

What Is Marketing Automation?

Let's first talk about what it is NOT!

- An easy button
- Human replacement or AI
- The first step to losing your job
- Complicated or complex
- Something fancy or new (you are already doing it)
- For our discussion, MA is not a system, software or technology

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What Is Marketing Automation?

Definition Time

- "MA is designed to help you prioritize and execute your marketing tasks in a more streamlined and efficient way." *HubSpot*
- "MA manages marketing processes and multifunctional campaigns, across multiple channels, automatically." *SalesForce*
- "MA helps you find your audience, engage your customers, and build your brand." *MailChimp*

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What Is Marketing Automation?

Automation is a Mindset

- Automation when done right is not just a tool
- Shift your mindset from "who will do it?" to "how will it get done?"
- Developing and maintaining the right habits
- Learning to ask the right questions
- The ultimate way back to the things that really matter
- MA is a game changer!

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What Is Marketing Automation?

Examples

- Out-of-office auto-reply is the basic mostly widely used automation
- Using Zapier to update your email platform with contact information
- Sending client surveys during project milestones
- Lead generation tools and bringing leads into a CRM tool
- Drip campaigns
- Social Media (SoMe) automation for posting, reporting, etc. - Hootsuite/Sprout
- Text Expander and Phone Text Replacement

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What to Automate?

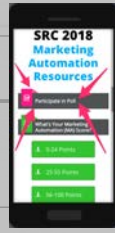
The Things You Hate or Burn You Out

- Hate sending handwritten thank you cards?
- Hate creating content? paper.li
- Hate feeding the SoMe machine? Buffer
- Hate hunting for information and not having centralized data?
- Proposal automation tools
 - Finding or gathering data
 - Formatting resumes, project sheets
- Collateral on the server/Intranet and forms to request custom collateral

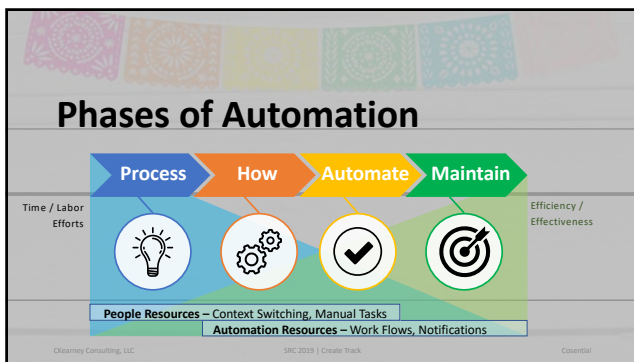
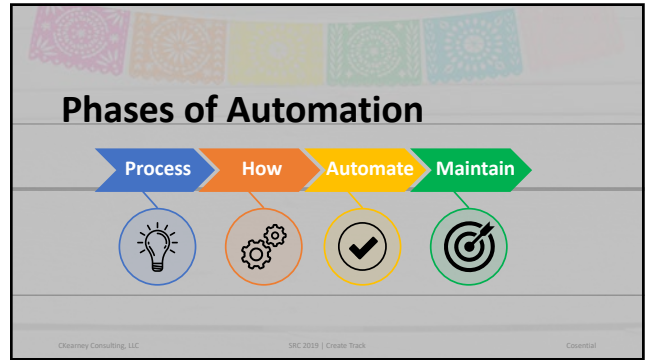
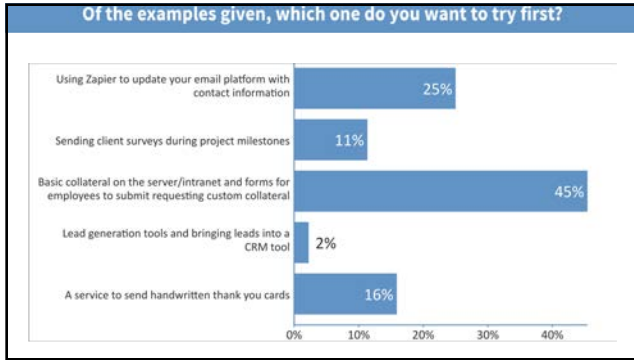
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Poll Time

- Get your phones out again!
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- Click Participate in Poll



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- ### Why You Should Automate
- Jump off the Hamster wheel
- Become more efficient and effective
 - Increase your reportability on your data and your productivity (ROI)
 - Streamline and seamless processes
 - Expedited deliverables
 - Centralized data with increased access

Why You Should Automate

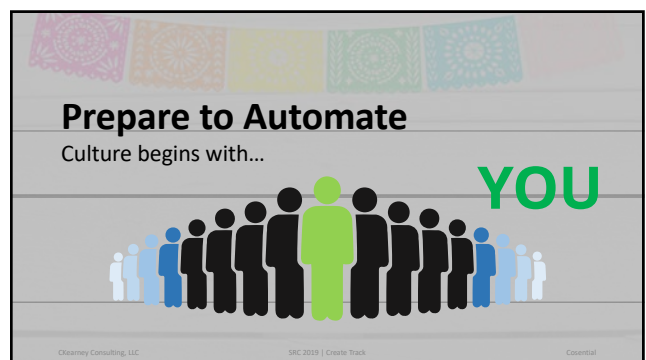
Allows you to spend time on what's most important

