



MARKETING AUTOMATION

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MARKETING OPERATIONS

?

THOUGHTS ON MARKETING ACCOUNTABILITY

LEFT-BRAIN MARKETER

"Profit begins with marketing. The best way to measure a marketing campaign's success is through its impact on bottom-line revenue."



RIGHT-BRAIN MARKETER

"Marketing is an art, not a science. Its impact is measured with brand loyalty and perception. It can't always be measured with math."





1920s



*Founded in 1961, the **Marketing Science Institute (MSI)** is a corporate-membership-based organization dedicated to bridging the gap between marketing theory and business practice.*



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THE
FIFTH
DISCIPLINE

The Art & Practice of
the Learning Organization

PETER M. SENGE



TAKEOVER


aprimo.®

eloqua™



MARKETING OPERATIONS

total strategy

techniques and processes

tracking and predictive modelling

technology

talent



MARKETING SOFTWARE

marketing intelligence

marketing automation

workflow automation



DYNAMIC LANDING PAGES



[Software](#) [Pricing](#) [Case Studies](#) [Partners](#) [About](#) [Blog](#)

Hello, Vicky

Thanks for using the world's #1 inbound marketing platform.

SITE PAGE

EMAIL

LANDING PAGE

earnest labs

Home Product Education About Us

A VOICE FOR THE VOICELESS.

5 REASONS TO JOIN APH. COMMUNITY GROUPS

POSTED BY: Jerry Guan DATE: Jul 29, 2013 4:30:43 PM

DOWNLOAD THE APP TODAY

First Name:

Last Name:

Email:

Visits in August 266.51k

99.20% ^ 132.7%

How'd we guess your name? Learn more about personalization in HubSpot. >



DYNAMIC LANDING PAGES

landing страница генерирана
спрямо твоето търсене, лични
данни или `referrer`



TAKEOVER

DYNAMIC ADVERTISING

Save big on all our home improvement products. **HOME HARDWARE**



This is a great weekend to install that fence. **HOME HARDWARE**



Wood Fencing Spaced Picket 42" x 8' \$23.00

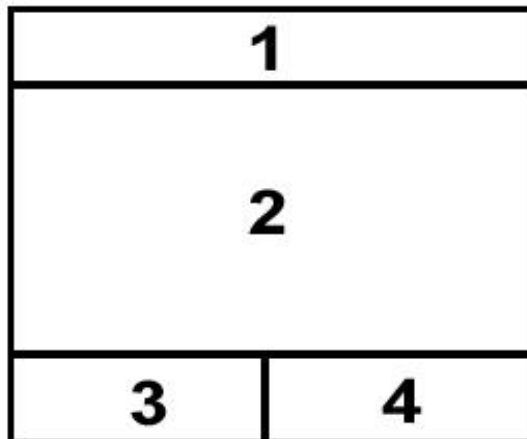
VISIT US AT
1212 Main Street
Colchester, VT 05401

SHOP NOW

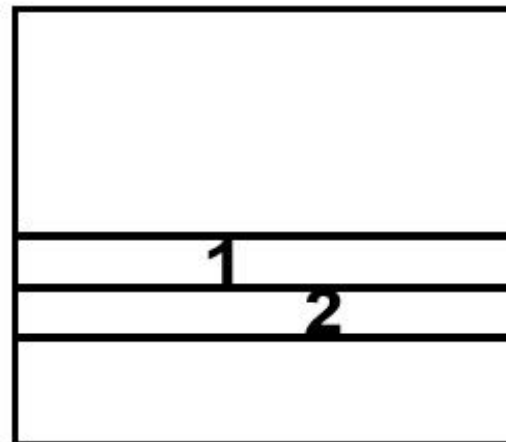
standard
retargeting



dynamically
optimized



DCO Template



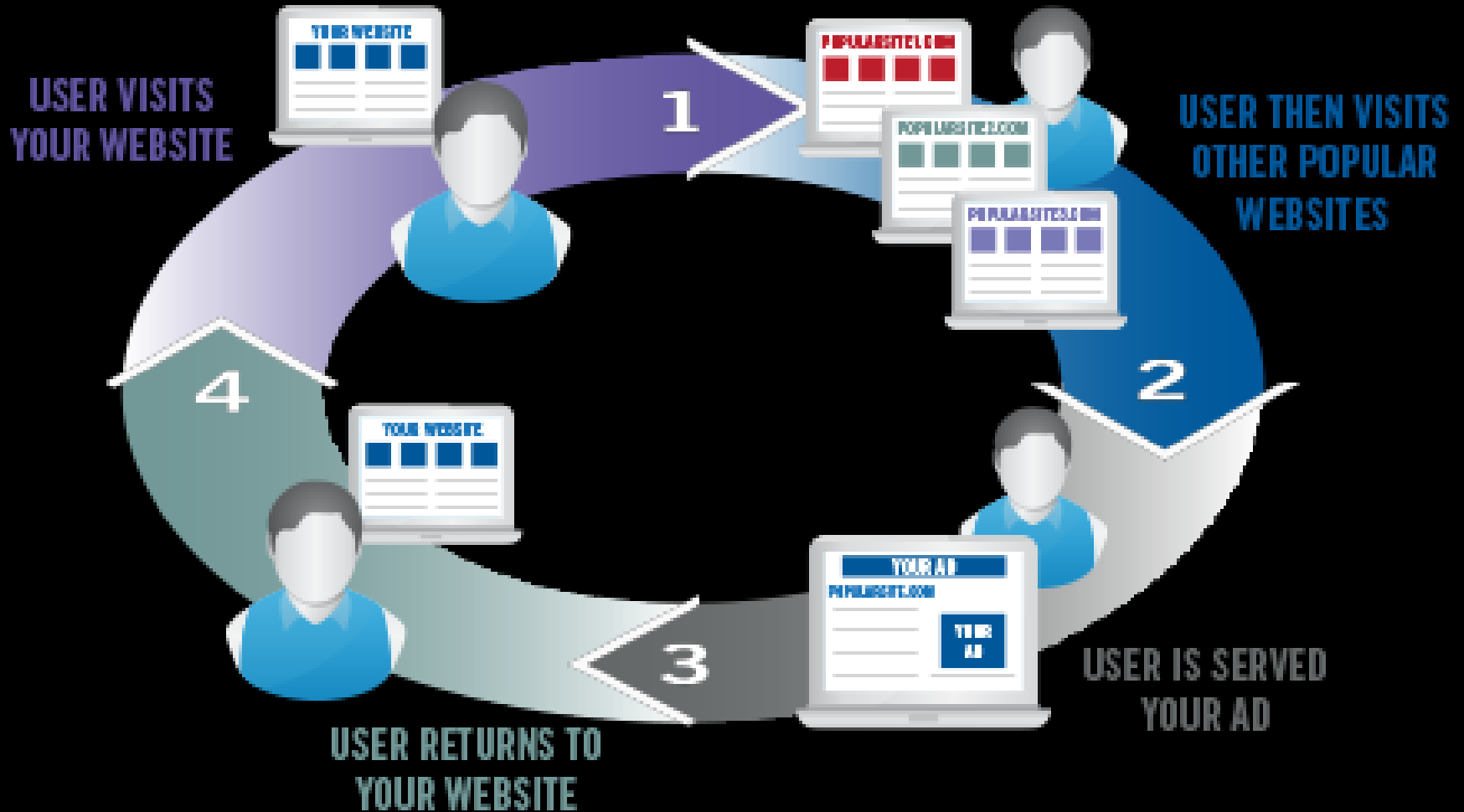
Display Advertising Technology Landscape





