



# The Automation Effect

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## The buyers journey has changed

**78%** of all buyers start their purchase with a web search

**50%** turn to social media to get peer reviews



## Top Performers are marketing differently



Customer Lifecycle



Metrics for Decisions



Segmentation & Personalization



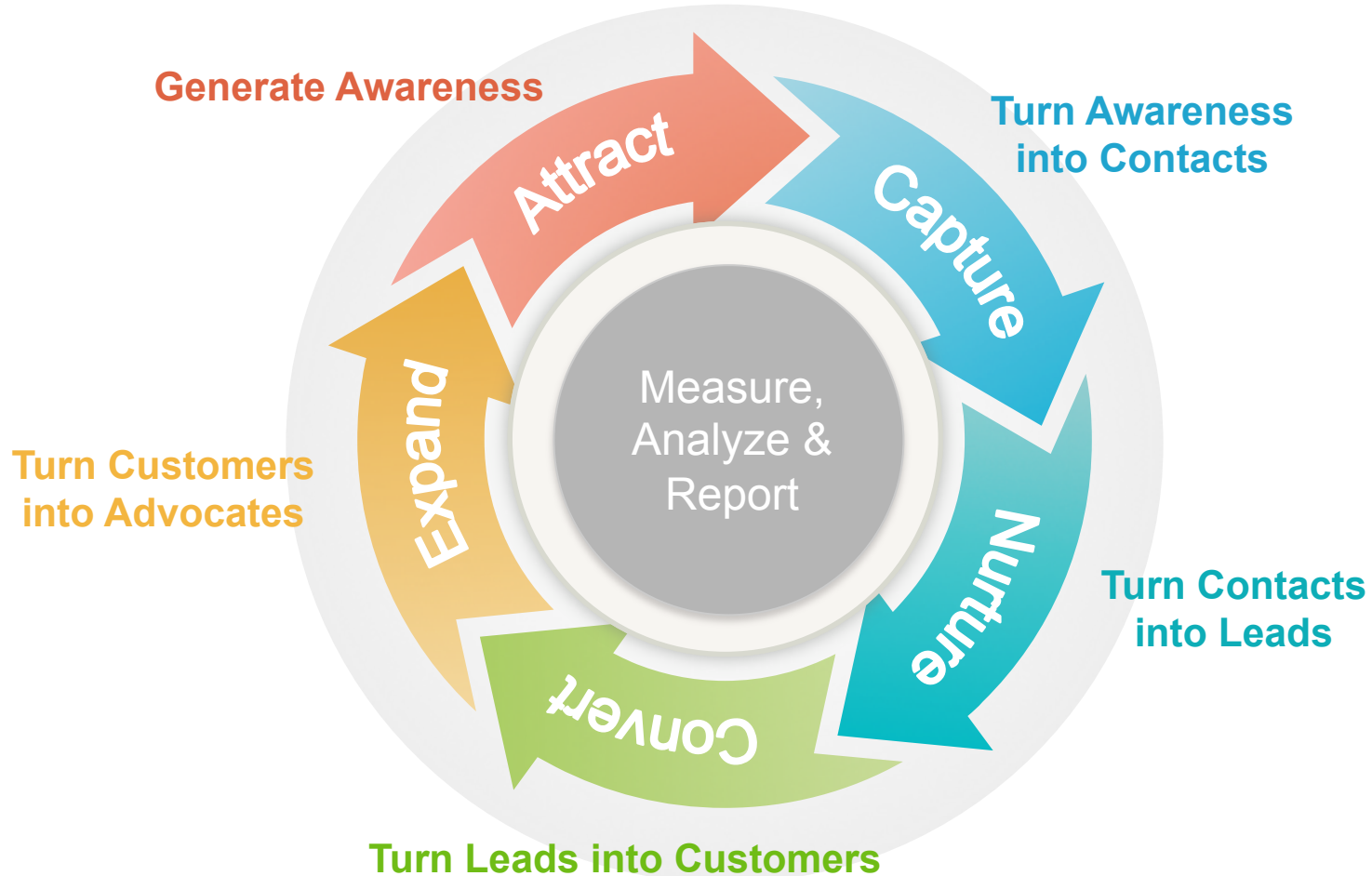
## Top Performers use marketing automation to achieve better results



