How Marketing Automation Can Help Small Teams Succeed

Marketo®

Introduction

With nearly 60% of marketers working in teams of only one to five people, it's no wonder that small marketing teams are often tasked with doing more, but with fewer resources. And as if they weren't challenged enough, small marketing teams also face the issue of being bogged down in a trap of manual processes such as creating batch and blast emails, working off of spreadsheets, and slugging through data in order to understand which channels are the top performers.

But even with these challenges, small marketing teams can make the best

of their situation by utilizing their strengths of agility, creativity, and adaptability, and by focusing on the efforts that give them the best return on investment (ROI). However, even with this sound plan, it's not always a smooth ride to success.

As a full, comprehensive solution, small teams should look to automate their processes through the use of a marketing automation platform. This strategy can effectively help to conquer small team woes and drive success, making the team appear not so small after all.

In this ebook, you'll learn how marketing automation can empower small teams to function at their optimum, including:

▶ The challenges and advantages of a small team

▶ 5 ways that a marketing automation solution can help small teams succeed

▶ 12 critical features of marketing automation

▶ 4 steps to ensure success prior to implementing a marketing automation solution

Small Team Challenges

Small teams come in many forms. You might be a small team within a large marketing department, or your entire marketing department might be small. Regardless of the make-up of your small team, you probably face challenges that are not necessarily felt by your larger counterparts. These challenges include:

HAVING SMALL BUDGETS

According to LegalZoom, companies on average only allocate 9–12% of their total annual budget to marketing, with some marketing budgets being as low as 2%. So, it's clear that marketing teams of *all* sizes are already at a monetary disadvantage. But then add the small team size factor on top of this, and your small team's budget has probably been narrowed even more. And let's face it—it's hard to pursue certain programs and campaigns if your budget is not large enough to support them.

PRIORITIZING TASKS

In our digital age of the internet, mobile, and social media, there are more channels than ever that marketing teams need to consider. A healthy marketing strategy includes a combination of inbound and outbound marketing. And if you want to be successful, all marketing teams, no matter how small, must address both sides of this equation. However, a small team does not have the bandwidth or the resources to engage in *all* of these activities, nor are they often able to go deep into any one area. Thus, it can be overwhelming to determine which activities to focus on.

LACKING STRUCTURED REPORTING

Due to a lack of structured and automated reporting, small teams usually don't have official reports on campaign performance. Instead, reporting is typically more ad hoc, relying on manual tracking methods that are not consistent or scalable.

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OPERATING IN THE REALM OF REACTIVE MARKETING (VS. PROACTIVE MARKETING)

Because of the lack of people, it's more difficult for small teams to strategically plan out their marketing efforts in advance. Therefore, small teams often fall into the trap of solely operating in a reactive mode, which isn't a healthy or balanced long-term solution.

LACKING ENOUGH TIME

Last but not least, a lack of time may be the biggest challenge for small marketing teams. With fewer personnel, the total amount of time that can be allotted to the team's marketing efforts is limited and therefore must be used efficiently. Small teams must assess all of their efforts from the point-of-view of time: is it being saved, or is it being wasted?

Automating processes through marketing automation opens the door to a whole new world for small marketing teams—one where challenges, like a lack of time, are addressed and no longer impede teams from making progress.

Small Team Advantages

Small marketing teams may not have it easy, but that doesn't mean they can't take what they *do* have and run with it. And there are a lot of advantages to being on a small team!

AGILITY

A typical facet of smaller teams and departments is fewer approval processes to trek through. This enables small teams to plan, execute, and deliver all types of campaigns and quickly respond to their audiences. Fewer bottlenecks means more time to spend on what matters: *attracting and nurturing potential customers*.

INNOVATION

With small budgets, small teams can't do everything under the sun. Options are limited. So, they have to get creative and think outside the box. This becomes the natural mindset of small team members and the place they operate from. So, if a team can only afford a few campaigns, they have no choice but to think smart and narrow down the field to only the most viable (and creative) options. In doing so, not only does the team save time and money, but it also increases the team's chances of being successful.