TAKEOVER

RETARGETING



Retargeting



Must-Know

Stats

SYNDACAST

Sources:

chango.com | emarketer.com
retargeter.com | wishpond.com

Consumer's reactions to online ads

30%

Positive

59%

Neutral

11%

Negative

Retargeted ads led to a

+1046%

increase in
branded search

[buy now]

Web visitors who have been retargeted with display ads are more likely to convert

70%

Websites see a

726%

lift in site
visitation after
4 weeks of
retargeting
exposure

Retargeting can increase conversion rates by as high as 147%

+147% CTA

72%

of online shoppers are likely to abandon their carts before checking out.

Without retargeting, only
of those customers return
to complete their transaction

8%

67%

of online advertisers are now using
FBX exchange for retargeting.



AUTOMATICALLY OPTIMIZED HEADLINES

1	Double Your Social Shares: The Visual Guide To Web Scraping and Data Analysis		0.0%
2	A Guide to Grow Your Blog (or Any Blog) 10X	Remove	+17.8%
3	Step by Step Guide to Grow a Blog 10X	Remove	+8.2%
4	How to Analyze Your Blog to Double Your Social Shares	Remove	-3.3%

Add Another Title

KingSumo



TAKEOVER

AUTOMATICALLY OPTIMIZED HEADLINES

To the person going through
our trash for their next meal,

You're a human being and
deserve a meal from

Economics

A restaurant owner left the most heartwarming note for the person who was digging through her trash.

By Eric March



Democracy

This 6-year-old's film was so important, President Obama showed it at the White House.

By Alisha Huber



Health

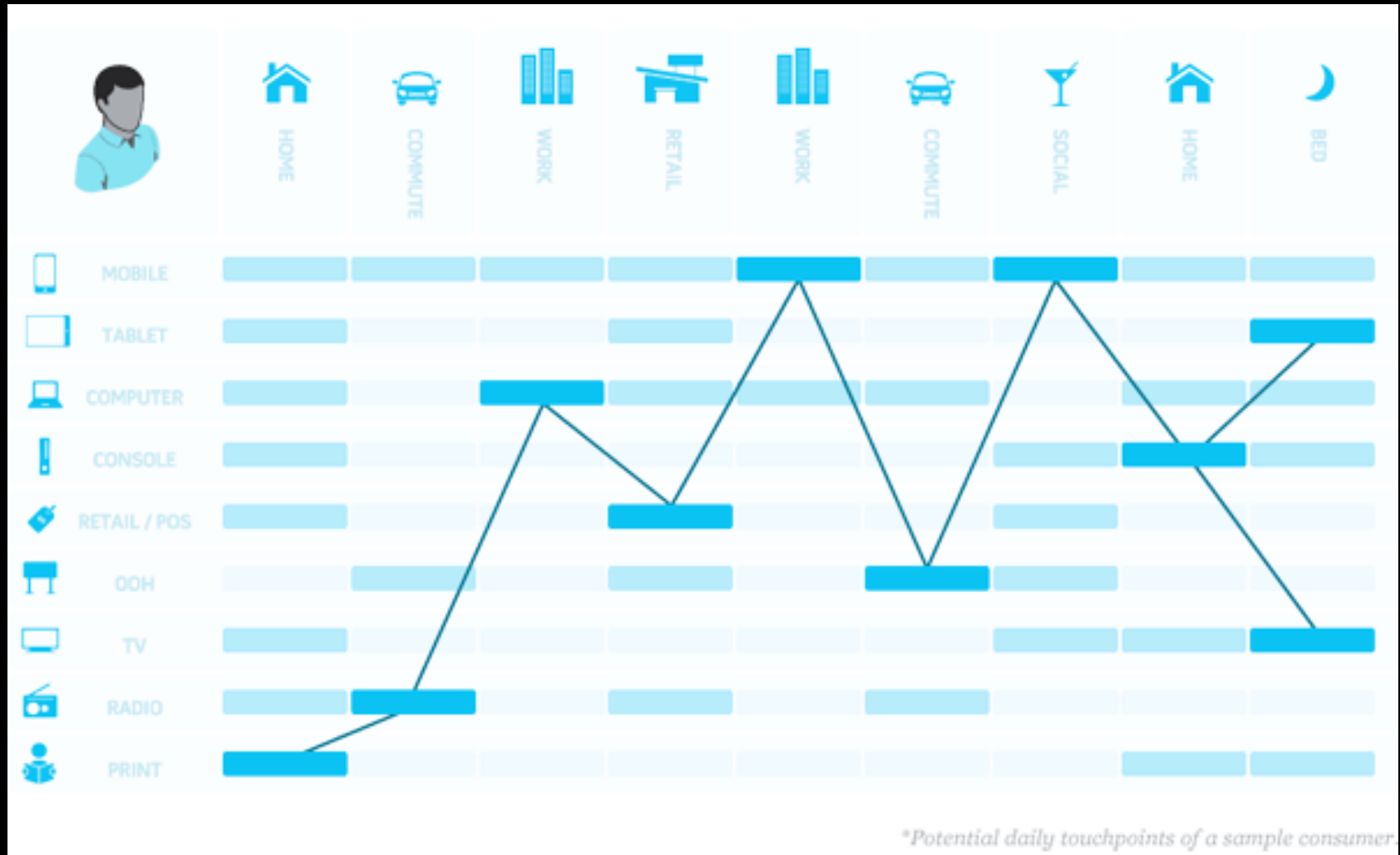
He's too poor to afford a doctor but not poor enough for government help. That's where they come in.