Marketers are generating a majority of the sales pipeline



Out-growing their competition who are not using MA





**ATTRACT**

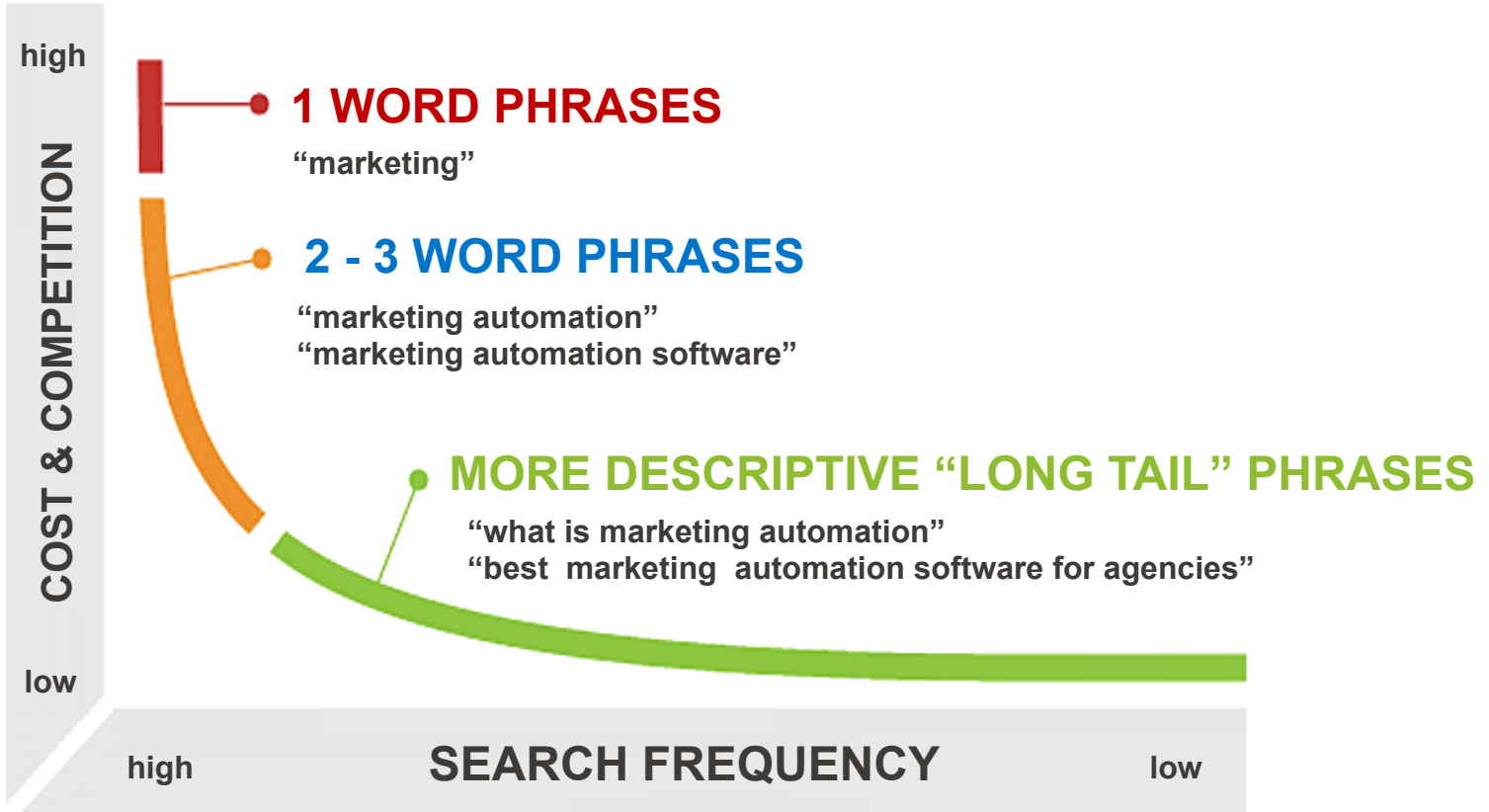
There are **267 Billion** searches each **month**

Over **78%** of all product research  
begins with a web search

Inbound leads have an  
**8x greater likelihood of closing**  
compared to other leads



To be the **best possible page** on the internet for your **target keyword**



```
<title>Investing in SEO: Marketers are Doing More SEO Than They Think - Search Engine Watch (#SEW)</title>
```

Title Tag

1

URL

2

Headlines and sub-headlines

H1 & H2 tags

3

Call to action links

Hyperlinks

4

Main body text copy,  
top to bottom

5



SEO copywriting helps your writing be more specific.  
It's just changing how we "see" and write copy!



