Time-giving Automation
The Way Back to Meaningful Marketing

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Courtney Kearney, CPSM
CKearney Consulting | Founder & Owner

- Wife, Mom & #DataLovingMarketer
- 20 years of experience – that's 41,600 hours!
- Started using CRM systems in 8th grade during my first internship
- Texas girl born and raised – Lives in DFW
- Teal hair, don't care
- Immediate Past President of the FW chapter

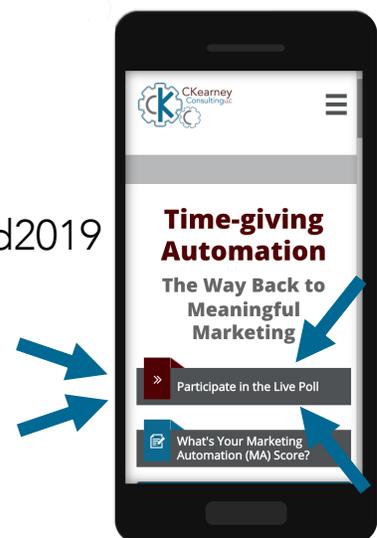CKearney Consulting | Heartland 2019 · #DataLovingMarkter

Agenda
Time-giving Automation

1. WHAT
   - Define Marketing Automation
   - Phases of Automation
2. WHY
   - Automation Benefits
3. HOW
   - Prepare
   - Implement
   - Keep Automation Going

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Interactive Session

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Time-giving Automation
The Way Back to Meaningful Marketing

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What's Your Marketing Automation (MA) Score?

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In one (1) word what does Marketing Automation (MA) mean to you?

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
- Overly 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 gives you time
- The way back to meaningful marketing

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What Is Marketing Automation?
Examples

- Out-of-office auto-reply is the basic mostly widely used automation
- Using Zapier to integrate your systems
  - Update your email platform with contact information from your CRM
- Sending client surveys during project milestones
- Lead generation tools and bringing leads into a CRM tool
- Drip campaigns
- Social Media automation for posting, reporting, etc.
  - Hootsuite, Sprout, HubStop

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Zapier
Update your email platform with CRM contact information
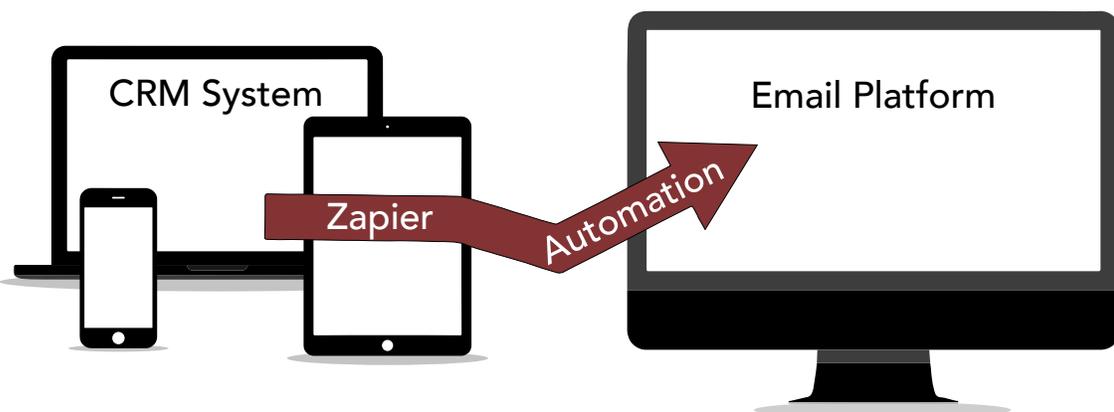
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Zapier

