



Marketing Automation Readiness Tip Sheet

As the digital landscape expands, companies are utilizing marketing automation tools to take their sales process to the next level. However, there's a misconception that marketing automation can replace a marketing person. Automation can save time and money moving prospects further down the funnel before your sales team has to pick up the phone, but you still need marketing and sales staff to ensure effective communications and build personal relationships. There are steps you must take though before you're really ready for marketing automation. If you are thinking about implementing marketing automation, consider these 10 questions to determine your market automation readiness:

- 1. Do you have a CRM?** A CRM allows you to manage your sales pipeline more efficiently, and an integrated CRM and marketing automation tool can improve sales and marketing alignment. Some marketing automation tools (like HubSpot) offer a built-in CRM, so if you are looking for an integrated solution, it's a great place to start.
- 2. Is your CRM data clean?** Your CRM is only as good as the quality of your data. Some marketing automation tools charge based on the number of contacts, so having incomplete, disorganized, or erroneous data is a waste of money. Before setting up a CRM in an automation platform, be sure that your contact list is thorough, up to date, and segmented by criteria such as job title, organization size, and industry. This will allow you to make smarter, data-driven sales and marketing decisions.
- 3. Do you have a long sales cycle?** Marketing automation can be used to nurture prospects on their buying journey, offering more information as they become further engaged. Marketing automation is an ideal fit for companies with a long sales cycle as it encourages ongoing communication without the daily involvement of a sales team.
- 4. Do you have more leads than you can manually contact?** This is a good position to be in and a substantial reason why marketing automation can be useful. Automated, personalized communication can help track and nurture any leads that come through, allowing your sales team to reach out when prospects indicate readiness.
- 5. Do you know which leads to hand over to sales and have a process established once passed off?** Indications such as content interaction and website visits, all traceable within your marketing automation platform, can help your sales team prioritize lead follow-up. You can develop sophisticated lead scoring to correspond with these actions. Most marketing automation platforms can help you keep track of a lead's activity and your communication with them in your sales funnel.
- 6. Do you have leads in your CRM who are interested but not yet ready to buy?** Having interested prospects is great, but far better when you can leverage automation tools to nurture these leads through the sales funnel until they're further along in the buying process.
- 7. Do you have marketing content?** Quality marketing content helps to build thought leadership for your company within your industry. Interaction with content can indicate a prospect's sales cycle stage, which is crucial to marketing automation as it provides a reason to continue communications with that prospect.
- 8. Do you use more than one marketing channel a day?** Automation platforms can be used to manage multiple marketing channels such as social media, email, a blog, and web content. This results in increased efficiency for your team.
- 9. Do you have content specific to different buying stages or cycles, or different target audiences?** Diversifying your communications to cater to prospects in various mindsets keeps your sales funnel full and healthy. Marketing automation tools can help streamline the organization of several groups of leads at once.
- 10. Are you currently using an email marketing tool and wish it had more functionality?** Email marketing is far from being dead. Some free email tools do not offer much, but using an automated marketing email tool for ongoing communications with prospects can greatly benefit the sales process. With marketing automation tools, you can build targeted emails for different contact segments, and track the performance of those emails with advanced analytics.

If you answered yes to 7 or more questions, it's time for a marketing automation solution. [Contact us today.](#)