**Understand your buyer** build personas of the different types of buyers

**Develop a curriculum** and content plan that matches a buyer's journey.

**Become a trusted advisor** by educating before selling.

**Get found** by optimizing your content for search engines.

**Use paid advertising** to bolster organic search.

**Reinforce content across multiple channels.**





Over **1.15 billion** users

23% of users log in  
**5x per day**

47% of Americans say  
it's **#1 influencer**  
of purchases

**70% of marketers** use  
it to gain new  
customers



**215 million** monthly  
active users

**34% of marketers** use  
it to generate leads

5x increase in  
engagement when post  
includes **photo/image**

**74% of people** follow  
SMBs to get product  
updates



**300 million** users

40% of users  
**check it daily**

**3 million** business  
pages

**6 out of every 10**  
**users** are interested  
in industry insight  
content



**359 million** monthly  
active users

Google+ is growing at  
**33% per year**

**70% of business brands**  
have a presence

After page authority, a  
URL's number of +1s is  
more highly correlated w/  
**search rankings** than  
any other factor

Showcase executive & company  
knowledge

**BY....**

Creating, curating & sharing content that  
**educates, inspires** and  
speaks **authoritatively** to:

*Industry, Product, Usage, Vision*

- Identify **influencers** & subject matter **experts**;  
increase company **mind share** through engagement
- Build lasting relationships with **partners** and **customers**;  
incentivize them to be **advocates**
- Create an **employee** evangelist **program**;  
leverage their networks to brand & expand the **business**

## 3 Cs: Conversations, Campaigns & Content:

- **Identify #tags and search for posts related to your industry**
  - Chime in, be helpful, share content to further the conversation
- **Use social media channels as an AD platform**
  - Target your audience and run a series of paid ads to drive conversions
- **Share a variety of different types of posts and keep audience engaged**
  - Paid, earned and owned

## Metrics that Matter

People visiting, Bounce rate

Social media followers, shares, leads

Number of new articles, press releases, events

Google ranking, search volume for brand

**How many people** are visiting our site?

**How attractive** is our content?

**How popular** is our brand?

## BOTTOM LINE:

Increase visibility and share-of-audience with more appealing **content**, better **SEO** and differentiated brand **awareness**.

*Key metrics at: Reports > Website Visitors*

- Strong **Web** Presence
- National & Local **Tradeshows**
- **LEGO** Education Hosted **Events**
- Social **Media** & Media **Relations**





**CAPTURE**





**56%** of advanced B2B marketers said content-based offers were their most successful campaigns.



*- Demand Gen Report Research*

- ✓ **Format** – Match it to your medium
- ✓ **Language** - Be clear and direct; use the active tense
- ✓ **Content** - Make it engaging and encouraging
- ✓ **Size** - Make your CTA big enough to grab attention
- ✓ **Color** - Use color to draw attention to your CTA
- ✓ **Placement** - Put your CTA on prime real estate
- ✓ **Repetition** - Repeat the suggestion to click if space allows
- ✓ **White space** - Let your CTA have room to breathe
- ✓ **Icons and images** - Incorporate visual clues
- ✓ **Landing Page** – Direct to a dedicated landing page to get offer





**44%** of clicks for B2B companies are directed to a home page, not a landing page.



- MarketingSherpa

- You **already have** contact info for folks in your database
- Reduce friction by **providing direct access**
- No form needed!



The screenshot shows an email layout. At the top left is the 'act-on' logo. Below it is a blue banner with the text 'janelle, find out why the marketing industry is all abuzz:'. To the right of this text is a smaller line: 'Click the button below and the whitepaper will load in your browser.' The main headline in the banner is 'Whitepaper - Marketing Automation Industry Overview'. To the right of the headline is a green button that says 'DOWNLOAD NOW'. Below the banner is a section titled 'More About this Whitepaper'. It contains a paragraph of introductory text and a bulleted list of three points. To the right of this text is a small image of the whitepaper cover, which has the title 'MARKETING AUTOMATION Industry Overview' and a colorful graphic. Below the image is the caption 'Whitepaper: Marketing Automation Industry Overview'. At the bottom of the email content area is a grey footer with the copyright notice: 'Copyright ©2008-2014 Act-On Software, Inc.'

act-on

janelle, find out why the marketing industry is all abuzz: Click the button below and the whitepaper will load in your browser.

