



Five Steps to Growing Your Business with Marketing Automation

an Instructional Tool Kit for SMB Marketers



INTRODUCTION

Learn how to do more with less.

When you're a marketer at a small organization, life isn't always easy—we know; we were an SMB ourselves not too long ago. Without the huge budgets, countless resources, and available headcount that bigger companies have at their disposal, SMBs are constantly focused on finding ways to do more with less.

We think doing more with less is what marketing automation is all about, which is why this tool kit will delve into specifics of how marketing automation can help SMBs find success as they grow, and address some important questions, such as:

- How can SMB marketers sell upper management on the need for marketing automation, and form a plan for success?
- How can marketers with a limited stock of content still find success with marketing automation as they build and grow their content library?
- How can marketing automation help marketers align with their sales teams, for a more streamlined and collaborative approach to selling?

- How can SMB marketers access reporting to prove marketing worth and pinpoint areas that need improvement?

But before we delve into how SMBs can find success with marketing automation, let's take a quick look at why marketing automation can be a powerful asset to a burgeoning business.

Top Benefits of Marketing Automation for SMBs

[Automate to save time.](#)

Whether you're just getting started or are a fast-growing, successful SMB, time is the one resource that always seems hard to come by. But what if you could eliminate some of the more tedious tasks filling your schedule (qualifying and assigning leads, sending out endless emails, etc.)? What if you could scale your messaging efforts while still delivering personalized messages that speak to a buyer's specific needs? Marketing automation essentially adds another

member to your team by automating more mindless tasks and scaling personalization — freeing you up to focus on higher-level strategies.

Build your one-stop-shop.

Having an array of marketing tools spread across multiple platforms wastes a significant amount of time and prevents you from having a complete view of your customer. Marketing automation allows you to pull all of these disparate tools into one comprehensive platform, using the data collected from each to target your campaigns more effectively. Create, deploy, manage and measure your assets all in one place.

Supercharge your sales cycle.

Not only does marketing automation put time back in your day, it also allows you to work smarter — in ways that will benefit both your marketing and sales teams. By integrating marketing automation with your CRM system, you can give sales insight into their prospects' interactions with your marketing materials, align your process for qualifying and distributing leads, and allow reps to identify the hottest leads at a glance.

See what's working — and what's not.

As a marketer, you're always reassessing which processes are having the most significant impact

on the growth of your business, so insight into the sales cycle is your best friend. Reporting features of marketing automation can show you every interaction that a prospect had with your brand—from click to close—allowing you to identify snags and improve the efficiency of your funnel. And having access to numbers that prove marketing's contribution to overall revenue doesn't hurt either — particularly when it comes time to make budget requests.

Getting Started

Marketing automation has many features and capabilities that can simplify the lives of marketers. But let's face it: if you're an army of one, single-handedly running your company's marketing department with limited manpower and resources, the prospect of implementing, learning, and maintaining a marketing automation system may not sound simple at all — in fact, it may sound impossible.

That's why we've broken down the process of achieving marketing automation success into five manageable steps, and included the resources to help. With a little planning and setup, these five steps can help SMB marketers accomplish the work of a much larger marketing department — and turn even one-man marketing teams into marketing superheroes.

Did you know...

Pardot marketing started out as a one-woman show? See how we used our own tool in the early days and what features were most useful in this blog post:

The One-Man Marketing Department's Guide to Automation.

[GO TO BLOG](#)



STEP ONE

Define and present your goals.

Maybe you're sold on the need for automation, but your boss isn't. Or maybe you need to be certain that marketing automation will be worth the investment for your own peace of mind. Either way, laying out your goals and strategy is the first logical step towards justifying the investment in a marketing automation platform, and achieving the results you want.

Find your inspiration.

The best part of selling the C-suite on marketing automation? Plenty of companies of varying sizes and industries have already seen value from marketing automation and have the success stories to prove it — you just have to share them. So compile a few stats and case studies from companies like yours that have successfully grown their business with marketing automation. Seeing which features were most impactful for them can help you prioritize your implementation strategy, and helping others on your team understand how this will directly impact revenue growth can go a long way toward garnering support.

