guide

KILLER WORKFLOWS THAT SAVE TIME & DELIVER THE GOODS

spotler

Killer Workflows That Save Time & Deliver The Goods

Introduction

IT DOESN'T MATTER WHAT INDUSTRY YOU'RE IN; I'M 99.9% SURE YOU'LL HAVE HEARD PEOPLE TALKING ABOUT MARKETING AUTOMATION. IT'S OK NOT TO KNOW EXACTLY WHAT IT IS THOUGH, WE ARE HERE TO HELP YOU!

Through this whitepaper, you will discover not only what marketing automation is but how it could help you save time and get serious results; whether that's increasing engagement, building a double opt-in database, warming leads.

What is marketing automation?

In a nutshell, marketing automation is a process that allows you to set up a series of email campaigns. You string them together with conditions such as wait periods, have the option to send your recipients down different paths based on specific (or non-specific) link clicks, check contact data conditions (for example, if they have confirmed opt-in to your campaigns) and more.

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Inspiration

Planning your marketing automtion workflow

It can seem intimidating and overwhelming to plan and implement a workflow, but in essence, it's quite straightforward provided you plan the structure properly.

Once you have an idea for a series you want to automate, you'll want to consider the following before you even get into the Workflow tool on GatorMail (or any other marketing automation platform for that matter).

What do you want to achieve?

Any and every project should always start with a clear goal. It's simply not enough to say "I want to create a marketing automation campaign because it's the done thing".

The four key questions to consider:
1) Are you trying to sell something?
Consider your approach, you'll need to spread the information over a series of emails rather than bombard over one sales-heavy pitch. Try making one key point per email.

3) Are you raising awareness or tracking a specific activity?
Sometimes your campaigns aren't necessarily about booking an event or selling something, but tracking interests of your database. For this kind of workflow it's about tracking and recording clicks, and driving traffic to your website to encourage downloads.

4) Is your workflow part of a set of communications?
If you have a recurrent series of emails, such as a weekly or monthly newsletter, a workflow could be ideal. Marketing automation is ideal for setting up a series of emails that you can 'set and forget' – saving you time in the long run.

Who are your audience?

Again, any time you have a campaign to plan, you must consider your audience. Not only is it important to the tone of voice but depending on their common attributes, they may respond differently.

For example, if you're looking for events bookings, you'd naturally think of the geography of your audience. There's no point inviting your overseas customers to a half day seminar!

Additionally, consider where they are in the customer lifecycle:
- Cold lead
- Warm lead
- Hot lead
- Prospect
- New Customer
- Existing customer
- Customer due to renew
- Unhappy customer
- VIP customer

...you get the idea! Say you're looking for case studies, your best bet is the VIP customer group, but potentially your new customers could be an option, depending on what you want to know about.

Are you looking at customer milestones? For example, you might wish to consider building an automated series that relies on contract renewals. Although it sounds complex, if you have a strong database this is achievable.
Lastly, consider purchase history. Are you looking to set up an x-sell or up-sell campaign? If so, you already have some conditions in mind to build your segment. Remember: the more specific and targeted you can be, the more successful your campaign should be.

Behaviour: what do you want to do?

You've set the goal of your campaign and your audience, but how does this all fit together?

Consider triggers for your workflow, what actions would a contact need to take for you to target them? Here are some ideas:

1) Website download

A great way to build a database of leads and track your customers' interests is to protect your website downloads with a form fill. You can also use this as an opportunity to build a
confirmed opt-in database.

2) Website visits

Perhaps you're triggering a series of emails based on your contacts history on your website. This is ideal for warming leads by sending them further relevant information.

3) Form fill

This is probably the most obvious one that often gets overlooked! Your contact who have filled in a web capture form are highly engaged. Consider sending them further relevantcontent based on what they did.

4) Lapse in activity

Provided you know the contacts email address is still active (e.g. they've not left the company) you might want to consider communications like what they call 'reactivation' in the B2C sphere. Remind them why you're relevant, interesting and helpful to encourage them to engage with you once more.

