HOW TO FIND A BETTER MARKETING AUTOMATION SOLUTION

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WHEN IS IT TIME FOR A CHANGE?

Marketing automation is a powerful tool. In fact, 80% of marketing automation users experience increased leads, and 77% experience increased conversions. However, not all solutions are created equal, and in some cases, your existing tool might be missing the mark.

Using a system that is too complex, has a steep learning curve, or delivers a difficult user experience is a common catalyst for change. Recognizing challenges with your existing solution is the first step toward re-energizing your marketing efforts and capturing greater results. Use this guide to pinpoint your exact challenges, and move forward with the best solution without losing any marketing momentum.

Signs It's Time for a Change

Change is hard. Complex tools like marketing automation software (not to mention all the integrations that make the whole engine work) are particularly challenging to implement and show value. People need to be trained, processes need to change, and it takes time to see the results. Technology should work for you, not the other way around. If any of the following scenarios sound familiar, you may have a bad-fit marketing automation provider.

Onboarding and Adoption Failed

Whether you are implementing marketing automation and other growth marketing tools for the first time, or attempting to make a change, onboarding is the first step toward success. Effective onboarding starts with the marketing software provider guiding the way, and should be a relatively painless experience from account creation to taking your first real actions on the platform. Of course, as a marketing team, you have to be certain it's not an adoption problem on your end. If you've tried everything, and it's just too hard to get things off the starting line, it's time for a change.

Long Time to Value Leaving No End in Sight

There's a difference between taking your time to set things up in a structure that works for your team, and getting stuck with endless configuration and consulting that make it impossible for your solution to pay for itself. If you haven't been able to figure out and launch your basic marketing automation programs, it's time to consider a change.

Expert Consultants Killing Your TCO

Total cost of ownership (TCO) is one of the most important considerations when choosing a marketing automation solution. When your solution requires a team of consultants, or specialized (aka. expensive) employees to keep the engine of marketing automation running, the cost adds up quickly. People are often the biggest hidden cost of marketing software platforms.

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Add-Ons and Database Costs Sneaking Up

Paying extra for avocado on your BLT makes sense. Shelling out payment after payment for add-ons to get your marketing platform to perform basic functions does not. If you feel nickel and dimed for the features and database space you need, it may be time for a change.

Stuck in Tinker Mode

When you're spending so much time tinkering you're not marketing, there is a problem. Running marketing programs, accessing data and making decisions based on reporting should be easier with a robust marketing automation platform, not harder. If it's taking an inordinate amount of time and effort to get your automated marketing efforts running smoothly at all stages of the customer's journey, it's time to take another look at your software choice.

Support Isn't Supporting

When it comes to one of the most crucial pieces of software your marketing team operates on a daily basis, you'd better have access to effective real-time support. If not, you may have to make a tough decision to seek a marketing automation alternative.

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HOW A MARKETING AUTOMATION TOOL SHOULD WORK

When a marketing automation tool is working well, it should be helping you generate new traffic, convert new visitors into known visitors, nurture those potential customers across the right communication channels, and qualify the best possible leads for your sales team (or lead to an e-commerce conversion).

Successful marketing automation has 9 key factors:

- Clean and clear database
- Lead generation tools
- The right integrations
- Behavior tracking
- Easy lead scoring and segmentation
- A/B testing capabilities
- Automated messaging (including email, SMS and social)
- Customer journey building for nurture programs
- Robust data and reporting options

Making sure each of these factors is available in your marketing automation platform is essential. Let's review the details of each, along with what the tool can facilitate for your business.

Marketing Automation Database

One of the most important foundational elements for marketing automation success is clear customer data in a format that is usable and scalable as your business grows. Your customer contact records should be able to show you every detail your contact has supplied via form fields, as well as information about how they've engaged with your website and other content. A unified view of such data is a crucial piece of marketing automation software.

Lead Generation Tools

The world's top marketing software platforms offer easy-to-use lead generation tools, including landing pages and forms. When your platform is working well, it should be relatively easy to use a landing page template to create a home for your new offer and gather new leads with the right form. Along with native tools and integrations for organizing your content and promoting it, your marketing automation solution should make it easier to generate and track leads.