By Laura Willard

UPWORTHY



MARKETING ATTRIBUTION





MARKETING ATTRIBUTION

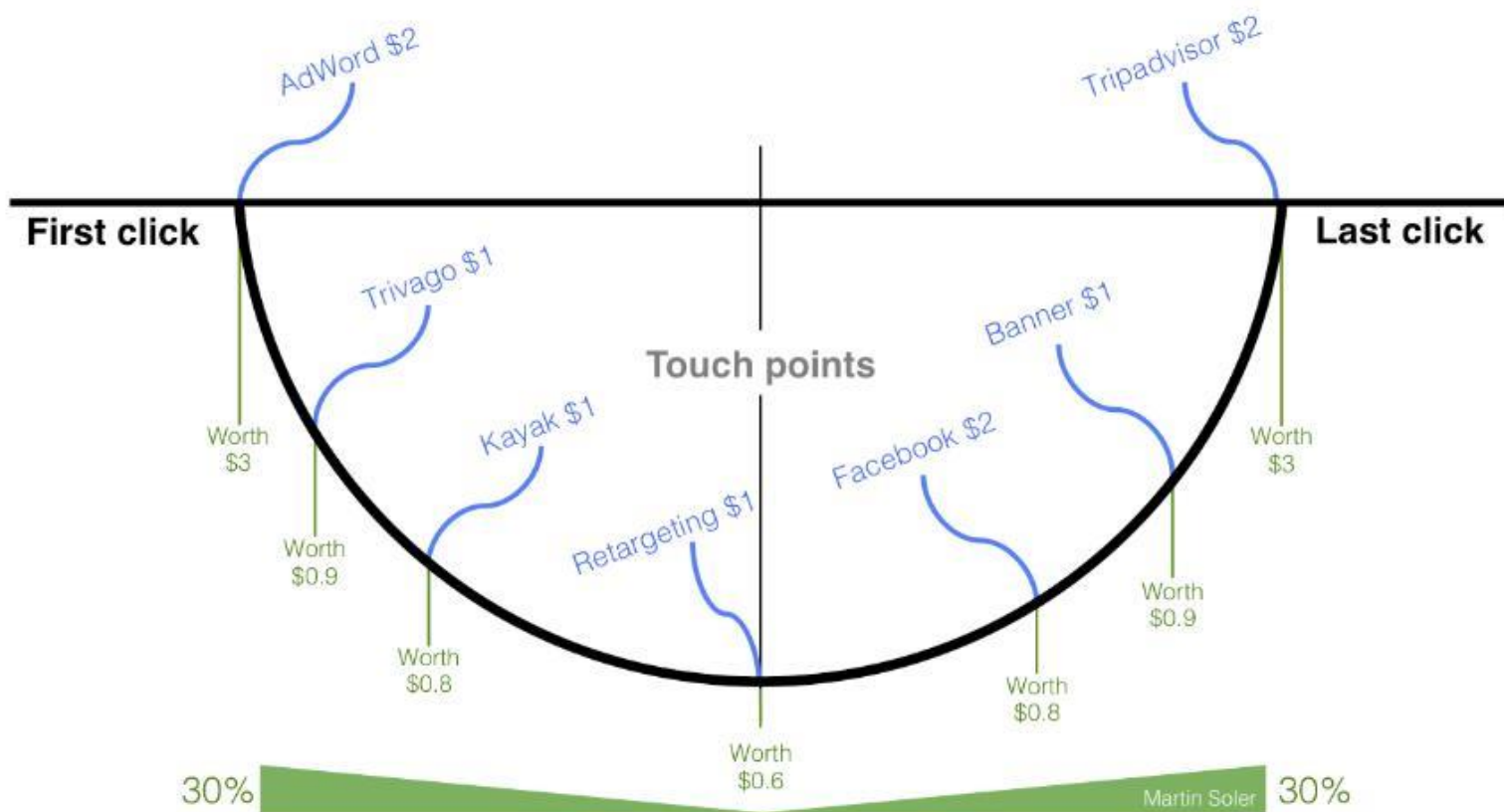
single source attribution

fractional attribution

algorithmic attribution

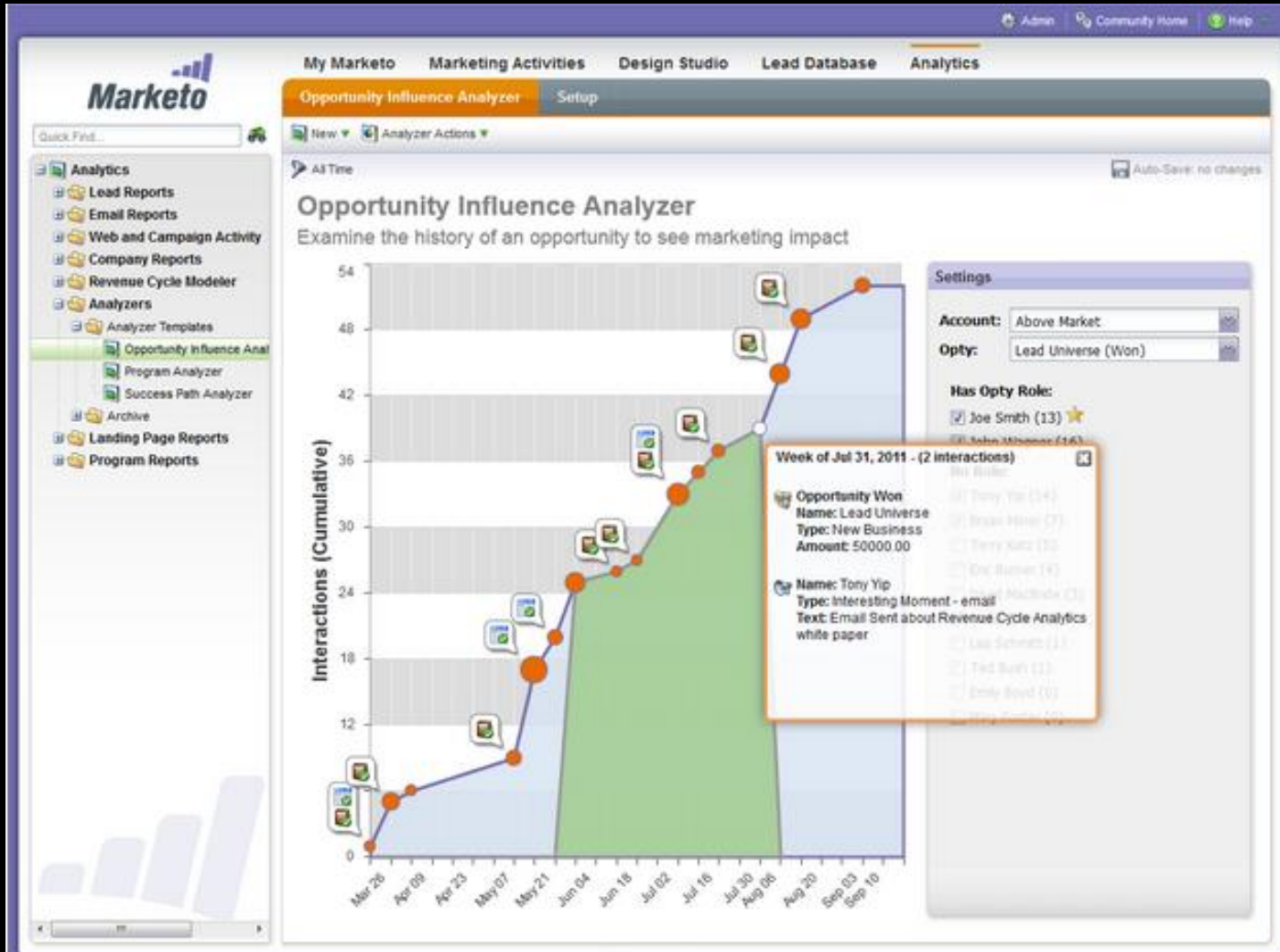


CPC value attribution model





MARKETING ATTRIBUTION





MARKETING ATTRIBUTION

Touch Weights ✕

Web Visit: <input type="range"/> 2	Landing Page Visit: <input type="range"/> 3	Message Clicked: <input type="range"/> 5
Form Viewed: <input type="range"/> 2	Form Submitted: <input type="range"/> 8	Doc Downloaded: <input type="range"/> 5
Webinar Registered: <input type="range"/> 7	Webinar Attended: <input type="range"/> 7	



DATABASE MARKETING

?



DATABASE MARKETING

consumer databases
statistical techniques
behavioral modelling
direct sales



DATABASE MARKETING

1. mystery lists
2. buyer databases
3. coordinated customer communication
4. integrated marketing



EVENT-DRIVEN MARKETING

*An Event was defined as a detectable change in an **individual's** circumstances, **today**, which is **significant**, either in fact or in their mind*



EVENT-DRIVEN MARKETING

today

individual
significant



EVENT-DRIVEN MARKETING

today

70% response rate within 24 hours

