**How do you develop your marketing automation strategy?**

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## Introduction

Marketing is a field that is constantly evolving, in part because of the ever-increasing importance of technology and new approaches that are changing the way people consume. This continually forces companies to adapt to today's reality.

There are also many techniques that are part of the execution of a good marketing strategy, and the one that is not about to leave us is marketing automation. An organization's ability to work faster, using fewer resources, in a relevant way, is truly an asset in the execution of successful tactics.

There are still many companies that don't take advantage of all that automation has to offer, or else they use it for specific campaigns without thinking about an integrated strategy based on it.

In this white paper, you'll get tips on how to better understand the steps to automation, campaign ideas to implement, and how Dialog Insight's new marketing automation editor works.

### Nucleus

**Automation is known to increase productivity by 20%.**

# Contextualization

**What is marketing automation**

It's simply a matter of scheduling repetitive and redundant tasks to be done automatically. It's also the best way to act in real-time when necessary.

The daily life of marketers is inundated with tasks, each one more repetitive and tedious than the last. These include emailing and managing contacts in your database.

By integrating marketing automation into your strategy, you free up the time you would otherwise spend on these tasks to concentrate on ones that cannot be automated and that are just as essential. This is how you significantly increase your efficiency and productivity.

Marketing automation can have many uses. Amongst those, we have:

1. Sending emails

2. Sending SMS and push notifications

3. Manage multi and omni channels campaigns

4. Promote an event

5. Do lead scoring and nurturing

6. Obtain behaviours dashboard on contacts, prospects and clients

7. Automatic and dynamic data management

8. Dynamic segmentation

9. Loyalty, up-selling and cross-selling strategy

10. Calculating the ROI of your campaigns and tracking KPIs

11. Lead acquisition

12. Content strategy optimization

# And much more

**Did you know that …**

Some facts about marketing automation:

- Marketing automation can bring you more qualified prospects. According to Business2Community, this is a 451% increase in leads obtained through automation.

- It saves time and energy, allowing your resources to work on value-added elements. Indeed, it improves the productivity of marketing teams by 20% (Nucleus).

- Your monetary investment is directed where it counts. According to Marketo, 76% of marketers report a positive ROI in one year.

- And you accumulate a phenomenal amount of data!

This solution becomes profitable quite quickly. The result is an overall improvement in the customer experience on your various digital platforms, and therefore an increase in revenue as well. It also influences the overall relationship with your customers, which leads to better customer retention.

# Why do marketing automation?

**Save time while limiting your efforts**

The first advantage of using automation is a considerable time saving. A well thought-out automation sequence leads the contact from one end of the customer's journey to the other, without losing interest in your product or service, which is very valuable.

Moreover, being done in an automated way, such a sequence allows you to easily reach your conversion objectives with little to no human effort. You therefore have time to focus on other important points of your marketing strategy.

**Nothing is left to chance**

Then, with marketing automation, everything is determined in advance. You decide the very precise route your contact will take. You also decide when your contact will move on to the next step in the sequence, based on the criteria in place.

For example, a sales cycle can be greatly shortened at a lower cost. According to a study, by using an automation strategy, your sales cycle can be reduced, on average, by 30%.

**Increased knowledge of your contacts**

Very often, the tools used to implement automation have dashboards and send you reports on your contacts. This allows you to better understand their needs, what interests them, and above all, what makes them react.

Such knowledge of your contacts can be useful in many other facets of your marketing. You will be able to use this data to distinguish what works well from what doesn't work so well. You will also be able to optimize your sequences to meet their objectives, whether for a purchase, a donation, a subscription or any other conversion that interests you.

## When should you use a marketing automation strategy?

**Your sale process is too long or too complicated**

Analyze your customer's journey and determine the paths they normally take. If you can't react quickly or accurately enough when it counts, it's time to get started!

**You don't know how to prioritize your lead**

This is where an automated lead scoring process could be interesting to identify your best opportunities.