Outline your goals.

It's one thing to tell upper management that marketing automation will deliver real results for your company; it's another to outline how. One of the most common stumbling blocks in any new technology purchase is purchasing a new tool without taking time to consider process and strategy around your implementation. Start by asking yourself a few questions, to get a true understanding of how marketing automation will impact your organization:

- Who in your company will use marketing automation? Who will take ownership?
- Are you using your website for lead generation? If so, how can you expand this?
- How can you incorporate cross-channel marketing into your efforts?
- What are your current KPIs, and how can you show each department's value?

Then, organize your answers to these questions with the worksheet on page __, share your long- and short-term goals with your team, and collect feedback from stakeholders to ensure your launch will be a success.

Set some dates.

Sometimes implementation can be one of the biggest obstacles to getting buy-in on marketing automation; after all, if you're a small organization with limited resources, putting progress on hold to implement a new system can be a hard sell. Getting marketing automation up and running can seem like a sizable task, but keep in mind that you don't have to have everything running right off the bat — and that you'll have plenty of help along the way.

An implementation specialist can help you set up basic features so you can start seeing results as soon as possible, and you can work your way towards more advanced features as you have more bandwidth. So talk through a plan with your vendor and lay down some goals for dates when you'd like to launch your initial programs — and have this implementation plan on hand before you pitch to your boss.

“ You don't have to have everything running right off the bat — and you'll have plenty of help along the way. ”



GET STARTED EARLY.

Ready to share your plan with the team? Download our free PowerPoint template below to pull all of this information into your own customized presentation, or use the worksheets at the back of this tool kit to organize your strategy.

GET THE TEMPLATE

STEP TWO

Plan with your sales team.

One of the biggest mistakes that automation users make is thinking that marketing automation is just for marketers. Marketing automation is about the revenue generation process as a whole; the quickest way to success is through collaborating with your sales team and helping them to see as much value from the platform as you do. Start the conversation by discussing the following questions:

- What does a great lead look like? What indicates to you that a prospect is going to be a good fit for our product?

- Are there certain pages on our site, or certain actions a prospect could take, that would indicate to you that a prospect is ready to talk? What are these actions?

- What ratio of sales engagements currently result in a closed deal? What steps can we take towards improving this ratio?

- How long is a typical sales cycle, from the point that you first contact them to the point they sign a contract?

- What are some of the areas in which prospects are having difficulty in seeing the value of our product? How can we help you better position our product?

The answers to the questions will be crucial to helping you build out some basic functionality within your platform, bringing in results right off the bat and encouraging further buy-in from your sales team. Let's take a look at how.

Build out a basic scoring and grading model.

Setting up a blended scoring and grading model for leads that come into the system prevents unqualified leads from clogging up your CRM, gives your sales team a concrete way to quickly identify and focus on the hottest leads, and goes a long way towards putting your sales and marketing teams on the same page. Your system for evaluating leads should be heavily influenced by feedback from your sales team — after all, your sales reps are the experts on recognizing when a prospect is ready to buy, and likely have a wealth of knowledge on how to recognize leads that should be prioritized. This functionality should be one of the first automation features you set up, and should be revisited (and tweaked) often.

Once you've collaborated on a system for scoring leads, turn your attention to your lead metrics. Working from a communal model to define marketing-qualified leads (MQLs) and sales-qualified leads (SQLs), and closed/won business will make it easier for your two teams to cooperate and work toward common goals.



SELL TO SALES

Having trouble selling your sales team on marketing automation?

Marketing automation can have real benefits for sales as well as marketing — but this message will be more impactful coming from someone who truly understands their circumstances. We've put together an eBook with tips, best practices, and testimonials from Pardot's own sales reps on how they use our product as a part of their daily routines.

[GET THE EBOOK](#)

Build a basic drip campaign.

Lead nurturing is one of the most powerful capabilities of automation, and it can be as simple or complex as you want it to be. So if you're just getting ramped up with automation and are strapped for time, start with something basic and expand over time based on the results you see.