5) Subscription or purchase history

You're probably familiar with the 'abandoned cart' emails from retailers, like Amazon, and this is the B2B equivalent. For example, you downloaded this whitepaper on x, here's similar guide/you might find interesting.

Exit strategy

So, we've considered how contacts will enter a workflow, but what about leaving it? There are quite a few reasons why you might want to remove someone from your workflow.

Here are some common triggers to remove a contact that you might want to consider:
- They've completed an activity (e.g. booked an event, confirmation opt-in has happened, completed a survey).
- The natural end of the workflow (consider naming the exit stage as you can use this as an entry in future workflows).
- Non-engagement/unsubscribe: if a contact isn't interested, stop contacting them or remove them and try a different
approach.
- The manual action that requires attention: for example, the contact has called your sales team.

Mind-mapping techniques

You're nearly ready! You know what you're aiming to achieve, your audience segment is prepared, you have a rough idea of logic (or you've considered how and why you might remove contacts from your workflow at least), and you've thought about the trigger points to initiate the workflow. What's next?

It's time to consider the flow of campaigns. Here you'll want to consider the following:
- Wait stages between campaigns
- Conditions: what happens if a contact does or doesn't click
- Campaign flows: does everyone receive the same emails or will it change depending on engagement?

So how do you plan this? We have a few recommendations based on how different members of the Gator team like to plan their workflows:

1) Draw it

"Nothing beats a pen and pad of paper for me"
– Kia Irving, Creative and Content Marketing Manager

Drawing the wireframe of your workflow can simplify the layout of what you're planning to do, making it easier to produce in our workflow tool. Although it is drag and drop, it's good to have an idea of what you're doing before you get started.

2) Plan it in Excel

"When anyone on the team comes to me to check their logic for a new workflow, I like to draw up a wireframe in Excel"
– Chris Royall, Operations Director

A good place to start is Excel, you have all the shapes and connectors there already, plus it's easy to copy and paste repeated elements.

3) Post-it notes

"I built a huge workflow a while ago and for me, arranging different coloured post-it notes on the desk in the boardroom really helped me plan the bigger picture"
– Jessica Brick, Senior Marketing Coordinator

Another great visual way to hash out the sequence of campaigns and conditions is physically arranging post-it notes. It's easy to colour coordinate, move around and absorb your plan.

Types of marketing automation available in GatorMail

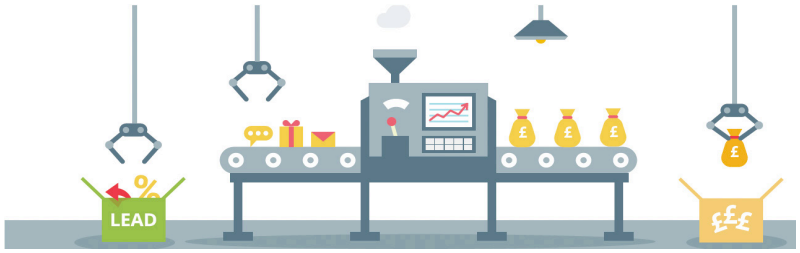
Marketing automation isn't just about creating flowcharts. There are many smaller areas that you might already be using that you didn't realise. In GatorMail, we have a tool called 'campaign series' that is, in essence, a more linear approach to automating your campaign flow. This is ideal for simple yes/no logic, so for example "has the contact booked onto the event?".

The restriction of this style of automation, however, is that you have one single flow of campaigns. In the context of the event booking example above, your contact would exit the flow as soon as they have completed the action required, rather than pushing them down a different journey.

If you're already a GatorMail user, you may have noticed some campaign settings like refresh recurring, refresh nonrecurring and close dates. These simple options are ideal settings for sending non-time sensitive campaigns to contacts when they enter a certain group.

You might want to consider using a refresh non-recurring campaign to a welcome email series for new customers or sign ups. What it means is that any time a new contact enters a group (e.g. they subscribe to a list) they'll receive a certain campaign.