**It is difficult to track the results of your campaigns in terms of ROI**

When you do multi-channel campaigns, it is possible that your results are spread out by channel. Marketing automation allows you to gather the results of all your channels in one place for much more efficient tracking.

**You are not satisfied with the amount of lead you get**

Creating a marketing automation sequence to generate more leads is a very effective strategy. Moreover, with a complete automated process, these leads will be taken care of early on in their journey and will not fall into cracks along the way.

**When should you use a marketing automation strategy?**

**You repeat the same marketing task at least 2 to 3 times a week.**

These repetitive tasks are often easy to automate. By doing so, you will save time to do more productive tasks, especially considering the time invested versus the return on investment.

**Your marketing actions are viewed as an expanse more than an investment**

If you are not able to determine the exact ROI of your actions, it is difficult to see marketing as anything other than an expense for other departments. Marketing automation can help you re-centralize marketing at the heart of your growth strategy by bringing more concrete results.

**The sector in which you operate is very competitive**

Automation can become an advantage over your competitors, as it allows you to stay close to your contacts, react to key moments in their journey, and deliver content that is relevant.

You have better opportunities to create engagement and relationship with them.

# How to set up a marketing automation strategy?

**Start by going the simpler route**

Your marketing automation strategy doesn't have to be complex to be effective. Just because you don't have a roadmap, think it's too complicated or that it's going to require a ton of content doesn't mean you shouldn't go for it.

The reality is that you can easily do a few small actions to get started and see the results of your efforts. The welcome sequence following the subscription of your contacts is a good starting point to get used to the process, or else a Happy Birthday campaign is interesting and easy.

With this in mind, we often hear these kinds of questions from our clients:

- Where do I start?

- What kind of scenario should I set up?

- How many scenarios do I really need?

- How do I build a scenario?

The next few pages will serve to clarify these points.

**Step 1: Analyze your customer journeys**

Have you already mapped the path of your customer segments? Whether it's based on a traditional funnel of discovery, comparison and conversion or something more complex ... journeys are essential to understand the possible moments to be optimized.

There should be a multitude of possible campaigns when it comes time to automate, enough that you will have to prioritize them. In order to do this, you will need to be able to select them according to the criteria established as a team, and probably in relation to your business and departmental objectives. These choices could be based on the ease of implementation, the urgency of this type of follow-up (business-oriented), to help the customer or stay more engaged with him/her (customer-oriented).

In any case, this work is in your hands and will be specific to your context.

Entry points can vary and are specific to your business:

- Downloading content
- Information request
- First donation
- Answering a survey
- Webinar Registration
- Creating a user account
- Subscribe to the newsletter
- Add one of your products to the shopping cart
- Shopping cart abandonment
- Etc.

# Customer journey mapping

There is no official template that you should use to create them... simply because no two customer paths are the same! This means that you have a lot of freedom to explore and be creative in their design. At the very least, here are 6 actions to start with, which you can enrich over time and according to your needs.

1. **Develop your segments**: they can be based on personas, or on differentiation criteria such as a level of loyalty or other indicator of engagement.
2. **Map contact points**: Integrate online and offline points according to your segment journeys.
3. **Identify the objectives per step** : to go beyond the obvious purchase or to get informed. What do they feel, what do they really need?
4. **Identify pain points**: These elements can help you identify their need, but also help you create value-added content.
5. **Prioritize moments to automate**: depending on the criteria that you will have established beforehand, either at the business or customer level.
6. Continue to add new campaigns and improve existing ones.

