Top 10 Marketing Automation Missteps that will HAUNT You

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10 - Conducting a “wake the dead” campaign, but letting zombies linger in CRM

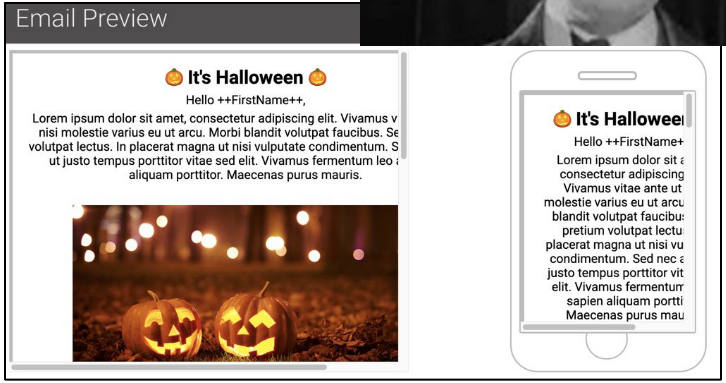
They will eat your brain

- Wake the dead campaign - targets older or less active recipients in an attempt to “wake them up”
  - Make sure you target these records in batches with valuable content
  - This can be a great way to reactivate old leads and get them engaged again, BUT there will be some that are just plain dead - SO GET RID OF THEM!
- After your campaign, evaluate your results
  - If someone has engaged, continue nurturing them and move them into more active campaigns
  - If someone hasn’t engaged, it’s time to let go
- Sometimes it hurts to delete
  - That’s okay, at least flag these records so that they can be excluded - manually opt them out, give them a status indicating they should not be mailed, add them to an inactive lead list, etc.
  - Removing these records not only keeps your CRM/MAP cleaner, it can improve your deliverability and protect your sender reputation

9 - Creating “hair-raising” email designs

We’ve all received one, don’t be the one to send it

- Tailor your message to the audience you are targeting
- Include an appropriate amount of content for an email
  - Keep it short *and* sweet
  - Eliminate scrolling by placing your call-to-action “above the fold”
- Follow your brand guidelines
  - Colors
  - Fonts
  - Overall look & feel
  - Use your website for inspiration
- Make it easy to read
  - Bullets, bold text, buttons, & charts
  - Whitespace is your friend



8 - Not knowing “witch” email designs perform best

Use A/B Testing to make informed decisions about your email campaigns

- Keep it simple and test one variable at a time
- Test a large sample set to avoid making changes based on statistically insignificant results
- Use the results of your test to guide your email strategy moving forward
- Things to consider testing:
  - Sender Info
  - Subject Line
  - Using Personalization
  - Email Content
  - Call to Action
  - Email Type - Text vs. HTML

7 - Ignoring the "dark magic" - aka Deliverability

Get your messages to their intended recipient

- List hygiene is *key* to making sure you are hitting the inbox
- Email providers use a variety of metrics to determine inbox placement. Things to monitor include:
  - Engagement rates - are recipients opening & clicking?
  - Bounces & complaints
  - Overall domain reputation
  - Subscription methods
  - Targeting content
- Easy items to help with deliverability
  - Avoid sending to your entire database
  - Provide personalized content to those who match the target audience
  - Put yourself in your recipient's shoes - what kind of emails do you find valuable?

6 - Letting your scoring profiles collect cobwebs

Re-evaluate your profiles on a regular basis

- Don’t approach scoring with a “set it and forget it” mentality
- Why?
  - Your content will change over time
    - Website
    - Forms/Landing Pages
    - Email Content/Cadence
  - Your target audience/prospect may change
    - Demographic scoring
- Evaluate the leads that are generated from scoring & update accordingly
  - Check in with your sales team to gain their perspective

5 - "Frankensteining" your lists together

Building a solid list helps keep subscribers and maintain good domain health

- Keeping a preference center allows you to target recipients with the types of communications they want to receive
- Use your data to create dynamic lists using the reports module
  - Saves time & effort
  - Avoids unnecessary imports which can open the door to user error
- Add and remove recipients from lists using nurture workflows
  - Automate this process by setting criteria based on Lead/Contact, Account, & Opportunity fields
  - Use the "List Checker" element to see if the recipient is already on an existing list
- Use lists strategically to streamline your efforts
  - Rather than trying to build one list that accounts for everyone, you can use multiple lists together to ensure the correct leads/contacts receive the information from your campaign

4 - “Ghosting” your prospects post sale

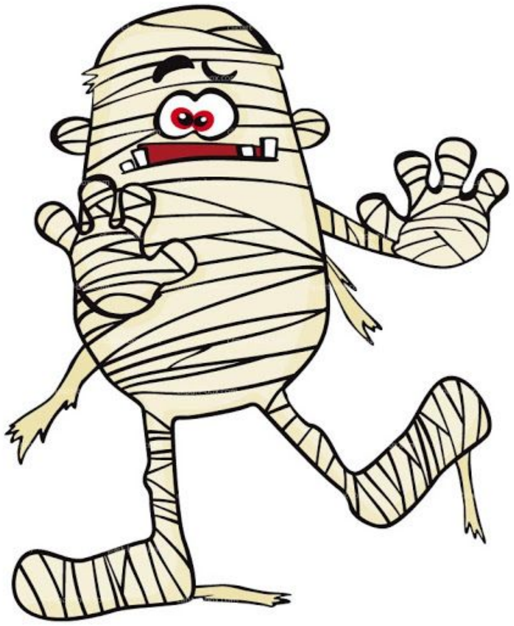
Marketing Automation can be just as useful AFTER a deal closes

- Use Nurture campaigns to follow up post-sale or to enhance the customer onboarding experience
- View the Buyer’s Journey as a Customer Journey
  - Are your customers continuing to engage with your content post sale?
- Target customers based on their Account Type
  - *Hint - use those dynamic lists*

3 - Getting "wrapped up" in complicated workflows

It doesn't have to be complicated to work

- Nurtures are incredibly powerful and can take into account a variety of conditional steps, BUT they don't have to
  - Sometimes simple is best - if the important thing is that folks receive the content, then a simple pause between steps is sufficient
- Always start with a goal in mind and keep that at the forefront when designing your workflows



2 - “Spooking” prospects by coming on too strong

Don’t propose on the first date

- Be mindful of your email cadence when marketing to new prospects
  - Sending too many emails to new prospects can be off putting and may lead to increased unsubscribes
- Allow recipients to manage their preferences and elect the type of emails they would like to receive
  - If you provide a “Manage Preferences” option, be sure to honor those requests when creating your campaigns
- Always comply with email marketing regulations - CAN-SPAM, CASL, GDPR, CCPA, etc.
  - With additional regulations, recipients are becoming more aware and savvy about their rights, so be sure to comply with any/all government regulations that apply to your use case

1 - Letting MQL's "RIP"

Technology is only part of the process

- Automating workflows to your CRM is incredibly helpful, BUT make sure you don't lose sight of the human element
  - In order to leverage the full value of the integration, you have to have an agreed upon process in place as to how leads will be followed up on when they push over to CRM
- Establish a clear sales & marketing process so that everyone is aligned and working toward the same goal
  - Marketing is responsible for qualifying leads & passing them to sales
  - Sales is responsible for working those leads and continuing to move them through the bottom of the funnel
  - BUT there also should be a process for passing leads *back* to marketing for continued nurturing if the lead is not qualified to the point of opportunity

Please comment below with any additional thoughts or questions!

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