

THE ULTIMATE
GUIDE TO
MARKETING
AUTOMATION
FOR SALESFORCE

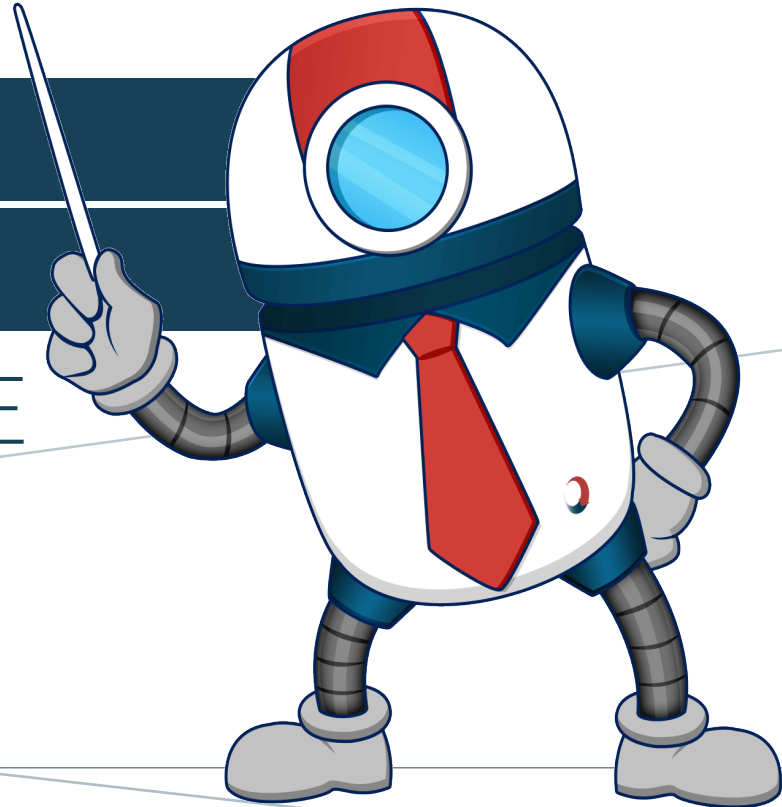


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MARKETING AUTOMATION

IS ABOUT
DELIVERING
THE RIGHT
MESSAGE.

Hi, my name is Mobot.
I will be your personal
guide through this eBook.



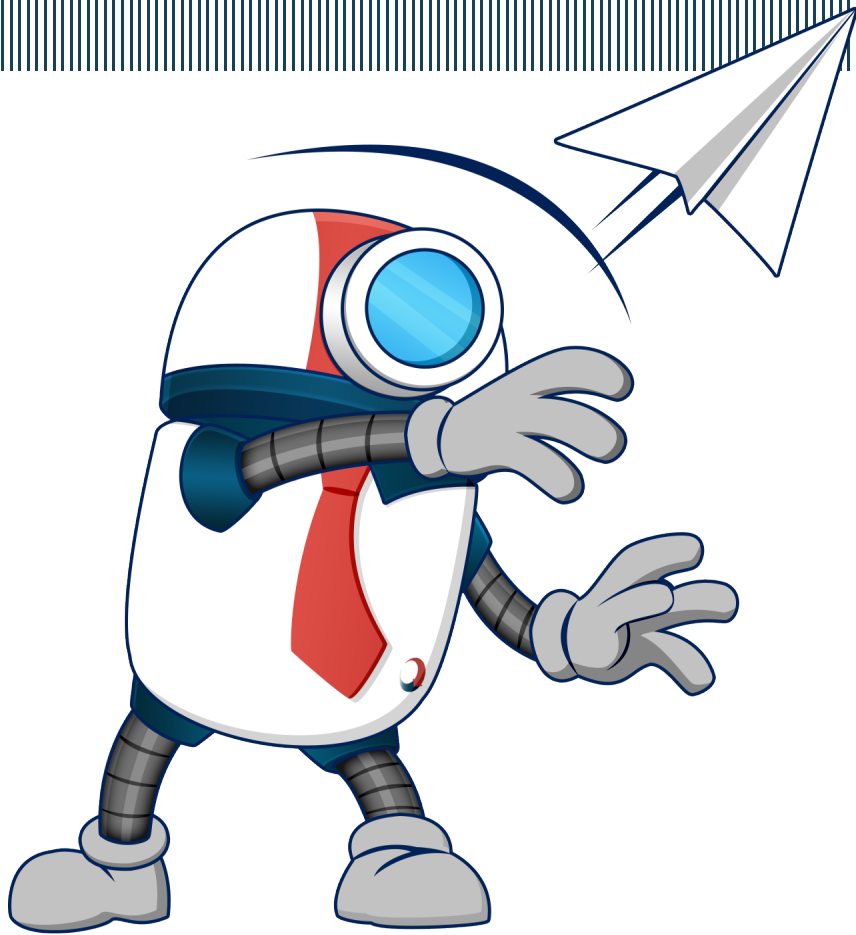
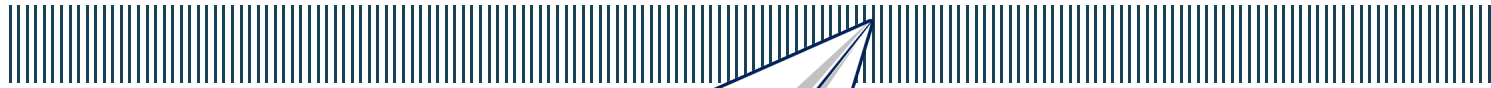
INTRODUCTION