Again, this process should start with input from your sales team. Have a sales rep walk you through your typical buying cycle and typical roadblocks they see. What questions are prospects asking as they learn about your product? What are the pain points they wish to see addressed? Then find a few resources that could be helpful for someone in the beginning stages of researching your product, write up a few short emails, and build out a simple nurturing track with minimal branching.

By placing colder leads on this nurturing track, you ensure that leads are more educated by the time they speak with a sales rep — and that your hard-earned marketing-sourced leads don't go to waste just because they aren't yet sales-ready.

“ One of the biggest mistakes...
is thinking marketing automation
is just for marketers. ”

STEP THREE

Build out your content library.

It's (hands down) one of the greatest challenges that SMB marketers face: creating a robust and valuable content library to use with your marketing automation platform.

Some organizations have an entire department to handle content strategy — someone to head up the company blog, someone to devote themselves to webinar production, someone to handle any design work — you get the idea. The reality is that a lot of B2B companies (particularly in the realm of SMBs) don't have this luxury. That doesn't mean you can't create great content - and plenty of it - to fuel your programs. Let's take a look at a few of the options for simplifying content creation, so you can decide which methods best fit your goals and budget.

Simplify the creation process.

We all know the benefits of maintaining a company blog, but for many SMBs, this is a major case of 'easier said than done.' Content creation does take time, but it doesn't have to take as much time as you think.

Often, one of the toughest parts of writing regularly is coming up with a topic to write about, so let an RSS reader regularly compile ideas for you. Turning ideas from your RSS reader into blog fodder doesn't have to be exhausting business, either (blog posts aren't term papers, after all). You can easily build off others' content to quickly add value and create helpful content of your own; here are three ideas on how:

- **Talk history.** Discuss how an idea or trend originated, and how it evolved over time.
- **Make predictions for the future.** Add your own analysis of where you think a trend is going and why.
- **Add secondary research.** Pull in research from another source to offer a different perspective on the topic.

Curate content.

Curating content, or gathering together content that others have already created, is another great option for SMBs with limited resources — as long as it's done right. If you'd like to pursue this route, keep the following two tips in mind:

- **Give your curated content a voice.** Don't just gather a smörgåsbord of blog posts and articles and call it a day; be intentional about the content that you choose. Does it fit a certain theme?