25% response within 48 hours

>10% in 72 hours



EVENT-DRIVEN MARKETING

triggers

simple events

significant events

super events

lifecycle events



TRIGGERED EMAIL





TRIGGERED EMAIL



Trigger: Downloaded an Educational Offer



Send: Transactional Email With Next Step
Call-to-Action



TRIGGERED EMAIL



Trigger: Took One Action in a Series, but Not the Next



Send: Related Content and an Alternative Action



TRIGGERED EMAIL



Trigger: Recently and Highly Engaged or Lacking in Engagement



Send: Timely Next Step Call-to-Action or Reengagement Campaign



TAKEOVER

↑
outbound



History

- All
- Messages
- Events
- Users

Production ▼

Logs for environment: Production

EVENT DETAILS	USER	STATUS	TIMESTAMP
User did Watch intro video	George	✓	a minute ago
New user created	George	✓	11 minutes ago
User updated	Josh	✓	28 minutes ago
User updated	Nigel	✓	28 minutes ago
User did Replied to comment	Josh	✓	29 minutes ago
User did Uploaded photo	Josh	✓	30 minutes ago
User did Commented	Nigel	✓	30 minutes ago
User did Watch intro video	Nigel	✓	35 minutes ago
User did Completed profile	Josh	✓	35 minutes ago



Who should receive this message?

If a user takes this action Signup send a message.

