VIDJAA'S MARKETING AUTOMATION BLOG SERIES

DIY DIGITAL MARKETING FOR SMALL BUSINESSES

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BASIC MARKETING AUTOMATION FOR SMALL BUSINESSES

Marketing automation is the technologies used to support your company's marketing goals that run 24/7 and include automated responses. Examples of marketing automation include collecting emails from a landing page after a prospect clicks an ad or automatically sending new customers the latest quarterly newsletter when you get their email. This six-part series will be easy to read and implement by small business owners throughout the USA.

MARKETING AUTOMATION SERIES

PART 1
OVERVIEW & PREP

Planning for marketing automation is no different than any other plan. You have a strategy and tactics that lead to a goal. The strategy of marketing automation is to offload manual work to software that runs 24/7, effectively saving labor hours that could be used for other important work in your business. The tactics might include the content pieces such as emails and landing pages plus the software tools that you will use to automate the tasks. The goal is usually very similar to most small businesses: more customers, revenue, and branding. Sometimes a map is a good place to start - here is a map I did recently to describe how digital ads would generate leads (emails).

Here the ads run all day every day. As people click the AdWords links or Facebook ads, they are taken to a landing page (it could be the home page) which is basically a specific webpage to generate leads.

We'll talk about landing pages more in Part 3.

After they enter their details, their email address is added to the CRM or database. Next, you will need to draft the reply email - this will be the email they will receive automatically upon signing up.

We'll discuss emails in more detail in Part 2.

A big part of the marketing automation is the set of tools that your company will use. Which tool will store emails or customer records? Generally speaking, I recommend MailChimp, Constant Contact, and GetResponse for small businesses. Other areas to consider tools for are email, graphics, spreadsheets, website CMS, and a video editor. You need tools that work within your budget and level of technical skill; if you're not sure what to use, we have a list of tools you can consider.

Your marketing automation program should focus on a goal (in this example the goal is getting leads for salespeople). Your company's goals may include Facebook likes, Instagram followers, menu downloads, or making sales online. Knowing whether you achieved your goal means keeping score of these things, which should be based on the metrics that are relevant to your business.

The metrics for your marketing automation might include location, source (Facebook, AdWords, Bing, etc.), number of unsubscribes, number of leads or emails forecasted in the month, and the conversion percentage. Conversion is the ratio of people that did something divided by the number of people exposed to your offer.

Advertising Math

For example, assume 1,000 people saw your Facebook ad and 50 of them clicked on it.

Doing the math, 50 / 1,000 = 5%. This Facebook ad has a 5% conversion%.

Most people think of a conversion percentage at each step in their marketing automation and an overall conversion percentage number.

Let's keep our example going, of the 50 people that clicked the Facebook ad, 45 saw your landing page with a special Buy One Get One (BOGO) offer. 12 people clicked on the "Buy Now" button.

This is 12/45 = 26%. This is a 26% landing page conversion percentage.

Next, of the 12 people that clicked the "Buy Now" button, 10 completed the purchase. Our overall conversion rate % in this example is 10/1,000 = 1%

Generally speaking, there is no magic conversion %, it depends on the industry and offers involved.

Using marketing automation technology instead of manual systems can be well worth the investment for your company: it's positive for branding, lead generation, sales, as well as time management.

PART 2

SET UP EMAIL

Typically, the first and best focus for a small business is to build a tribe of fans using emails.

WHY FOCUS ON EMAILS?

Because the best business strategy is to focus on the assets that your company owns, such as your logo, brand, products, real estate, and emails.

WHY IS EMAILING AN ASSET?

Emails are from people that have opted-in to receive marketing messages from your company (or purchased goods or services). In a sense, they are warm leads. Because sending emails is almost free, having a large email list is an easy way for a company to boost sales. Having lots of emails increases the value of your firm!

Sending emails requires a tool like Zoho mail. You will also need a CRM tool like MailChimp to manage emails while complying with US SPAM laws, which allow people to opt-in, unsubscribe, and control emails being sent to them. If you want to add cool pictures to your emails, then consider Canva, as it is easy to use – and free!