## Whitepaper - Marketing Automation Industry Overview

DOWNLOAD NOW

### More About this Whitepaper

As ROI from traditional marketing channels continues to erode, modern marketers have turned to new, tech-based methods for attracting customers. The world of marketing automation is growing, and fast. Get the scoop on what it all means in this complimentary whitepaper, Marketing Automation Industry Overview, to learn:

- When, how and why you should consider marketing automation
- Essential elements of a marketing automation platform
- Role marketing automation plays in aligning sales and marketing
- Considerations when selecting a vendor



Whitepaper: Marketing Automation Industry Overview

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**For 2 years running,**

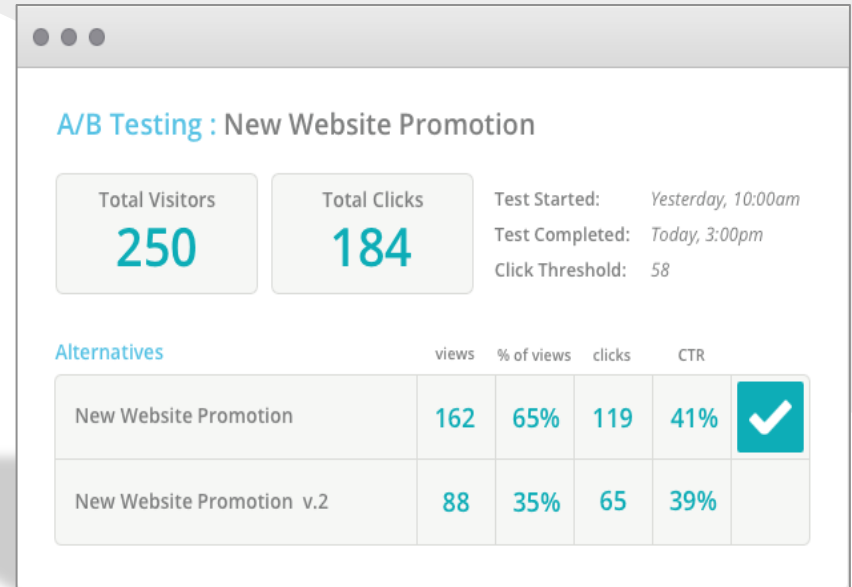
A/B testing is the most used  
method for improving conversion.



- *Econsultancy*

# Where should you test?

- Emails
- Landing Pages
- Forms
- Segments
- PPC campaigns



# What should you test?

- Subject lines
- Sent from alias
- Preview text
- Calls to action
- Headlines
- Photos & graphics
- Send time, date
- Number of choices
- Responsive and text
- Creative feel
- Navigation
- Content layout
- Length of content
- Personalization
- Prices and discounts
- Simple vs complex

- **Numbers** in subject lines *increase opens*
- **Customizing** with business or first name *boosts opens*
- Don't be shy about **sending on Saturday** or “light” holidays





## Metrics that Matter

Conversion rate on calls to action

(Ad) Cost per click, Investment \$, Form fills

Known visitors, Number of new prospects

**How many content consumers** became known prospects?

**What calls to action** are most effective?  
With what audiences?

**What channels** are most effective?

**BOTTOM LINE:**

**Increase known prospects** in the funnel

Key metrics at: *Reports > Forms & Media Reports*



**NURTURE**

Companies that  
**excel at lead nurturing generate**



**50% MORE**

SALES READY LEADS

- AT -

**33% LOWER**

COST

- Forrester Research



Companies that automate

lead management

see  
a

**10%**

**OR GREATER**

**increase in revenue in 6-9 months.**

-Gartner Research



Nurtured leads make

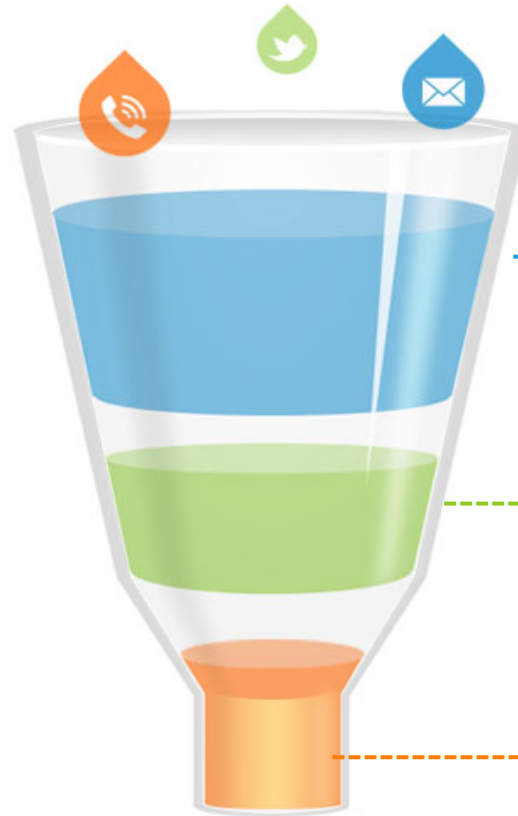
**47% LARGER**

PURCHASES

than non-nurtured leads.