+ Delay: 3 days

- Add a filter

▼ has not done Complete Profile DELETE + OR

Segment users by Events

User has not done Complete Profile

[+ Add a time period](#)

[+ Add an optional property](#)

+ AND



Email version ▾

Push version ▾

+ Add Variant

Push Notification

To:

Users who meet the conditions above

Badge Count:

1

Payload:

Key

Add Payload Field

Message Body

`first_name`, you're almost done! Just fill in your `missing_info` and you're set.

Insert User Data

Include user data by dragging it into the message

USER ATTRIBUTES

Done

Save

email

first_name

last_name

phone_number

apns.default

gcm.default

test_attribute

EVENT PROPERTIES

Add

missing_info



Campaign: Add fav player - push

▶ Live

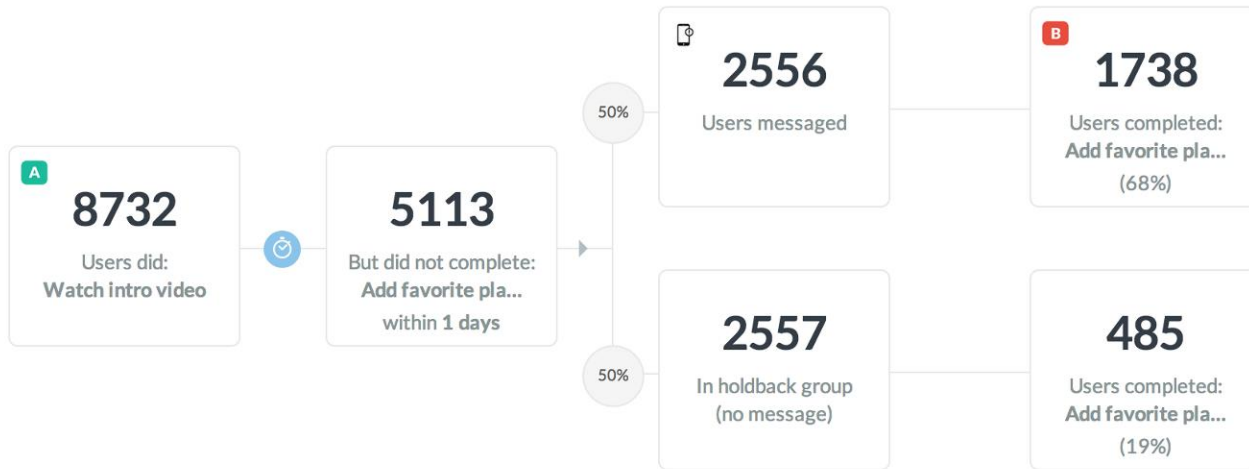


📅 Oct 16, 2014 - Nov 16, 2014

REPORTING

SETUP

Campaign Users



CAMPAIGN RESULTS

1252

1738 - 19% * 2556


More users did
Add favorite pla...

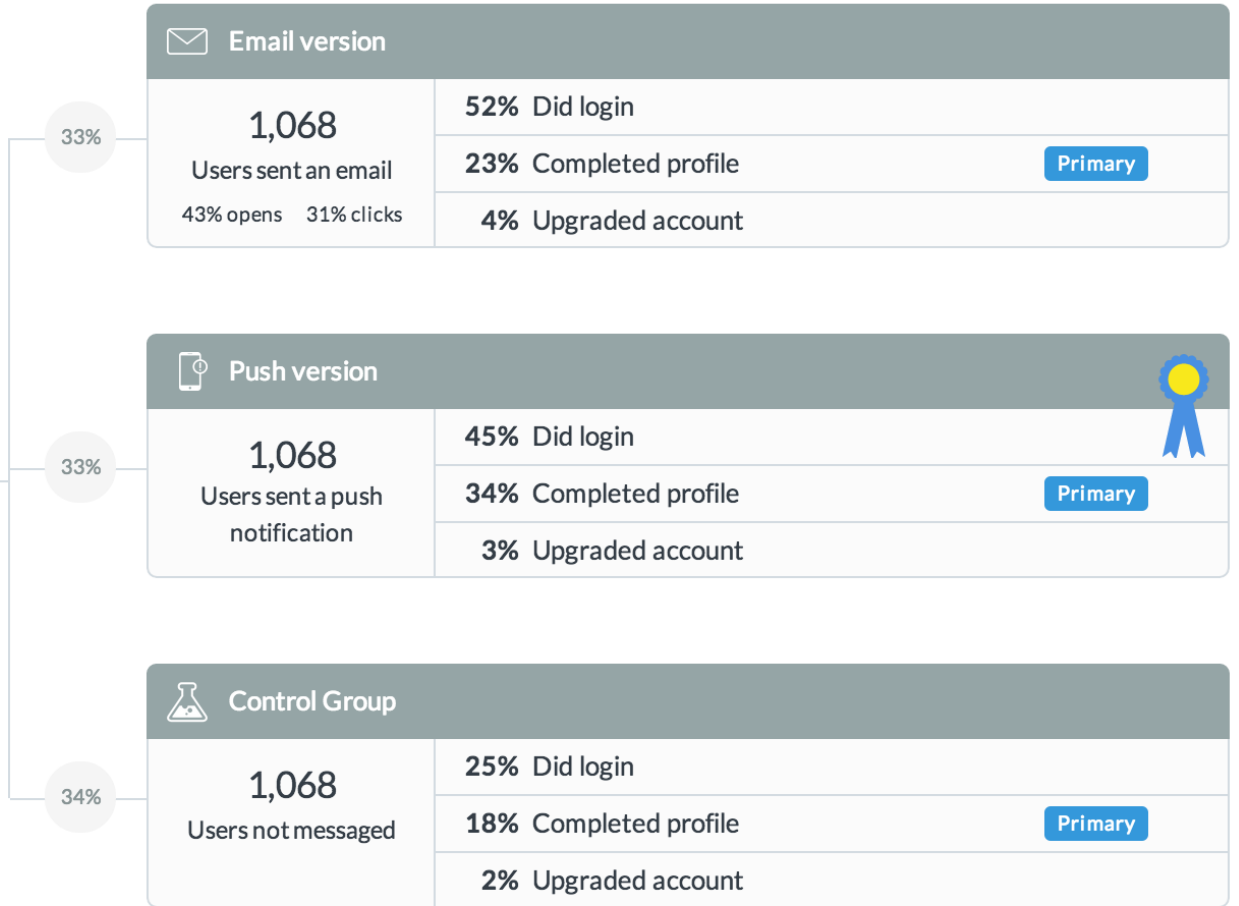
Sending this message
increases conversion by 4X