DRAFTING AN EMAIL USING MAILCHIMP

Let's assume your marketing automation includes collecting emails and sending the new prospect an automatic reply or a 'WELCOME' email. Drafting your welcome email,

the subject line needs to be interesting and gripping - remember that in today's world, a lot of marketing material is ignored so you need to inspire the client to open it. The email copy needs to be written in the same 'voice' as your website and other business materials (i.e. lawyers might be very formal, and a campus sub shop might be using a casual style). If the brand includes pictures, make sure that you own the rights to the images or paid for them from a site such as iStock or Dreamstime. Any links in the email need to be checked twice, first on a desktop PC and then on your smartphone to ensure they run smoothly and lead to the correct page. Once you have the email ready, send test emails to yourself to see how they look on desktop PCs, laptops, and mobile devices.

Finally, I recommend using Grammarly to draft the text of your email: it checks spelling and offers basic grammar advice. Such mistakes may not seem important, but they can be quite detrimental to the effectiveness of your marketing.

EXAMPLE MOBILE DEVICE EMAIL PREVIEW BELOW

Having emails ready to go is an easy way to begin marketing automation!

PART 3

SET UP A LANDING PAGE

With a solid plan and working email, we can begin to collect emails and information. This element in marketing automation is a special (and perhaps the most important) page of your website, focused on achieving one thing - acquiring emails, phone numbers, or selling a product. Web traffic to landing pages can come from anywhere, such as organic searches from Google and Bing, referrals from online directories, and of course your digital ads running on Facebook or Google. Prospects will 'land' here after clicking a link or ad. Here are two examples:
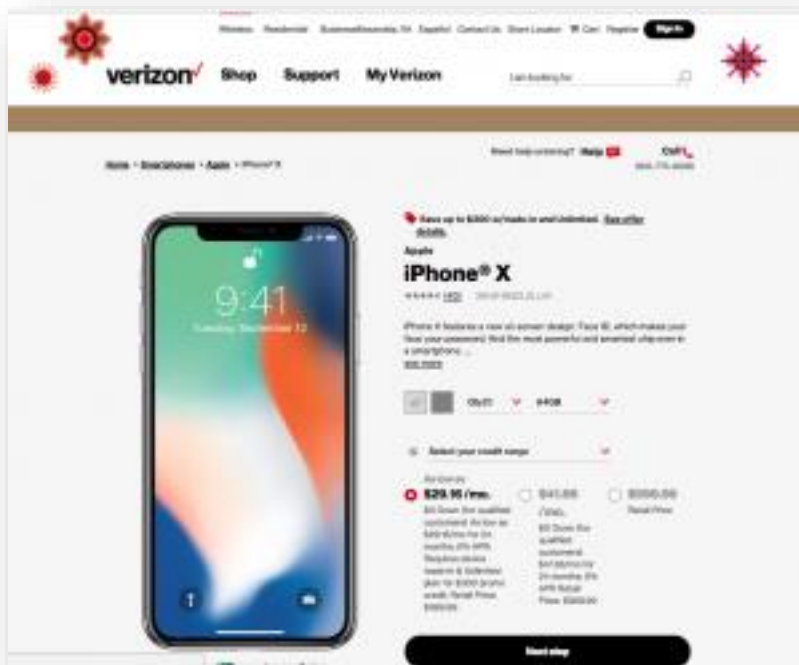
A landing page has three components:

1. A Lead Magnet
2. Hook
3. Call to Action

The lead magnet is something of high perceived value that is offered to the visitor in exchange for their action. In the Vidjaa example above, it is presented as a free digital marketing checklist. In the Verizon example, it comes in the form of a special financing option on the new iPhone X.

The hook is the big headline and emotional copy that entices the visitor to act. Here, the benefits are described and what the lead magnet (product) will give you. Generally, the best hooks are emotional (i.e. greed, vanity, desire, status, etc). The hook should imply a time-based offer (for example, '*only 10 left!*' or '*good for 24 hours!*') and be specifically tailored to the intended prospect.

The final element of this marketing trifecta is the call to action (CTA). Here it could be entering an email, phone number. In the Verizon example, it is a sequence of actions, first the credit range, then quantity, and finally the '*Next Step*' button.

Landing pages can be built and managed from your website or use another tool like Verizon does. External tools to manage landing pages are very common and very easy to use with their drag and drop designs. When your company uses a tool such as [Leadpages](#) or [Clickfunnels](#)to manage the landing pages you can implement several cool additional features like A/B testing and improved metrics.

