Marketing Automation

Quick Start Guide

www.kentico.com

What Is Marketing Automation?

Marketing automation enables marketers to create and manage customer interactions with greater speed and customization through repeatable marketing processes. Marketers can go from setting up single email processes (e.g., follow-ups, abandoned shopping cart) to designing entire sets of emails (e.g., in lead management and nurturing, event communication).

Why Do I Need Marketing Automation?

Having marketing automation in place allows marketers to deliver the right content to the right people at the right time. Marketing then enables the sales team to concentrate on what they do best – closing deals with the sales-ready leads and grow your revenue.

What Marketing Automation Is NOT

Marketing automation is not simple lead generation, email marketing, or a CRM. It puts in place features like email marketing, lead scoring, customer segmentation, or content personalization and links them together.

Marketing Automation – Basic Techniques

- Define key goals and metrics that define success.
- Determine segments of customers on which you will run your automated processes.
- If used for lead management, align marketing and sales to set up lead scoring.
- Decide what actions will start the process.
- Prepare emails and create workflows.

Marketing Automation – Advanced Techniques

- Create more complex scenarios to allow for a higher level of personalization.
- Set up an automatic content personalization on your website based on what you have learned about the contact.
- Start a new automated process once the previous one is finished, if suitable.

Marketing Automation Optimization

- Analyze your emails open rate by comparing it to the click rate.
- Fine-tune your automated emails—tone of voice, subject lines, copy, and email formatting.
- Make sure the content is useful and valuable from the customer perspective.
- Review the time you allow in between each email the contact receives—is it enough? Too much?
- Check for any overlapping processes so contacts do not feel overwhelmed by the number of emails they receive.

Top Resources

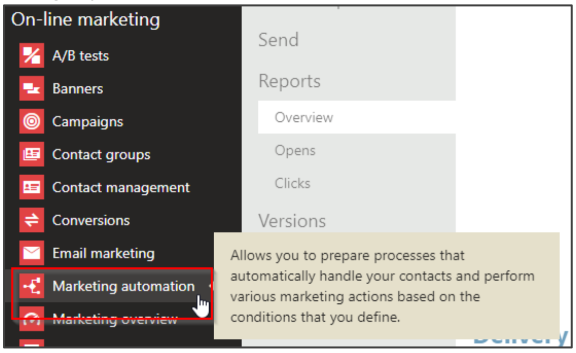
Marketing Automation for Success:
https://www.kentico.com/MA-for-success

Ways to Nurture Your Customers with Marketing Automation:
https://www.kentico.com/nurture-customers-with-MA

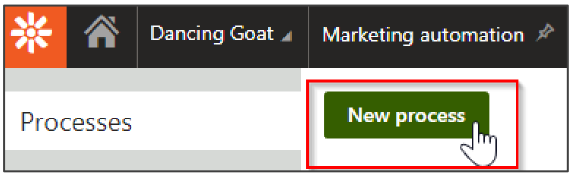
Kentico Marketing Automation – Quick Start

You can set up marketing automation for your website in the **Marketing automation** application.

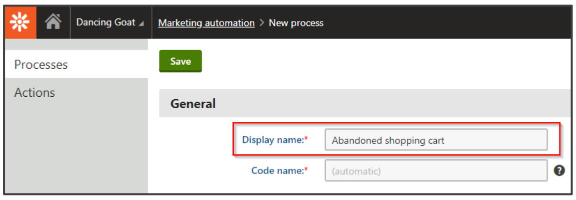
1. In the administration interface, open the Applications list and click **Marketing automation** under the Online marketing category.



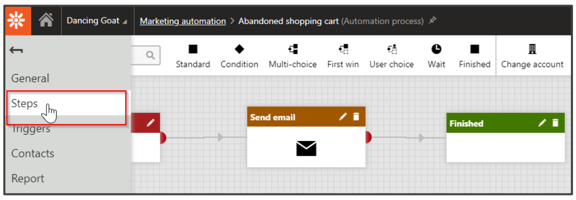
2. Create a new automated process by clicking the **New process** button.



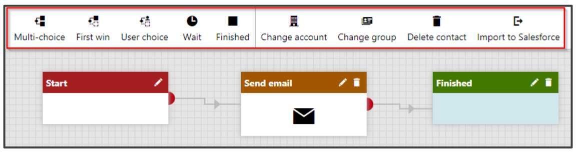
3. Enter your process name in the **Display name** field and click **Save**.



4. You can now switch to the **Steps** tab to design the workflow of your automated process.

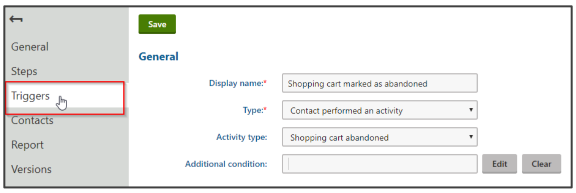


The process designer allows you to make use of different types of steps from the **standard** ones such as conditional steps or wait steps, to **action** steps that make the system perform given actions, e.g., send an email, start another automated process, or move contacts between accounts or contact groups.



You can also create your own **custom actions** and add them through the designer too.

5. Next step is to open the **Triggers** tab and set up a trigger/s that will start your process automatically.

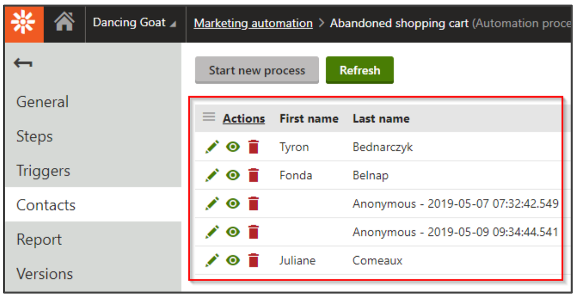


For more information visit: www.kentico.com/product/overview

You can also start your processes manually without having automatic triggers in place, e.g., in case you want to invite your existing customers for an annual conference.

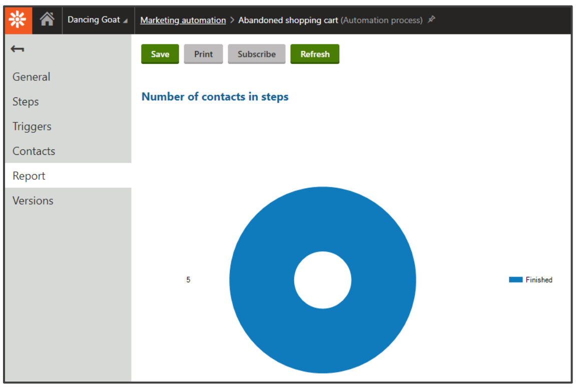
6. Once you have set up a trigger, the process is ready to start on your contacts.

You can see all contacts in the process on the **Contacts** tab.



If you have not set any automatic triggers then you can start your process manually on your contacts by clicking **Start new process**.

7. The **Report** tab shows the number of contacts in particular steps of your process, including the Finished step.



8. The **Versions** tab allows you to view and compare your process versions. So, in case you made changes to your process and you are not happy with the results, you can always revert to any of the previous versions of the same process.