Start with the data entry into the CRM

Zapier

Then Zapier ZAPS the data

Zapier
Data is now in the email system

Search Campaigns and Contacts

Everything ⌄	super woman	✕

Advanced search keywords

Super Woman · superwoman@heroes.com
Cosential Contact Database

[View Profile]

mailchimp

What Is Marketing Automation?
The Things You Hate or Burn You Out

- Hate typing the same thing over and over? Text Expander
- Hate sending handwritten thank you cards? Postable.com
- Hate creating content? Paper.li
- Hate feeding the SoMe machine? Buffer
- Hate hunting for information and not having centralized data?
  Hate formatting resumes & project sheets? Proposal Automation Tools
- Hate getting interrupted with walk-ups asking for collateral?
  - Have standards on the server/intranet ready for others to print/email
  - Create and automate a form for staff to request custom collateral
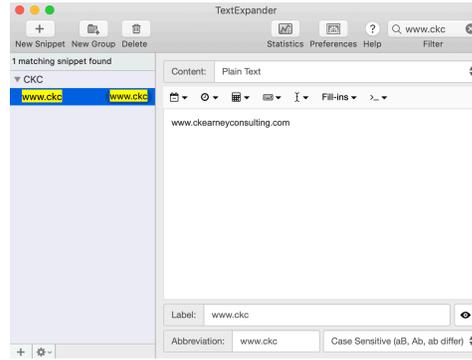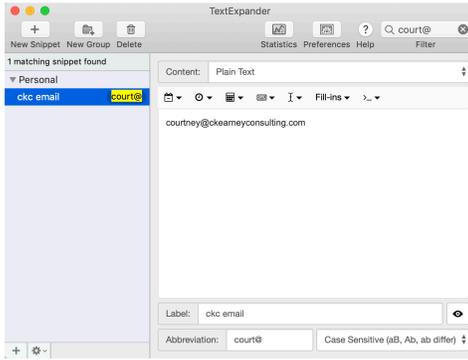
Text Expander

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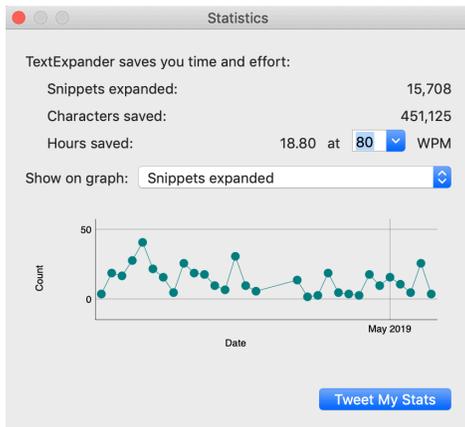
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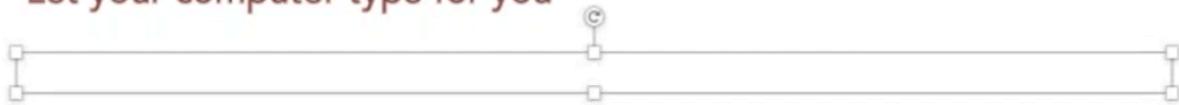
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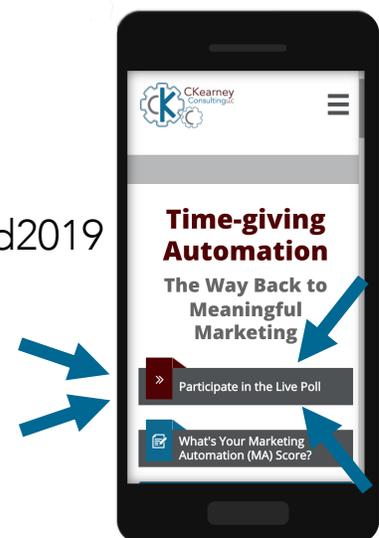
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Of the examples given, which one do you want to try first?