A/B testing allows you to split the incoming web traffic 50/50 between two variants of your landing pages. This statistical approach helps you see which one converts at a higher percentage. Leadpages includes easy to use page building tools and connects with MailChimp and your email tool. Vidjaa's landing page was built in WordPress, which runs the entire website. Of course, your normal website analytics are sufficient to see where website traffic came from, time spent on your website, the average number pages users saw, and more.

Good landing pages have a singular focus and should be geared towards attracting customers to your business.

PART 4

CUSTOMER RELATIONSHIP MANAGER (CRM)

A brief recap: with our plan, emails, and landing pages all setup, what should your company do with the emails and data that has been collected? How can this data be effectively used? A sales-focused database to support the goals of the company is called a Customer Relationship Manager (CRM). Here is a cool podcast from Australia that helps to define CRM.

MANAGING THE LEADS AND SALES PROCESS

HOW DO LEADS HELP YOUR COMPANY?

Leads for service, retail, and software businesses are vital. Referrals are gold but like the precious metal, not easy to get. Leads are managed through the sales stages by the CRM database. The database records the activities and moves the opportunities (leads) forward to a close (hopefully a 'WON' status) - a paying customer!

EXAMPLE 1

Shane's Rib Shack, a quick serve BBQ restaurant, has a tablet on the counter to enter a phone number. Customers then get text messages on meal deals. The CRM database records your visits from the tablet check-ins that you make. At regular intervals, they text you a meal discount special. When you come back, you enter your phone number to redeem the discount offer, and they get great CRM data to use for marketing. *Here the CRM is managing mobile phone numbers and triggers text messages to incentivize repeat visits.*
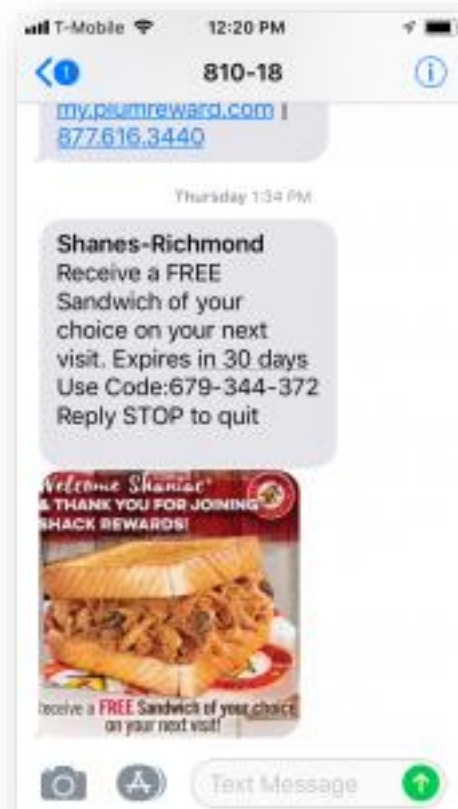
MAJOR CRM COMPONENTS

Most CRMs have a vocabulary, so here is our explanation of the CRM parts:

- **CONTACTS** - people that work for a company (B2B) or a possible customer (B2C)
- **COMPANY** - the organization that is the lead (B2B)
- **PIPELINE**, funnel or deal stages - defined steps of your sales process
- **OPPORTUNITIES** - also called leads, the active prospects in the pipeline
- **TASKS** - chores assigned to sales staff to move a lead through the sales funnel
- **ACTIVITIES** - when a lead watches a video, clicks on an email or attends a webinar
- **REPORTS** - formatted views of the data
- **DASHBOARD** - a snapshot of what's happening in the sales funnel
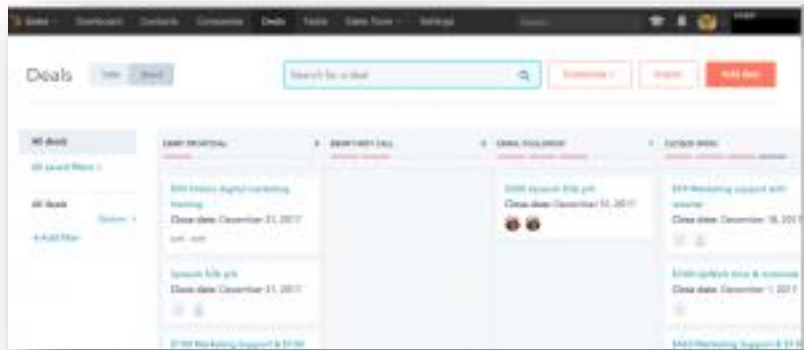
EXAMPLE 2