Integrations: Your MarTech Stack

One of the most important aspects to implementing any software tool for your business is to make sure it integrates with existing and future solutions you'll need to keep growing. In the case of marketing automation software, one of the most important integrations to think about is with your CRM.

When working well, all of your tools are integrated with two-way data synchronization and reporting, but especially in the case of integrating your marketing automation tool with your CRM, your sales team will get all the data it needs to close more deals.

Behavior Tracking and Reporting

Any marketing automation solution worth using will track what your contacts do on your website and organize it into the individual record. Tracking and reporting on this data allows your team to understand details like what industry the contact is in, which services or products they are interested in, and what stage of the buyer's journey they seem to be in as they engage with your brand. Behavior tracking is an essential building block for personalization and automated messaging.

Lead Scoring and Segmentation

One of the most important functions of marketing automation software is to enable personalized, well-timed messages to customers and prospects. In order to facilitate this, automated lead scoring and segmentation are crucial. Lead scores can be used to trigger automated marketing campaigns meant to move any contact through your funnel and towards a purchase and lifelong customer relationship. When working as it should, your marketing automation solution will help you to automatically score and segment leads to power your personalized marketing programs.

A/B Testing

Can your marketing automation tool help you figure out what's working? Using a great marketing automation solution allows you to test elements like email subject lines, button text and other elements that can help you to optimize conversions and continue growing your business.

Automated Messaging

One of the most basic functions of marketing software is to help your company deliver automated messages to the right people at the right time on the right channel. A great marketing automation solution will allow you to automate messages via email, SMS and social media.

Customer Journey Building

Getting a little deeper with your marketing automation efforts means paying attention to the entire customer journey, and delivering a seamless, positive brand experience at every touch point. Your marketing automation tool should help you to build out the entire marketing experience for your leads and customers. This type of immersive experience has proven to be crucial for building brand affinity and sales in the long term.

Data and Reporting

Modern marketing doesn't work unless you have detailed data that you can use to create the reports you need to see. Your marketing automation solution should help you to collect data and construct reports that guide your decision making. If it's hard to understand what's happening with your marketing programs, and even harder to get at the right data, the problem might be your marketing automation tool.

HOW TO MAKE SURE YOUR MARKETING AUTOMATION INVESTMENT IS PAYING OFF

Investing in marketing automation software is an important decision for your business. In the best case scenario, the return on that investment is all positive, and you can sit back and watch the results pour in. In the worst case scenario, your company dumps a lot of resources into standing up a new solution, but never quite gets off the ground to launch the automated marketing campaigns that help your business grow.

Understanding the costs and benefits in the equation is crucial for making sure your marketing automation software is generating positive ROI. To start, do you know exactly how to measure your inputs and outputs with marketing automation?

Inputs can include resources like time, money, ideas and people. Outputs include speed, conversions, efficiency, and customer retention.

One of the most important ideas to understand when evaluating the value of your current marketing automation solution is total cost of ownership (TCO). This includes the subscription cost for the software, migration costs, onboarding and training, add-ons and the costs involved in creating content and running marketing programs with the software. In addition, time to value can be a big concern if it seems to be taking an extraordinary amount of time to get up and running on a solution.

The most overlooked aspect of marketing automation ROI is people. Some marketing software is so complicated, it requires an army of consultants to keep it running. For businesses running lean or specialized marketing teams, the people factor can be an ROI killer.

To make sure your marketing automation investment is paying off, structural elements must be in place to provide the foundation for success. These elements include:

- Marketing automation strategy that aligns with and supports your overall marketing and sales strategies

- Buy-in from stakeholders throughout your business

- Resources, including budgets for content creation, advertising, campaign configuration and analysis

- Guidelines for visual brand, personality, messaging and voice

If the foundation is there, the next step is to implement a great-fit marketing automation tool, and run it well. The best marketing automation tool for you should be:

- Clearly priced without surprise costs

- Easy to implement with migration support

- Simple to operate without a team of expensive experts

- Flexible enough to grow with you as you scale

Even when your foundation and tools are both there, your marketing automation investment will not pay off unless you identify the right campaigns and run them well. Sometimes, your tech stack can get in the way of good strategy. To be sure that's the reason you may be falling short on goals, or questioning some of your processes, investigate the following three areas.