-The Annuitas Group

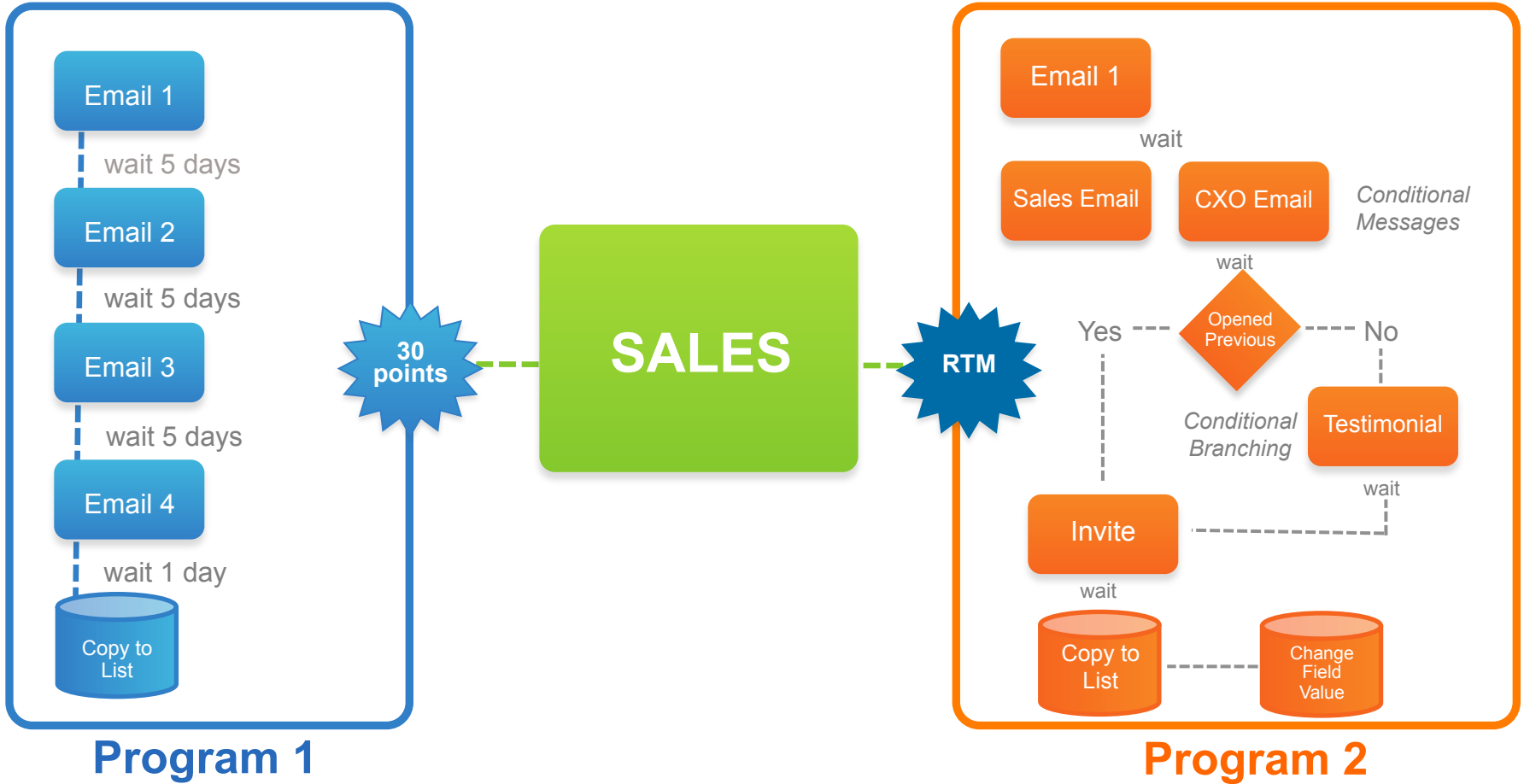
Act-On uses automated programs to **create leads** and **move them** through our sales funnel, focusing on where a prospect is at in **their buying cycle**