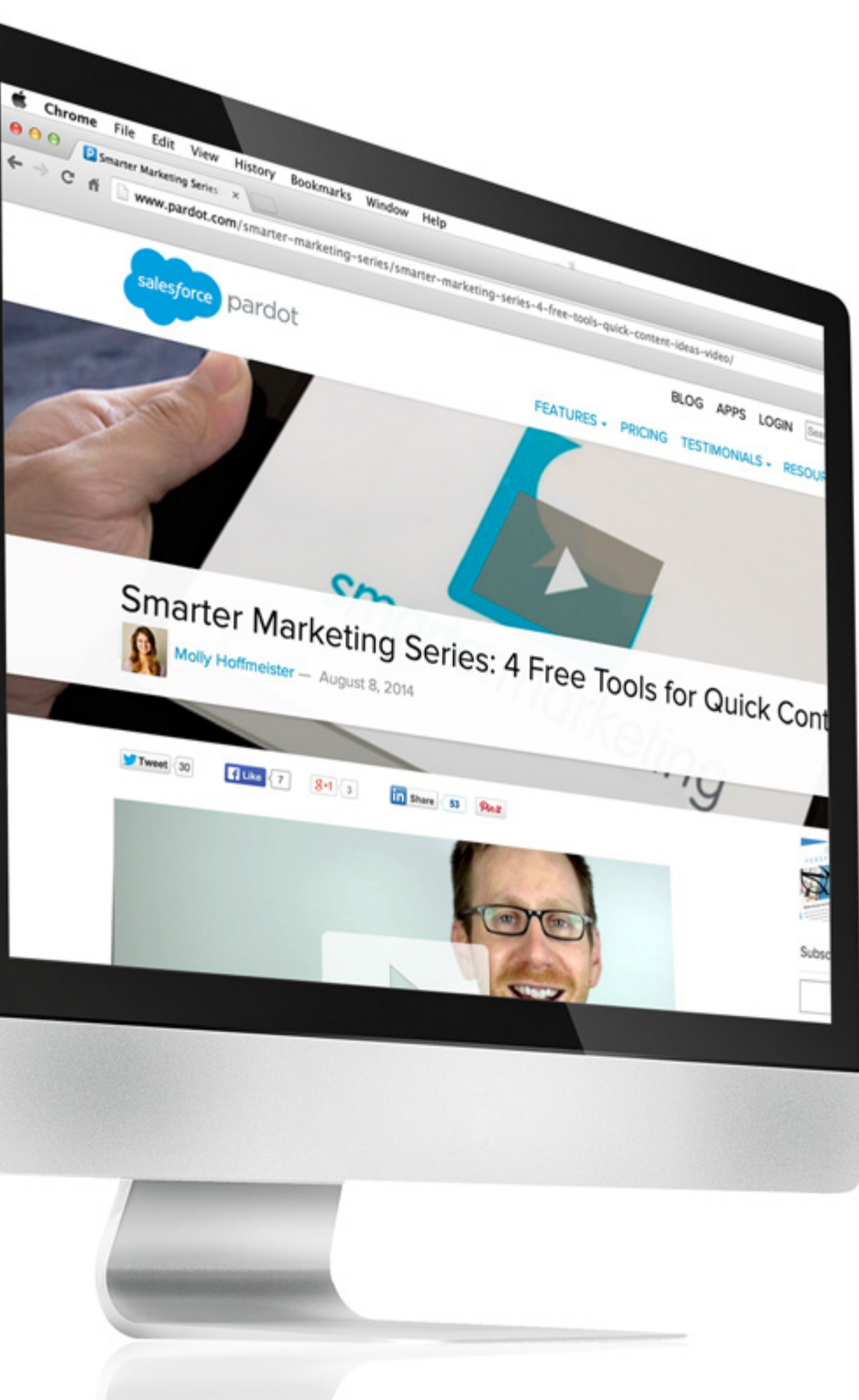
- **Attribute content that's not yours.** One of the most important parts of curated content is attribution. Don't take credit for work that's not yours. Include links to the original source whenever you're working with content that's not your own.

Create content partnerships.

Don't rule out a cool content idea just because it feels too big. You'd be surprised how many companies are thinking the same thing about a piece of content they want to create — your two teams could very well be able to fill in the gaps that each team is missing on their own. If you come up with an idea for a content campaign you want to run, but don't quite have the resources to make it happen on your own, try approaching some of your partners or customers to see if they'd be interested in a co-branded piece. Often, one team can handle copy or design while the other handles the operational aspects. Everybody wins!

Outsource content.

Sometimes, if content curation or co-branded pieces don't sound feasible, or if you want to tackle a huge content project, outsourcing your content might be your best bet. While this will cost you budget, it will also free you up to pursue other initiatives that you have on your plate, helping to save time and resources in the long run. Look for agencies that have done work that you like, and make sure that your goals and deadlines are clear and aligned.



Need inspiration?

Looking for content ideas? In this 90-second video from Pardot's Smarter Marketing series, Brand Evangelist Mathew Sweezey shares four free tools that can provide you with an endless stream of valuable content ideas.

[WATCH THE VIDEO](#)

STEP FOUR

Consolidate your marketing.

Remember when we mentioned building a one-stop shop with marketing automation? If you've planned out your strategy, started developing content to support it, and put some basic functionality in place, it's time to pull in other areas of your marketing.

A typical marketing organization features a myriad of different roles: Social Media Manager, Data Analyst, Demand Generation Manager, Operations Specialist, Email Marketer — and the list goes on. But if you work for an SMB, there's a good chance that several (or all) of these titles refer strictly to you. Many SMB marketers are performing an impressive balancing act while managing multiple channels — and let's face it, that's a lot to handle (and handle successfully) for one person. It's time to start distributing, promoting, measuring, and improving your marketing efforts in one platform.

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refer strictly to you. ”

Let's take a look at a couple of the tasks (and job titles!) that marketing automation can consolidate.

Create catered emails.