A refresh recurring setting is similar, in that any time a new contact enters the group, they get a certain campaign.
However, everyone else in that group gets the same campaign again.
Another important setting for this is campaign close dates. What it means is that links will expire after the close date, but also if it is a refresh campaign, it will stop sending after that time.



How to report on your workflow

You can set up an activity report in GatorMail and add the campaigns to it. This will give you an average for all sent campaigns that refresh on demand, as well as each campaign. You can export this option.

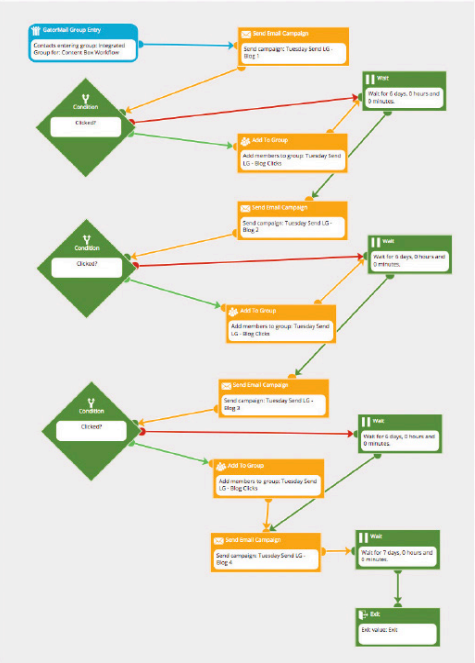
Simple newsletter workflow

The simplest way to implement an automated series of emails that'll save you time in the long run is a newsletter workflow. Rather than setting up your regular newsletters on a regular basis, use non-time sensitive content to create a series of campaigns that you can set and schedule ahead of time.

"Setting up our customer newsletters used to take me about 4 hours or so a week. Every week I would need to create my audience segment, write the email content, test etc. etc. While it's necessary, to take half a day out of my week every week didn't feel efficient.

I planned my workflow and spent probably a week or so collating my content and writing my campaigns. My audience segment was a refresh non-recurring campaign from CRM (integrated with GatorMail) so that didn't take long. In total, I probably spent 2 weeks preparing content for over 6 months.

Since then, I've added small batches of campaigns to the workflow but I don't spend nearly as much time on it as I used to. It's good to know it's all in hand."
– Kia Irving, Creative & Content Marketing Manager, Spotler



While my workflow is admittedly much more complex than the example I'm showing you, the same theory applies really. You can save a lot of time if you can sacrifice time upfront. You don't need to spend weeks writing campaigns, mine needed enough campaigns for four topic flows to last around 5 months each (22 campaigns per topic = 88 in total!).

For the simple newsletter workflow, all you need is to set up each of your campaigns with a wait period of however long you want (could be a week, perhaps a month depending on how regularly you send) and a condition that tracks who is clicking.

By adding your newsletter clickers to a new group, you have the option to target those engaging with your newsletter separately.

How could you benefit?

Saving time is a big one here. Although you might have to set aside some time upfront to prepare the workflow and campaigns within, the time you save in the long run makes up for it. Consider having weeks on end where you don't need to set time aside for this campaign!