**Step 2: Create a data directory**

Speaking of the criteria that will guide your choice of scenarios, another aspect that will have a major impact on this is your ability to access information.
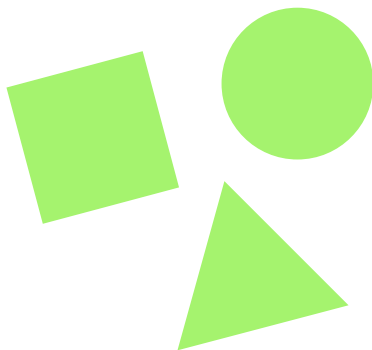
Indeed, automation is directly linked to the rules that regulate it, and it is the data that allows you to build good scenarios. If the information is inaccessible or in limited quantity, it will be difficult to have a good ROI on this kind of campaigns.

Simple project: you would like to do a birthday wish campaign, but do you have enough contact with the date of birth to make it worthwhile?

Complex project: you would like to create email based on abandoned shopping carts, but do you have all the information to make relevant reminders that are linked to the information of a particular shopping cart?

## Data management and automation

Chances are, therefore, that you have some work to do with customer information to ensure that your marketing automation will work the way you want it to, namely by:

- The processing or formatting of data;

- Connecting to other data sources to fill in the gaps;

- Strategies for acquiring data when it is missing.

For example, at Dialog Insight, in a post-event sequence, we have a processing of the Excel participation file to be done, followed by data assignment to automate where possible.

This means it will be important to be close to your IT team as projects become more complex, but if the information is there, the implementation is not rocket science!

## Step 3: build your scenarios

Now that the planning portion is over, you can start building your scenarios. There are different ways to build your scenario, either on post-its, a large white board (or the virtual one like Miro) or directly in your automation tool.

We recommend less the method of building your automation directly in your tool from the start, since it is likely to change a lot the more you look at it. A scenario can also change along the way, especially as you think about it. With this in mind, opt instead for brainstorming sessions to set up a potential sequence, then once you are happy with the result, start working in your tool.

We've put together a template that you may find useful in this brainstorming session, to be completed before or during. To download the resource, click here!

*Interestingly, the Dialog Insight tool was built on the concept of a virtual whiteboard. It can go well with this kind of brainstorming session!

| The sequence goals | Target | # | Trigger/ Conditions | Delays to next message | Summary of the content message | Desired action (Call to action) | Intended feeling / reaction | Will the message include a reminder ? | If so, under what conditions ? |
|---|---|---|---|---|---|---|---|---|---|
| | | 1 | | | | | | | |
| | | 2 | | | | | | | |
| | | 3 | | | | | | | |

**De quoi se compose un scénario automatisé?**

Normally, regardless of the tool, automation will include at least a minimum of:

- One or more triggers

- Conditions

- Delays

- Actions

There may also be the concept of ''end nodes'' that are mandatory, but not all tools work that way. In addition, some tools require the insertion of delays at certain points in the scenario to ensure its operability, while others also bring the element of customer behavior as another criterion for moving a contact through the various branches.

Let's look at these elements together to help you build your next scenarios.

- **Triggers**

The trigger is the most important portion of your scenarios, and often the most difficult to identify. For the same type of rule based on 'these contacts must be in my scenario'', there may be several technical answers to make this possible.

The challenge is to ensure that the criteria that are set and considered as trigger rules actually meet the stated need. It may be simple, but there are often small details that need to be considered in targeting, for example, in order to get it right.

In addition, a tool like Dialog Insight allows the insertion of several triggers (i.e., several entry points), which sometimes makes the task more complex. So, take the time to clearly state the different trigger rules.

- **Actions**

The actions are very simple, and probably the easiest to visualize and place. They are actions that will be **directed to the contact.**

This can be several things, such as a message (email, SMS, notifications) or otherwise unsubscribe, delete, quarantine, etc.

More often than not, the actions are related to data, or otherwise to elements of a campaign such as a message or a web follow-up (the website or a landing page, for example.)

Depending on the tool you use, different actions are available.

- **Conditions**

Conditions are the places where branches are created. So, the more conditions you set, the more your scenario will be divided and will look like the root of an old tree.

Conditions are often related to contact actions (opening, clicking, visiting, etc.) or contact information (like a persona tag or scoring).