This eBook, *'The Ultimate Guide to Marketing Automation for Salesforce'* is designed to answer the burning questions you have when determining the best marketing automation solution for your business. In this eBook, you'll learn:

- What marketing automation is
- How marketing automation can help your company
- Why marketing automation is so popular
- The common features and advanced functions of marketing automation tools
- How it should integrate with Salesforce
- How to tell if you're ready to move to marketing automation

In the following pages, you will also find worksheets that you can use to determine whether your company is ready for marketing automation and how it will help you increase your revenue and meet other business goals. Lastly, we provide a list of items and functionalities to look for in order to choose the right marketing automation system for your company that integrates with Salesforce.

We hope this guide will be your entry to a new universe for more effective, efficient, and automated marketing.



MARKETING AUTOMATION


WHAT IS MARKETING AUTOMATION?

Marketing Automation is technology that allows companies to streamline, automate, and measure marketing tasks to increase operational efficiency and grow revenue faster. Implementing marketing automation allows companies to better align their sales and marketing teams while automating mundane, repetitive processes.

TRENDS DRIVING MARKETING AUTOMATION

The maturity of the Software-as-a-Service (SaaS) industry has rapidly helped the adoption of marketing automation and CRM systems into more companies with the promise of increasing efficiency and revenue.

Another trend that has pushed marketing automation forward is the customer's need and desire for personalized, relevant content and communication. Gone are the days when a "batch and blast" email strategy was all you needed in order to successfully communicate with your customers.



From a marketer's standpoint, the game has changed from "let's make a quick sale" to "let's build long-lasting, strong relationships" with our customers. Marketing automation was (and still is) the most effective, efficient way to do this. In the long-run, this strategy will lead to stronger brand awareness, and will drive more word-of-mouth recommendations, increased lead generation, and revenue.

BELOW ARE SOME ADDITIONAL REQUIREMENTS THAT HAVE HELPED THE ADOPTION OF MARKETING AUTOMATION SOLUTIONS:

- Relevant Content
 - Personalized Content
 - Timely Content
 - Relationship Building
 - Revenue Efficiency
 - ROI Measurements
 - Transparency in Marketing
 - Delivery to Multiple Devices
-

KEY BENEFITS & FEATURES

BENEFITS OF MARKETING AUTOMATION

The focus of marketing has shifted towards customers self-educating and analyzing products and services before even having the first interaction with a company. It's become obvious that small and mid-size businesses can benefit tremendously from analyzing a prospect's digital body language, identifying where they are at in their purchasing journey, and interacting with them to create loyal, repeat customers. Companies of all sizes and across all industries can benefit from marketing automation to establish real-time, one-to-one interactions to maintain and extend customer relationships.