Winning & Keeping

Saves Time and Money

Internal Clients

Working as a Team



Prepare to Automate

- 01** You
- 02** Others
- 03** Market the Change

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Marketing Automation Score

- Get your phones out again!
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- Click What's Your MA Score

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Marketing Automation Score

1. Do you have a marketing/business development process and/or system(s) in place?	Yes 25 pts	No 0 pts
2. Do you have your project lifecycle documented and mapped?	Yes 15 pts	No 0 pts
3. Do you have multiple marketing software channels and/or platforms?	Yes 15 pts	No 0 pts
4. Does your firm have more than one office, business units or division?	Yes 10 pts	No 0 pts
5. Do you have recurring tasks that could be automated to save you time and resources helping you prioritize and streamline in an efficient way?	Yes 10 pts	No 0 pts
6. Is your leadership interested in measurable marketing objectives and analytics?	Yes 10 pts	No 0 pts
7. Would your firm benefit from transparent communication, reminders and clearly defined processes?	Yes 10 pts	No 0 pts
8. Could your firm profit from a 14.5% increase in sales productivity and a 12.2% reduction in marketing overhead?	Yes 5 pts	No 0 pts

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MA Score Resources

- Marketing/Business development process and system(s)
- Project lifecycle documented and mapped
- Multiple marketing software channels and/or platforms
- More than one office, business units or division
- Recurring tasks
- Measurable marketing objectives and analytics
- Transparent communication, reminders and clearly defined processes
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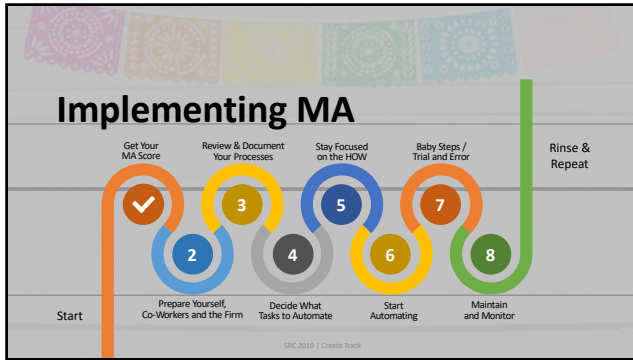
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MA Score Resources

14.5% increase in sales productivity and a 12.2% reduction in marketing overhead

– Nucleus Research

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Keep Automation Going

Maintain and Monitor

- Align your automation goals with the company objectives
- Monitor your automations regularly
- Review your documentation, processes and mappings
- Tracking your before and after metrics
- Celebrate the wins

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Keep Automation Going

Keep the overwhelm away

- Chip away, one at a time
- Take it slow and steady
- Marketing Automation doesn't happen overnight
- Ask "Wouldn't It Be Great If..."

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Keep Automation Going

Remember Automation is a Mindset

- Not just a tool
- Shift your mindset from "who" to "how"
- Reviewing your habits
- Ask the right questions and asking "wouldn't it be great"

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Automation


The Marketing Game Changer

- Automating frees up our time and money to focus on winning and keeping clients.
- Hopefully you didn't just learn why to automate but you have been inspired and now want to automate.
- Take the tangible action items back to the office and increase your productivity, boost your efficiency and focus on the things that make you an amazing marketer.


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What are your take aways from today's session? What marketing automation tasks/tools are you interested in trying?

- "TextExpander sounds super super usefull!"
- "Automation is a mindset. Finding a way to implement marketing automation to event management"
- "Helpful websites to assist in automation"
- "Text expander"
- "Can't wait to toot my own horn!"
- "To start small"
- "Paper.li/postable/zapier/Hootsuite/sprout/buffer"
- "Emails that need to be filed"
- "Text expander!"



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<p>"Wouldn't it be great if..."</p> <p>"Paper.li to create content"</p> <p>"Automation is a must!"</p> <p>"MailChimp Automation"</p> <p>"Not reading emails first thing in the morning."</p> <p>"TextExpander is life!"</p> <hr/> <p>"It's a mindset."</p> <p>"Reminded me about files and I need to implement for approvals."</p> <hr/> <p>"Automated handwritten cards? Game changed. Also, celebrating our wins company wide should happen more"</p> <p>"Automation is a journey not a destination!"</p> <p>"Attack automation in smaller steps than I've been attempting"</p>	<p>"Documentation of processes as a foundation"</p> <p>"Tracking habits and processes is the way to know what you can change"</p> <p>"Start small. Automate what I can and keep going."</p> <p>"Use Cosential x Zapier in earnest."</p> <p>"How not who"</p>
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