Using Zapier to update your email platform with contact information

Sending client surveys during project milestones

Basic collateral on the server/intranet and forms for employees to submit requesting custom collateral

Lead generation tools and bringing leads into a CRM tool

A service to send handwritten thank you cards

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Phases of Automation

Map the Process → **Focus on the HOW** → **Automate** → **Maintain**

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Phases of Automation
Benefits

Time / Labor Efforts

Efficiency / Effectiveness

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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

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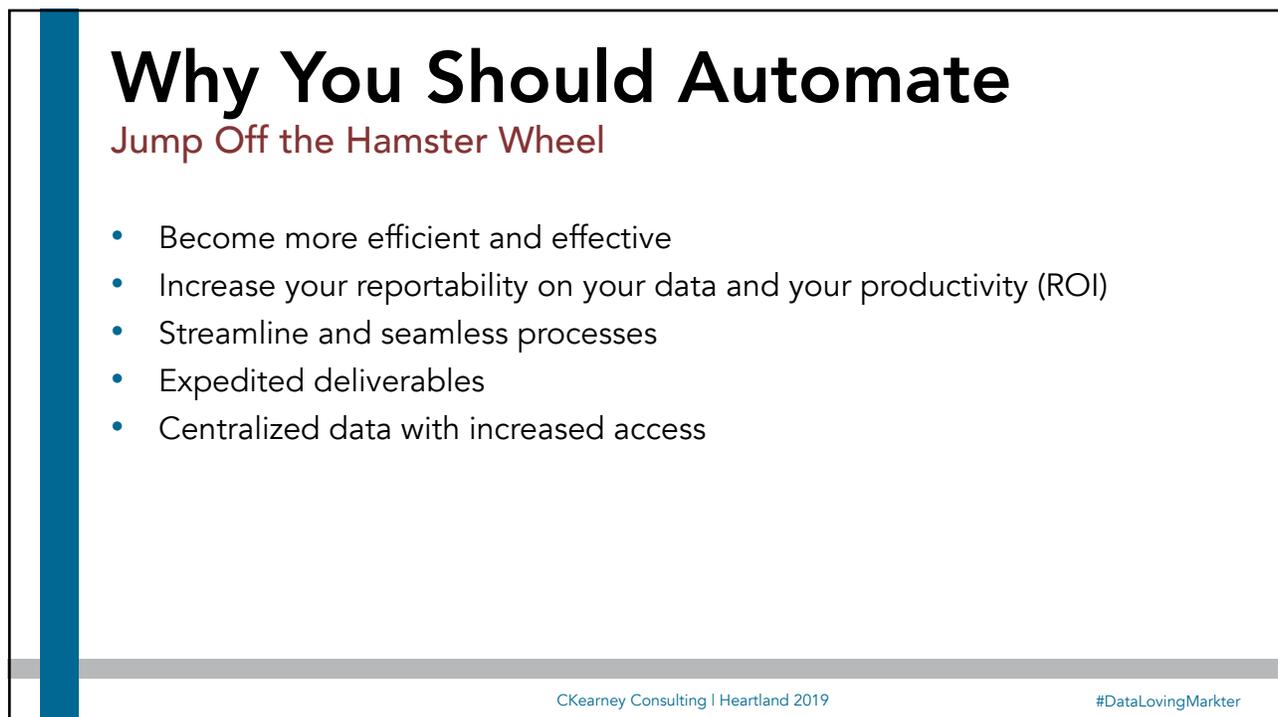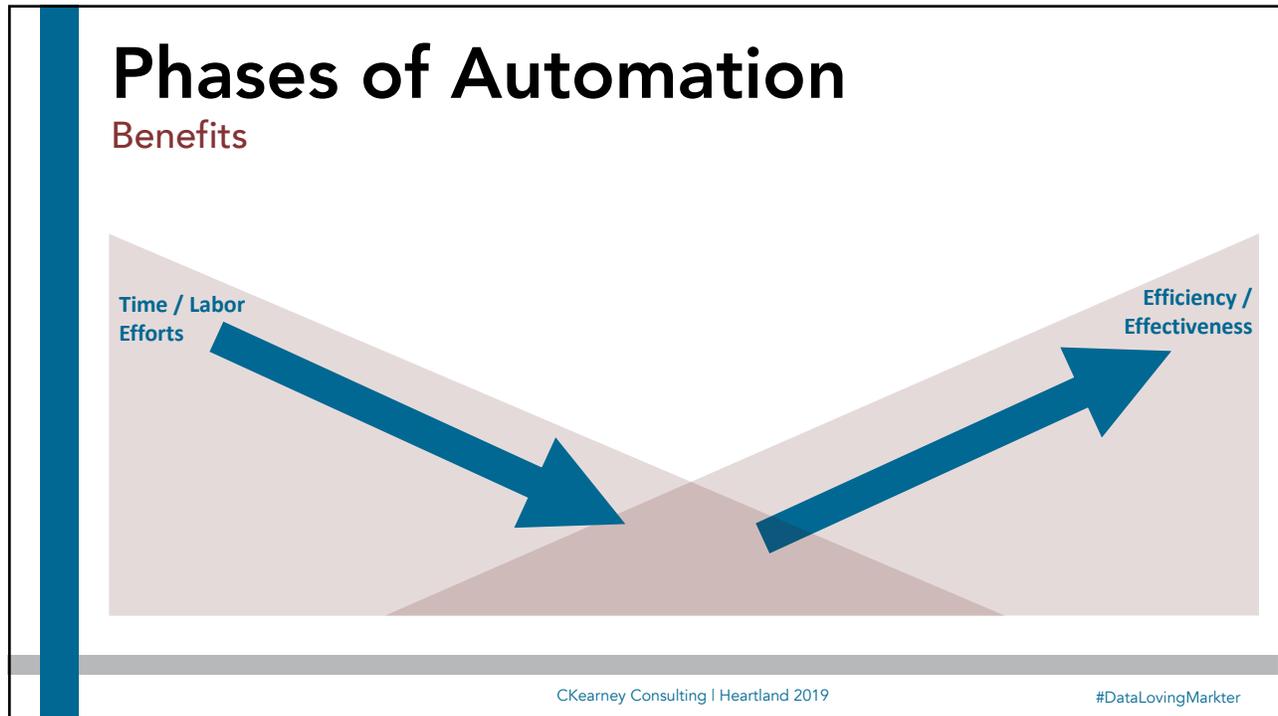
Why You Should Automate