If you are considering marketing automation for your business, it's important to know what to expect and possible benefits that are in store for you. Below are a few benefits that companies with marketing automation mention:

- Time savings¹
- Increased customer engagement¹
- More timely communications¹
- Generating more and better quality leads²
- Improved marketing productivity (cost and time savings)²
- Improved conversion and response rates²



KEY FEATURES OF MARKETING AUTOMATION

Marketing automation platforms are only as good as the features they offer. Being able to identify the right platform with the necessary features to suit the needs of your business is vital.

HERE ARE SOME KEY FEATURES EVERY MARKETING AUTOMATION PLATFORM SHOULD OFFER:

- Email Marketing
 - Campaign Management
 - Lead Scoring
 - Lead Nurturing
 - CRM Integration
 - Audience Segmentation
 - Social Media Integration
 - Engagement & Behavior Tracking
 - ROI Reporting & Analytics
 - Content Management
-

CUSTOMER RELATIONSHIP MANAGEMENT

CRM DEFINED & FEATURES

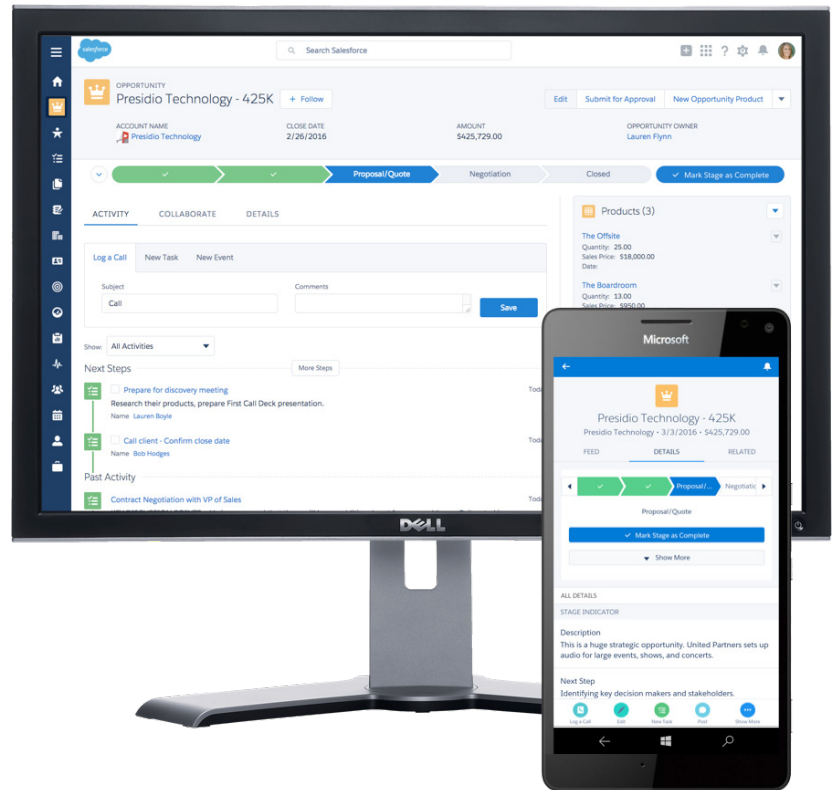
Customer relationship management (CRM) software can make a lot of business processes run smoothly, especially the sales process. Salesforce, the leading and most successful CRM provider in the world,³ defines CRM as a business tool that allows you to manage all your customers, partners and prospects information all in one place.⁵ It allows companies to manage their relationships with customers as well as potential clients and helps sales teams close deals faster which improves a company's profitability.⁴

A CRM solution, along with its native integrations with key marketing technologies (like marketing automation) allows large enterprises, as well as small and mid-size businesses, to thrive.

SALESFORCE CRM

With over 100,000 customers, Salesforce is the largest global CRM provider.