In the Dialog Insight tool, there is also the possibility to create multiple conditions, which divides the contact database into several branches (e.g. 10 branches can be created depending on whether the contacts meet 10 different criteria).

When you create your scenario, the conditions can be very simple, or complex if they need to meet your business needs.

- **Delays/Behaviours**

Delays are the most common elements in automation tools. Normally, between actions in your scenarios, you must insert delays before a contact moves on to the next step.

These delays must be long enough to allow time for the action to be completed (especially if you set a click, open, visit condition, etc.). As mentioned previously, some automation tools require delays in the creation of a scenario, and don't take into account customer actions. However, this is an evolution that will be seen more and more.

Of course, it is possible to combine rules of behavior and delays together, even though this is often the case since you don't want to bombard the contact!

Inserting the right elements

Now that you have a little more understanding of the elements that normally make up a scenario, here are a few tips on how to put them in the right places.

We advise you to build your scenarios in the same order as they were presented previously. Start by understanding the trigger(s) of the sequence and specify if criteria need to be added to properly include the contacts. Then position the actions that your sequence should have, in terms of message and data actions. No need to worry about conditions or deadlines at this point. Then move on to the conditions to be placed before the actions, and add more actions if you see that your sequence needs to split up more and more. Finally, insert the delays that are placed before the conditions, to allow enough time for people to do what the condition says.

As for creating the elements of your sequence, whether it is an email, a notification or a landing page, we advise you to build them before setting up the sequence in your tool. Once everything is in place, it will be easier to set up your sequence and link the elements together!

## 4. Continuous improvements

Never forget to go back over your scenarios once they have been running for a while. On the one hand, new information may force you to change them, mostly related to the performance of your actions.

Look at opening rates, clicks, visits, or even to see if portions of your scenario aren't working. It could be that messages are in error, or that branches have fallen inactive.

Finally, if a tool offers to do A/X tests on your scenarios, as is the case with Dialog Insight, coming back to validate the winning variations is essential!

# Maintain the relationship: some examples

You may be wondering how marketing automation can help you strengthen relationships with your customers. There are several possible applications to solidify those relationships. Let's take a look at some examples:

The welcome email

Welcoming everyone who lands on your contact list, whether they've signed up for your communications, participate in a loyalty program or are new customers is really important. This is the time to show them your brand personality and why they should do business with you rather than your competitors.



**LOVE WHERE YOU STAY, LOVE HOW YOU TRAVEL**

You've joined a community of people who are reinventing how they travel, explore, work and connect with the world. Selina is a complete hospitality and co-working ecosystem that has something for everyone: beautiful accommodations, state-of-the-art co-working spaces, unique adventures, and a chance to connect with like-minded travelers. When the world is your home, Selina is your family.

**EXPLORE**

Catch some waves at a gorgeous beach, stare jungle wildlife in the face, stroll through colorful markets, or experience the hustle and bustle of a new city with friends. Let Selina guide you through hand-picked adventures that are sure to feed your wanderlust.

Join An Adventure

This email can take many forms: from a discount on a purchase to a simple personalized welcome package. It is often your first point of contact with them; it's your chance to make a good impression! Don't hesitate to be creative in order to capture their interest.

Despite the fact that this type of message sometimes ends up in the spam box (16%), their opening rate is still 23%, on average. It is therefore worth betting on this type of message in your marketing automation.

**First purchase: up-selling and cross-selling offers**

At this point, your contact has become a customer. This first purchase represents an opportunity for you to encourage further purchases. Offer him/her products related to this first transaction.

That's right! It is possible to create emails that will be filled with information automatically, according to rules that you will have defined. You could suggest products or offers based on the same category, or even complementary categories.  No need to work manually!

In the case of a service, also think about complementary offers or simply the superior package, when there is one.

Finally, it doesn't have to be a revenue goal, since you can encourage reading of complementary content, participation in similar events, or downloading of resources that follow. It's up to you!

