Automated Marketing for Small Business

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Swiftpage

Marketing Automation for Small Business

Example used: ACT! by Sage combined with Swiftpage

Automated marketing tools are a common, well-utilized tool in the enterprise marketplace. As a small business owner, you do not have the time or the expertise to launch a complicated marketing system that is normally managed by an entire department with seemingly unlimited resources. In order for you to be successful in telling the story of your product/service to new leads, prospects and existing customers, you need a level of automation to save time, money and eliminate the need for additional personnel.

The keys to your small business automated marketing solution are:

- **Ease of use** – You should be able to drop in your target list and know they will be receiving the right messages at the right time.
- **Inexpensive** – A dollar spent on one initiative means a dollar not spent on another. You need to maximize every dollar that leaves your company doors.
- **Support for all list sizes** – Your targets are laser- focused. You need the ability to send highly relevant messages to a well- defined group as well as general messages to a broader group.
- **Pre-packaged content** – You need a solution that saves you time, not one that costs you time.

An automated marketing solution that can provide these key requirements allows your small business to focus its limited resources and achieve maximum results.

This document will focus on the automation of the following sales and marketing processes:

Lead Management

1. Lead gathering
2. Lead nurturing before you have permission to email
3. Lead nurturing using email
4. Delivering qualified leads to sales
5. Old/dead lead nurturing

Customer Nurturing

1. Getting new customers on board
2. Nurturing to increase customer retention
3. Customer cross-selling

Lead gathering

How can the small business generate leads inexpensively? The starting point is to have a place on the website that tells the company story and allows the viewer to request information. You can also motivate current customers to refer new leads. If the budget allows, use the strategy to purchase lead lists and use paid advertising (such as paid keywords) to drive traffic.

Action:

Website – Create a website with a survey form that allows people to ask for more information about the company's products or services. Ask for their email address and if they want to be called by a sales person.

Networking - Collect leads at a networking event and enter them into the ACT! by Sage database.

Referral – Send an email blast to your current customers with an incentive if they refer you. Include a form in the email that allows the customer to enter contact information for the new person they are referring.

Purchased List - Purchase a list from a list provider with demographics that you are interested in. Import the purchased list into your ACT! by Sage database and utilize the print and telemarketing stages. You can then lead them to a website landing page with an opt-in survey form or simply ask for permission to email over the phone.

Purchase a Lead – Work with a web-based portal that sells qualified leads for your industry and enter the lead into your ACT! by Sage database. Again, utilize print and telemarketing pieces before you send emails without permission.

Advertise – Place an ad that drives people to your website or product-specific landing page to capture lead information using a survey form.

Desired Result:

A group of new leads in ACT! by Sage that have requested a call from sales.
A group of new leads in ACT! by Sage that need to be nurtured.

Swiftpage Provides

Email

Surveys

Landing Pages

Lead nurturing before you have permission to email

Print and Telemarketing (BtoB only) are the best methods of communicating with a lead until he/she is interested enough to engage in a less expensive email relationship. Never send a marketing email to a lead before you have permission. Not only is it illegal, but it will turn off your lead.

Action:

Perform a look up in ACT! by Sage to create a target list of leads that you do not have permission to email.

Contact the lead using Swiftpage Drip Marketing to deliver print material that asks the lead to go to a landing page with a sign up form for more information or purchase on-line.

and/or

Make a profiling call to the lead using the Swiftpage Drip Marketing Telemarketing stage. Find out if they want to be contacted immediately by a sales person, or if they want to be sent more information via email.

Desired Result:

Have a list in ACT! by Sage of leads who want to be called immediately.

Have a list of leads in ACT! by Sage who have asked for more information. This gives you permission to send them email.

Swiftpage Provides

Lead nurturing using email

Garner greater results with a call-to-action
Be the expert advisor
Build an email relationship that has the lead looking forward to the next email

Deliver a sequence of emails that tells the story of the product or service over a period of time. Have the email sequence present a call-to-action such as: attend a live webinar, request a sales call or purchase online. Each email should tell only a portion of the story, with a link to a landing page that they can continue reading on. This will present the opportunity to get your leads to your website for another call-to-action touch point.