PEOPLE

By necessity, smaller teams tend to employ versatile people who are accustomed to rapid change and have the ability to acquire new skills on the fly. Therefore, the team can wear multiple hats, as it lives and breathes flexibility.

Thus, even with their challenges, there are still advantages to having a small team, all of which can be leveraged immediately! Small marketing teams can succeed by using these positive qualities to their benefit, while also developing a way to automate their processes.

Automating processes helps small teams do more with fewer resources. Using a marketing automation tool, like Marketo, is the best way to make this happen.

Marketing Automation:
The Secret to Small Team Success

## What's the secret to small team success? It's marketing automation!

Marketing automation is a powerful software tool that automates and syncs various efforts (campaign management, customer segmentation, and data analysis, to name a few) in order to obtain the best return on investment. For small marketing teams, marketing automation makes a lack of resources a non-issue and allows teams to turn their back on endless manual and inconsistent processes.

In a nutshell, marketing automation makes marketers' lives easier. Being on a small team with limited resources, marketers couldn't ask for a better problem-solver—and opportunity-maker!

Marketing automation sparks more efficiency and effectiveness all around. As a result, small teams appear much larger than their actual size because the traditional challenges of a small team cease to exist, and the teams' real potential is unleashed.

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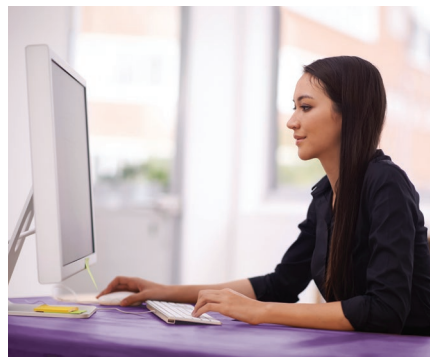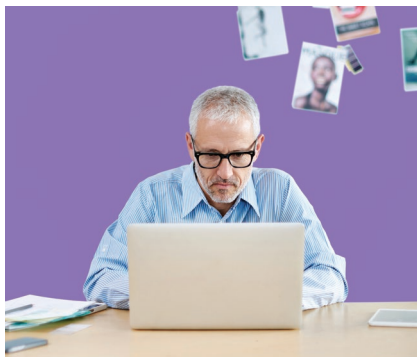
5 Ways That a Solid Marketing Automation Solution Can Help Small Teams Succeed

Marketing automation equips small teams with the tools they need to convert more customers and address the bottom line. Here are five capabilities of marketing automation that small marketing teams will find the most benefit:

1. CUSTOMER ENGAGEMENT

Marketing automation helps small teams to implement the strategy of engagement marketing, which is about marketers creating meaningful interactions with people throughout their customer journey. This type of relationship building is important in today's fast-moving and quickly-changing digital marketing landscape. Further, marketing automation helps to automate the ABCDEs of engagement marketing, meaning marketers are able to connect with people:

as individuals, **b**ased on what they do, **c**ontinuously over time, **d**irected towards an outcome, and **e**verywhere they are. See, ABCDE! Small teams can quickly acquire new customers and properly nurture them until they're ready to convert. All-in-all, marketing automation facilitates every marketer's dream: *the development of durable, long-lasting customer relationships*.

2. SALES AND MARKETING ALIGNMENT

We all know that for our organizations to be successful, sales and marketing alignment is crucial. When sales and marketing unite around a single revenue cycle, this dramatically improves marketing ROI, sales productivity, and top-line growth. In particular, scoring, a mutually agreed upon system for ranking potential buyers based on their sales-readiness and a critical feature in a marketing automation platform, is an important part of alignment—and one from which small teams reap much value.

Through scoring, small marketing teams can ensure that their sales counterparts are spending time working on only the hottest leads—closing more deals across the board.

Another important aspect of sales and marketing alignment comes in the form of nurturing—the process of building relationships with potential customers before they are ready to buy. Through this process in your marketing automation solution, marketing can help nurture potential customers until they are sales-ready. This enables the sales team to spend less time prospecting and more time doing what they do best—selling!

