

MARKETING AUTOMATION FOR SALES PLAYBOOK



one

two

three

four

five

six

quick
facts

Marketing Automation: Sales' Secret Weapon

It's a common misconception that marketing automation is only for marketers, and that sales will be left with yet another system to learn how to use. This couldn't be further from the truth — in fact, it only takes a few hours for sales reps to learn everything they need to know to get the most out of an automation system.



While marketing automation does have many benefits for marketers, it also enables marketers to better support their sales teams through features like improved lead qualification and lead nurturing. This Quick Guide takes a look at this improved workflow between marketing and sales while progressing through a typical day in the life of a sales rep using marketing automation.

6 Steps to Marketing Automation →

one

two

three

four

five

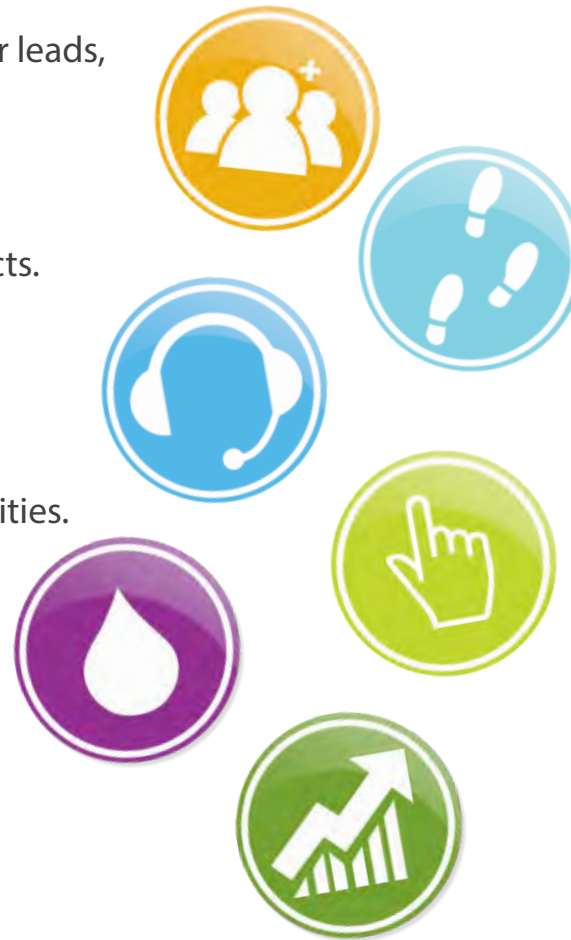
six

quick facts

Marketing Automation: Six Steps

Take a look at the next few pages to see how sales reps can use marketing automation to track prospect activities, prioritize their leads, and target their sales pitches.

1. Get updates on all new prospects.
2. Prioritize your hottest leads.
3. Avoid cold calls — forever.
4. Stay updated on prospect activities.
5. Nurture tomorrow's leads.
6. Track your efforts.



Use the tabs to skip through the 6 steps!

one

two

three

four

five

six

quick facts

Step One: Get Updates on Prospects



Prospect

Contact

Activity

| Activity | Type | Campaign | Date / Time |
|---------------------------------------|------------------------|-------------------|----------------------|
| Email: Your Pardot Monthly Newsletter | Sent | Success Community | Apr 27, 2011 3:35 PM |
| Email: Your Pardot Monthly Newsletter | Sent | Success Community | Mar 31, 2011 2:15 PM |
| Email: Your Pardot Monthly Newsletter | Open | Success Community | Feb 28, 2011 2:34 PM |
| Email: Your Pardot Monthly Newsletter | Sent | Success Community | Feb 28, 2011 2:23 PM |
| Opportunity Associated - pro edition | Opportunity Associated | | Feb 16, 2011 9:55 AM |

A sales rep's day normally begins with a review of active prospects. Which prospects were active most recently? Which need more immediate follow-up? With marketing automation, this decision-making process is made easier with daily digests of prospect activity. Reps can choose to have an email delivered to their inbox every morning with a list of all of their assigned prospects who were active within the past 24 hours.

one

two

three

four

five

six

quick facts

Step Two: Prioritize Your Hottest Leads



When it comes to follow-ups, you probably want to spend your time on the leads who are ready to speak to you. Using lead scoring and grading, marketing automation gives you the intel you need to prioritize your time. While poor lead quality can often lead to quarrels between marketing and sales teams, using a lead score and grade to objectively qualify leads can ensure that only high-quality leads are getting passed from marketing to sales. By looking at a lead's score and grade in either the marketing automation tool or the CRM, sales reps can quickly identify which leads are ready for immediate follow-up, and which are not.

Learn More:

A lead score measures how interested a lead is in your product or service. Different actions are given weighted numerical values depending on how valuable they are, so the higher a lead's score, the more interested they are in your company. A lead grade, on the other hand, measures how well a lead fits your ideal profile. Lead grades take job titles, industry, company size, and other criteria into account and display a letter value (A, B, C, D, etc).



one

two

three

four

five

six

quick facts

Step Three: Avoid cold calls — forever.



If sales reps could permanently transform cold calls into warm calls, why wouldn't they? With the tracking capabilities of a marketing automation solution, prospect activity data is constantly being collected and imported into your system — so you always have access to the most relevant and actionable information. Use behavioral data collected through landing page forms, social profile information, and real-time tracking (all housed in a single interface) to prepare for all of your sales calls, then tailor your conversations to your prospects' needs and interests based on what you know.

