

## Lists



Your path to a successful Marketing Automation campaign starts with something Marketers have struggled to manage before there was an Internet – lists. It is necessary to start with a “clean slate” for your lists, which also means having clean data – as simple as merely having email addresses – that will be delivered through the system of ISPs that guard watch over SPAM. How do you ensure deliverability? How do you build good lists? What are things to look for when building a “smart” list? What areas in your database need improvement? These are the kinds of things the Workshop will help you cover.

## Templates



While you may have worked with older generation Email Service Providers (ESPs) and have created email or even landing pages, Marketing Automation gives them a whole new power and it pays to understand this from your very first campaign onward, which should start very simply but can hopefully evolve into a more complex undertaking. You’ll learn some best practices on how to leverage email, landing pages, and the forms within those landing pages, including A/B or multivariate testing, and dynamic content based on your segmented lists and subsequent prospect behavior.

## Workflows



The flow of data throughout a campaign or nurturing program is critical; to leverage as much out of the data as you can, you must be prepared for various scenarios presented by the data – and must know what to do with it. Each interaction by a prospect with any of your digital assets may have a meaning – or none at all. The timing of what you do may make an impact on prospect response, as well as what you are presenting to them. Understanding the cadence of conversation and the rhythms of the customer buying process can be enhanced by thinking out your campaign and program workflows with the customer in mind.



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# Marketing Automation Based Campaigns

## Workshop

### Sample Objectives

- **Understand how to set campaign objectives and guidelines, and delegate responsibilities for all the elements of a particular campaign.** This ensures that every single member of the team is on exactly the same page, facing in exactly the same direction and motivated to achieve exactly the same goals.
- **Determine the digital components of the campaign the participant will be utilizing.** The list, email template, landing page template, forms, and content all must be prepared and perhaps customized for the particular campaign.
- **Determine what critical data the organization may have to obtain over time.** Depending on the condition of database, one may have to update or append new data to the organization's CRM.
- **Determine what campaign or content attributes the participant wants to test and optimize.** Decide on the things suspected to move a lead down the conversion path/funnel.
- **Design a simple short-term promotional campaign.** Starting simply, design a workflow for a campaign that involves getting leads to attend or act on a deadline-driven event.
- **Design a simple nurturing or "drip" program.** Create a long term, incremental content-intense opportunity to interact with leads over time while they may have no definitive time to buy or have a very long buying cycle.
- **Determine "self-serve" campaigns to be initiated by sales staff.** Designate small, salesperson-driven campaigns that allow them to manage and monitor the conversation a buyer is having regarding the seller's product or service.
- **Determine and measure the ability to which campaign objectives are achieved.** What should be measured and how can the organization's next campaign more successful?

### Sample Deliverables

- Workshop books for two key attendees (Extra charge for each additional attendee).
- A prioritized list of fields for which lead data must be collected.
- An initial, static email segmentation on which to base a marketing automation campaign.
- A prioritized list of additional static email segmentations that need to be established.
- An initial, dynamic email segmentation on which to base a marketing automation campaign.
- A prioritized list of additional dynamic email segmentations that need to be established.
- A high-level assessment of email templates, including Privacy Policy, unsubscribing and template stewardship.
- An agreed upon naming convention for all of the firm's Marketing Automation-based campaigns.
- Specifications for an initial Marketing Automationbased promotional campaign, including the workflow, email components, landing page components, forms, content, and expected ROI
- Specifications for an initial Marketing Automationbased nurturing campaign, including the workflow, email components, landing page components, forms, content, and expected ROI

### About Allinio - [www.allinio.com](http://www.allinio.com)

Allinio is a platform-neutral, Marketing Automation, CRM and Marketing Stack services company dedicated to helping firms evaluate, select, configure, implement and support cloud-based marketing and sales technology infrastructure to accelerate revenue growth and maximize marketing ROI.

Contact Allinio today at 410-929-7644 or opt-in at [www.allinio.com](http://www.allinio.com) to better align your marketing and sales departments, automate lead management and qualification processes and effectively capture, analyze and act upon the behavioral data that ultimately drives revenue.