Additionally, sales teams, no matter the size, can benefit from a solid marketing automation platform, equipping them with the following capabilities:

▶ Highlighting the best potential customers and opportunities

▶ Defining potential customers by quality and urgency

▶ Tracking potential customers' behavior and activities, in order to indicate their level of buying interest

▶ Sending emails and entire campaigns with the click of a button

▶ Revealing which contacts are contributing to opportunities

Thus, marketing automation gives the sales team full insight into the playing field, allowing them to convert more prospects into real customers. As a small marketing team with limited resources, an automated solution is therefore the best option for achieving sales and marketing alignment. And your sales team will thank you for it!

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3. PRODUCTIVITY

Marketing automation provides small marketing teams the relief of automating manual tasks (such as sending multiple emails for multiple simultaneous campaigns.) This is a definite time-saver (and boredom-reliever!) With more time under their belt, small teams can get more done! Whether that's exploring new potential programs to garner new customers or crossing off items that have been sitting on their to-do list for months.

For instance, let's take the process of sending out a webinar event invite. Typically you will have the same email structure for every webinar—title, abstract, bio, and so on. You also probably have landing pages and forms. Through the use of tokens in your marketing automation platform you can easily clone these programs—only updating what needs to be updated—versus re-creating entire email flows and programs over and over again. This leads to much more productivity and time savings!

In addition, based on clear and accurate metrics and analytics provided by an automated platform, small teams can easily understand which of their programs are working best to convert customers and which ones aren't working at all. With marketing automation, small teams remain efficient since their time is focused on the efforts that yield the highest ROI. With time being a valuable resource of small teams, there's nothing better than being able to identify where *not* to spend time.

4. ROI

According to The Annuitas Group, after implementing a marketing automation tool, the average company gets a 77% increase in revenue and a 53% higher customer conversion rate. Clearly, marketing automation helps small teams to increase the ROI on their efforts, since they are no longer trapped in manual, unsynchronized, and inconsistent processes. The bonus here? If they can prove ROI for their programs, they are likely to be allotted more budget in the future, which could be used towards taking advantage of more features of their marketing automation system, expanding their programs, and adding additional manpower to the team.

5. SCALE

It is crucial for small marketing teams to select a marketing automation platform that not only helps them be more efficient, but also allows them to scale over time. Scalability is one of the most important features of a solid marketing automation platform. Clearly, teams shouldn't settle for a simple solution that doesn't consider the possibility of growth. Who knows what the future holds! The worst scenario for a small team would be to implement a marketing automation tool that works for now but is not robust enough to satisfy future needs. Eventually, this would negatively affect ROI and impede making progress with potential customers. On top of this, small teams would have to take time they don't have to search for and integrate a new, more robust solution down the road. Avoid future headaches by locating and implementing a scalable solution from the start.

12 Critical Features of Marketing Automation

There are twelve functions a marketing automation tool can (and should) have to bring efficiency to a small marketing team at every stage of the buyer journey:

1 **EMAIL MARKETING**

2 **LANDING PAGES**

3 **CAMPAIGN MANAGEMENT**

4 **MARKETING PROGRAMS**

5 **LEAD GENERATION (FOR B2B)**

6 **NURTURING AND SCORING**

7 **CRM INTEGRATION**

8 **SOCIAL MARKETING**

9 **RESOURCE MANAGEMENT**

10 **MARKETING ANALYTICS**

11 **MOBILE MARKETING**

12 **PERSONALIZATION**

4 Steps to Ensure Success When Implementing a Marketing Automation Solution

Small marketing teams need to have *focus* in order to be successful. Simply put, there's not enough time *not* to be focused. So, prior to implementing a marketing automation platform, small teams need to identify their goals and establish a clear-cut plan. Gaining this level of clarity can be achieved by carrying out the following four steps. And doing so will ensure optimal performance of the automation platform, setting small teams up for the best chance at success.