Introduce Act-On with lighter content – videos and white papers

Offer persona-specific content to help aid buying process for prospect

Decision-supportive content, post-sale programs, and ongoing customer communications



## Metrics that Matter

Number of new leads, Number of Reopened leads

Number of Marketing Qualified Leads (MQLs), Cost per MQL

Open rate, CTR of automated programs

Number of Leads by lead scores

How many **Marketing Qualified Leads?**

**What automated programs** are most effective?

**What's driving** lead scores up?

**BOTTOM LINE:**

**More prospects** qualified to buy

*Key metrics at: **Dashboards for “Automated Programs” Reports > Revenue Impact***



Identify warm and hot leads via **scoring**; monitor online **behavior**

- Are prospects clicking through site?
- What content are they downloading?
- Are they watching videos?

*EX: Opening an email message is given 1 point, while attending a workshop is given 10 points*

Create **content** that speaks to the buyer's **persona**

- **Automated programs** based on where the buyers are in the **funnel**
- Targeted, segmented **campaigns** based on **firmographic** details
- Open **communities** for teachers to **learn** how other teachers use LEGO in education, **share ideas** and get questions answered





**CONVERT**





“... organizations that have tightly integrated marketing and sales around the shared task of demand creation **close between two and seven times the number of deals** of those that do not.”



- *Sirius Decisions*

Use every engagement opportunity to **learn more**

**Share profile data with sales**

– both demographic and behavioral information

Gathering intelligence will **save sales time** and allow them to tailor their conversation to the individual

**William Adeoshun** [Send] [Edit] [Delete] [Close]

Master List

**CTO, IT**  
**Mayo Clinic**  
13400 Shea Boulevard  
Scottsdale, Arizona

**E-Mail** wadeoshun@mayoclinic.com  
**Mobile** 602.486.1579  
**Work** 916.259.1219  
**Home** 602.355.6830

**Overview** | Website | Mailings | Forms | Webinars | Media | Custom | All

Website	E-mail	Forms
Page Views: 79 Site Visits: 26	Sent: 48 Opened: 28 Clicked: 9	Views: 24 Submits: 14

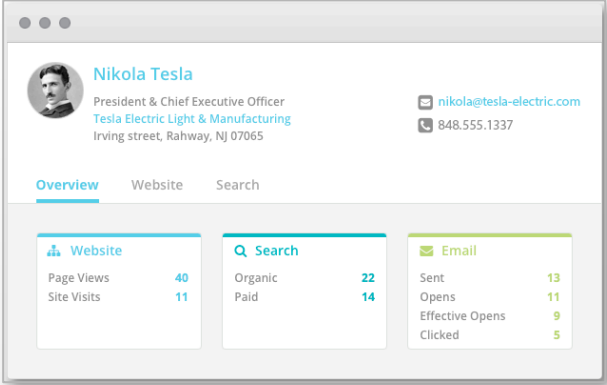
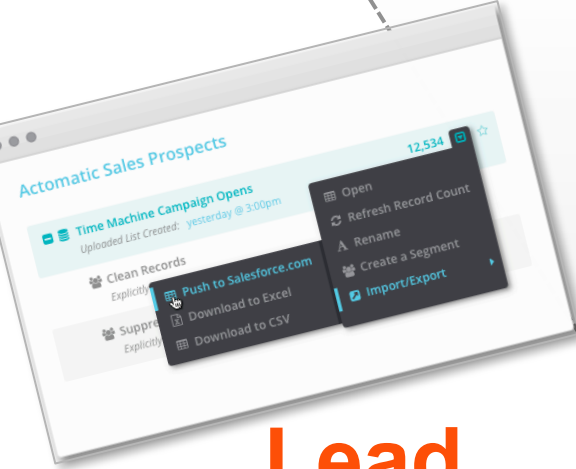
Webinars	Media	Bounce & Opt-Out
Registered: 2 Attended: 1	Downloads: 12	Opt-Out: 0 Bounce: 0

Total Score **323** for all time

Outbound	Inbound
<b>First</b> 414 Days Ago <b>Most Recent</b> 2 Days Ago	<b>First</b> 414 Days Ago <b>Most Recent</b> 2 Days Ago

**act-on**

# Use Insight to Improve Conversion



## Lead Distribution

Distribute high quality leads to sales

## Increase Intelligence

Use profile and behavior to better serve

## Sales Acceleration

Identify and act on hot prospects



## Metrics that Matter

Number of Sales Qualified Leads (SQLs)

Velocity from Lead to SQL, SQL to Win

Campaign/Channel ROI

Cost per SQL, Cost per new customer

How many **Sales Qualified Leads**?