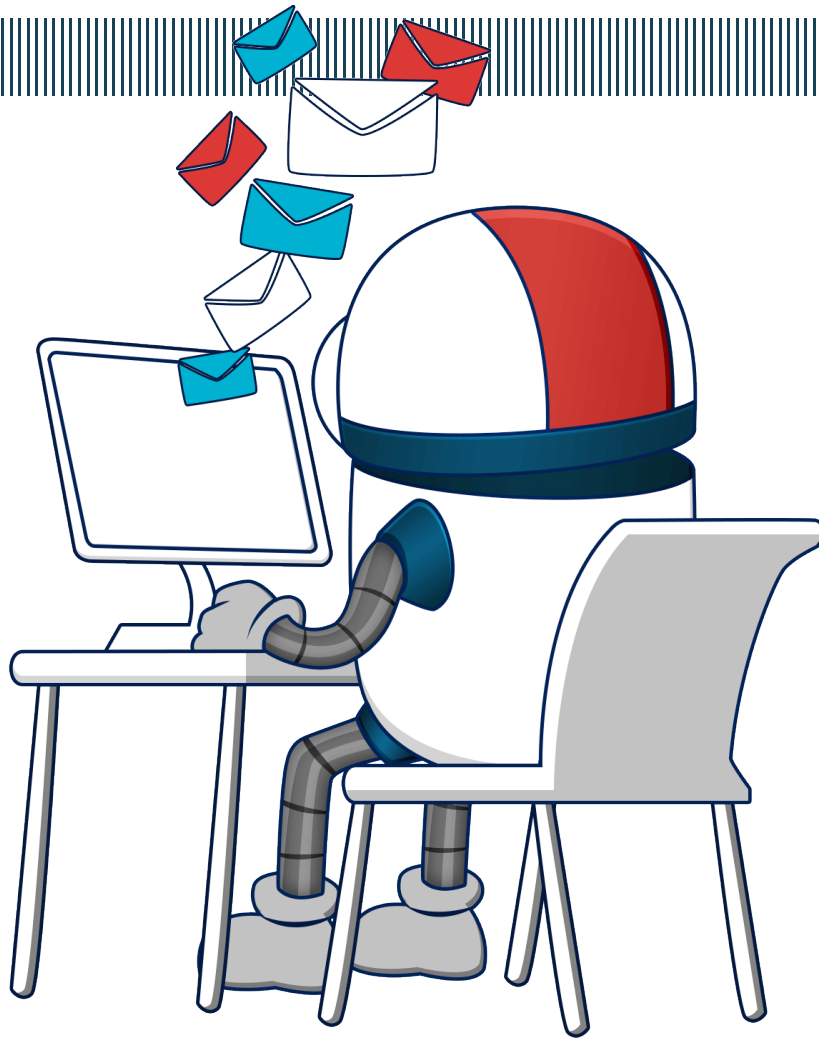
Salesforce CRM provides a solution for marketing, sales, partner management, and community management.





HERE ARE A FEW OF THE FEATURES YOU'LL FIND IN THE SALESFORCE CRM.

- Contact Management
 - Opportunity Management
 - Lead Management
 - Account Management
 - Reports and Dashboards
 - Customizable Page Layouts
 - Sales Analytics
 - Mobile CRM
 - Sales Forecasting
 - Workflow and Approvals
 - Territory Management
 - Sales Data
 - File Storage
 - Marketing Automation Integration e.g. Pardot, Predictive, Hubspot, Marketo
 - Case Management
 - Role-based Views
 - API Access
 - Web Forms, Web-to-Lead
 - Campaign Management
 - Customization Options
-



CRM + MARKETING AUTOMATION

WHAT TO LOOK FOR WHEN CHOOSING
A MARKETING AUTOMATION PLATFORM
FOR SALESFORCE.

**Here are some key features to look
for when going through your vendor
selection process:**

1

NATIVE INTEGRATION

Native CRM integration is key to the success of marketing automation. An app or system that is natively integrated to Salesforce essentially “lives” within the Salesforce platform. All of the data that’s collected resides in your CRM and can be customized and reported on using Salesforce tools that you already know and love! Best of all, the data is updated in real-time. You can literally WATCH who opens, clicks, etc. on an email within a campaign. If a marketing automation system is a third party integration, this could be a red flag.



2

LIGHTNING READY

If a marketing automation platform is “Lightning Ready” in Salesforce, it essentially means that the app is modern, clean, intuitive, and optimized for speed. Need I say more?

3

SINGLE SIGN-ON

Single sign-on capabilities allow you to use one set of login credentials to access multiple applications. It allows employees to be more productive and administrators to ensure network security.

