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# B2B Marketing
# CHEAT SHEETS
## Marketing Automation (MA)

## What It Is

Marketing Automation (MA) is a process which ensures that prospects are constantly engaged.

- It creates and delivers email campaigns and other marketing collaterals
- It tracks website traffic and email responses

## What it is not

- It is not about only implementing a new product; it is about a change in mindset.
- Automation alone does not translate to increase in sales, it automates sending of email; taking the prospect to the next level is what the sales team needs to do.
- It is as good as the strategy that is developed for it..

## Best Practices

All functionalities of MA tools should be used to justify its effectiveness. You should:

- Observe customer actions and interactions to send them relevant messaging at the right time.
- Know which customer is in the "buying mode", therefore building valuable leads for your sales team.
- Monitor, measure and develop reports through KPI dashboards to find out marketing and sales effectiveness.
- Develop customized and flexible sales workflow to give attention every lead deserves.
- Integrate MA with CRM systems in order to nurture leads with relevant communication.

**3 questions that will help in knowing if MA works for you:**

**1** Do you have more number of leads than you can manage individually?

**2** Do you have actionable customer segments and targeted marketing plans?

**3** Do you have a CRM system already in place to integrate with MA?

If you've answered yes to all questions, then Marketing Automation is something you need to consider.

*With MA develop customized, 'right-time' marketing programs that educate, inform, propose and keep prospects alive, interested and engaged.*

## Benefits

MA helps in maintaining a single point view of all customer interactions across channels.

- You can understand customers' needs at a detailed level.
- It aids in implementing 'real-time', behavior-driven, trigger based campaigns.
- It helps in anticipating and predicting changing customer needs required in improving satisfaction.
- It enables customized communication.

## Dictionary

**Marketing Automation -** The use of software and technology to streamline marketing processes. It provides awareness of different phases of the customer lifecycle.

**Data Modeling –** Marketing information of offers, campaigns and audience graphical represented.

**Data Warehousing –** Collection, sorting and categorizing of data for future extraction. Merging or matching of data will provide further in-depth understanding of and targeted use of information for campaigns.

**Customer Analytics –** Analysis based on customer needs, preferences, interests and behavior.

**Process Metrics –** Measures that focus on each step of processes including metrics such as accuracy, quality, time, effectiveness and efficiency of campaigns.

**Usage Tracking –** Mapping of objectives, timing, frequency and scope of usage such as open rates, click-throughs, website activity and downloads of campaigns and resources.

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With **Info CheckPoint** you can easily integrate your database with one of the leading CRM applications, Salesforce.com. You can implement coherent nurturing strategies and action plans.

### Signup for a complimentary
### 30 day trial

Utilize a multi channel email engagement approach to build customer relationship through automating marketing processes.

### Gain access to targeted databases with Info CheckPoint