LinkedIn Info

Behavioral Data

Data.com Sync

| Field | Pardot | Sync | Data.com |
|----------------|-----------|-------------------------------------|-----------------------|
| Company | ABC Corp | <input type="checkbox"/> | ABC, Inc. |
| Address One | (No Data) | <input checked="" type="checkbox"/> | 77 W 67th St |
| Phone | (No Data) | <input type="checkbox"/> | +1.212.456.7777 |
| Annual Revenue | (No Data) | <input type="checkbox"/> | 100000000 |
| Country | (No Data) | <input checked="" type="checkbox"/> | United States |
| City | (No Data) | <input checked="" type="checkbox"/> | New York |
| Employees | (No Data) | <input type="checkbox"/> | 5000 |
| Industry | (No Data) | <input checked="" type="checkbox"/> | Media & Entertainment |
| State | (No Data) | <input checked="" type="checkbox"/> | NY |
| Zip | (No Data) | <input checked="" type="checkbox"/> | 10023-6203 |
| Website | (No Data) | <input checked="" type="checkbox"/> | www.abc.com |

Cancel Send to Pardot

one

two

three

four

five

six

quick facts

Step Four:

Stay updated on prospect activities.



LeadDeck

As your day progresses, you'll want to stay as up-to-date on your prospect activities as possible. Prospect tracking tools like Pardot's LeadDeck make it possible for sales reps to stay informed on their prospect's movements, even during meetings and those well-deserved lunch breaks. Get real-time notifications delivered to your email, CRM, or desktop application — and always know when your prospects are active on your site (or are taking actions that you've deemed more valuable than others, like visiting your pricing page).

one

two

three

four

five

six

quick facts

Step Five: Nurture tomorrow's leads.



You don't want to waste large portions of your day following up with leads who aren't ready to buy. Fortunately, with marketing automation, you don't have to. Instead of letting these leads slip through the cracks, your marketing team can set up lead nurturing campaigns to automatically nurture leads through the sales process. By providing content to prospects over time, your company will stay top of mind, reducing the risk that prospects will be scooped up by competitors. Now, inactive leads won't turn into lost revenue — instead, they'll be nurtured until they're ready to speak to a sales rep.

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four

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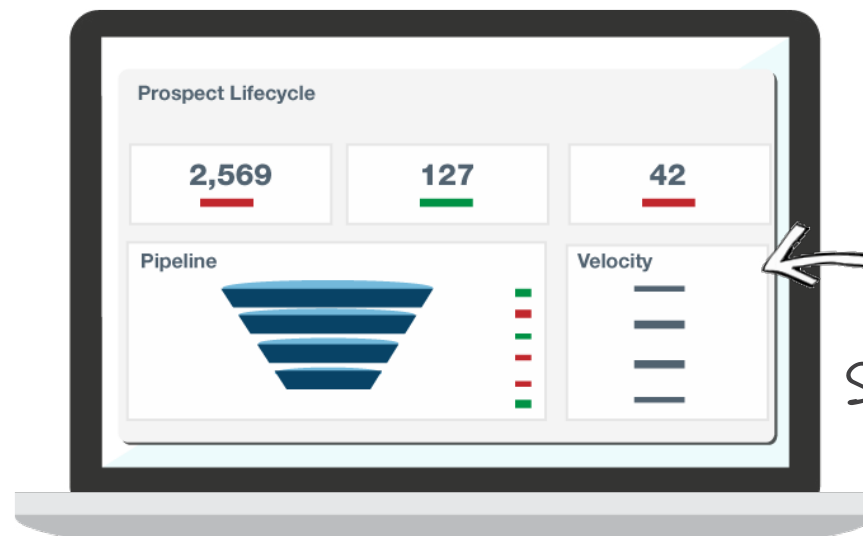
six

quick facts

Step Six: Track your efforts.



At the end of the day, your marketing team wants to see what's working and what's not, so that they can continue to deliver highly-qualified leads to sales. That's where the closed-loop reporting functionality of marketing automation comes into play. With the ability to map closed deals back to the campaigns that created them, your marketing team will always know which channels bring in the best leads. They can also use features like lifecycle reporting to gauge the health of your sales funnel, allowing them to see opportunities in the pipeline and the length of time that leads are spending in each stage of the sales cycle. With this information, marketers can adjust and improve their strategies so they're bringing in the most qualified leads possible, maximizing speed through the pipeline.



See opportunities
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one

two

three


four

five


six


quick
facts

Quick Facts:


90% of business buyers say when they're ready to buy, they'll find you.
(DemandGen Report) 


Research shows that 35-50% of sales go to the vendor that responds first.
(InsideSales.com) 


70% of the buying process is now complete by the time a prospect is ready to engage with sales. (SiriusDecisions) 


61% of B2B marketers send all leads directly to sales; however, only 27% of those leads will be qualified. (MarketingSherpa) 

Nurtured leads produce, on average, a 20% increase in sales opportunities versus non-nurtured leads. (DemandGen Report) 

Companies with mature lead generation and management practices have a 9.3% higher sales quota achievement rate. (CSO Insights) 

Companies that excel at lead nurturing generate 50% more sales-ready leads at 33% lower cost. (Forrester Research) 

Nurtured leads make 47% larger purchases than non-nurtured leads.
(The Annuitas Group) 

Companies that automate lead management see a 10% or greater increase in revenue in 6-9 months. (Gartner Research) 

one

two

three

four

five

six

quick
facts

Marketing Automation for the Customer Company

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.



Smarter Marketing. Better Results.

www.pardot.com