A prospective client completed a demo request form on a SaaS (Software-as-a-Service) company website. This becomes an opportunity (lead) and the CRM automatically generates a task for a salesperson to contact them. As the client moves through the sales funnel, their status changes until they accept or reject the proposal. The steps are visible to sales management and can be % predicted to close (win). Also, the opportunity may be assigned to a sales teammate should the assigned seller be out on vacation. The company will see all the aggregated data (all the deals in progress) and forecast of revenue with improved certainty. *Here the CRM connects to the website to collect the opportunities and records the activities of sales people working the leads. It also prepares reports for management on leads within the pipeline.*

DASHBOARD

Many CRMs will also send potential clients an email if too much time has passed, or they declined the offer. Also, some CRMs can connect users to the customer support staff. Just like the sales pipeline, this functionality highlights user support issues and helps prioritize fixes.

For small companies, here are recommended CRMs. *(Note Vidjaa does not receive any consideration for recommending a product. Also, we * the ones we use.)*

HubSpot CRM* - the free plan is a great way to start.
Salesforce.com - the original CRM, it is fully functional and has a large user base.
Zoho CRM - an up and coming CRM, that connects to their great email* products.

CONCLUSION

It's a best practice to manage your company's sales process with a Customer Relationship Manager tool. Most companies can benefit from having a tool to connect marketing with sales and a CRM is the best way to do it. Having a structured sales process that can handle the incoming marketing leads is the proven way to grow the value of your company.

PART 5

ANALYTICS

Thanks to the magic of the internet, the collection of data and analytics is far more accessible than it ever was before, resulting in very accurate information. Unlike other mediums, almost 100% of online activities get collected as data which we analyze to make decisions that are far more fruitful. Google Analytics is free and the most used tool for measuring website analytics. Another facet of online metrics is their timeliness - the numbers are almost real time, as opposed to delayed offline metrics which include direct mail envelope opens, TV commercial & radio station ratings, and billboard driver traffic counts. Most of these offline metrics use sample data that is extrapolated to give a value. *The key takeaway is online metrics are accurate and fast, whereas offline mediums are using sample data that is delayed.*

Online metrics can be grouped by their functionality, basic website data, acquisition data, and goals. *Basic website data has three main metrics: users, visits (or sessions), and pageviews.*

A USER is a human being and their device (laptop, tablet or smartphone) coming to your company's website. A user is counted only once per calendar month.

A VISIT (OR SESSION) is when a user is surfing through your company's website reading menus or looking at product pictures. As long as their mouse or finger is moving the visit keeps going. When they stop for over 30 minutes, that visit is over and counted. A user can make a lot of visits to your website during the month or go on for hours (think Netflix).