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

Culture begins with…

YOU
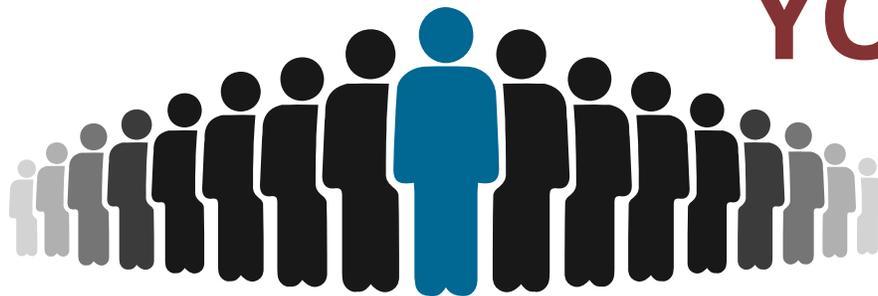
Prepare to Automate

01
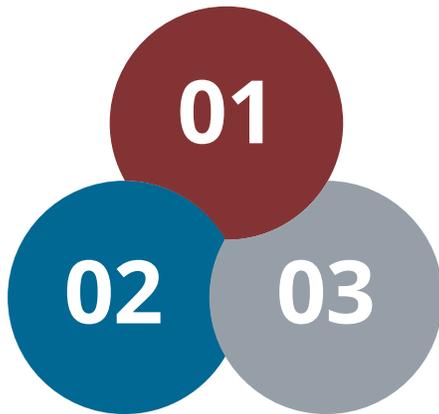
01 You

02 Others

Actions are contagious
Encourage others to join you
They too will pay it forward

02 **03**

03 Market the Change

Market your MA goals
Campaign the change
Communicate, communicate, communicate

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- Click What's Your MA Score?

Automation

The Way Back to Meaningful Marketing

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What's Your Marketing Automation (MA) Score?