With marketing automation, the impressive, flashy email templates and advanced targeting options that larger companies have employed for years are no longer out of reach for SMBs. Using a WYSIWYG email template builder in an automation tool, you can create sleek email templates without having to know HTML. You can then decide who you want to send your newly-minted emails to by segmenting your database based on criteria like location, product interest, and more. This allows even the smallest marketing teams to target their communications to specific audiences, helping to increase engagement rates.

Market with social media.

Maintaining your various social outlets, responding to your audience in real-time, and distributing your content can all take up a significant portion of your day. Marketing automation allows you to post to your social profiles from one interface, monitor your link clicks, and schedule out your

future posts. This takes some of the tedious but necessary posting duties off your plate, ensuring your content still gets distributed appropriately, and leaving you with more time to focus on creating meaningful interactions.

Simplify database management.

Data collection can be a bear, no matter how big your company is. For SMBs, it's important to start streamlining your data collection process right off the bat, so that you're gathering useful data to power your marketing campaigns. That's where forms and landing pages come into play.

By using forms and landing pages to fill your database with tons of actionable information, you're letting your marketing automation tool do the heavy-lifting for you. Use this buyer data to power your marketing campaigns and improve sales intelligence.

With these major marketing initiatives housed under one roof (and the benefit of single sign on and bi-directional data syncing), marketers can stop jumping from platform to platform and access all of their prospect and customer data in one place. Additionally, multiple connectors allow you to tie in all of your favorite online marketing tools (think SEO tools, and webinar- and video-hosting platforms), creating a single destination for tracking prospect interactions and marketing success across complex, multi-channel campaigns.



TOO MANY HATS?

When asked what you do on a daily basis, how often do you find yourself fumbling for an answer and landing on, "Well, I wear a lot of hats..."?

If you're an SMB marketer, it's probably quite frequently.

GET THE EXPERIENCE

STEP FIVE

Report on success.

SMB marketers are working with a limited budget, so every dollar counts. Make sure you're not wasting valuable marketing dollars on campaigns that aren't bringing in returns. Instead, use a marketing automation tool to understand which campaigns are working and which are not. Let's take a look at a few ways marketing automation can revolutionize your reporting.

Start measuring the metrics that matter.

SMB marketers too-often fall into the 'vanity metrics' trap, spending too much time looking at surface-level metrics (think page views and clicks) and failing to focus on the metrics that truly matter (the ones that drive revenue). How many leads are your marketing efforts driving, and even more importantly, how qualified are these leads and how many are turning into closed deals? With marketing automation, you can see where leads are entering the sales funnel, how many leads you're generating, your cost per lead, and more.

Close the loop on reporting.

Most marketing automation platforms provide closed-loop ROI reporting, allowing you to tie prospects back to the campaigns that originally created them and providing insight into individual campaign performance (and hopefully giving

marketing a share of the glory). Even if the prospect did not convert on that first point of contact, tracking can retroactively identify that initial touch point and attribute the lead back to its source.

Gain insight into the sales cycle.

The B2B life cycle isn't exactly short. That means that there's a lot of time between initial contact with a lead and the close of a deal, and a lot of touch points to track. Taking a look at your life cycle metrics using a life cycle reporting feature can tell you a lot about where your leads are in the sales funnel, how many opportunities you have, and how much time is being spent in each stage. This information can give you a better understanding of the lead life cycle, allowing you to structure your campaigns accordingly and target any areas where leads are stalling in the sales funnel.

The implications of improved reporting are huge: not only can marketers prove their worth and justify the investment of budget in their initiatives, they can also use this information to improve their efforts and increase their impact on the bottom line. See where the best leads are coming from, prioritize outlets and channels accordingly, and have your automation platform send you regular reports to keep yourself updated.

Follow the marketing metrics that matter.

See some common vanity metrics (and some better alternatives) in our *Marketing Metrics that Matter* infographic.

[VIEW INFOGRAPHIC](#)



QUICK FACTS

Get the numbers.