PAGEVIEWS are the total count of website pages the user viewed during their session on your website. Pageviews are counted from all users even if the see the same pages again (i.e. usually your home page).
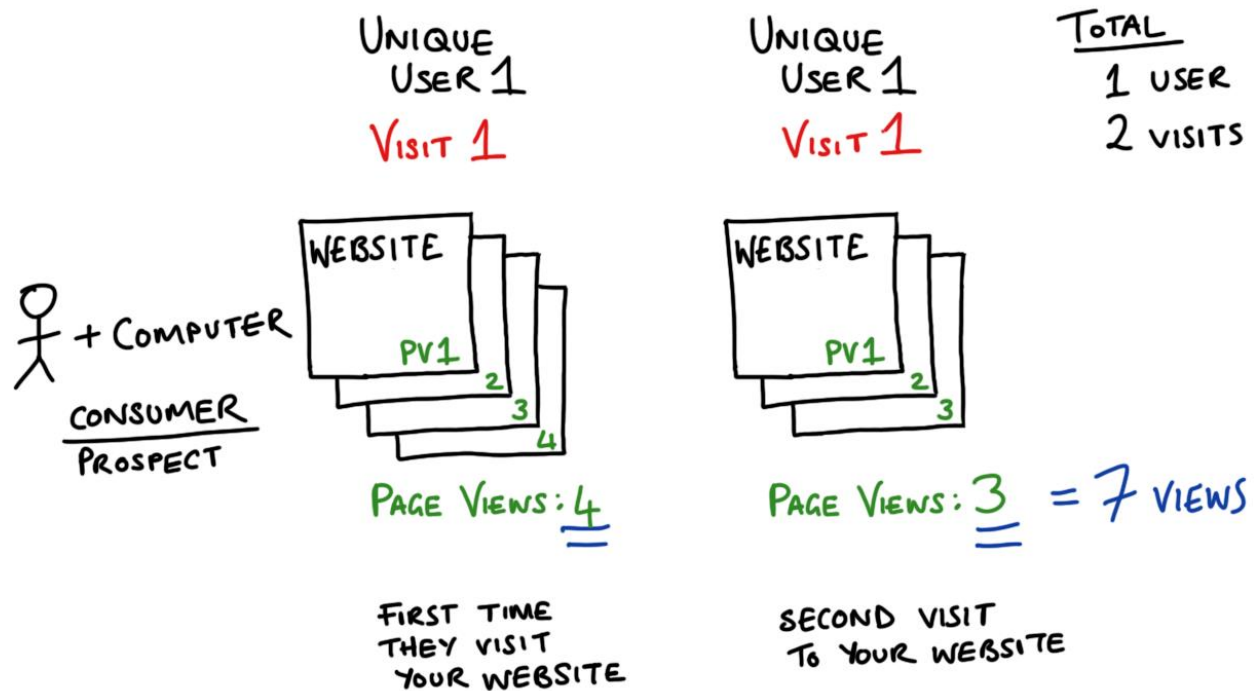
These three metrics are the infrastructure of the internet and their basic value to your website is really important. Some examples to clarify why these three are so critical. Some websites have high users and visits. Others have many sessions. Some have really high pageviews. For example, Google has a lot of users and visits/sessions, but usually only 1-page view. *How often have you ever gone to page two on search results?* Your local TV station has many sessions per user because people check traffic and weather every day. Amazon has a lot of pageviews because people like to look at many different items before they buy something. **Depending on your business model, these three metrics can mean a lot!**

The next set of metrics involves acquisition, or how to get people to your company's website. The SOURCE METRIC is where the user came from: was it Google or Bing? An email? Did they click a link in a newspaper article about your company? Most analytics tools have these source types:

- **DIRECT** - the user knows the URL or brand name and typed it in the browser
- **ORGANIC** - the user came from a search engine like Google or Bing
- **PAID** - the user clicked on an ad on the search engine results page (the 3-4 shaded listings at the top and bottom of the search engine results page)
- **DISPLAY** - the user clicked on a visual display ad on a website that has ads
- **EMAIL** - the user clicked on a link within an email they opened
- **SOCIAL** - the user came from Facebook or LinkedIn