⬇ 0-24 Points

⬇ 25-55 Points

⬇ 56-100 Points

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

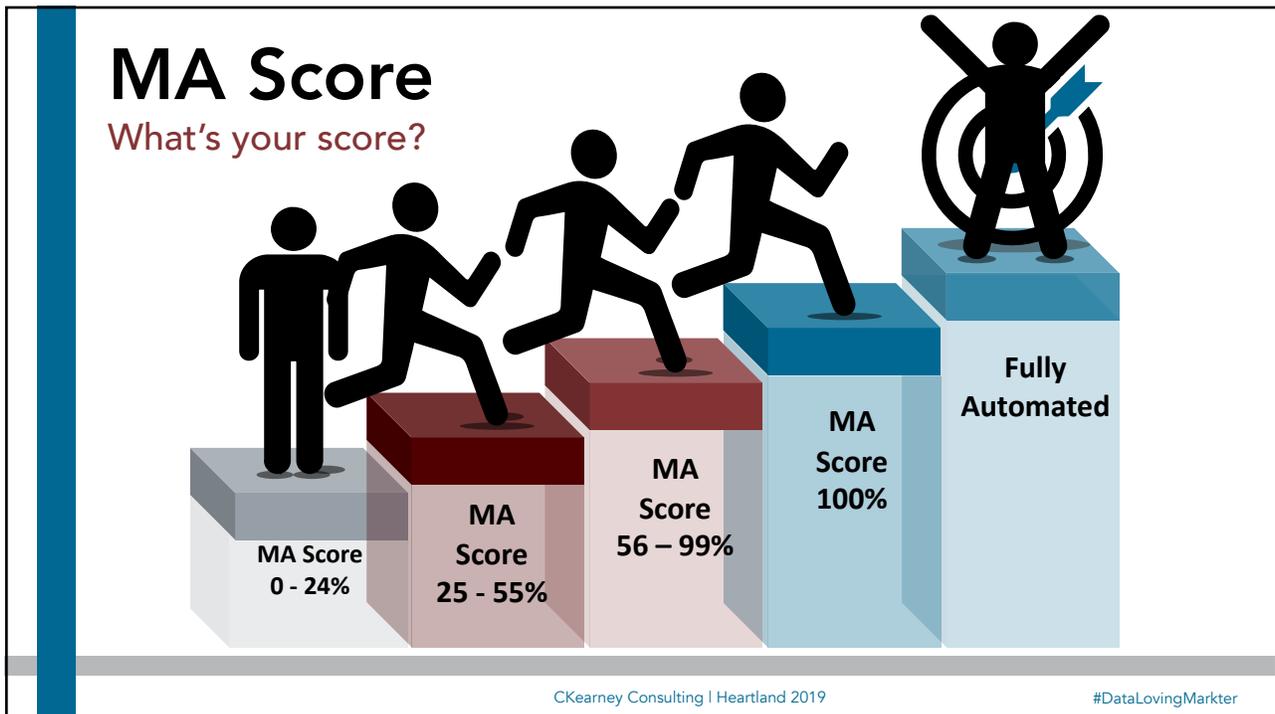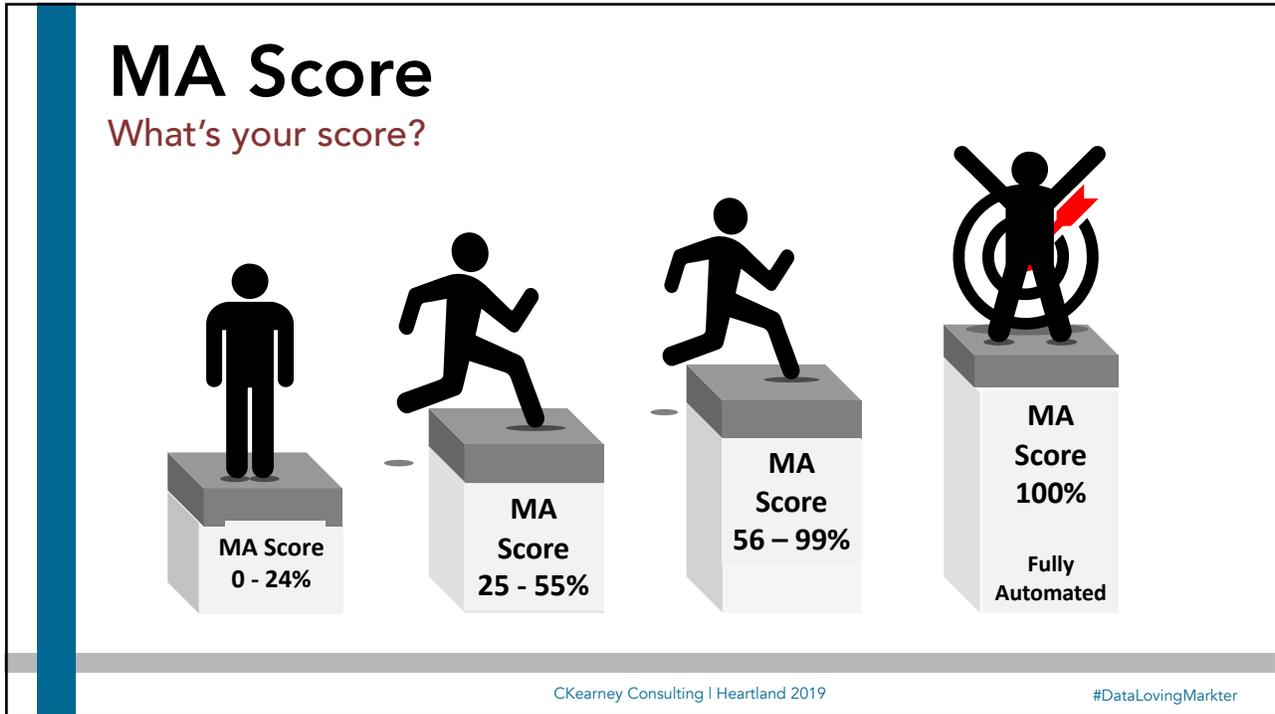CKearney Consulting | Heartland 2019   #DataLovingMarkter