94% of B2B small business marketers use content marketing. (CMI)

Over **50% of the current working population** in the United States works in a small business setting. (Forbes)

69% of B2B small business marketers say case studies are the most effective content marketing tactic they use, and 67% cite in-person events as the most effective tactic. (CMI)

48% of B2B small business marketers have a documented content strategy. (CMI)

Small businesses have generated more than **65% of the new jobs** created in the U.S. since 1996. (Get Busy Media)

85% of B2B small business marketers say brand awareness is their organization's top goal for content marketing. (CMI)

34% of B2B small business marketers outsource content creation. (CMI)

Organic search accounts for, on average, **41% of traffic to SMB B2B websites, but just 27% of leads.** Social media, in contrast, supplies just 2% of visits but 5% leads. And email accounts for just 1% of web traffic on average, but 9% of leads. (eMarketer)

91% of B2B small business marketers cite LinkedIn as the social media platform they use most often to distribute content. (CMI)

ROI OF EMAIL

70% of SMBs spend 3 or fewer hours per week on email marketing, but **77%** reported that email marketing increases their revenue.





Worksheets

WORKSHEET ONE

Ownership & Goals



- 1. Marketing automation point person:** Who in your company will head up this initiative?

- 2. Users:** Who will have a seat in your platform?

- 3. Current pain points:** ex., low lead quality, small ratio of leads passed to sales become closed deals.

- 4. Long-term goals:** What do you want to accomplish in the long term?

- 5. Short-term goals:** What do you want to accomplish in the short term?

- 6. KPI's to measure:** ex., MQLs

WORKSHEET TWO

Objectives Planning



Goal

Campaign

Channel

1.

1.

1.

2.

2.

2.

3.

3.

3.

4.

4.

4.

5.

5.

5.

Example: "Increase number of marketing qualified leads by 20% in Q4."

Example: "Run lead nurturing campaigns targeted to prospects who have been inactive less than 6 months."

Example: "Email."

WORKSHEET THREE

Changes in Strategy



Old Strategy

1.
2.
3.
4.
5.

Example: "Monthly email blasts to cold leads."

New Strategy

1.
2.
3.
4.
5.

Example: "Targeting nurturing tracks to educate non-sales-ready state."

WORKSHEET FOUR

Implementation Plan



Implementation contact: _____

Kickoff date: _____

Goal for completion: _____

LEAD SCORING

Determine the best criteria with which to grade and sort your leads to ensure quality lead generation.

Complete by: _____

LEAD MANAGEMENT

Develop lead management rules based upon your organization's lead routing process.

Complete by: _____

NURTURING CAMPAIGNS

Define your first prospect nurturing campaign in Pardot to begin nurturing leads immediately.

Complete by: _____

LANDING PAGES

Create custom landing pages for your content to convert visitors into prospects in Pardot.

Complete by: _____

FORMS

Develop forms to help you capture information from your prospects to build prospect profiles in Pardot.

Complete by: _____

BRANDING

Work with your project manager to brand all Pardot tools and materials to your company.

Complete by: _____

WORKSHEET FIVE

Example Quarterly Campaign Plan



January

February

March

OVERARCHING CAMPAIGN:

OVERARCHING CAMPAIGN:

EVENT 1:

EVENT 2:

EVENT 3:

EVENT 4:

NURTURING CAMPAIGNS:

SOCIAL MEDIA:

PAID ADVERTISING:

WEBINARS:



CONCLUSION

Get success by getting started.

As an SMB marketer, you may find yourself wishing you had the resources and yearly revenue of some of your bigger competitors, but keep in mind: the internet has put small and big companies on a much more even playing field. These days, it's the companies with the biggest brains, not the biggest wallets, that are seeing the most success — and with the right tools and the right processes in place, you can scale your marketing to punch far above your weight.

Interested in learning more about marketing automation? [Download our free Buyer's Guide](#) to take a closer look at the features and capabilities of automation, and use the six free worksheets to guide you in your search for the vendor that will best fit your needs.



WANT MORE INFORMATION?

Pardot is marketing automation for Salesforce customers.

Your customers are smarter, more capable, and better-informed than ever before. This new breed of consumer demands a better breed of marketing, and the Pardot platform has the capabilities to get you there.

[LEARN MORE](#)

