Web Marketing Automation Buyer's Guide

Break through the barriers of integrated web marketing

Introduction to Web Marketing Automation Systems

▶ What is Web Marketing Automation?

A marketing automation system is an on-demand solution that increases sales and maximizes efficiency for companies with complex sales cycles. It allows business to business (B2B) marketers to manage all prospect interactions such as business chat, email, forms, and more. Data is seamlessly passed from each marketing vehicle to a CRM system allowing a marketer to track all touch points with prospects from the moment of lead generation to the close of the sale. The solution can also produce significant efficiencies by automating many marketing and sales tasks currently performed manually.

Integrated Marketing Management

The explosive growth of the Internet has led to a steadily increasing shift of marketing dollars from offline channels to online vehicles. Marketing automation systems were developed to meet the needs of organizations with a growing online presence. A marketing automation system typically offers:

- Micro-level analytics tracking all touch points with a prospect – forms, page views, emails, and more
- Score prospects based on parameters and prioritize sales reps' time
- Automated "drip marketing" emails sent to prospects based on pre-defined rules
- Automatically notify sales reps of online prospect activity
- Closed sales loop allowing for easy calculation of cost per opportunity and marketing ROI
- Easy creation and editing of online marketing campaigns by non-technical users

▶ What are the advantages of marketing automation?

Marketing automation provides many advantages over traditional methods, particularly when distributed teams of users are responsible for isolated marketing or sales channels.

Decrease Costs and Maximize Revenue

A marketing automation system significantly lowers costs associated with managing marketing and sales efforts online. Manual processes are eliminated allowing teams to work on proactively improving ROI.

- **Score and Prioritize Prospects**
  Marketing automation systems can automatically score prospects based on buying signals that they have shown through their online activities: page views, form submissions, emails, event attendance, and more. This functionality allows sales reps to spend more time with their more active leads and takes the guesswork out of prioritizing prospects.

- **Arm Sales Teams**
  Marketing automation systems provide micro-level or individual reporting on prospects, allowing marketers to track all touch points from lead generation to the close of the sales opportunity. This information is extremely valuable for sales personnel who can use activity history to gauge interest and prioritize their assigned prospects. This also allows them to tailor the timing and content of their pitches based on what interests their prospects the most, significantly increasing the likelihood of closing sales.

- **Close the Loop**
  B2B companies typically find it difficult to determine ROI because of long sales cycles and marketing vehicles that operate in silos. By tying marketing and sales data together, a marketing automation solution allows businesses to calculate true advertising ROI. Costs from marketing systems such as Google AdWords can be associated with individual prospects. This data is then tied to closed opportunities in the integrated CRM system allowing the marketer to accurately determine ROI and shape marketing strategy accordingly.

- **Automate Marketing Tasks**
  Marketing automation allows for advanced automation rules, allowing marketers to streamline their efforts and perform many tasks automatically. Prospects can automatically be assigned to sales reps based on specific criteria, emails can be deployed automatically, and a host of other functions can be carried out without any human intervention.

Improve Accountability

A Marketing automation systems include functionality to improve accountability, allowing management to focus on other matters.

- **Email Transcripts**
  Email transcripts are stored and tied to both the representative and prospect involved. This provides managers with a means of spot checking customer service quality.

- **Easily Calculate ROI and Other Key Performance Indicators (KPIs)**
  A central dashboard and advanced reporting allow marketers to continuously monitor ROI and other KPIs in one central location.

- **Automation Rules**
  Eliminate human error by automating various marketing tasks. Notifications, assignments, and automated marketing emails are sent on time, every time.

Maintain Marketing Consistency

Content published to or sent via diverse marketing vehicles is often displayed in an inconsistent manner, confusing the prospect. Rather than force someone to relearn the site navigation menus and layout several times, marketers should enforce standards that maintain consistency throughout.

- **Presentation Consistency**
  Content should be presented within pre-defined creative templates whenever possible. Templates provide a mechanism for maintaining a consistent look and feel, thereby creating a professional image of uniformity for the site visitor.

- **Brand Integrity**
  Brand integrity is enforced with a marketing automation solution by utilizing creative templates for landing pages and email communications. This helps limit users from, in a non-malicious manner, publishing graphics and content outside corporate brand guidelines.

► How does marketing automation compare to disparate marketing and sales tools?

Marketing automation represents a revolutionary way to manage marketing and sales campaigns online when compared to traditional methods.

Marketing Automation vs. Without a Marketing Automation

	With Marketing Automation	**Without Marketing Automation**
Setup	Only one system to implement, which can be done in less than a day. Tying into third party tools is simple process	A separate, often lengthy implementation is required for each system
Cost	One flat or usage based monthly fee	Separate fee for each disparate marketing tool used
Data Analysis	All data is stored in one place, allowing for apples to apples comparisons of marketing and sales results and true ROI calculation	Data is kept in individual silos, making cross-channel calculations and comparisons tedious. Calculating true ROI for marketing activities must be done manually
Analytics	Available at the prospect level, detailing each touch point with your potential customers	Only available at the aggregate level, providing little insight into what an individual prospect is doing
Ad-Hoc Sales Emails	Tracked emails can be sent via Outlook without any extra work from your sales team	Individual sales emails lack tracking and have no assurance of CAN-SPAM compliance
Data Feed from Landing Page Forms to CRM	Seamlessly fed to CRM solution once prospect is assigned, or automatically using pre-defined automation rules	Data feed is more cumbersome, often involving uploading of CSV files

Marketing Automation Implementation

Do I need a marketing automation system?

