



# Generate and nurture leads online

Marketing automation tools let you efficiently and cost-effectively generate leads online and nurture them until they are ready to talk with you or another member of your firm. These tools let you understand what individual website visitors are downloading and interacting with on your website. You can then structure communications campaigns with them based on their “digital footprint”.

Marketing automation goes a step beyond putting good content on your website by enabling you to understand who is looking at that good content and then to capture enough information about them (especially their email address) to allow you to follow up with them. It also allows you to track what’s working and what isn’t, and to experiment easily with what you are doing to see if changes (sometimes even just small adjustments) might affect how many people get and stay engaged with you.

Key questions for you to consider as you think about marketing automation include:

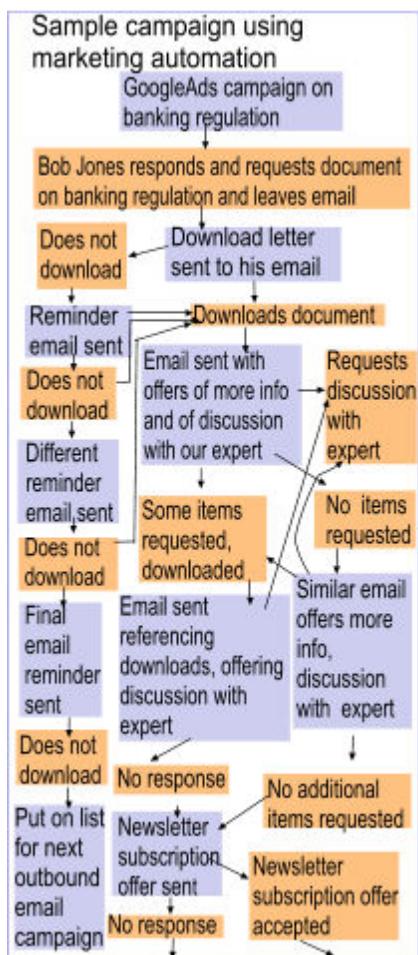
- Is marketing automation appropriate for you?
- How does a marketing automation campaign look for a professional services firm?
- What’s the basic technology for marketing automation?
- What’s the work involved?

## Is marketing automation appropriate for you?

Marketing automation is appropriate if you want to generate leads and/or nurture leads with prospects; other (simpler) tools are appropriate if online lead development is not your goal.

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## **How does a marketing automation campaign look for a professional services firm?**

At each step, a pre-designed action is automatically taken, based on the responses received so far. Information from previous steps can be incorporated into personalized emails.

The marketing flows begin with attracting people to the website and getting them to provide their contact information. For each potential move by the prospect at each step, the professional service firm has developed an automated response to that move. The professional service firm sends out emails (or makes phone calls or otherwise implements its pre-planned tactics) based on the responses and a timetable. For example, it might send a follow-up email two days after an initial email.

For a professional services firm, the most likely goal of a marketing automation campaign is to either start a relationship or maintain a relationship in a cost-effective way. The marketing automation program can provide a series of “touches” to potential clients.

It's also possible to structure a marketing automation campaign to allow for deeper online dialogue between a prospect and the professional service firm — where the prospect can provide additional information over time in response to requests from the firm.

# What's the basic technology for a marketing automation solution?

To implement marketing automation, several kinds of software need to be in place and integrated.

- Your website. Your website is the hub of your marketing automation effort. It's where you try to attract people so they willingly provide their contact information and permission for you to contact them. A website that serves well the needs of marketing automation looks and is structured differently than one that serves information-sharing or other more traditional website roles, so putting together a site that can meet multiple needs (or creating multiple sites) is critical
  - Landing pages for campaigns. Landing pages are individual pages

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where visitors arrive in connection with a particular offer. The landing page has a similar look and feel as the rest of the site, but the focus is on getting the visitor to complete the offer, e.g., download a piece of content, that attracted them.

- Marketing automation software. This software is designed to facilitate the setting up and execution of marketing paths in response to particular visitor actions. The marketing automation software is integrated with the website through the forms that visitors fill out to get information and with email marketing campaigns or newsletters, and with your customer relationship management software. Marketing automation can be either licensed by a company or used remotely as software as a service for a monthly fee that depends on volume of traffic and/or use.
- Customer relationship management (CRM) software. This software tracks individual prospects by name for both online and offline interactions. CRM software can be licensed and hosted by a company, or can be used as software as a service for a monthly fee that typically varies with number of customer records. Linking the CRM and the marketing automation software allows leads generated by marketing efforts to flow into the organization's sales or business development tracking tool.

### ***What's the work involved?***

Setting up a marketing automation system involves a fair bit of upfront work. Key tasks include:

- Recrafting your website to have high quality content available in ways that facilitate marketing automation. This may involve writing new content or reformatting what you have.
- Developing the sequences of your marketing flows. This involves both outlining which steps follow which and when, and also creating all of the emails, invitations, webinars and other offers that you are going to make or provide.
- Developing the search engine optimization, paid ad campaigns or outbound marketing that will bring visitors to your website who can take the first steps to engage with you.

The design of marketing flows and the attraction of visitors are ongoing



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tasks which continue after the system is up and running.

In addition, most users of marketing automation will find it beneficial to try to improve the system's performance by experimenting. It is very easy with a marketing automation system to see how changes such as different email subject lines, slightly different messages on landing pages, or how things are displayed on the website affect responses. Tools exist to make testing options easy while the marketing process is going on.

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