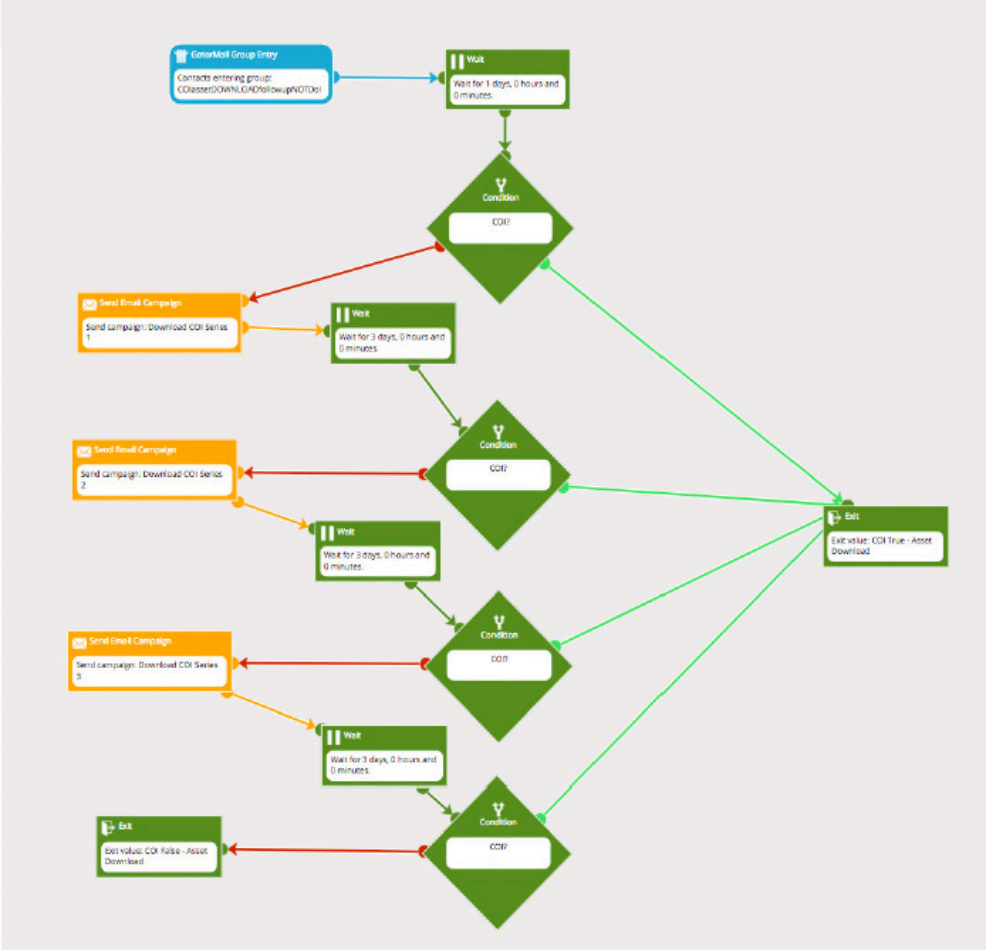
Web capture download series

If you protect your high-value content, such as whitepapers, guides and case studies, using web capture forms, this is ideal for getting your engaged contacts to confirm opt-in to your database.

The workflow is triggered by contacts downloading assets from our website, via a web capture form. Within the form (built in GatorMail) is a hidden field that populates this group. Any contacts who have already completed confirmation opt-in will exit the group and automatically receive the asset download.

Those whose contact field for confirmation opt-in (mapped from our CRM using the Microsoft Dynamics integration) will enter this workflow. The series sends a few emails encouraging the contact to opt-in, therefore helping you build a database that's compliant in time for GDPR in May 2018.

Three campaigns are sent with three days wait and a condition that checks if they have completed confirmation optin between each. As soon as the contact has completed this, they exit the workflow and will automatically enter the group that sends the asset download direct to their inbox.



How could you benefit?

The clearest benefit is building a double opt-in database, ensuring that your marketing is compliant way ahead of any changes the GDPR will bring in May 2018. Although we can't be certain what will happen yet, you have nothing to lose in doing this.

The workflow and campaigns didn't take long to set up, and if you need advice on what to write, you can contact us at any time.

Additionally, you'll benefit from having a more engaged database. Contact who double or confirm opt-in tends to interact more with your campaigns, as they have expressed interest by doing so. This means happier customers and warmer leads.