Strategy

Are you taking the time and space to really think about which audience your business is targeting, and conceiving of the best ways to reach new people in that segment? Are you truly making it a priority to evaluate the customer experience, and to figure out how to better serve the companies that have chosen your products and services?

To get the most out of your marketing automation investment, make sure you're providing the right foundation with a clear strategy.

Execution

You may already have a proven strategy in place for bringing in new business, and building upon existing customer relationships. In that case, execution may be what's slowing you down. Software - more specifically, your marketing tech stack - is a big part of execution when it comes to modern marketing and sales.

Commonly, marketing teams implement a stack of tools to help with lead generation, lead management, scoring, segmentation, email, video, SMS, social media, advertising, lead nurturing, website building and maintenance, SEO and more. As you have probably experienced, this can sometimes lead to gaps, tacked-together processes, or even overlapping tools that do the same types of things a little differently. Add to that the need for effective integrations, and you can see how important the right tech mix can be for marketing execution success.

Analysis

One of the best things about marketing automation is that it can help you to capture first-hand behavioral data. Especially as marketers are facing increased privacy controls, and the death of the third-party cookie, it is crucial to pay close attention to the data you can capture with your own offerings and tools. Your marketing automation solution should be capturing lead-level data for you, and providing an opportunity to analyze the behaviors of people who visit your website and become your best customers.

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Your Marketing Automation Solution Should Drive ROI, Not Kill It

Marketing automation ROI comes down to the right inputs and the right tools to generate the intended results. Having an automation tool should make marketing easier for the people in whom your department is investing, not more complicated.

The ideal is that your marketing tech stack should make it easier to execute targeted, multi-channel campaigns to attract, nurture and keep your best customers. When your tool simplifies processes for setting up automated email nurturing, lead scoring, audience segmentation and analysis, what follows is the capacity to do a lot more.

Your marketing automation solution should be helping to drive ROI, not providing a sinkhole for your marketing resources.

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BENEFITS OF SWITCHING YOUR MARKETING AUTOMATION SOLUTION

When it's time for a change, it's easy to feel frustrated. You've got ongoing marketing programs in place that may not be operating at their fullest potential, but they still need to operate. In this context, focusing on the hope you have for fine tuning and growing your marketing automation can be a positive step. It puts you in the frame of mind for solving, rather than feeling stuck.

Now is the time to look towards the opportunities, and start reaching for the growth that is right in front of you.

Benefits for Marketing

The benefits of implementing a marketing automation tool that fits better with your team and its needs can be transformative for your growth goals. The idea is to choose a marketing automation solution that fits well and provides benefits for your people, focuses on your marketing needs, and streamlines your marketing processes. Automation should be working for you, and not against you.

- The people who handle your marketing on a daily basis will benefit from a more intuitive, customizable marketing automation solution. Never underestimate the power of an easier, more intuitive daily workflow.

- Built for marketers, Act-On is a great alternative to solutions like Marketo, and HubSpot, which can sometimes lose sight of the marketing focus when acquired by a larger enterprise with competing priorities, or expanding into sales, service and website building.

- Content managers, campaign managers, email coordinators, analytics managers, and other people-resources who need to be in your marketing automation solution every day will thank you for an easier to use solution.

Benefits for Sales

Having marketing automation data readily available and accessible to sales is crucial, whether that's directly inside your marketing automation solution, or via a two-way sync with your CRM. Marketing automation benefits sales directly when the system is running smoothly to attract and qualify leads, then pass them on to the sales team with rich and helpful information that pushes the conversation forward.

- Business development teams benefit from engagement data, so they can better vet the best leads to pass down the funnel.

- Salespeople and strategic growth teams can create personalized offers that make their prospects feel seen and close more deals.

- The entire organization, including marketing and sales teams specifically, can feel more connected in working together towards growth goals.