**Purchase follow-up**



These messages require the linking of purchase data to the email messages. This can be a challenge if your systems are not already linked. But it's worth the effort!

Automating purchase confirmations, order follow-ups, complementary product recommendations and satisfaction surveys leaves you plenty of time to focus on your other important tasks.

Messages sent in connection with a purchase are often perceived as important by consumers. This may explain the high opening rate of 44%, on average.
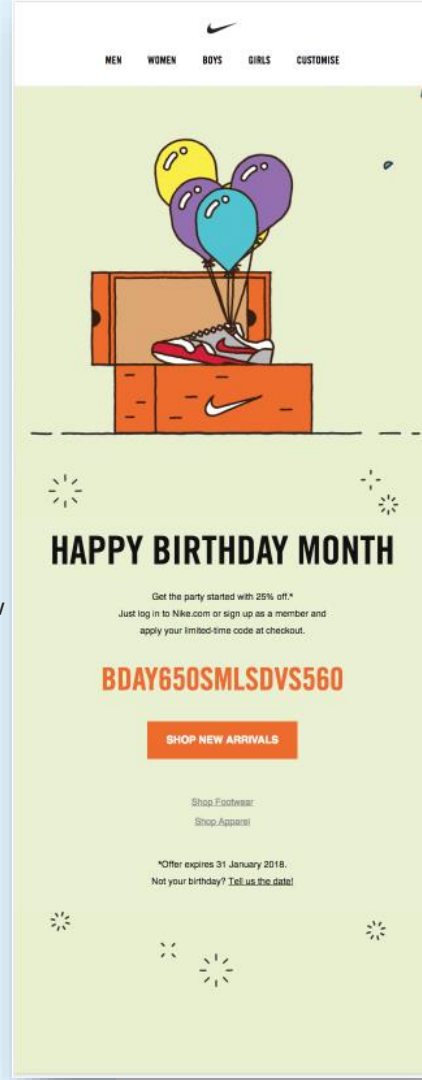
Newsletter

Propose email sequences according to your clients' interests. Send information on their favorite topics, while highlighting the relevance of your product or service. According to a study by Return Path, newsletters generate an average of 18% opening.
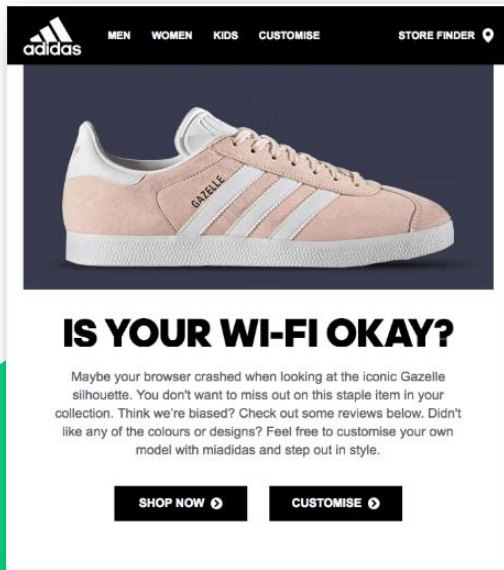
Themed emails:  birthdays

Pay special attention to your customers on their birthday or a few days before. Make them feel special by including a small gift inside, or a special and targeted offer. You will certainly be more successful!



Anniversary messages require little effort for the performance achieved.

It's a simple way to reach people during a personal moment. If you already send birthday greetings manually, nothing is easier than to automate the sending.

**Shopping cart abandonment**

Remind your contacts that they have left items in their shopping cart or suggest similar products for them to purchase. If possible, add a sales incentive for them to finalize their order.

The commitment for this type of message is not high (20%), and 12% of people delete the message without even reading it. On the other hand, if only one person clicks to proceed with their purchase, it's a big win!