Action:

Use Swiftpage's Drip Marketing to send a sequence of emails in order to educate your leads about the product or service.

The Swiftpage Drip Marketing campaign can create a priority ranked Call List based on the interaction each lead had with the email campaign.

Desired Result:

Educate the leads on the features and benefits of the product/service.

Provide sales with a ranked Call List of interested leads.

Allow the lead to purchase on-line.

Swiftpage Provides

Hand off of qualified leads to sales

Qualified leads are all any salesperson wants. With automated marketing the leads have been qualified by one of the following:

Call Me Now: These are the leads who have specifically requested to be called. The email, website, landing page and telemarketing surveys create data that is copied back into the ACT! by Sage database to indicate how the lead wants to be contacted.

Call List: All emails generate a scored response of who is the most interested in the product or service. The score is based on open and click data accumulated over the different emails that were sent with Swiftpage Drip Marketing. The scored Call List is transferred into ACT! by Sage using the Swiftpage Snapshot tab in the database. This allows the sales person to prioritize his/her calls based on score in order to spend the most time on the most qualified leads.

Action:

Use ACT! by Sage to look up who has requested an immediate call from a sales person and then call them first.

Use the Swiftpage Snapshot tab in ACT! by Sage to work through the Swiftpage Call List that was created by the Drip Marketing sequence. The Swiftpage Call List is a ranked list of who had the most interaction with the previous emails.

Desired Result:

The sales team is talking to leads who have said, "call me now".

The sales team is calling the most interested leads based on score data.

ACT! by Sage allows the salesperson to see who has been previously called and if someone has already purchased, so they do not make unnecessary calls.

Swiftpage Provides

Call List

Old lead nurturing

Each lead shows interest in their own time, and that does not always match up with when the company obtains the lead. Most company's marketing processes only focus on new leads. With automated marketing, it is easy to maintain a relationship with old leads until they are ready to move forward. Creating a Swiftpage Drip Marketing campaign that informs the old lead about the industry, latest products and new services over an extended period of time keeps your company top of mind when the time is right. An example of a Swiftpage Drip Marketing campaign is a monthly email newsletter. During newsletter campaign, send a print piece twice a year to those who are not opening the email. Swiftpage Drip Marketing will manage all of the delivery so that Old Lead Management is fully automatic.

Action:

Establish a Swiftpage Drip Marketing campaign that sends a series of informative emails to the lead. Periodically, send a print piece to the old leads that are not opening the emails that includes a call to action such as, "Send me more information".

Desired Result:

When the lead is ready to learn more they will fill out the form for more information or purchase online.

A Call List is created to show the "Old Leads" that are the most interested. The sales team can then place a call for those that are active.

ACT! by Sage allows the salesperson to see who has been previously called and if someone has already purchased, so they do not make unnecessary calls.

Leads purchase the product/service.

Swiftpage Provides

Getting new customers on board

New customers have a lot to learn about the company and about the product/service that they just purchased. An educational Swiftpage Drip Marketing campaign will walk them through key features and cut down on support calls.

Action:

> Establish a Swiftpage Drip Marketing campaign that sends a series of educational emails to the customer about the product/service that they have purchased.

Desired Result:

> You will have a more informed customer with a more positive start-up experience. Ultimately, the customer will be better trained and require fewer support calls.

Swiftpage Provides

Nurturing to increase customer retention

With automated marketing integrated within ACT! by Sage, the small business can communicate more often and more effectively to maintain a positive customer relationship. The most cost-effective method is to send out a newsletter about your industry trends, existing products, new products and new features. Use the newsletter to ask a few questions which will provide you with valuable customer feedback. ACT! by Sage can be used to store that valuable survey feedback for each customer. It can also be used to send only the relevant information to that person based on their purchase and usage history.

