

8 steps to build an efficient automated marketing strategy

Bringing a consumer through the various steps of the conversion funnel is an important challenge for all marketers. So imagine automating it. But once the process is set up, you'll quickly see its power.

01. DEFINE GOALS



Defining your goals is important; it will determine your success. What do you expect by implementing an automated marketing strategy?

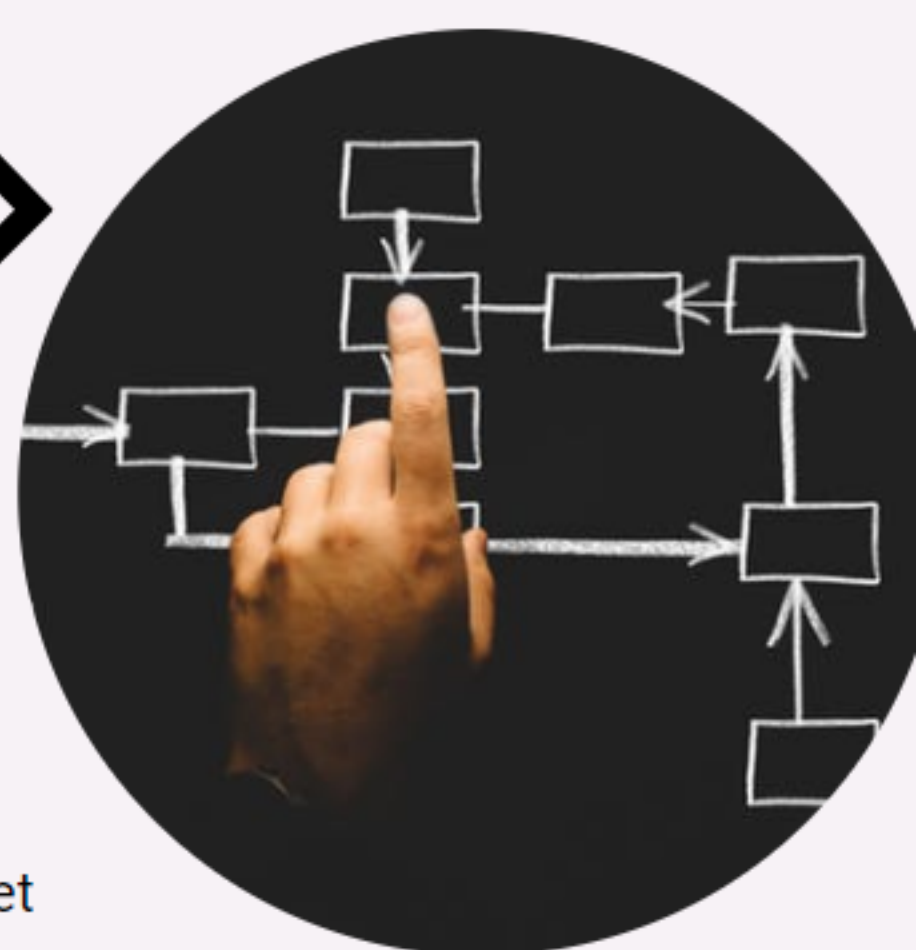
- Increase your sales
- Attract new contacts
- Improve client relations and experience
- Increase client knowledge
- Educate clients
- Increase employee productivity by using alerts and notifications
- Reduce operational costs
- Reduce/automate the buying cycle
- Improve prospect qualification

02. IDENTIFY PROGRAMS TO IMPLEMENT

Based on the goals you have defined on Step 1, various scenarios are possible. Identify the ones that will help you reach your goals.

- Message sequences (welcome, training, education, tips and advices, etc.)
- Transactional emails or SMS
- Registration and confirmation processes for events and webinars
- Contests (to engage specific segments)
- Progressive forms
- Automated message content generation and assembly

Already in this step, identify the processes you wish to implement to meet your goals.



03. BUILD SCENARIOS



To better define your automated marketing strategy, answer the following questions. Do not hesitate to draw your scenario to better visualize it and understand the different steps.

- What will be the starting point? (Document download, newsletter or event registration, purchase, website visit, information request)
- What would be the second step trigger?
- How many steps will your scenario have? And how much time between each step of the scenario?
- Will there be any conditions triggered by an action or profile information?
- What should be the outcome?

Associate the steps of the client life cycle to the different steps in your scenario.