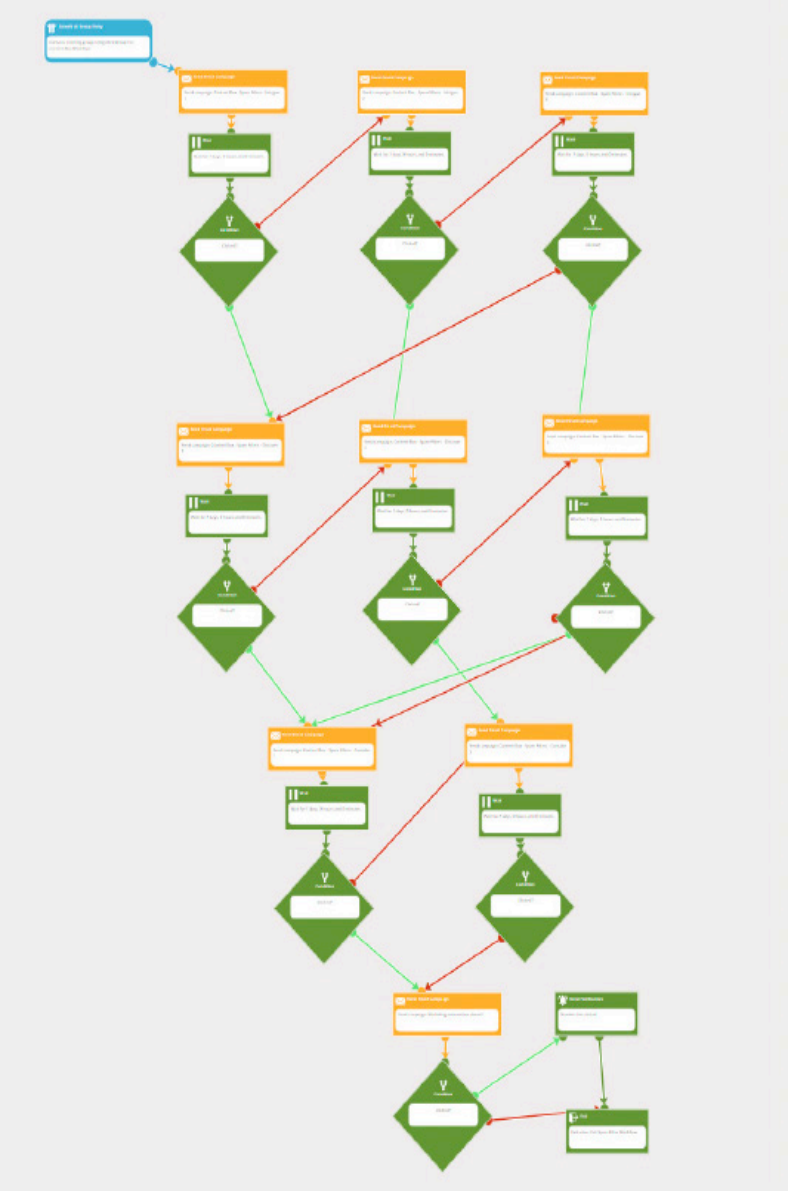
Jessica Brick, our Senior Marketing Coordinator says:
"This workflow is great to have running in the background for encouraging downloaders to opt-in – we do not send them the asset they have requested until they opt-in. Since implementing, we have seen a 67% opt-in rate from this workflow alone, so is a great tool for building a double opt-in database without having to manually manage it all."

Lead nurture series

This simple, tried and tested lead generation nurture series is ideal for warming leads. The workflow has a fourlayer structure with content best suited for that part of the lead warming journey:

- Intrigue: blogs
- Discover: webinar recordings/video/whitepaper/guide
- Consider: product features relevant to content the contact has engaged with
- Decide: a demo request/sales message

A bit like Snakes and Ladders (minus the snakes!), every time a lead clicks on an email, they're move down to the next layer of content, with one week between each email.



How could you benefit?

An easy way to nurture and warm leads, this workflow is ideal for cold/warm leads who aren't yet ready to enter the sales process. This "set and forget" automated program, doesn't need too much attention in terms of content updates as the sales lifecycle.

"Another great workflow to have running in the background. It allows us to focus on creating targeted and tactical campaigns, while still nurturing our colder leads at the same time. 12% of our sales from the last 6 months have come from this lead nurture workflow, generating us over 37,000 worth of annual revenue.