STEP 1
ESTABLISH A HIGH-LEVEL PLAN

The marketing landscape is in constant flux, thus marketers must regularly stay on top of trends, while also managing their every-day programs. With so much going on and so much to consider, it's easy for small teams to get side-tracked as they feel pushed and pulled in various directions. The answer is to create a high-level plan ahead of time that focuses on the bottom line (customer conversion and revenue generation) and, *most importantly, stick to it*. Doing so will ensure that small teams continually focus on what's important, meaning their work is always addressing top corporate objectives.

STEP 2
CREATE CUSTOMER PERSONAS

A persona is a detailed description of your buyers, highlighting their behaviors, goals, skills, and attitudes. Persona creation is an important baseline for all marketing efforts, especially in a small team, since without defining personas before implementing a marketing automation solution, small teams won't be able to properly tailor their marketing programs to the likes of their potential customers. The more well-defined the persona, and the better it's weaved into the design and messaging of the marketing campaigns, the more successful small teams will be at grabbing potential customers' attention and converting them. This will allow small teams to spend time on the marketing programs and campaigns that truly cater to their customers and not waste time developing ones that don't.

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STEP 3
IDENTIFY THE BEST CHANNELS

Before taking the plunge into marketing automation, small teams should have already settled on their cross-channel campaign strategy—finding a synergy between various digital, mobile, and social channels. In selecting the most appropriate channels, small teams should consider the unique preferences and needs of their customers, as inferred by the descriptions of their personas. For instance, if the persona is that of a B2B SMB practitioner, they may want to consider a cross-channel strategy that combines outreach through email and social media, which are channels through which marketers can easily engage with them to serve early-stage content, best practices, and how-to tips. All-in-all, having a cross-channel plan mapped out ahead of time will help to optimize efficiency from the get-go once the automation tool is activated.

STEP 4
DESIGN PROGRAMS TO BE MEASURABLE AND SCALABLE

Marketers are under constant pressure to ensure their investments are creating an optimal impact on the metrics that matter. So, before moving to automate their marketing, small teams need to make sure that their marketing programs are not only measurable, but that they also provide desired metrics that relate to the company's top objectives. Small teams should also agree on how they will report on each program, so that consistency always remains intact and enables easy comparisons to be made down the road. Again, small teams don't have time to reconcile and make sense of disjointed reports.

To optimize their efforts, small teams also need to clone successful programs to scale. Most campaigns, such as webinars, have many moving parts: there are invites, reminders, follow-up emails, landing pages, forms, and workflows. With an efficient automated solution, when you want to run your next webinar you can copy all of these components with a simple click, and then simply fill out fields to adapt all the content across the board all at once. Here, you save valuable time which can be devoted to other activities that serve the bottom line.

Conclusion

Whether it's during the planning stages or after the launch of a marketing automation solution, time is of essence. There's probably no more valuable a resource for small marketing teams than time, and thus how these teams choose to use it matters more than anything in predicting their success. Through all of its capabilities, marketing automation helps to preserve and make the most of this number one asset.

If small team success is the question, marketing automation is the answer. With a marketing automation platform, small marketing teams can function at their optimum and show everyone that big things *can* come in small packages!

Marketo

Marketo (NASDAQ: MKTO) provides the leading marketing software for companies of all sizes to build and sustain engaging customer relationships. Spanning today's digital, social, mobile and offline channels, Marketo's® customer engagement platform powers a set of breakthrough applications to help marketers tackle all aspects of digital marketing from the planning and orchestration of marketing activities to the delivery of personalized interactions that can be optimized in real-time. Marketo's applications are known for their ease-of-use, and are complemented by the Marketing Nation™, a thriving network of more than 250 third-party solutions through our LaunchPoint™ ecosystem and over 50,000 marketers who share and learn from each other to grow their collective marketing expertise. The result for modern marketers is unprecedented agility and superior results. Headquartered in San Mateo, CA with offices in Europe, Australia and a joint-venture in Japan, Marketo serves as a strategic marketing partner to more than 3,000 large enterprises and fast-growing small companies across a wide variety of industries. For more information, visit **marketo.com**.