MA Spectrum
Where do you fall?
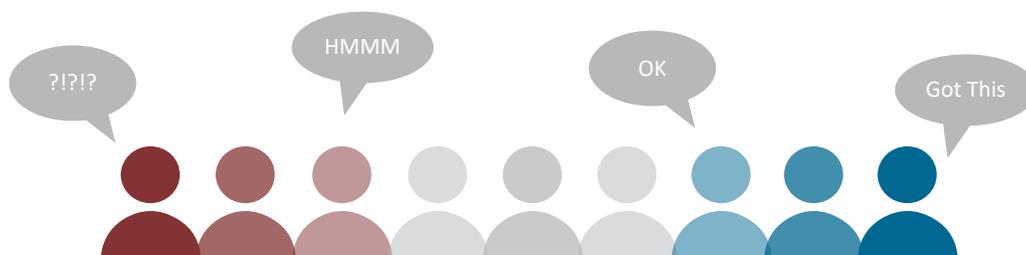
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MA Score Resources

No matter your score, we've got you

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

0-24 Points

25-55 Points

56-100 Points

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Additional Resources

What others are saying

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

~ **Nucleus Research**

Slides 2 / page

Slides 6 / page

Additional Articles

Automation is a Mindset

MailChimp Automation

HubSpot Automation

SalesForce Automation

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Still More to Cover
The way back to meaningful marketing

- What is Marketing Automation
- Phases of Automation
- Why You Should Automate
- Prepare to Automate
- Implement the Phases of Automation
- Keep Automation Going

Implementing MA

Get Your MA Score

Review & Document Your Processes

Stay Focused on the HOW

Baby Steps / Trial and Error

Rinse & Repeat

Prepare Yourself, Co-Workers and the Firm

Decide What Tasks to Automate

Start Automating

Maintain and Monitor

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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Time-giving 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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Share insights from your MA Score or ways you already automate your marketing tasks or objectives.

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