**What campaigns and lead sources** are most effective at closing?

**How fast** are the leads closing?

**BOTTOM LINE:**

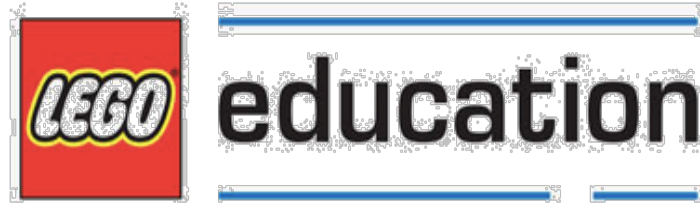
**More leads and customers** at less cost.  
**Higher quality leads** convert more.

**Known brand**  
so sales do happen  
directly on website



**Print 80,000 copies of its  
main print catalog**  
annually, & reaches 20,000  
educators at back-to-school  
time w/ trifold mailers

**15 person inside  
sales team**  
& handful of outside  
sales reps assigned to  
territory



**Pass nurtured leads  
with achieved lead score**  
to inside sales

**Partner w/ schools**  
to host 1-day  
symposiums; show &  
tell, workshops, inspire  
to use



**EXPAND**

## Customer Retention vs. Customer Acquisition

6 or 7

Number of times **MORE COSTLY**  
it is to **acquire** a new customer  
than to **retain** an existing one

25% - 95%

**AMOUNT OF INCREASED PROFITS**  
that can come from **boosting customer retention**  
rates by as little as 5%

**1**

There is a **massive misalignment of efforts and objectives** at Average B2B mid-sized firms.

---

**2**

The customer lifecycle needs a **LEADER**

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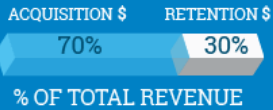
**3**

**Marketing technology is key** to monitoring, measuring, and engaging with customers across the entire lifecycle





## AVERAGE B2B FIRM



## TOP PERFORMERS

ESTIMATED % OF SATISFIED CUSTOMERS

ESTIMATED % OF REVENUE FROM EXISTING CUSTOMERS

% MARKETING BUDGET ALLOCATED TO CUSTOMER RETENTION

% OF TIME ALLOCATED TOWARDS CUSTOMER COMMUNICATIONS



Beat revenue plans

90% of their customers are *happy*

Effective at managing entire lifecycle

## Know your customers

How much are they spending? How active are they? Have they had any problems? What industry are they in?

## Identify patterns for segmentation

Running into the same problems? Less use of your product or service?  
Very active customers/

## Develop an Engagement Plan

Personalized, relevant and regular



# Start Engagement Early



Customer Success

## GETTING STARTED

### ACCOUNT SETUP SERIES






{{^dynamic\_text\_B4(HTML\_TEXT)}}

My focus is on your implementation goals which rely on a solid foundation of core functional knowledge, appropriate account setup, best practices, and technical integrations. I'll be happy to apply what you learn from the instructor-led trainings, self-paced modules, and knowledge articles in Act-On University as well as marketing best practices documentation in the Act of Excellence (ACE).

To get started, register for and attend the Setup Your Act-On Account instructor-led course. If you can't make it to the class, watch the Getting Started self-paced video anytime!

Start with  
**Onboarding**  
customers

The screenshot displays the Act-On University user interface. At the top, the navigation bar includes the Act-On logo, a user profile icon, and links for ACT-ON UNIVERSITY, CENTER OF EXCELLENCE (ACE), CUSTOMER SUPPORT PORTAL, REGISTER FOR TRAINING, and TOUR ACT-ON U. Below the navigation bar, a blue banner features a search bar with the text "Search..." and a green "Search" button. A welcome message "WELCOME BACK, ATRI" is displayed. The main content area is titled "ACT-ON UNIVERSITY" and contains a grid of ten navigation tiles: "What's New" (green starburst icon), "Getting Started" (red circle with "START" and a mouse cursor), "Feature Requests" (blue checklist icon), "User Community" (blue and orange people icon), "Inbound" (orange envelope icon), "CRM Integration" (grey document with green plus icon), "Contacts" (grey document with person icon), "Forms" (blue document icon), "Landing Pages" (green document icon), and "Email" (grey envelope icon).