04. ORGANIZE INFORMATION

Identify the systems that contain information to be used in your scenarios.

- CRM
- Mailing system
- ERP
- Point of sales
- CDP

Then, determine how information will be transferred between systems to allow you to personalize your communications.

- Manually
- Automated imports
- Web services

Structure your databases and automated transfers.

- Unique key
- Data tables
- Required fields



05. COLLECT INFORMATION



Collect as much information as possible from your target clients, from various sources. Then, connect all this information to offer a personalized and omnichannel client experience.

Multiple tools can help you collect data. Define the ones you wish to use.

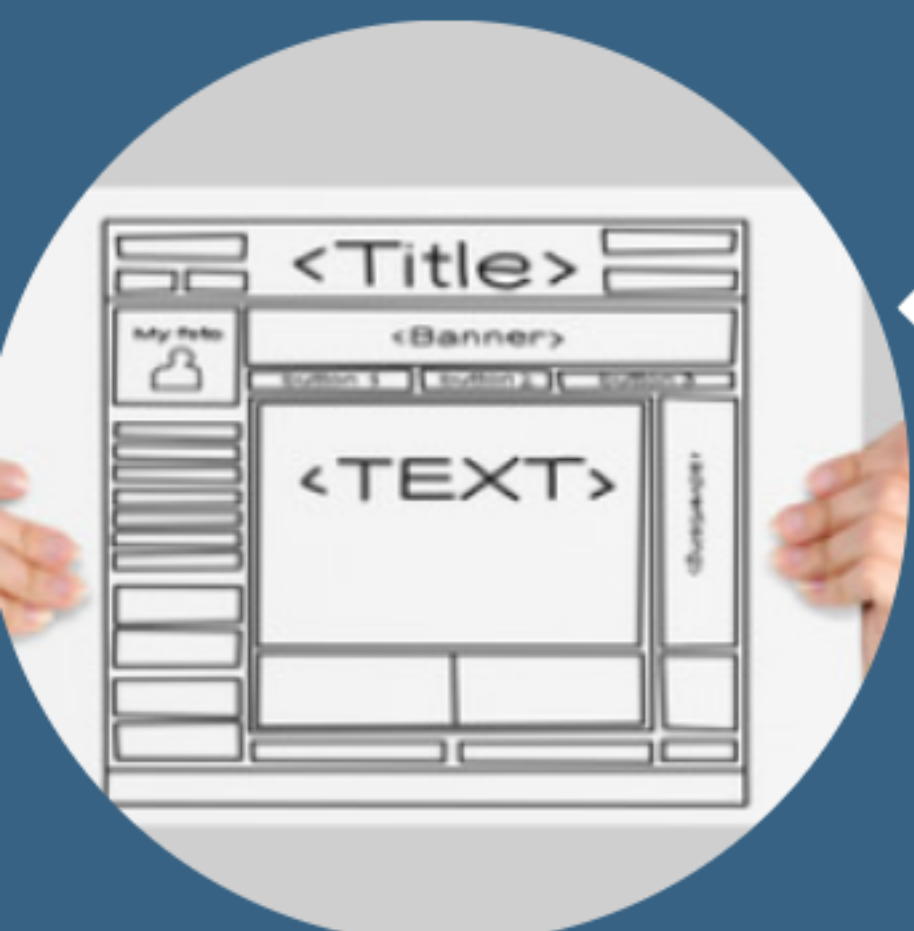
- Web forms
- Progressive profiling forms
- Interceptor
- Preference and consent center
- Website visit follow-up

06. MANAGE SENT COMMUNICATION TYPES

Identify all the communication types you plan on sending using automated marketing scenarios. It will be easier to identify those affected by the Canadian Anti-Spam Legislation (C-28).



07. DEFINE COMMUNICATION TOOLS



To make it easier to create content, use templates that contain predefined functionalities (dynamic display, personalization, links, statistics). Create templates for your messages, landing pages and event management and contest forms.

Define the template to be used by each division in your organization and make a list of all your needs. Link your communication systems together to optimize follow-up on all channels.

08. ANALYZE, TEST & ADJUST

Define key performance indicators and analyze them regularly to change your actions if needed.

Identify the reports that will help you measure your results, share them with other members of your organization and plan your future actions.

Analyze your automated processes to figure out where each contact is at and how long they take to move from one stage to the other of the client life cycle. Improve your scenarios to get better results.