I would say around 70% of our leads that have been nurtured go through to sales as an MQL and we currently convert 1 in 10 MQL's, so it is essential to do this before passing them from marketing to sales.

We see on average around a 15% click through rate over splitting the content and sending the right people the right content
at the right time. From the 'decide' level we see an average 17% click through rate."
– Jessica Brick, Senior Marketing Coordinator, Spotler

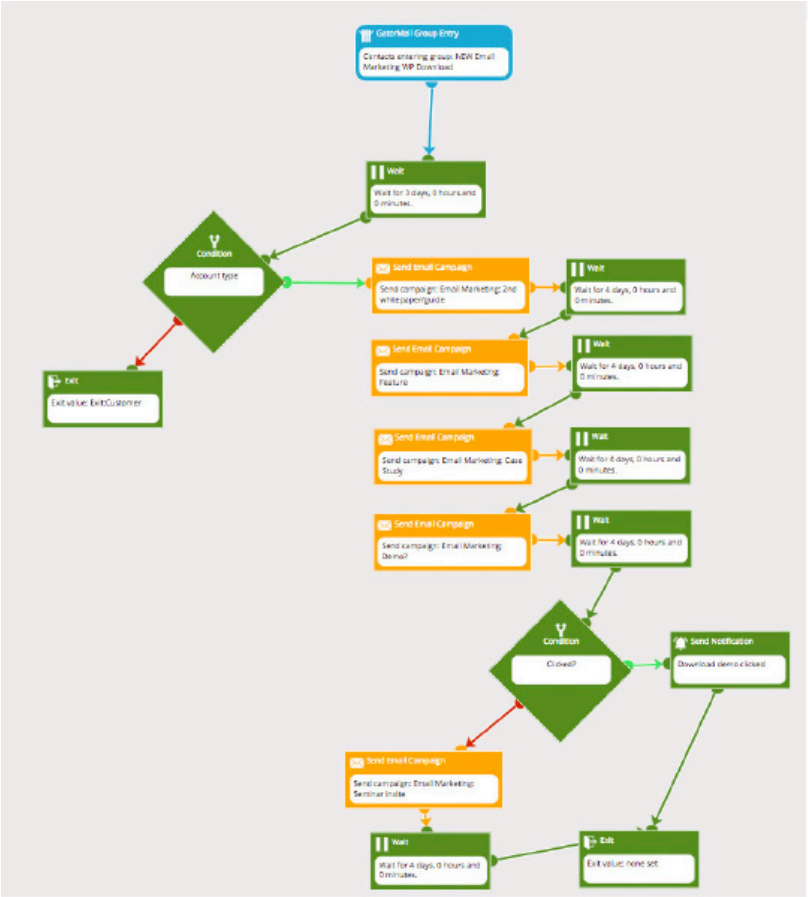
Download follow up series for lead nurture

Asset downloads are a pretty strong indication that the leads on your website are warm and potentially ready to enter the sales process. We recommend gating this content so you can record what your leads are downloading and identify potential behavioural patterns that you can use to nurture them.

We recommend using this simple follow up workflow, targeting leads (and excluding customers). The campaign
structure contains five emails over sixteen days:

- Email one: a second whitepaper, relevant to the original download
- Email two: a platform feature relevant to what the lead has engaged with (in this example, our marketing automation features)
- Email three: a case study based on the topic (e.g. a customer who has had success using our marketing automationtools)
- Email four: an invitation to book a demo with our sales team

If the lead doesn't respond to the demo invite, another four days are added and they are then invited to one of our seminars, where they would meet our sales team.



How could you benefit?