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Benefits for the Business

At the end of the day, your marketing tech stack has to provide tangible benefits for your business. Implementing marketing automation should improve the volume and velocity of new business, period. Look forward to improvements in efficiency, expenditure, retention and revenue.

- Improve efficiency and spend less by automating manual tasks, and marketing to more of the right people with automated, segmented marketing programs.

- Retain your best customers and expand their relationship with your business by implementing customer nurture and cross-selling initiatives.

- Grow revenue overall by attracting more customers, nurturing them automatically, and closing more deals long term.

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5 CLEAR STEPS FOR CHANGING YOUR MARKETING AUTOMATION SOLUTION

Whether you've been trying to make your team's modern marketing goals a reality with a poor-fit legacy solution, or struggling to evolve with your current marketing software, you are not alone. There are lots of solutions out there for marketing automation, and it makes sense that you or your team could have been sold on one that is not a perfect fit for your needs. Whatever the reason, when it's time for a change, there's no need to hesitate. There is a better solution for your business.

Follow these five simple steps for changing your marketing automation solution:

- Clarify your goals

- Research the options

- Vet your top 3 replacements

- Sell your solution internally

- Make a purchase

Let's explore more deeply, one-by-one:

1. The first step to moving towards a better marketing automation solution is to understand your goals. Perhaps what you are trying to achieve is not aligning with the tools you're using to get there.

2. Next, research your options by checking out product comparisons and reviews, and dive deeper with each solution's website, content and product details.

3. Narrow down your options, and then talk to sales teams and get a personalized demo with your top three choices.

4. Once you've vetted the options and chosen a platform that will work better for your hard working marketing team, in most cases you've got another step ahead of you. That step is sharing the solution with your team, and convincing stakeholders it's the right move for the continued growth of your marketing programs.

5. Your final job is to requisition the purchase, and get started with your better marketing automation solution.

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MIGRATING YOUR MARKETING AUTOMATION PLATFORM

Migrating to a new marketing automation platform is an exciting endeavor, full of promises of increased functionality, time savings, and more. Achieving these benefits, however, requires you to get off to a strong start during the migration process, and this begins with a deeper understanding of goals and planning to support those goals.

Foolproof Steps for Safe Migration

Migrating your marketing automation platform involves particular steps that will vary based on the individual organization, but understanding a few of the most critical areas can help make the process more foolproof. For starters, talk with your chosen marketing automation partner about the exact path of migration so you can lay the groundwork for success. A few important areas to consider include:

- **Gathering critical assets**. Gather essential assets, such as email templates and workflows, and have those written out so you can consider how to rebuild them in the new platform.

- **Identifying contacts and lists that need to migrate.** Gathering contacts and lists for the new platform, whether that's through a CRM or a manual CSV upload, is also critical.

- **Locating key stakeholders early.** Identifying critical stakeholders from the start helps you receive early guidance and mitigate risk of unexpected delays.

Migrating your marketing automation platform means you need to consider not only your current state but also your future state. How do you plan to use automation to fuel growth after the launch, and what steps will you take to get there? We'll talk more about this shortly, but first, let's uncover a few of the potential pitfalls so you can avoid them.

Potential Migration Pitfalls

One of the most common migration hurdles is CRM integration. Your best protection against potential issues is getting the right players on your team early, such as the CRM admin team.

It's also essential to connect with your IT team for technology and support early in the process. With so many nuances involved during tech setup, you need to identify your internal point person to guide you along the migration path.

Getting Support with Migration

If you get stuck, who will help? This is where selecting the right marketing automation provider is a game changer. Ensure that whatever solution you select has dedicated onboarding coaches. The role of these individuals is to guide you along the migration path during the early weeks so you never get overwhelmed or lost.

A good team will not only work to understand your initial goals but also seamlessly hand you off to the next point person so the migration process goes smoothly.

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SUCCESSFULLY IMPLEMENTING YOUR NEW MARKETING AUTOMATION SOLUTION

The right automation tool has the potential to transform your business, but like any tool, it's only as good as the implementation process. Understanding the key elements behind what makes a solution successful and what doesn't empowers you to get the most from your marketing automation tool this time around.