4

ON-BOARDING, TRAINING & ONGOING SUPPORT

Make sure the marketing automation vendor provides initial on-boarding and training to ensure your company’s success. Bonus points if the initial on-boarding and training is free! You should also look for a provider that offers various support packages that will fit your needs. Client testimonials often indicate the effectiveness and responsiveness of the support team--it’s a great first place to look for this information.



5

SEAMLESS USER INTERFACE

Seamless user interface essentially means, ‘how easy is this platform to understand and use’? Any good marketing automation platform will provide a visually appealing, intuitive user interface and user experience. Being able to stay organized, quickly learn, and intuitively interact with the system will lead to increased productivity and a reduction of errors.

6

SEGMENTATION

In order to send the right message to the right person (at the right time, of course), the marketing automation platform should allow you to segment lists by various criteria, including demographic and behavioral attributes.



7

LEAD SCORING

A marketing automation platform must allow you to score, qualify and prioritize leads based on their behavior and readiness to purchase. With this powerful capability, you'll be able to increase the quality of each prospect and give your sales team the ability to close leads, faster.

8

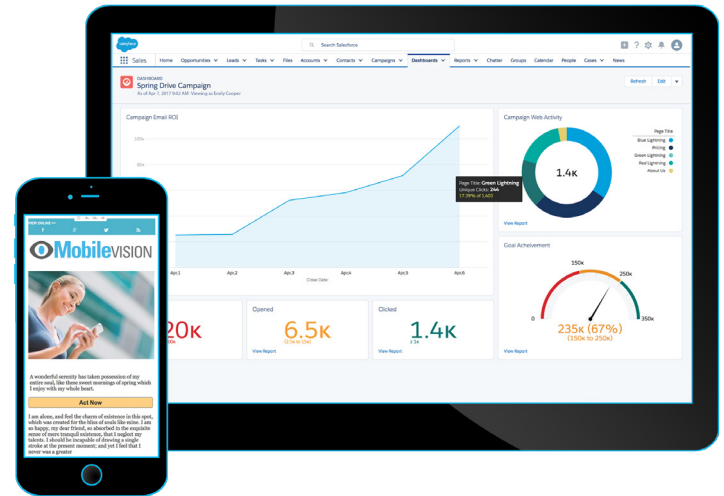
DYNAMIC CONTENT

Look for a marketing automation platform that goes beyond just the standard merge tags for personalization. Look for one that allows for dynamic content. Dynamic content allows you to provide a more relevant experience and tailored messaging, based on information or behavior already known about a contact.

9

REAL-TIME TRACKING & REPORTING

It's essential that all of the interactions a prospect or customer has with your brand is recorded and is available in the CRM. A great platform will allow real-time analytics and tracking--not just email interactions, but website and social media activities as well--all housed right in Salesforce! In addition, a marketing automation system should offer a variety of intuitive, customizable reports to analyze your campaign results.



QUIZ TIME!

Now that you have a better understanding of what marketing automation is, what the benefits are, and what to look for in an

automation platform, take this quiz to see if your business shows the tell tale signs of needing a marketing automation tool.

On a scale of 1 to 5, please rate how strongly you agree or disagree with the following statements.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1. You want your marketing and sales teams more closely aligned	1	2	3	4	5
2. It's hard to distinguish a "hot lead" from a "cold lead"	1	2	3	4	5
3. You are sending email blasts rather than engaging in a conversation	1	2	3	4	5
4. Your campaigns are sent manually	1	2	3	4	5
5. You're wasting time on time-intensive, repetitive tasks	1	2	3	4	5
6. Your email marketing is disconnected from your CRM	1	2	3	4	5
7. Your segmentation needs improvement	1	2	3	4	5
8. You have problems with timing of campaigns (i.e. they're not automated)	1	2	3	4	5
9. You don't know if your emails are driving engagement	1	2	3	4	5
10. You're having trouble measuring the ROI of your marketing efforts	1	2	3	4	5



SCORING

UNDER 20

You know how important marketing automation is and most likely already have it up and running! You already have the right processes in place, are able to create customized, personalized (automated) email campaigns, and are able to measure the ROI of your marketing automation efforts. Congrats!