° **REFERRAL** - the user clicked on a link on someone else's website page, such as a newspaper article or blog post
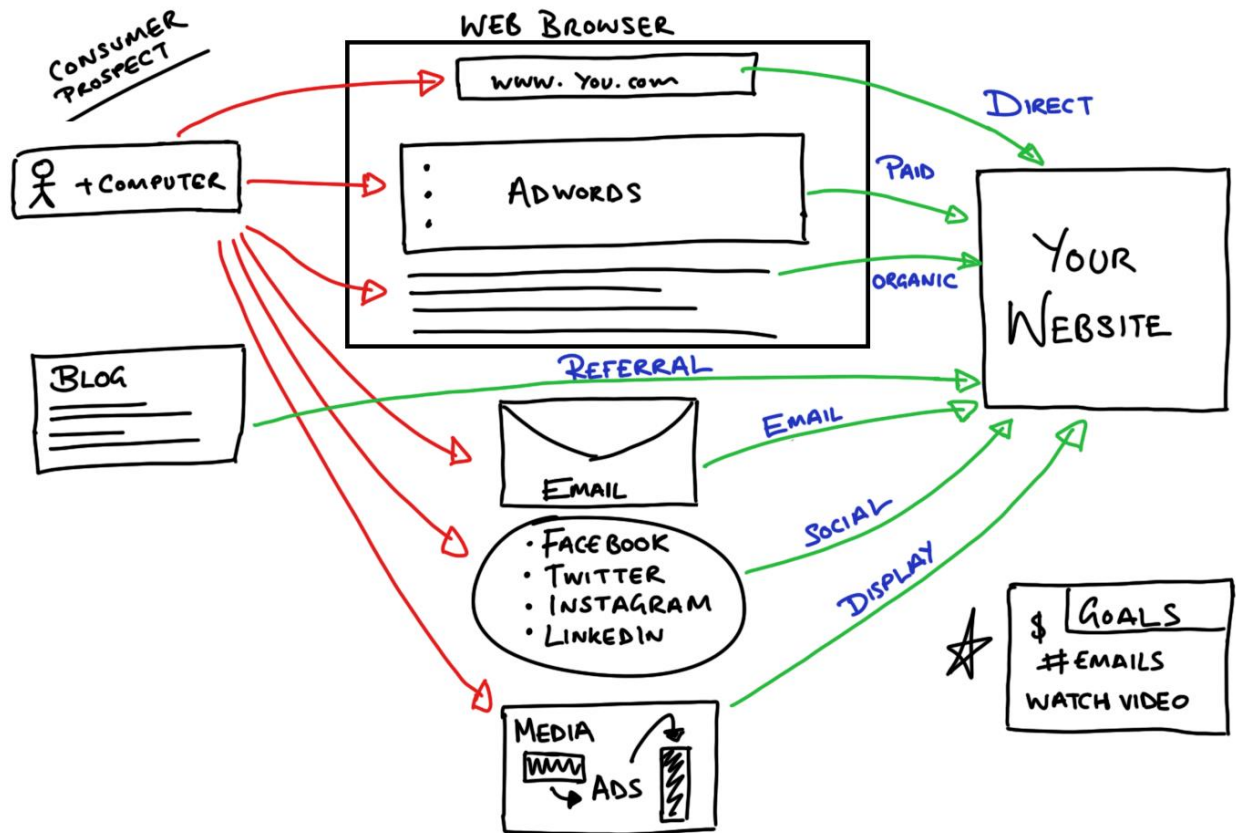
Another useful metric in acquisition is the new and returning user proportions of 100% of all users. New users are people that are visiting your website for the first time that month. In whatever manner they got there - email, Google, Facebook - they are checking out your website for the first time. Returning users are the people that have come to your website two times or more. Depending on your business, either of these might be important.

For example, let's say your company does outdoor landscape lighting for high-end homes. You would want a high % of NEW USERS because it is unlikely that you will get many existing clients wanting outdoor lighting installed more than once. If you are selling products online, you may want many RETURNING USERS, because they are buying from you again. REPEAT CUSTOMERS already have a user account and they came from an email newsletter or other very low-cost marketing vectors.

The third set of metrics are GOALS - these are what drive your company forward. Some examples of goals:

- ° collecting user's emails for a monthly newsletter
- ° selling products online
- ° or watching a video before they make a donation

Goal metrics are very specific and relevant to your company's performance. Usually, goals are matched to an offline system, such as credit card processing data or the actual counts in your email list software (i.e. MailChimp or Constant Contact). *These three basic website metrics types plus # emails in your list are key numbers in marketing automation.*

For VIDJAA MEMBERS, the Google Analytics video may be helpful. It is in the Whiteboard video section. Register here to get access to all of Vidjaa's content. There are several analytics tools for small businesses, but we recommend Google Analytics because it is free and easy to use. Analytics from Facebook, HubSpot, and social media management tools (i.e. Hootsuite and Buffer) can be useful as well. Reviewing the analytics for your company's website is a skill that every small business owner should know.

HAVING A SENSE OF HOW THINGS ARE GOING ONLINE NOW CAN DETERMINE HOW WELL YOUR COMPANY DOES IN THE FUTURE.

PART 6

DIGITAL ADS TO GENERATE TRAFFIC

Digital ads and other advertising for small business serve to build your brand, generate awareness and spur demand. There are many DIY digital platforms for advertising such as Google, Facebook, Twitter, LinkedIn, among many others. Legacy or traditional advertising in the Yellow Pages, newspapers, magazines, billboards, radio, and TV is certainly well known but lacks the 100% attribution that digital advertising has. Your TV or radio does not know that you left the room to make a sandwich in the kitchen! For this post, we will focus on digital advertising.

ADVERTISEMENT

WHY DO DIGITAL ADS?