Onboarding

As you're shopping for solutions, a key question to ask is "After we purchase the product, what comes next?"

The answer should include details about the onboarding process and what to expect. How will the onboarding team ensure that you start to get value quickly and that implementation stays on track?

A dedicated contact is essential—one who will work to understand your initial marketing goals and set you on the path to meeting those goals. The ultimate goal of any onboarding team should be to get you to the benefits that you purchased faster so that you start to realize that value quickly.

Training

Different marketing teams have different automation goals. One might want to automate a single process to start, while another might have extensive experience with automation and have a goal to increase complexity with segmentation and personalization. That's why training looks different for every company. In most cases, if you've got a marketing automation provider already, your team is well-versed in the basics of marketing automation, and the most important focus for training will be the processes and features of your new automation platform.

Workshops, support, and onboarding need to be flexible enough that you can customize the resources to your goals and, ultimately, experience faster results.

Adoption and Strategy

When you're implementing a new marketing automation solution, it pays to think hard about adoption and strategy. Your team might feel comfortable with the existing solution, for example, even though it's underperforming, so that presents an internal challenge. People can also be naturally resistant to change, so a strategy to encourage adoption is important.

You may have concerns, such as:

- How will you get your people to want to switch?

- How can you migrate all important program components and keep everything running smoothly?

- How can you ensure that data is retained and nothing important goes missing?

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The answer lies in a solid plan and an experienced partner that can walk you through the process. Not only do you need to get your team on board with a change, you also have to consider how the tool you choose will replace your existing marketing automation solution, including how it will fit and interact with your other MarTech tools.

Migrate and Integrate

Understand the technology integrations that you need, so you can ensure the new solution easily integrates with your existing tech stack. If your team knows the new MA solution integrates easily, they'll feel less resistance to change.

Additionally, ensure that you don't lose any data, especially in your CRM, by creating a strategy for integrating that data into the new platform. Consider your data's existing organization and categorization to get ready for the implementation state. This is also an excellent opportunity to evaluate existing automated lists and clean up any potential data issues.

Implementation

The implementation phase will include moving your database, configuring lead management and reporting, ensuring that any existing web tracking and forms are migrated and functional, the migration of nurture programs, replicating landing pages, and rebuilding lead scoring programs.

A few tips to ensure that implementation goes smoothly include setting up recurring or ongoing campaigns by duplicating content, pathways and data collection, and backing up and storing historical data to easily compare existing results to future campaigns. You'll also want to test and verify that any tracking codes are working correctly in the new platform. Testing is a critical link between the implementation and the launch of your marketing automation platform.

Testing

The risk for error exists in any tool, which is why it's important to test. Every team uses marketing automation a little differently, based on their goals, but a few testing examples include:

- If you're using a tracking code, ensure that it's implemented correctly on all relevant pages. For example, test forms in private and incognito browsers to ensure a clean testing environment.

- If you're sending emails, ensure that the email is formatted correctly across different email clients.

- Review reports for accuracy and ensure that email alerts are routed correctly.

Building time in your schedule for testing helps you avoid the potential stress and time waste associated with fixing unintended mistakes and dealing with the potential fallout.

Launch

A common worry when migrating to a new marketing automation solution is that you'll lose the momentum you created in your previous platform. However, nothing will be lost during the launch phase, and you can be up and running with a new solution quickly, provided you've created a solid strategy and have an experienced partner on your side.

Consider creating a slow plan for roll out, launching in small chunks, which allows you to build out specific programs and make sure your team is strategic about continuing or shelving particular campaigns. Top marketing automation consultants recommend turning on different aspects of MA incrementally, and you can take advantage of this approach as well, going channel by channel.

During onboarding, your partner should have asked about your goals and "target send date." During launch, you get that first goal marked off your to do list, then continue with additional phases and iterate as needed.

