

Marketing Automation

The Marketing Game Changer

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We plan to regularly review and refresh this documentation so be sure to sign up for the [CKearney Consulting newsletter](#) on our website to be notified of updates.

Marketing Automation Scorecard

1. Do you have a marketing/business development process and/or system(s) in place?

| | |
|--------|-------|
| Yes | No |
| 25 pts | 0 pts |

2. Do you have your project lifecycle documented and mapped?

| | |
|--------|-------|
| Yes | No |
| 15 pts | 0 pts |

3. Do you have multiple marketing software channels and/or platforms?

| | |
|--------|-------|
| Yes | No |
| 15 pts | 0 pts |

4. Does your firm have more than one office, business units or division?

| | |
|--------|-------|
| Yes | No |
| 10 pts | 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 | No |
| 10 pts | 0 pts |

6. Is your leadership interested in measurable marketing objectives and analytics?

| | |
|--------|-------|
| Yes | No |
| 10 pts | 0 pts |

7. Would your firm benefit from transparent communication, reminders and clearly defined processes?

| | |
|--------|-------|
| Yes | No |
| 10 pts | 0 pts |

8. Could your firm profit from a 14.5% increase in sales productivity and a 12.2% reduction in marketing overhead?

| | |
|-------|-------|
| Yes | No |
| 5 pts | 0 pts |

PA Score Results

0 – 24 Points :: Prepare for Automation
25 – 55 Points :: Automation In Progress
56 – 100 Points :: Majority/Fully Automated

Marketing Automation Resources

25 – 55 points :: Automation In Progress

If you scored between 25 and 55 points, you have begun to automate some of your marketing functions and are liking on steps 6 or 7. You've started and are testing what works or doesn't work for you and your firm.

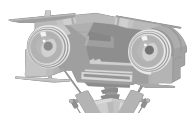


Automation In Progress

What's important now is to track your marketing automation as a marketing campaign and market it internally. Be strategic about MA, set goals, celebrate the wins and communicate all of it internally. It will build momentum, keep buy-in and help your MA processes and tools be successful.

Here are some examples of MA tools and tasks:

- 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
- Collateral on the server/intranet and forms to request custom collateral
- Lead generation tools and bringing leads into a CRM tool
- Proposal automation tools
- [Postable](#) to automate card sending
- [Drip campaigns](#)
- Content creation [paper.li](#)
- Social Media automation for posting, reporting, etc. - [Hootsuite/Sprout/Buffer](#)
- [Text expander](#) tools



Phases of Automation

Remember to work through the phases of automation and then repeat them regularly whether that's monthly, quarterly or annually. Review your processes, review how things are being done or need to be done and keep away from the "who" trap.

Play with automations in small increments and implement them one at a time. Then monitor and maintain those automations. Once you build momentum, capitalize on your increased efficiency and effectiveness and use that return of time wisely.

