## Finding and nurturing contacts online

Increasingly, people look online to find help from professionals. So your website really matters if you want people to be able to find you. But you also might benefit from being able to nurture relationships online with people who have found you. That's where marketing automation comes in. It's just coming of age and is ripe for use now by professional service firms.

**Marketing automation generates a sequence of responses in response to a visitor**
Marketing automation tools let you efficiently and cost-effectively generate leads online and nurture them until the visitors/prospects are ready to talk with you. These tools tell you what an individual website visitor is downloading and interacting with on your website. You can then structure communications campaigns with them based on their "digital footprints."

Marketing automation goes a step beyond putting good content on your website. It enables you to see who is looking at that good content and makes it possible for you to easily follow up with them.

You begin by attracting people to your website and getting them to provide their contact information. Depending on where they were in the site when they provided the information, you respond in a certain way (likely in a different way for different spots on the website). Perhaps they respond back, or not. For each potential action by the prospect at each step, you've developed a response to that action. Your firm sends out emails (or makes phone calls or otherwise implements its pre-planned tactics) based on the person's actions and a timetable you develop. For example, you might send a follow-up email two days after an initial email. Information from early steps can be incorporated to make later steps more targeted and more personalized.

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.

**The basic technology for marketing automation**

The basic technology includes:

- *Your website*. Your website is the hub of the effort. You attract people to it so they willingly provide their contact information and permission for you to contact them.

- *Landing pages for campaigns*. Landing pages are individual pages where visitors land when they respond to a particular offer (for example, in an online ad or an email). The landing page looks similar to the rest of the website, but the focus is on getting the visitor to complete the offer, e.g., download the content that attracted them.

- *Customer relationship management (CRM) software* . This type of software tracks individual prospects by name for both online and off-line interactions. You might be using CRM software already (e.g., salesforce.com). 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.

- *Marketing automation software*. This software facilitates setting up and executing marketing paths in response to particular visitor actions. The marketing automation software integrates with your website, with email marketing campaigns or newsletters, and with your customer relationship management software. You can license the software or use it for a monthly fee.

**Marketing automation requires substantial investment in planning and execution**

The big tasks include:

- *Recrafting your website* to have high quality content available in ways that facilitate marketing automation. You may need to write new content or reformat what you have.
- *Developing the marketing flows* you want to have. You outline which steps to follow when, and also create the emails, invitations and offers you are going to make.
- *Developing the marketing efforts*, e.g., search engine optimization, paid ad campaigns or outbound marketing, to bring people to the site so they can begin to engage.

The design of marketing flows and the attraction of visitors are ongoing tasks which continue after the system is up and running.

## What to do this week

Decide if marketing automation is relevant for you today or for your firm. (It is a big undertaking for a solo practitioner or small firm, although there are marketing automation services like Hubspot that make it easier). If so, begin to investigate some of the options for getting it done. If not relevant today, then plan to keep your eyes open as marketing automation evolves, because over time it is likely going to be as important as having a website has been.

## What are these tips?

These monthly tips help professionals create more business and enjoy their work more. We focus on how to start relationships, how to build relationships, and how to convert those relationships into sales.

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