Before planning your implementation, make sure you understand how marketing automation works and what business needs it can and cannot meet. Examples of marketing vehicles that can be managed within a solution include:

- Web Analytics
- Automation Rules
- Landing Pages
- Forms
- Emails
- Paid Search
- Site Search
- Anonymous Visitor Tacking

Steps to Implementing a Successful Marketing Automation System

Create a Plan

1. Plan the requirements for the marketing automation system
2. Plan the timeline for the project
3. Assemble the team assigned to choose and manage the solution

Create Realistic Goals

4. How long does it take for a routine landing page update without a marketing automation system? How long would you like it to take with a marketing automation system?
5. How long does it take to analyze campaign data across all marketing channels without a marketing automation system? How long would you like it to take with a marketing automation system?

6. How long does it take to qualify, score, and assign prospects without a marketing automation system? How long would you like it to take with a marketing automation system?

Evaluate and Try Available Options

7. Understand the level of product sophistication required for your organization
8. Ask for several product demonstrations from vendors, both from a business user's view and from a technical, administrative perspective
9. Ask for a trial version to ensure that your campaigns run smoothly in the solution

Decide and Implement

10. Decide on a solution and embrace it
11. Set up your initial marketing campaigns and integrate the most critical content first
12. Integrate more content as needed
13. Train business users and request feedback
14. Provide feedback to all parties involved
15. Establish organizational best practices from knowledge gained

Assess Results

16. Analyze the measurable goals
17. Examine the change in online marketing activity
18. Inspect marketing automation solution usage within your team
19. Understand the amount of time now required by staff to support marketing and sales efforts
20. Assess the results of the marketing automation implementation

Ten Questions to Ask When Evaluating Marketing Automation Systems

The questions below will help you evaluate what solutions best meet your business needs. These are meant to help you organize your thoughts before you evaluate and choose the marketing automation suite that is right for you.

How do you currently manage your sales and marketing campaigns?

1. What marketing solutions do you currently employ (email marketing, paid search, etc.)?
2. Does your sales team use a CRM system?
3. How does marketing pass leads into the CRM system (if applicable)?

What are your goals?

4. Which areas of your marketing and sales processes could be more efficient?
5. Who in your organization will use the marketing automation system?
6. What is the projected timeline for deciding on a solution?
7. What are some of the short-term goals to be achieved with marketing automation?
8. What are some of the long-term goals to be achieved with marketing automation?

How do you currently manage your sales and marketing campaigns?

9. What type of browser (Internet Explorer, Firefox, Safari, etc.) do your employees typically use?
10. Do you have web programmers in-house, or do you use an outside agency?

Upon answering these questions, you should have a better understanding of what you should be looking for in a marketing automation system.

What to Expect During the Marketing Automation Sales Process

Choosing a marketing automation solution should be straightforward and based on continuous feedback between vendor and client. The following sample steps will help you know what to expect during the evaluation process.

Step 1 (Self-Evaluation)	• Answer marketing automation evaluation questions • Determine implementation goals • Set a project leader
Step 2 (Vendor Evaluation)	• Choose solutions to evaluate • Receive high-level business demonstration of each • Narrow choices • Re-evaluate goals based on presentations
Week 3 (Technical Demo)	• Receive technical demonstration • Ask final vendor questions
Week 4 (Trial)	• Sign up for software trial • Set up marketing automation solution
Week 5 (Decision)	• Evaluate the solution based on your trial run • If satisfied, purchase solution
Week 7 (Training)	• Outline training objectives • Receive training for specific business scenarios • Have full team begin using the solution
Week 8 (Feedback)	• Provide feedback to vendor based on experience • Offer suggestions for improvements • Set up open communication for continuing dialogue

Functionality Checklist

There are several strong marketing automation solutions available, and choosing the one that best meets your business needs can be difficult. The following matrix provides a straightforward way to compare different products in terms of functionality. We have checked off the features available in Prospect Insight and have left space for you to examine other solutions as well.