BETWEEN 20-35

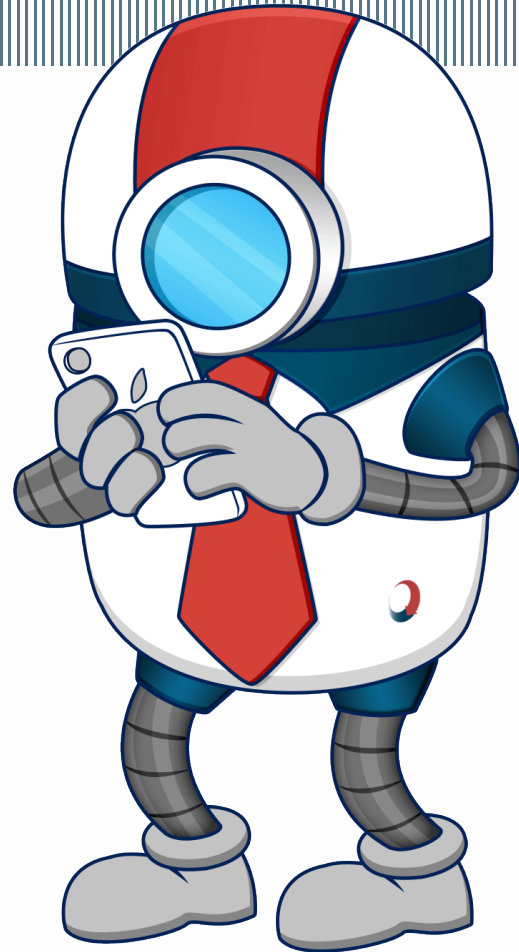
You may already have an email service provider or marketing automation system in place, but it may not be fulfilling all your businesses needs. You're doing a lot right

with your marketing efforts but feel like you could always do better. Maybe you're missing the lead scoring option or it's hard to gauge the true value (and ROI) of your marketing campaigns. It could be that your marketing automation tool isn't natively integrated with Salesforce and that is causing troubles for you...It could be one of many things. In a nutshell, there's a possibility your company needs marketing automation or a better platform.

OVER 35

Your business is showing the telltale signs of needing a marketing automation system that works! Either you don't have a marketing automation system in place or the system

you're currently using just isn't measuring up to your expectations. You probably already know about the advantages of marketing automation, but are not quite sure how (or where) to proceed. You want something that's full of advanced functionalities, simple to implement, intuitive to use, measures real-time campaign performance and marketing ROI.



WRAP UP

Outperforming your competitors in today's marketplace demands 100% relevant messaging that is precisely timed and curated to speak directly to your individual audiences. This change has made marketing automation a necessity for success. So, what is the right automation solution for your company?


WHILE THERE ARE A VARIETY OF FACTORS THAT CAN MOVE YOU TOWARD A DECISION, THERE ARE FOUR ELEMENTS THAT YOU CANNOT IGNORE WHEN MAKING YOUR CHOICE:

How well will your platform integrate with your CRM?