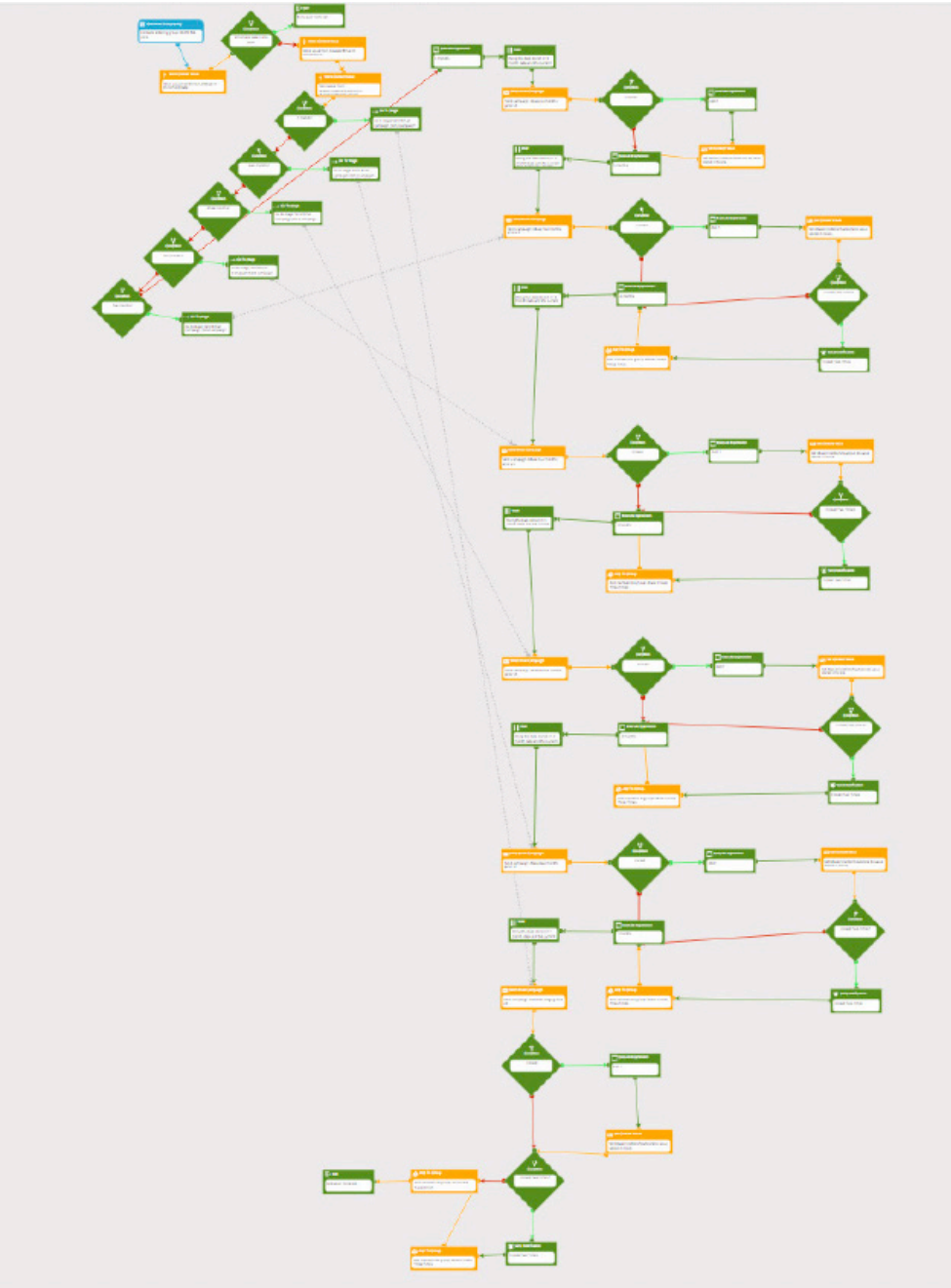
This process nurtures leads based on their engagement with your downloadable website content. The real proof is in the pudding though:

"Members from this workflow count towards our MQL's (Marketing Qualified Leads) so it is vital for our marketing and sales processes. We have generated over 1,000 MQL's from running this workflow, with 10% of those going on to sales, and 25% of those with our sales team are in or have gone through the sales cycle process."
Jessica Brick, Senior Marketing Coordinator, Spotler