Analysis

You likely needed to present a case to migrate to a new solution, and during analysis, you'll prove that your business case was on target. For example, lead generation is considered the top goal of marketing automation by 61% of marketers. Other important strategic goals include lead nurturing (57%), sales revenue (47%), and improving customer engagement (36%). Depending on the goals that you presented in your case, analyze the data to show your results.

If your goal is lead generation and you've generated 1,000 new leads after the marketing automation migration, you're likely on target. On the other hand, maybe your goal is to boost conversion rates, and you've increased those rates by 20%. That's a success too. Regardless, the analysis phase is all about measuring your results and pivoting if necessary.

Repeat and Grow

Migrating to a more effective MA tool gives you back something difficult to recapture, which is time. A more effective tool gives you the ability to improve existing programs and frees up resources previously allocated to running the marketing automation program. As a result, you can refocus energy, scale programs faster, and achieve more impact in your marketing efforts.

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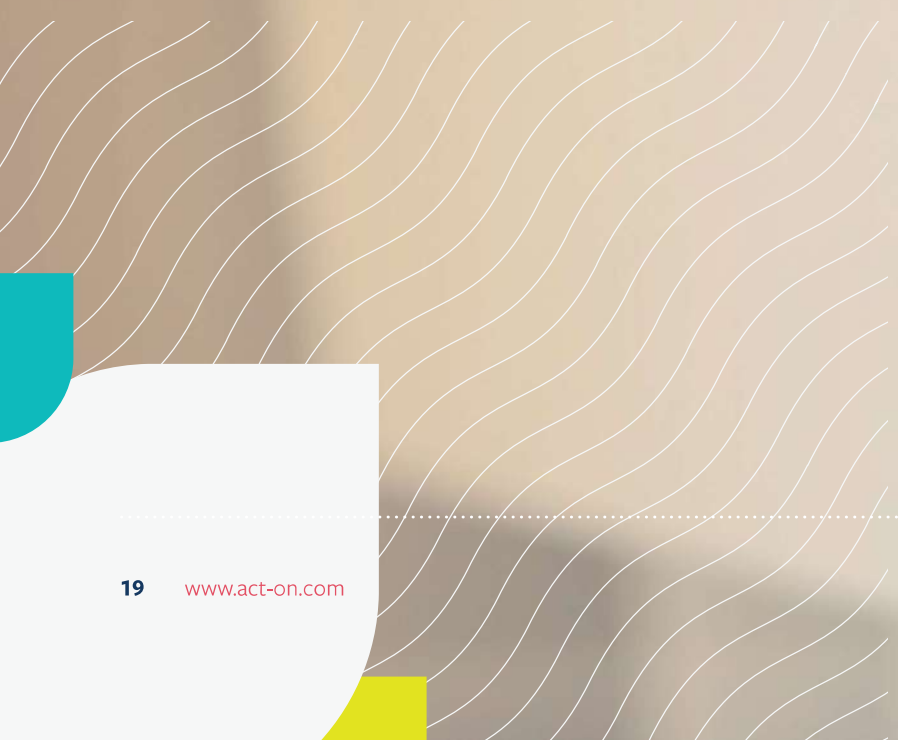
GROWING AT EVERY STAGE OF THE SALES FUNNEL

Marketing automation is a high-impact tool, and statistics show that over half of marketers are focused on top sales funnel goals, such as lead generation. Of course, this is a critical area to grow, but the power of marketing automation is that it can do much more. You may already know that, but if your current tool does not seem like a good fit, it may be time for something that fits your specific needs better.

You can leverage Act-On to boost conversion rates, increase customer engagement and nurture your prospects at every stage of their buyer journey. It's a robust, marketing-focused tool that can help you accomplish lead generation if that's your goal, but it can help optimize other stages of your funnel and ultimately create engagements that feel more authentic, meaningful, and relevant to the customer throughout their entire journey with your company.

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ABOUT ACT-ON SOFTWARE

Act-On Software is the world's growth marketing leader, offering solutions that empower marketers to move beyond the lead and engage targets at every step of the customer lifecycle. Act-On makes customer data actionable so marketers can strategize smart, effective solutions to grow their businesses and generate higher customer lifetime value – all with the fastest time-to-value.