Setting Up for Success
With Marketing Automation
Develop:
Your Lead Management Process (Is There One?)
Leveraging the Technology
The Cost of Being Disconnected

- **Not Enough Leads**: 68% of companies have not identified their sales funnel.
- **Poor Lead Quality**: 79% of Marketing leads are never converted to Sales.
- **Low Lead Conversion**: Only 46% of reps win more than half of potential deals.
- **Limited Visibility**: 10% of revenue lost per year due to Sales and Marketing misalignment.

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Missed Revenue Target
Tip #1: Develop Your “Ideal Buyers” or Personas
What are Buyer Personas?

- Matt Marketer
- Sally Sales
- Teddy Tech
- Fiona Finance

- Fictitious representations of your ideal customers
- Combination of profiling, behaviour and motivation
- Target content towards most valuable leads
- How many personas should a company have?
Defining Buyer Personas

- Who are you selling to?
- Why are they buying/what are they trying to accomplish?
- What are the roadblocks/limitations/challenges this persona may face?
- Who is qualified to buy?
- Is location or size important?
- Involve all key stakeholders
Tip #2:

Create a scoring/grading structure
Tip #3:
Map out nurture campaigns
*(start small)*
Tip #3b:

Map out nurture campaigns with Engagement Studio! *(start small)*
Whiteboard Your Process

1. **Conversion**
   - Whiteboard
   - Creation of MA profile
   - Users are notified

2. **Nurture**
   - 100 points

3. **Assign to Sales**
4. **sales follow-up (12 hours)**
5. **Sales Process Begins**

**Notes:**
- Not a sales-ready lead
- Salesteam is "working"
- Nurture list (-100)
Develop: Your Team’s Skills
4 Skills Recommended

**Creative**
- Understands target audience
- Skilled writer
- Manages campaigns and understands customers' messages

**Revenue-focused**
- Sense of urgency
- Understands the buying cycle

**Analytical**
- Deep understanding of analytics
- Articulates data trends and provides recommendations

**Forward-thinking**
- Thinks ahead of the buying cycle
- Pulls it all together
Develop:
Your Content Strategy
You can’t automate if you don’t have anything to send.
How can personas help?

- Focus on prospects
- Identify gaps in content
- Reduce content overload by delivering persona specific content
- Targeted content
- Don’t generalise, *personalise*!
K.I.S.S.
Keep Yourself Accountable
Develop:
Milestones
Sample Milestones

60 Days

Milestone 1: Complete Pardot Quick start Implementation (syncing to SFDC, integration for forms, landing pages, etc.)

Milestone 2: Defined our content and buyer persona strategy.

90 days

Milestone 3: Developed a grading and scoring system for leads.

Milestone 4: Added new forms and content to the website to catch leads, and setup automatic lead assignment in Pardot.

Milestone 5: Audited all call-to-actions on the website while offering similar resources readers would be interested in.

1 year

Milestone 6: Customize reports in SFDC and Pardot.
Customers Who Use Pardot Grow Faster

- 129% Increase in content conversions
- 53% Increase in SEO
- 55% closing on viable leads
- 40% Increase in email subscribers
Need Pardot Strategy?

http://www2.pardot.com/advocates

Pardot Success Community
Thank you.
Questions?