

8 steps to streamlining your processes and improving customer engagement through marketing automation



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Automating your marketing processes enables you to reduce the time your team spends on repetitive, low-value tasks, improve customer engagement across multiple channels, and ultimately, get a better return on investment from your spending. Here are eight steps you can take to streamline your business via marketing automation.



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1. Know your audience

If you have been running your business for a while, you will already have data about which products or services they respond best to, which channels they engage with most, and when they tend to interact with and purchase from you. This information will help you to determine your ideal audience, products or services, and campaign timing.

Ideally, you want to start with the audiences, services, and/or product lines that are your primary focus areas and that will generate the most business for you. This is a great experimental opportunity to fine-tune your approaches before taking on more complicated niches. In other words, start with what you know before moving on to areas where you might have less experience or know-how.

2. Plan where to meet your audience

Based on what you know about your audience, you'll be able to outline how you need to (or plan to) meet them as they interact with you – from the initial point that they hear about you, to the points at which you gain their interest, close a sale, offer post-purchase support, and, hopefully, secure further purchases.

There are several components that may need to be considered during this step including:

- Consumer experience (CX): This relates to the principles, feelings, or emotions that you want the consumer to associate with your brand.
- Journey design: This involves the types of interactions you have with your consumers and the ideal path following each interaction.
- In-moment design: This is more specific to key moments and events where you respond to your consumer.

Some of the key elements to consider in this plan are:

- How are you going to interact with your audience (marketing channels)?
- What is the right conversation to have with them (content)?
- When is the right time to introduce an offer (recency/frequency)?
- What is the right offer for them (offer management)?
- When do you need to back off?

3. Organise and enhance your data

This step involves making sure that you have the right data to identify your audience and collecting the right signals from your audience to know when and how to engage with them. This might involve various actions such as reorganising or performing some hygiene on your data. You might also find that you have missing pieces of data or that you have not yet connected your data sources together.

Carrying out these processes could be a project on its own. There are many services available to help you define a data strategy, physically manage your data, enhance it, perform identity services, and make it production-ready. At this point, including data governance, security, and privacy management data will also provide opportunities for futureproofing and scalability.

4. Ready your platforms and tools

This is the stage where your research, plans, and data all come together. There are hundreds of automation options to choose from. Peers, online communities, market researchers and analysts like Gartner and Forrester, and mar-tech consulting firms can all help you ensure the best fit for your company, based on your specific needs, audience, budget, and future roadmap.

5. Organise your operations and team

Everyone should know what they need to do and how – in other words, you need an action plan to ensure your team knows how to function to achieve your objectives. Outside of the initial assets and processes needed to get started, there might be a range of experiments that you want to test in smaller cycles before you release them as part of your greater marketing engine. Ensure that your team members are clear on the vision and are organised to work together on achieving that vision.

6. Put an analytics framework in place

You can't manage what you can't measure. If you do all this work, but don't know how it is contributing to your business – how do you substantiate the work, effort, and money spent on all these tasks? How can you be confident that the program

performed or understand where and how to optimise it?

More importantly – how can you request a budget increase to achieve even greater success going forward, if you can't demonstrate the success you've achieved to date? Once again, there is, fortunately, a wide range of tools and services to help you set up and manage your analytics framework.

7. Get started

Thinking, planning, and talking about all these initiatives is great, but putting them into action is better. If you are unsure where “near to perfect” might be for you, defining a roadmap of key milestones you want to grow or optimise is great. This will help you to stay on track in your efforts to achieve your ideal marketing automation engine.

8. Analyse and optimise

It's important to understand how customers are responding based on your available initiatives and analytics. Then, you'll need to come up with fresh ideas to further or better engage them. From this point, you can test different channels to reach your customers by tweaking timing, content, and offers.

Eight simple steps

If you are building out a new marketing automation strategy or you need to reinvigorate your existing one, the steps above will help you get started. These steps might seem simple but if they're well-executed, they can help you scale in leaps and bounds.

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