Renewal emails

Reset a contact life cycle who, for example, have a subscription or service contract that is about to expire. Do this in an effort to help your customer, as they may not remember that their subscription is about to expire. Offer them an attractive reengagement or renewal offer.
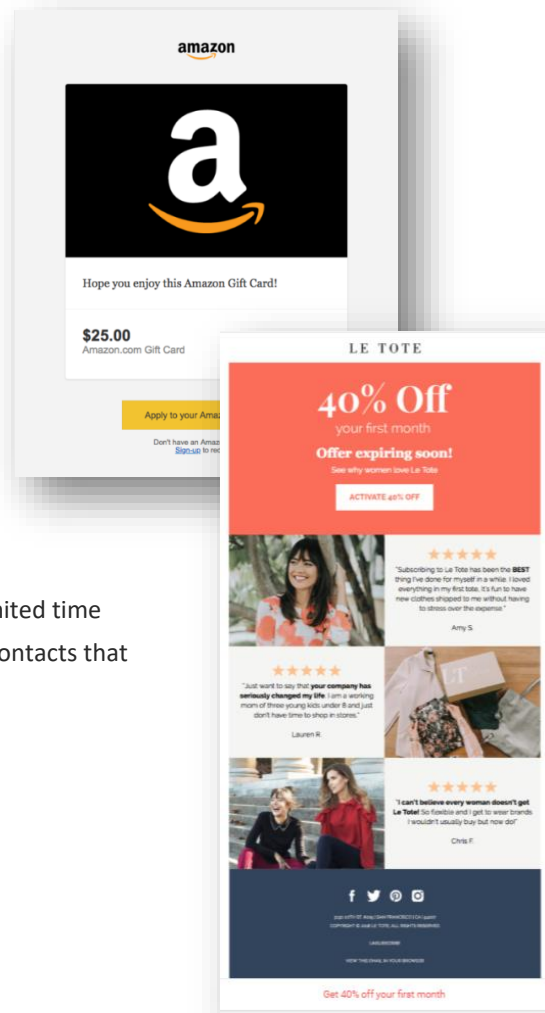
## Reward email

Reward your committed contacts, longtime customers or customers who have given your company positive feedback with offers or exclusive content. You can also make an offer for a contact to become an ambassador for your brand.

Promotional messages are the most used by brands (70% of emails sent are promotional). Their opening rate is, on average, 19%.

## Reengagement email

Try to recover, gently, customers who have not given you any sign of life for some time. Send an interesting limited time offer. You can also simply ask them if they still wish to receive your communications. This way you can delete contacts that remain inactive even after you've sent them.

1 out of 5 customers consider renewing their relationship with a brand after a reengagement email.

Email for a newly reengage contact

Did you manage to seduce your client with your reengagement email? He is then a potential contact towards the purchase, which should not be abandoned. Time is running out before he loses interest!

Reward them with a personalized message, make a recommendation of targeted products, and if possible, attractive offers that they can't refuse.

These examples are just a few of the many possibilities that can be linked to marketing automation.

It's your turn to play and create sequences that will meet your own business objectives!
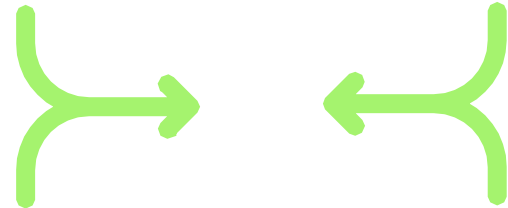
# Marketing automation and Dialog Insight

Our vision

In 2020, we began a complete overhaul of our marketing automation tool, under a new concept that allows us to work as if on a large whiteboard, in virtual mode. This new approach is much more appropriate to the reality of today's work; it moves away from other scenario creation tools that are rigid in their construction approach.

With a drag-and-drop interface, you can play in the creation panel by putting all the nodes you think are relevant, placing them as you think they should be ... without having to connect them from the start. So no need to follow an order 1, 2, 3 ... just create it the way you want. Once you are satisfied, connect the nodes together, add the content, and you're done!