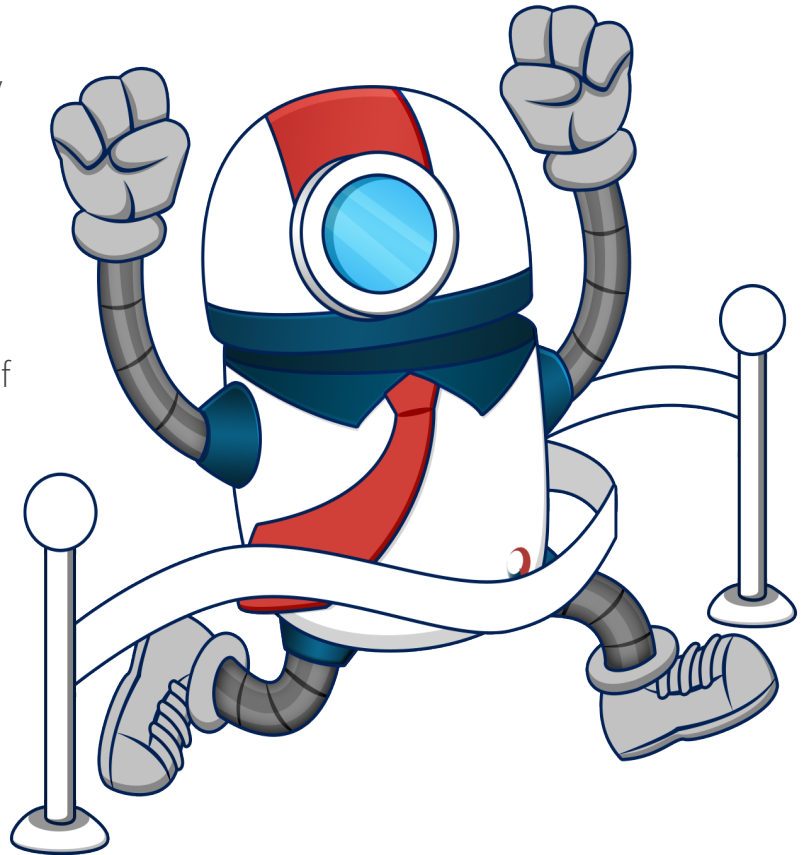
What features and capabilities are available now? And what features and capabilities will be available as your strategy expands?

How user-friendly will the platform be for your marketing team?

What type of support is available from a provider as you begin your journey into marketing automation?



Your goal should be to find an automation platform that fits your needs, has the ability to grow with your business, and can integrate seamlessly with your Salesforce CRM. The bottomline, choose the right marketing automation platform for your business, and you'll be able to create innovative, efficient ways to a higher level of customer engagement with your company, and you'll start to win more business. Most importantly, you'll make every marketing dollar produce more revenue, and you'll provide your company with a higher marketing ROI than ever before.



PREDICTIVE MARKETING AUTOMATION



NATIVE INTEGRATION

Install in a snap thanks to native Salesforce® integration. Forget worrying about logging in someplace else, everything is managed right in your Salesforce® deployment. Just grant access to your users and they're off to the races.



DRIP CAMPAIGNS

Drip campaigns send emails at the cadence you choose and are especially effective for nurturing new leads.



REAL-TIME REPORTS

Real-time reports give you all your email metrics (opens, clicks, click through URLs, opt outs and campaign completions) where you want them — inside Salesforce®.



ADAPTIVE EMAILS

Adaptive emails adjust to a recipient's behavior so you can respond to their actions as they open, click and complete a campaign



PROSPECT TRACKING & LEAD SCORING

Prospect tracking and lead scoring identifies which contacts and prospects are most engaged with your email and website.



SALESFORCE APP INNOVATION PARTNER

Salesforce® App Innovation Partners are committed to providing their customers with the technology and resources that deliver unparalleled success.



LIGHTNING READY

Install the latest Predictive Marketing Automation solution and get cutting edge marketing capabilities in your new Lightning user interface.

It is an amazingly efficient, intelligent user experience enabling nonprofit marketers to work faster and smarter, while delivering better results and driving user adoption.



TRAINING BOOTCAMP

We provide free setup & training to get you off the ground to a successful start in the first week! Our support staff will guide you through sending, reporting and setting up automation.

ABOUT PREDICTIVE

Established in 2006, Predictive was founded with the vision of creating superior email marketing and campaign automation applications, natively integrated with Salesforce. Our goal is to provide our clients with a state-of-the-art engagement marketing solution which makes it simple for businesses to create meaningful interactions with your customers and prospects throughout their complex buyer's journey. We want to empower companies to reach a new level of influence, increase the lifetime value of their customers, and turn more prospects into happy, repeat customers.



registered ISV
partner

We are happy to walk you through a live, personalized demonstration of Predictive and discuss your marketing automation needs.

[SCHEDULE A DEMO!](#)



“

Predictive's software offers excellent value with very easy-to-use, yet advanced features, effortless integration with Salesforce, and an outstanding support team.

All this is delivered at competitive price points.

”

-Jeh D.



SOURCES

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³Forbes (2015), 2015 Gartner CRM Market Share Analysis Shows Salesforce In The Lead, Growing Faster Than Market

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By Chuck Schaeffer**

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⁵Salesforce, What is CRM?

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THANK YOU!