[How do we calculate results?](#)



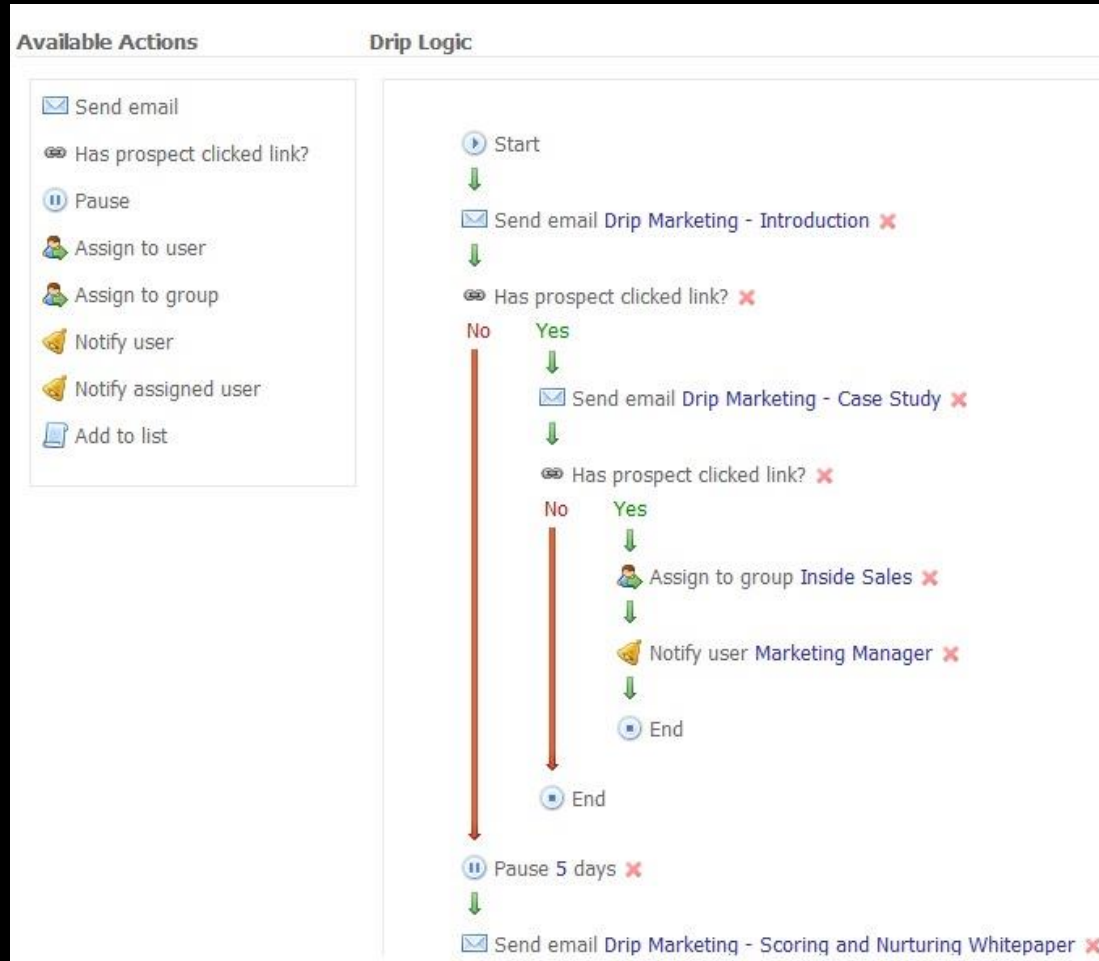
TAKEOVER

 **3,204**
Users did *Signup*





DRIP MARKETING





Workflows > Edit workflow x

https://app.iterable.com/workflows/edit?workflowId=424983

Edit workflow

Untitled Workflow Off

Created 7 days ago • Updated 3 minutes ago • 12 total nodes • 128,233 users currently in this workflow

Limit simultaneous workflow entrances per user... ?

```
graph TD; Start[Start when: User adds an item to cart] --> A1[Perform action: Update user's profile with {"group":1}]; Start --> A2[Perform action: Update user's profile with {"group":2}]; Start --> A3[Perform action: Update user's profile with {"group":3}]; A1 --> W1[Perform action: Wait for 1 day]; A2 --> W2[Perform action: Wait for 25 min]; A3 --> F1[Filter users: Split via weights]; W1 --> F2[Filter users: Matches query]; W2 --> A4[Perform action: Send email: New product roadmap Template]; F1 --> A5[Perform action: Send email: New gmail schema test Template]; F1 --> A6[Perform action: Send email: Email Newsletter 12/23]; F1 --> A7[Perform action: Add user to list: My awesome list];
```

The workflow diagram consists of the following nodes:

- Start when:** User adds an item to cart (128,233 users here)
- Perform action:** Update user's profile with {"group":1} (0 users here)
- Perform action:** Update user's profile with {"group":2} (0 users here)
- Perform action:** Update user's profile with {"group":3} (0 users here)
- Perform action:** Wait for 1 day (0 users here)
- Perform action:** Wait for 25 min (0 users here)
- Filter users:** Split via weights (0 users here, 33% each branch)
- Filter users:** Matches query (0 users here)
- Perform action:** Send email: New product roadmap Template (0 users here)
- Perform action:** Send email: New gmail schema test Template (0 users here)
- Perform action:** Send email: Email Newsletter 12/23 (0 users here)
- Perform action:** Add user to list: My awesome list (0 users here)