There are many good reasons, as mentioned above. Practically speaking, grand openings, new products, opening additional locations are common reasons to run a digital advertising campaign. Social media can amplify your ads and reinforce your messages. Here is an example of what we mean: assume your restaurant is opening a second location. You are planning a digital ad campaign and are working on drafting the campaign. As the new location is being built, take pictures and post those to social media - these are great teasers for the big event! The ad campaign for your new

location plus the social media posts will be effective in making prospects aware of the new location.

One of the biggest challenges of digital advertising is knowing your target audience. We like to start with ZAG (zip code, age, and gender) - this begins the process of defining your target audience. From there, consider income, life stage (young adult, college student, singles, married, new baby, your child goes to college, retirement, etc.), and online behavior (desktop, tablet, smartphone).

Finally, psychographics: how do they see themselves? What do they aspire to? Does your target see themselves as busy people and place a premium on convenience? Or do they want to showcase their home with landscape lighting? Most digital platforms have a range of targeting options and it important that you have a profile of your ideal customer to set up the campaign.


TYPES OF DIGITAL ADS

There are two kinds of DIY digital advertising available to small businesses: display ads and search engine marketing (SEM).

DISPLAY ADS can be images, animated GIFs, and videos, so small businesses can run displays ads on Facebook, Instagram, Google Display, and YouTube. Typically, display ads are impression based - this means you are paying to show a certain number of ads regardless if anyone clicked on the ads. Each platform (Google, Facebook, Instagram,

etc.) has its pros and cons, but they all do an excellent job of providing data and connecting to your website's analytics.

SEARCH ENGINE MARKETING (SEM) is when you use a search engine (Google or Bing) to look for something. The ads appear at the top and bottom of each search engine results page (SERP). SEM advertising is performance-based, meaning you only pay when someone clicks. There is no cost to have your ad show in the SERP. Again, these ads have wonderful data and connect to your website's analytics.
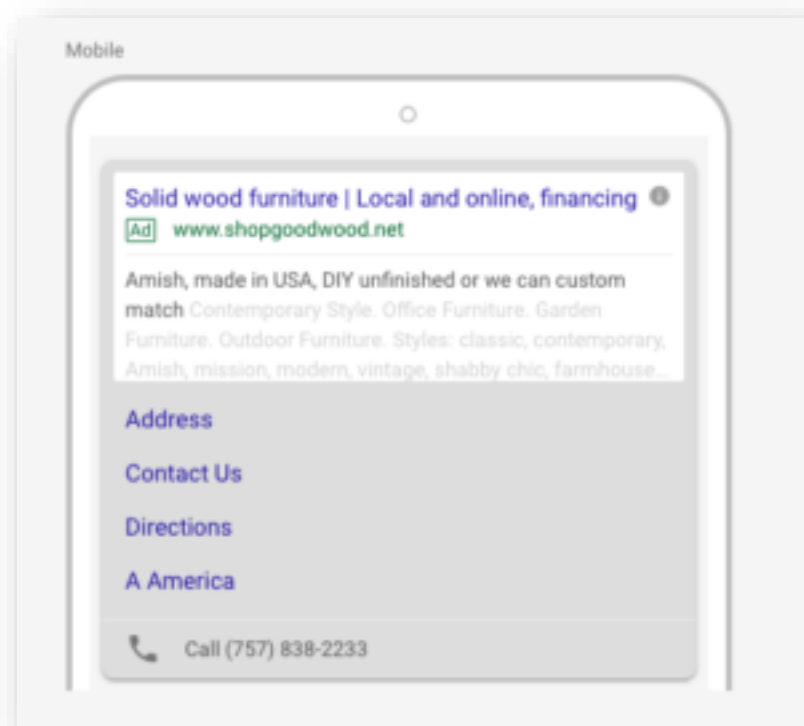
ADVERTISING TERMINOLOGY

There are several advertising terms that you should understand because campaign pricing and effectiveness are often described in these terms. IMPRESSIONS are counted when your ad is shown to a prospect on another website like Facebook or a Google website partner. An impression is counted if your ad is fully displayed to the user. Typically, you are charged a certain dollar amount per 1,000 impressions or showings of your ad. This fee is to deliver the ad and does not change if people click on the ad or not. This is called Cost Per Thousand or CPM. On the other hand, search engine ads charge you per click. This is the COST PER CLICK (CPC) or the PAY PER CLICK (PPC). The ratio of clicks divided by impressions is the CLICK THROUGH RATE (CTR) percentage. The higher the CTR% the better!