New Customer Drip Program		Sent	Opens	Clicks
 <b>Act-On Website Visitor Tips</b> <i>Step: Website Visitor Tracking</i>	Deployed Tue Jun 25 9:13 AM	2955	5709	766
 <b>Get the most out of your email marketing with Act-On</b> <i>Step: Email Messages</i>	Deployed Tue Jun 25 9:46 AM	2886	3071	383
 <b>Learn how to create Forms in Act-On</b> <i>Step: Forms</i>	Deployed Thu Jun 20 11:27 AM	2867	3115	501
 <b>Expand your SEO and Social Media efforts via Act-On</b> <i>Step: SEO and Social Media</i>				
 <b>Act-On Features - Learn them today!</b> <i>Step: Final Email - All Features and Forum Highlight</i>				

Hi {{VCard.FIRSTNAME}},










If you haven't set up or used all of the website tracking features you may be missing out on hot new leads! Increase visibility into your campaign effectiveness, score and segment your database, and see new companies that are interested in buying from you.

Here's a few quick items to help maximize your website tracking returns:

- Simply apply a few lines of [code to your website](#) to get started.
- Receive [Customized Daily Emails](#) with all of the known and unknown visitors to your website.
- Use [Data.com](#) to pull contact information for anonymous visitors directly into your Act-On account.
- Create [Real Time Alerts](#) based off of territories, company names, or web pages.
- Use the [twitter prospector](#) to view the traffic generated through Twitter!

## Segment and personalize to improve engagement

- Use behavior and demographics to segment
- Personalize interactions for each segment at each stage in the journey

Agency AP Lists	
 <b>Salesforce Saved Report: Agency Nurture Program 1</b>	70  
<i>Salesforce Leads / Contacts / Campaign Members Created: Thu Feb 19 2015 5:19 AM PST</i>	
 <b>Agency Nurture Program 1 - Starter Agency</b>	47  
<i>Segment Last Counted: Thu Feb 19 2015 5:19 AM PST</i>	
 <b>Agency Nurture Program 1 - Full Agency</b>	16  
<i>Segment Last Counted: Thu Feb 19 2015 5:19 AM PST</i>	

## Metrics that Matter

Open rate, CTR of customer campaigns

Pulse & Churn rate

Upsell as % of Total

Overall health (example: Net Promoter Score)

Which **customer marketing programs** are most **effective**?

How **engaged** are customers?

How **successful** are we **in upselling** to customers?

How is the **the overall health** trending?

**BOTTOM LINE:**

**Keep customers and expand revenue**

# HOW LEGO EDUCATION EXPANDS THE CUSTOMER RELATIONSHIP

## Host **workshops** & **webinars**

- To increase usage and value derived from LEGO play
- To provide new story ideas and ways to leverage LEGO play sets in classroom
- Show & Tell curriculum

## LEGO Education **online community**

- Encourage teachers to share lesson plans, use cases and curriculums
- Challenge educators to create story ideas through contests & offers
- Engage through storyboarding & visual sharing using LEGOs; across Pinterest, FB & Twitter





## We're **Act-On!** And we're leading the marketing automation transformation

- Our **MISSION** is to **delight** marketing teams with **big ambitions**
- Our **PRODUCT** gives you **simplicity without compromise**
- Our **SUPPORT** is **legendary**
- We have **over 3,000 customers**

The logo for Forbes America's Most Promising Companies 2013, featuring the word 'Forbes' in white on a black background, followed by 'America's Most Promising Companies' in blue and red.

2013

The logo for Inc. 500, with 'Inc.' in black and '500' in large, colorful letters (red, yellow, blue).

2013 & 2014

The Forrester logo, featuring the word 'FORRESTER' in white on a dark green oval background.

**LEADER 2014**

*Forrester Wave for  
Lead to Revenue  
Management*

The Deloitte Technology Fast 500 logo, with 'Deloitte.' in blue and 'Technology Fast 500' in green.

2013 & 2014

The SaaS TOP 250 Montclair Advisors logo, featuring a green sunburst and a blue banner with 'TOP 250' and 'Montclair Advisors' below it.

FROST & SULLIVAN

2014 BEST PRACTICES AWARD

GLOBAL MARKETING AUTOMATION SOFTWARE  
ENTREPRENEURIAL COMPANY OF THE YEAR AWARD

## For more information

- [www.act-on.com](http://www.act-on.com)
- Visit our table at the show at expo

## Join our Workshop tomorrow

- Wednesday @ 1PM

Contact us: [atri@act-on.com](mailto:atri@act-on.com), [Paige@act-on.com](mailto:Paige@act-on.com)