Potential individual-specific demographic scoring rules

- Title
- Role
- Purchasing authority
- Number of direct reports
- Level of manager (to whom do they report?)
- Years of experience
- Specialties
- Type of email used (Gmail, corporate, Yahoo)
- Years at current position
- Designations/Certifications
- Honors and awards received
- Social network participation
- Social network connections
- Social network influence
- Public recommendations
- Affiliations - groups and associations
- Career interests
- Personal interests
- Degrees received

- _____
- _____
- _____
- _____
- _____

Potential company-specific demographic scoring rules

- Rankings/Stock Indexes: Fortune 500/Inc 500, etc
- Number of employees
- Company revenue
- Revenue growth (growing, declining, etc)
- Company financial viability
- Number of divisions
- Number of products sold (SKUs)
- Location
 - City
 - State
 - Zip
 - Country
 - Phone area code
 - Headquarters or satellite
 - Location of branches
 - Size of branches
- Website traffic
- Website plug-ins
- Year founded
- Organizational structure (proprietorship, partnership, corporation)
- Geographic markets served
- Competitors
- Partners
- Fiscal year end
- Industry

- _____
- _____
- _____
- _____

Relationship scoring rules

- Account type (Potential vs. Actual)
 - Customer
 - Partner
 - Competitor
 - Prospect
 - Investor
- Previous relationship
 - Ex-customer
 - Lost opportunity
- Product(s) purchased
- Complimentary technologies used (CRM, ESP, ERP, CMS, MRM, MA)
- Recycled count
- Lead source
 - Website
 - Sponsorship
 - PPC
 - Content syndication
 - Online ad

- Budget defined (Monthly, Quarterly, Annually)
- Timeframe (Project completion deadline)

- _____
- _____
- _____
- _____

Did everyone in Sales and Marketing mark the same attributes? Discuss any that don't match and then compare to the reporting and buyer personas you have created. Do the demographics match your personas and the data in your reports? If not, discuss these with the group.



LEAD SCORING

Viewed landing page

Fills out form on landing page

Uses instant chat functionality

Uses request a call back functionality

Viewed - any

Viewed - product specific

Viewed - pricing

Viewed - customers or reviews

Viewed - multiple web pages

Viewed - multiple web pages in 1 WK

Shared via social sharing

Browser used



LEAD SCORING

★ 1 - Change Score ▲ ✕

Add Choice

Choice 1 ▼

If: is + ▼

Score Name: Change: ✕

Choice 2 ▼

If: is + ▼

Score Name: Change: ✕

Default Choice

Score Name: Change: ✕

Note: Only the first matching choice applies



PROGRESSIVE PROFILING

Marketo Research on the Impact of Removing Form Fields

First Name: *

Last Name: *

Work Email: *

Job Function: *

Company: *

First Name: *

Last Name: *

Work Email: *

Company: *

Job Function: *

Employees: *

Industry: *

First Name: *

Last Name: *

Work Email: *

Work Phone: *

Company: *

Job Function: *

Employees: *

CRM System: *

Industry: *

Short Form (5 fields)

Conversion: **13.4%**

Cost per: **\$31.24**

Medium Form (7 fields)

Conversion: **12.0%**

Cost per: **\$34.94**

Long Form (9 fields)

Conversion: **10.0%**

Cost per: **\$41.90**

REACHFORCE

Progressive profiling - collection

1. Basic Lead Form

First Name

Last Name

Email

Company

GET OFFER ▶

2. Returning Leads – Pre Populate

First Name

Last Name

Email

Company

GET OFFER ▶

3. Returning Leads – Pre-Populate – Gather More

First Name

Last Name

Email

Company

Job Title

Phone

GET OFFER ▶

4. Returning leads – Personalize – Pre-Populate – Progressively Gather More

Welcome back Tim Smith.
Please complete the form to receive the offer....