How does digital advertising fit into marketing automation? Simple really, you are paying for ads to get people to your website and interact with your company. Why not give them the way to exchange their email or contact details for more content, specials, deals, prizes, appointments, etc?

Registered Vidjaa members can see my Facebook advertising video after they log in. Vidjaa is free to register and you'll see all of our great DIY digital marketing content.
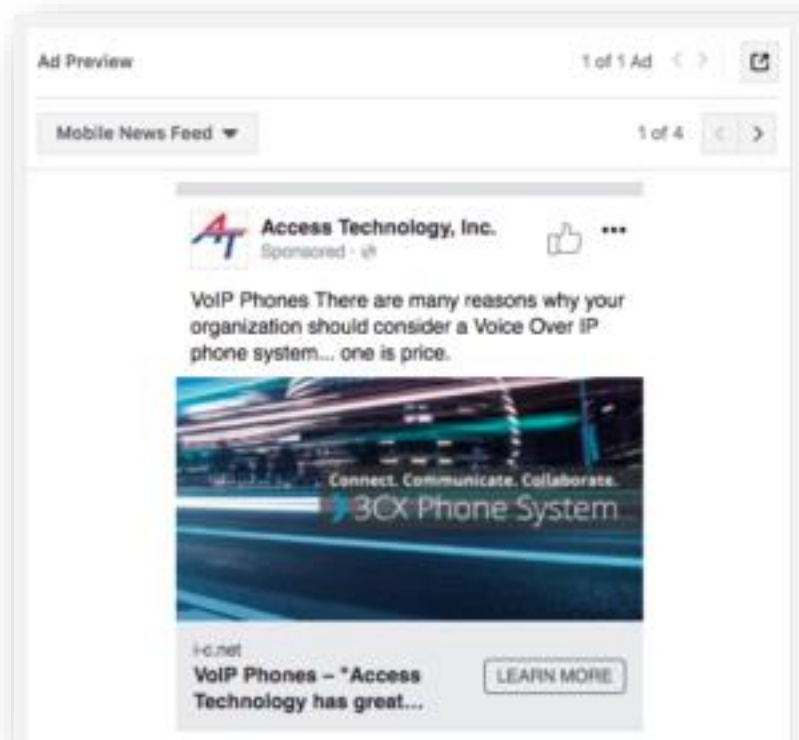
THE CONCLUSION TO OUR MARKETING AUTOMATION SERIES

The goal of marketing automation is to offload manual work to automatic systems to support company goals. As we described in previous posts, there are many parts such as content, emails, landing pages, databases, analytics, digital ads, plus the software tools that connect everything together. Connecting these parts together can be done by most small business owners with a little work.

USING MARKETING AUTOMATION TECHNOLOGY IS WORTH THE INVESTMENT FOR YOUR COMPANY. IT'S POSITIVE FOR BRANDING, LEAD GENERATION, SALES - AND SAVES TIME!

About Vidjaa.com

Knowledge in India is *Vidya*. Yes in Germany is *Ja*.

Vidjaa is the stylized combination of that positive attitude in the search for digital marketing knowledge.

Vidjaa's Founder

Butch M. Sarma is the founder of Vidjaa.com. He is a small business owner, university instructor, and lover of digital technology. His father is a noted scientist, engineer, professor, and author of Hindu Mythology books. His mother was an entrepreneur from Germany.
Butch lives in Richmond, VA, with his wife and daughter. You can view his LinkedIn profile here.

Vidjaa's Editor

Ms. Raha Waheed, from the United Kingdom, is Vidjaa's editor. Given her academic training and considerable writing experience, she is a wonderful addition to the team. She also a talented designer and has greatly improved the Vidjaa network websites. She has visited the US many times and works in Bradford, UK.

How are we different?

No compensation for product reviews! When websites offer product reviews and they accept advertising from companies with reviewed products, you have to wonder - we do. Vidjaa.com is an information business and we do not get paid to review software. However, in the normal method that we work, we will use a free trial or use an evaluation code to review the software. If Vidjaa.com (the business) uses the software, we will always inform you.