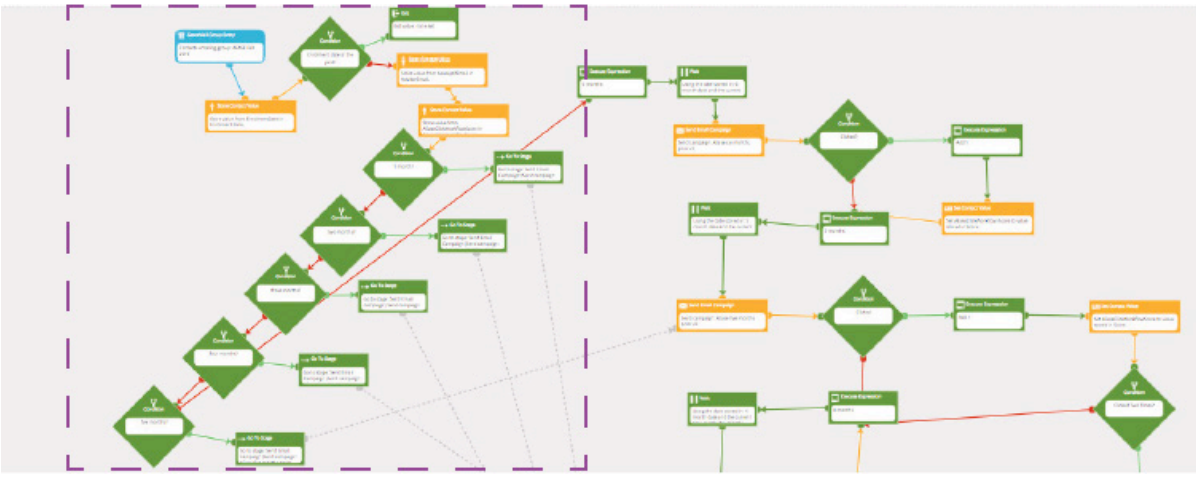
Contract Renewal Reminders

Another excellent example of saving time comes from one of our customers, Jelf. As an independent insurance broker, reminding their customers of their policy end date with time to make arrangements for renewals is paramount to the service they provide.

They needed a reliable system that would save them time, while helping improve retention and generate revenue. The solution was for us to help them build a workflow that pulled in contract renewal dates from their CRM using mapped fields from their integration. You can read about it in depth here.



In the hashed area below, Jelf have used a series of Store Contact Values to pull in a series of data sets from their CRM, such as renewal date, followed by a series of conditions that checks the date at intervals. So a contact enters the workflow five months prior to their renewal date, with conditions checking before sending campaigns specifically written for that stage of the process.



How could you benefit?

Originally it was a time-consuming process for the team at Jelf to be manually creating lists of customers due for renewal and contacting them at the intervals based on the contract renewal terms. And then repeating the same process every month!

As an automated program that uses a refresh non-recurring list from their CRM, and the workflow checking mapped fields for enrolment date, the process is much simpler, and now the team only needs to monitor the workflow from time to time.

This workflow alone has saved the marketing and advisor teams an untold amount of time as they are relieved of following up on over 7,100 customers since the workflow launched in February 2016.

In addition to saving time, Jelf has seen an uplift in retention and profitability, which is in part thanks to this workflow and the personalised campaigns attached.

If you need help getting to grips with your marketing automation journey, or you'd like to discuss your ideas, please get in touch with your account manager on 01483 411 911 *option 4

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SpotlerUK is one of the leading B2B marketing automation & lead generation software providers in the UK.

Offering an all-in-one inbound and outbound marketing software, SpotlerUK provides everything you need to launch effective marketing campaigns that generate leads and engages your audiences.

To read all the juicy details of what the platform offers and how we can help your business jump on over to our website: spotler.co.uk.

Or for more on all things marketing and sales related, visit our blog: spotler.co.uk/blog or sign up to our newsletter: spotler.co.uk/newsletter.

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