Email

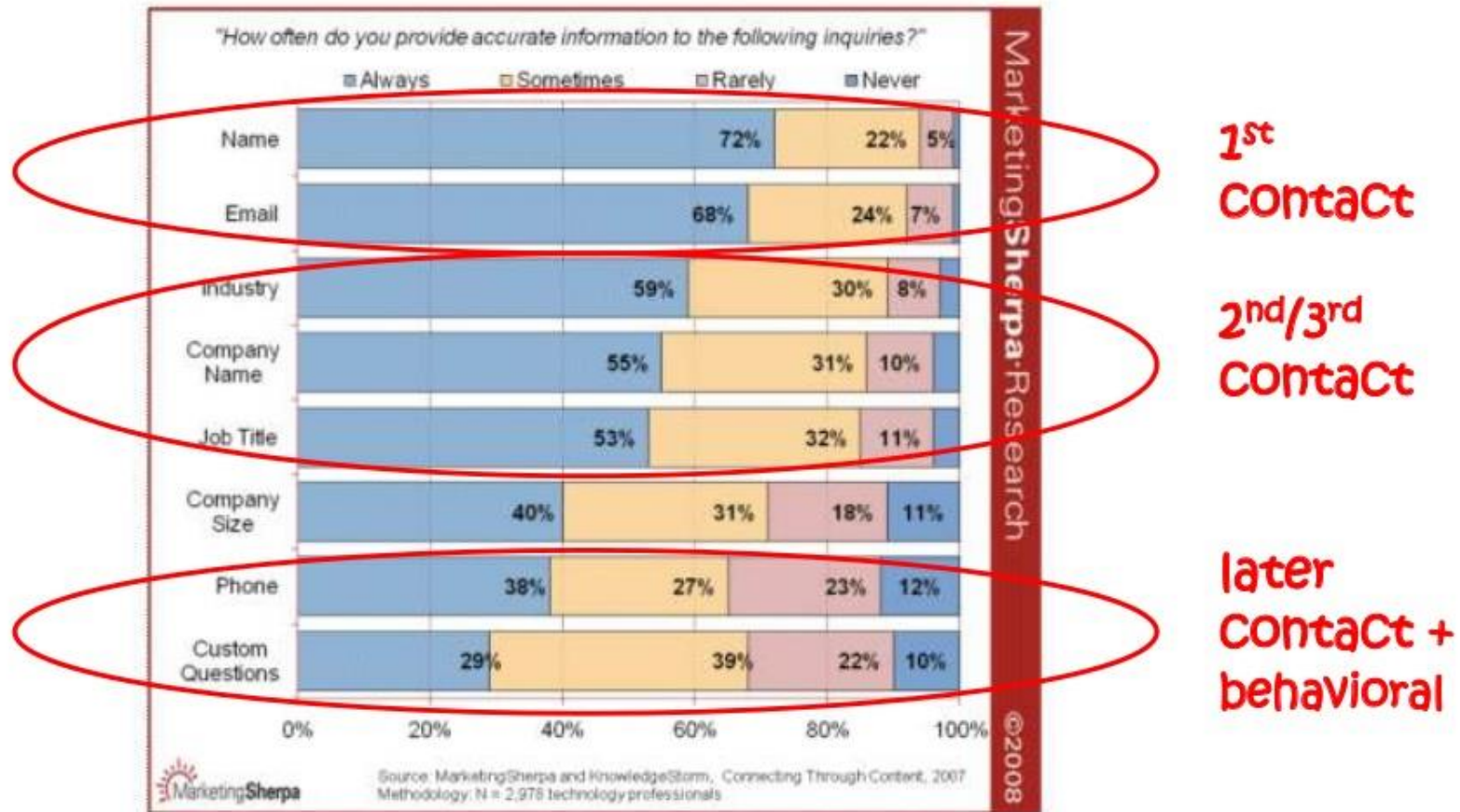
Industry ▼

What is your budget ▼

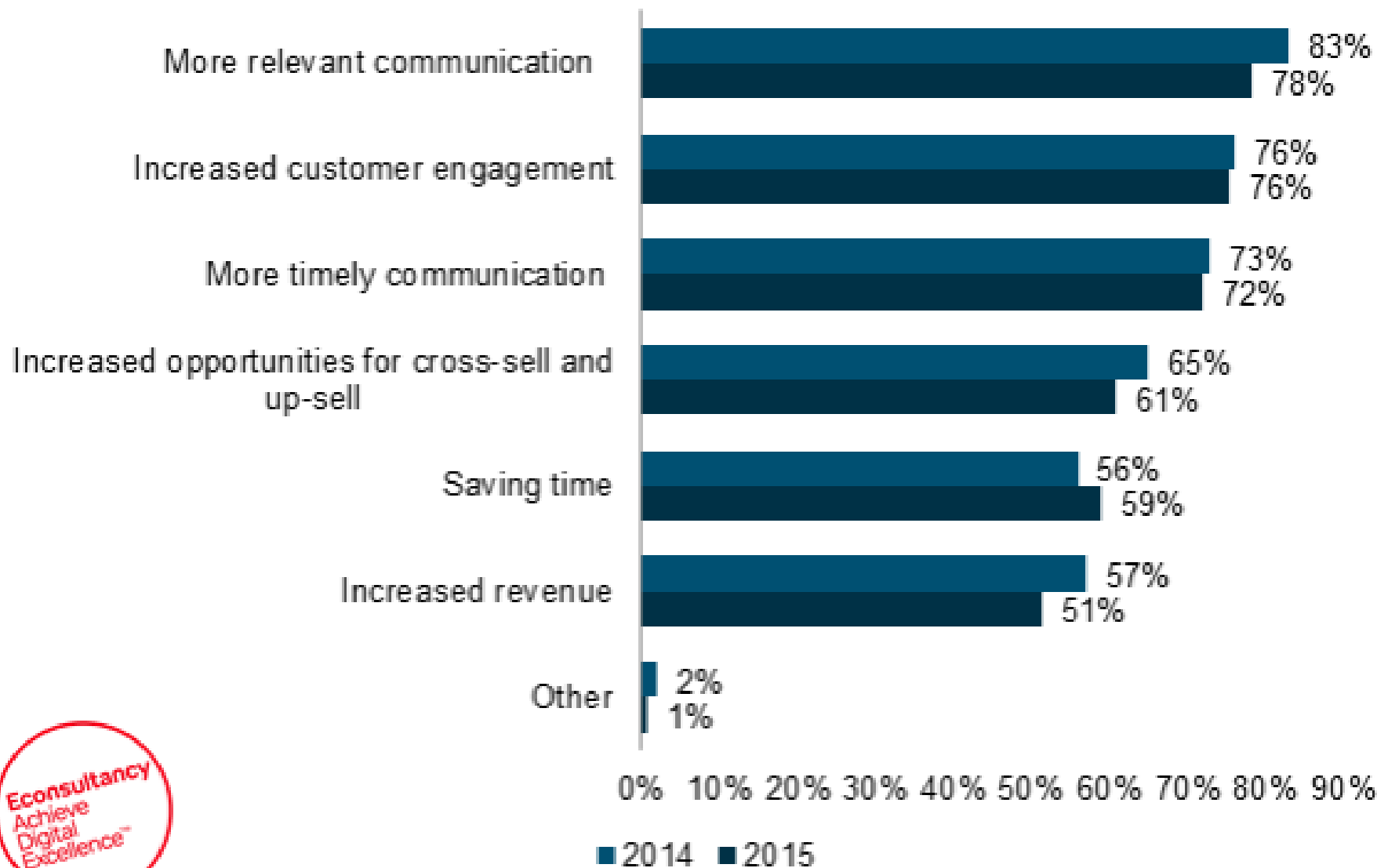
When do you need this solution ▼

GET OFFER ▶

Progressive profiling - logic



Source: MarketingSherpa and KnowledgeStorm, "Connecting Through Content"



Respondents 2015: 392
Respondents 2014: 433

Note: Respondents could check all the options that applied.



БЛАГОДАРЯ!
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