timeline to allow for the foundational strategy through to true conversions is closer to a year or even longer.

Going in with a realistic understanding of the work it takes to go to market with an inbound approach will set you up for meeting expectations. The flipside to this is you promise your executives and board an unrealistic timeline. Then your leadership buy-in dwindles before you have time to show any growth and the tool is abandoned.

It is important that you share the vision for what you are going to roll out and a realistic timeline for when to expect true conversions. In the early stages, you can still promise value. You are gaining insights into your content and gaining leads in your funnel that you can nurture, and eventually, turn into new members for your organization.

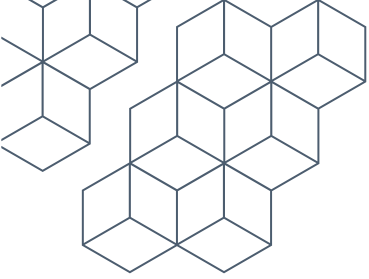
### **Do you have the right roadmap?**

Having the right tools in place comes down to how you will integrate between systems.

Once you have the business case, vision and realistic timeline, your budget will be set. Then, to achieve success with marketing automation, you will want the right data talking between your association management system, your marketing automation tool, as well as, your email automation tool. When your systems are integrated and talking, it is a seamless experience for the marketer and acquisition teams as they will have the full picture across psychographic, behavioral, and demographic data being collected.

## **Do you have the right partners?**

Your partners should be involved in more than just turning on the switch for you to have the tool at your fingertips. They will want to also know your business objectives. Marketing automation has been around for some time in the for profit world. Associations are just beginning to wrap their arms around the technology. In the for profit software space it is a self-led learning experience these tools expect and provide. But that's not necessarily the model that will scale and set up the marketing and recruitment teams within the association for success. The right partner is as much a part of the strategic set up of going to market with marketing automation as they are a part of just turning the tool on. They will be a part of your goal planning and build the infrastructure for you to scale all of the capabilities within the tools.

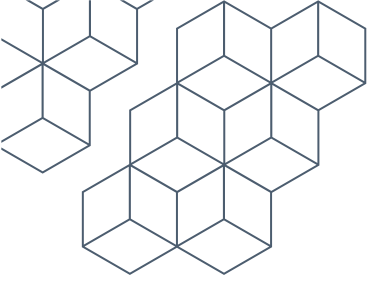


## What it Looks Like if You Are Not Set up For Success

It will serve you to be aware of the universal pitfalls that are unique to associations before embarking on investing in marketing automation. We're finding that associations will experience delivery issues where they find their numbers decreasing considerably. This happens mainly because marketing automation is designed for one-to-one communications with the consistently engaged. What happens when associations try to use marketing automation for their member communications, they find that over time the message doesn't make it to the inbox and when a member does want to engage with you; it's too late. They are put on an unengaged list in SharpSpring and you are left with decaying numbers.

Product adoption is a recurring pitfall we've seen as well. That's because, as we've mentioned, marketing automation platforms are for profit by design. They come with robust technology yet adhere to a 'self taught' training philosophy. A strategic partner will come in and also supply strategic training in relation to the product adoption.

Associations might also stumble by investing in marketing automation, and then revert back to merely using the tool like it is an email marketing tool. They send mass communications and scatter shot emails. As the emails build up, more and more contacts are getting flagged as unengaged. Marketing automation is monitoring if your constituents are actually engaging with a built in algorithm. The list of contacts automatically getting suppressed builds quickly when one in 11 emails that aren't opened are flagged for suppression in your platform. You have the ability to override that automatic suppression flag, but the consequences of that are a bad sending reputation and worsening delivery issues.

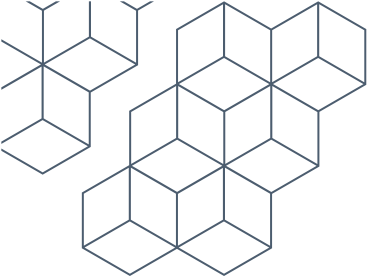


## What Transformation Looks Like

What's on the other side of all of this philosophy and product adoption? The outcome will include a lead scoring practice that allows you to assess overall levels of engagement. This is huge for building an engine that constantly feeds your funnel with qualified leads.

Another outcome is you will have persona-based campaigns that are goal tied, trackable, and data driven. This is another huge outcome on the other side of your marketing transformation. It is taking the mentality of going out and building a campaign for your conference and flipping it on its head. Instead you are identifying your five personas, and then you are building out your campaign based on a reflection of someone in your industry. The key difference is you are strategically nurturing your persona-set with relevant content and not just arbitrarily shooting out content.

Finally, you will have an engine that is feeding you audience and industry insights to further help you map out programmatic content. This transformation is not just about conversions, which you will gain as well, but it is about gaining valuable insight into your industry that informs every aspect of your organization.



# Making the Business Case for Marketing Automation

How do you know that you have all of the right elements in place to make the case for marketing automation? Ask these three questions.

## **Are your goals aligned?**

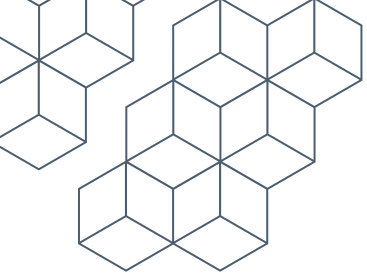
You will know you have what you need to make the case for marketing automation when your goals are aligned. Two key goals indicate that you are ready: Are you looking to grow revenue with membership growth or programming? Are you looking to gain insight? What you get in operational efficiency is a by-product of launching with marketing automation. More so, the point is to refocus freed up time on the more strategic nurturing of conversions in your ecosystem.

## **Do you have leadership buy-in?**

You will need leadership buy-in that is both financial, so your budget, but also from a change management perspective. Is your organization culturally ready for this shift? You want to make sure you have clearly presented the ROI from the initial investment and beyond into subsequent years. Members of the leadership team will also want to be informed on what training their staff entails from both a tactical execution perspective to the philosophical mindset shift that is inbound, one-to-one, nurturing and marketing.

## **Is your organization culturally ready for the change?**

In this process you are also assessing if your team has the right skill sets. From there you can identify any gaps where you could source other staff or if you need to supplement with outside consultants. Once you determine the right mix of staff resources and or third party assistance, can you adequately support and train your team? Here you are marketing the assessment if the team assigned with making this happen can strategically build out your go-to market approach. How much understanding do they have in the philosophy and technology? Or will they work against the technology and not with it? Finally, is your team ready for the level of change they need to make? What kind of change management plan do you have in place? It's about being transparent and honest with where your organization is and assessing what you will need to get them to execute at a high level under this novel set of rules and methodologies in the inbound movement.



You've identified that you have a need to nurture prospects into members and members into advocates. That is why we promote a two-pronged approach. On one side of the coin there is a need for list driven communications to your members, then on the other side you need to build trust and nurture your prospects into members. Then, at the moment of conversion, when you get your prospect to fill out a membership application, you move them over to your email marketing tool via your integration.

Those associations that are taking the lead with marketing automation are evolving in digital maturity are taking these novel principles and applying them wholeheartedly into the foundation of their marketing programs.