We will continue to improve it for the future, as several iterations are currently planned. In the following pages, you will find the most interesting features of our marketing automation module as well as their advantages.
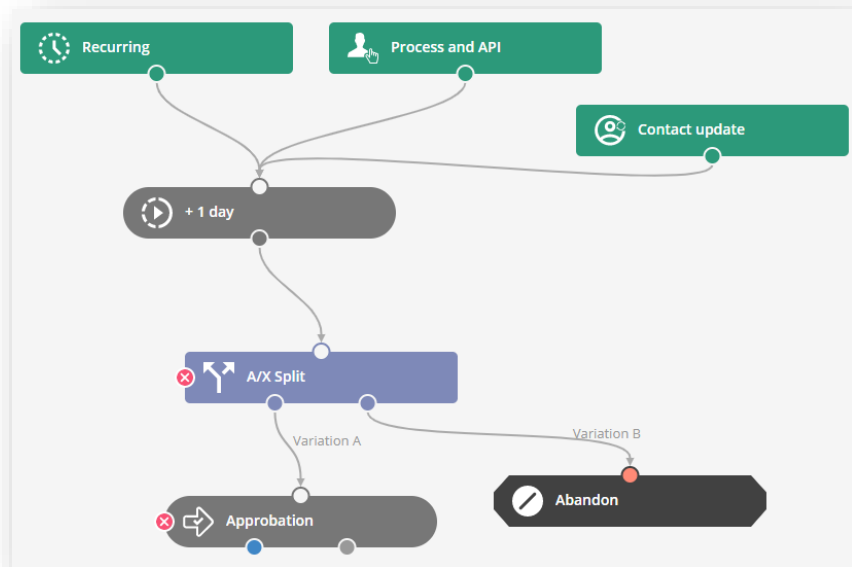
Some advantages

An interface that is truly easy to use

- A virtual board that allows you to work as you wish, in brainstorm mode or for your final version;

- Access to pre-configured or custom models that you have created yourself, to work faster or to ensure the conformity of your scenarios;

- Easy access to all resources related to your campaign, to easily edit messages, web pages, and much more!

## Novel features unique to our tool!

- Management of multiple triggers, for integrated multi-channel campaigns;

- A/X test integration, to measure the performance of different sequences/content;

- Manual scenario triggering (perfect for one-time automated campaigns);

- Multiple condition node to segment your database and truly personalize!

- An integrated approval process, for internal alerts when a portion needs to be validated before being continued;

- Integrated with our Ecommerce tool, so you can easily build campaigns that are linked to the purchasing process.

# Conclusion

**Conclusion**

To close the loop on the subject, marketing automation has many advantages. This strategy allows you to save time, efficiency and increase your revenues.

However, don't forget, your marketing automation should supports your overall marketing strategy, and especially your corporate/departmental goals. So you should:

- Establish SMART objectives

- Have your marketing personas well developped

- Have a good **volume** of **contacts** and **data**

- Have an excellent knowledge of your **customer journey**

This will ensure that your automation really personalizes your messages to a higher level than if you were doing it by hand.

**So, are you ready to take the plunge into marketing automation?**

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## About Dialog Insight

One of the most effective ways to achieve your growth objectives is to take control of your customer data to maximize your marketing actions. At Dialog Insight, we believe that each of our clients is unique and that their needs are specific. That's why we have developed global solutions in personalized marketing to adapt to constantly evolving contexts.

On the one hand, we provide a platform that centralizes your customer data, orchestrates multi-channel campaigns and allows detailed analyses of the performance of your actions. On the other hand, we offer strategic and operational support services aligned with your needs. Whether you are aiming to increase sales or stimulate customer engagement, leverage the customer knowledge you've gathered over time.

You will then communicate in a more relevant, consistent and personalized way than ever before. Make every point of contact an opportunity to provide your customers with a brand experience beyond their expectations.

With Dialog Insight at your side, you are more than ever the master of your success.