▶ *Compatibility/Infrastructure*

Item	Description	Prospect Insight	Solution 1	Solution 2
On-Demand / Software as a Service	Full application functionality available from a standard web browser without plug-ins or downloads	✓		
Supported Browsers	Support for Internet Explorer, Firefox, and Safari	✓		
Supported Operating Systems	Support for Windows, Mac, and Linux platforms	✓		
User Roles	Support for four distinct user roles (administrator, marketing, sales manager and sales), each with separate access levels	✓		

Web Analytics

Item	Description	Prospect Insight	Solution 1	Solution 2
Prospect Activity History	Record and display all online activities for individual prospects	✓		
Interaction Time	Show interaction timestamp and duration for each action taken by a prospect	✓		
Record Anonymous Activity	Record actions of anonymous visitors and display them once the visitor has become an identified prospect	✓		
Record Referring Site	Display the page that prospects came from when visiting your site	✓		
Prospect Scoring	Automatically score prospects based on their site activities (e.g. page views), CRM activity (e.g. new opportunity), or form fields, allowing sales reps to quickly prioritize leads based on buying signals.	✓		
Prospect Grading	Allows user to assign a grade (A-F) to prospects based on how well they fit an ideal customer profile	✓		

▸ Automation Rules

Item	Description	Prospect Insight	Solution 1	Solution 2
Automatic Prospect Assignment	Rules-based assignments based on prospect activity, geography, or various other specified criteria	✓		
Notification Triggers	Notify sales or marketing personnel when prospects take a specified action or certain types of visitors come to your site	✓		
Drip Marketing (automated deployments)	Automatically deploy email messages based on pre-defined rules	✓		
Scoring Rules	Add or subtract points to a prospect's score based on actions (e.g. bonus points for specific search queries), data fields (e.g. bonus points for .gov email addresses), or other factors.	✓		

▶ *Email*

Item	Description	Prospect Insight	Solution 1	Solution 2
Drip Marketing (automated deployments)	Send automated emails to prospects according to pre-defined time schedules or rules	✓		
Microsoft Outlook 2007 Plug-in	Allow your sales teams to send tracked emails from within their Outlook clients	✓		
Mozilla Thunderbird Extension	Send tracked emails from within Thunderbird	✓		
WYSIWYG Template Creation	User-friendly HTML and text authoring tools for email templates	✓		
Third Party HTML Support	Utilize your own email HTML created with third party authoring tools or by hand	✓		
Auto-Responder Emails	Emails automatically sent when a prospect takes a specific action	✓		

► *Landing Page Management*

Item	Description	Prospect Insight	Solution 1	Solution 2
HTML Importer	Enter a URL for one of your existing pages and automatically import the formatting	✓		
WYSIWYG Template Creation	User-friendly HTML and text authoring tools for page layouts	✓		
Third Party HTML Support	Utilize your own landing page HTML created with third party authoring tools or by hand	✓		
Preview Before Activation	View your landing page creative before you activate it for quality assurance	✓		

► *Forms*

Item	Description	Prospect Insight	Solution 1	Solution 2
Customizable Form Fields	Create new data fields and map them to your CRM solution	✓		
Progressive Profiling	Unobtrusively obtain additional data points from prospects as they move through your site	✓		
Drag and Drop Construction	Simply drag and drop fields to put together a custom form	✓		
Free or Invalid Email Address Filter	Improve the quality of your prospects by preventing form registrations with invalid or free email addresses	✓		
Advanced Form Capture	Erroneous form submissions and abandoned submissions can be captured and tied back to prospect records in the event of conversion	✓		
Custom Formatting	Support for your own CSS template to control the look and feel of your forms	✓		

▶ CRM Integration

Item	Description	Prospect Insight	Solution 1	Solution 2
CRM Connector	Sync data with your CRM system	✓		
Route Leads Directly to CRM Account	Assign leads in your marketing automation system and have them posted to your sales team's CRM accounts	✓		
Retrieve and Analyze Opportunity Data	Retrieve opportunity status and revenue data from the CRM and analyze it against marketing costs captured by marketing automation system	✓		
Custom Fields	Create custom fields in the CRM and map them to fields used in the marketing automation system	✓		

▶ Site Search

Item	Description	Prospect Insight	Solution 1	Solution 2
Indexer	Automatically index up to 250 pages of your site	✓		
Record Query as Prospect Activity	Record and display any queries as activities tied to individual prospect records	✓		
Reporting	Display total queries, top queries, and other vital statistics	✓		

Anatomy of a Marketing Automation System

Using Prospect Insight as a model, the following screenshots demonstrate the typical features you can expect from a marketing automation system.

► *Prospect Activity*

► *Form Builder*

► *Email WYSIWYG*

About Pardot LLC

Pardot, an independent subsidiary of Inc. 500 content management provider Hannon Hill Corporation, provides on-demand interactive marketing solutions. Prospect Insight, Pardot's marketing suite, has been well received by clients due to its rich feature set, ease of use, and flexibility.

Pardot's Prospect Insight is a powerful marketing automation solution for B2B marketers. The on-demand suite solves the integration challenges faced by B2B marketers today by allowing them to control formerly disparate marketing tools such as paid search, site search, email marketing, landing pages and forms from one central interface.

In December of 2007, Pardot announced that Prospect Insight became an official salesforce.com AppExchange partner. The AppExchange is an eco-system for approved applications that integrate with the CRM platform.

Pardot was founded in 2006 and is headquartered in Atlanta, GA.

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