Action:

Create landing page(s) that are referenced from the emails to communicate a deeper level of detail about a product/service.

Create survey questions that ask for customer feedback.

Create Swiftpage Drip Marketing campaigns that include a series of informative emails about different products/services.

Use ACT! by Sage to look up customers that are using the different products/services and place them in the appropriate Drip Marketing campaign.

Desired Result:

Maintain a relevant email relationship with the customer, informing him/her about important industry and product issues.

Gather customer feedback using a survey.

Swiftpage Provides

Customer cross-selling

The best place to sell a product/service for a small business is the existing customer base. Swiftpage Drip Marketing can be used to communicate new products/services to the correct audience at the correct time.

Action:

Use ACT! by Sage to lookup the customers that fit the cross-sell criteria.

Load the ACT! by Sage group to the Swiftpage Drip Marketing campaign that has a series of email stages, as well as a Telemarketing stage.

Use ACT! by Sage to look up who has requested an immediate call from a sales person and then call them first.

Use the Swiftpage Snapshot tab in ACT! by Sage to work through the Swiftpage Call List that was created by the Swiftpage Drip Marketing sequence. The Swiftpage Call List is a ranked list of who was the most active from the previous emails.

Desired Result:

The sales team is talking to leads who have said, “Call me now”.

The sales team is calling the most interested leads based on score data.

ACT! by Sage allows the salesperson to see who has been previously called and if someone has already purchased so the salesperson does not make unnecessary calls.

Current customers purchase the new product/service.

Swiftpage Provides

Swiftpage Detail

Email Stage: Send a blast email at a specific time. Capture open and click data. Manage all opt-outs and bounces. Copy the data into ACT! by Sage.

Call List: Creates a prioritized list based on email interaction and displays that list in the Swiftpage Snapshot tab in ACT! by Sage. The Swiftpage Call List is a ranked list of the hottest to the mildest contacts based on a score of opens and clicks. Multiple email blasts can be used to create the score.

Postcard Stage: A Swiftpage Postcard stage can be used with a Swiftpage landing page that has a Swiftpage Survey form for the visitor to enter their level of interest and contact information. Swiftpage can complete the postcard mailing or provide the data in CSV format for the company to use with internal printing or local print shops.

Telemarketing Stage: A Swiftpage Telemarketing stage is used to place a profiling call to gauge interest in the company's products or services. The telemarketing caller places the call with a telesales script and fills out a Swiftpage input form. The form is copied back into the ACT! by Sage database. If the result is voicemail then the operator can leave a message to go to the company's Swiftpage Landing Page that describes the product or service. On that landing page, a the lead could fill out a Swiftpage Survey with their contact information Swiftpage can provide a telemarketing vendor or provide the list in CSV format for the company to make the calls internally.

Survey Forms: Swiftpage provides the ability to create surveys of all types such as customer feedback forms, event registration, newsletter sign up and more. Swiftpage Surveys can be linked to from within an email or embedded on a website or landing page. When someone submits the survey form, the information is brought into the ACT! by Sage database as either a new contact or updating the data of an existing contact. The Swiftpage Survey can then automatically load the contact into a Swiftpage Drip Marketing campaign.

Landing Pages: Swiftpage has a landing page creation feature that allows the user to tell the story of a specific product, service or promotion. On the landing page, a call-to-action Swiftpage Survey form such as "Purchase now" or "Learn more" can entice visitors to fill out their contact information, which would get entered into the ACT! by Sage database. The Swiftpage landing page is used commonly placed in print pieces as a URL, given out on telemarketing calls and can be linked to from any email.

Drip Marketing – Swiftpage Drip Marketing manages the process of delivering on-going communication via email and print and creating the Call List over time. Swiftpage Drip Marketing is integrated into ACT! by Sage and allows for all of the activity of the Swiftpage Drip Marketing stages to be copied back into ACT! by Sage history. A dynamic group that is created in ACT! by Sage can be synced to the Swiftpage Drip Marketing database before a Swiftpage Drip Marketing stage is executed.