

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

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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

- Get your phones out!
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In one (1) word what does Marketing Automation (MA) mean to you?

Start the presentation to see how to @CKearneyConsulting | Heartland 2019 #DataLovingMarketer

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

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

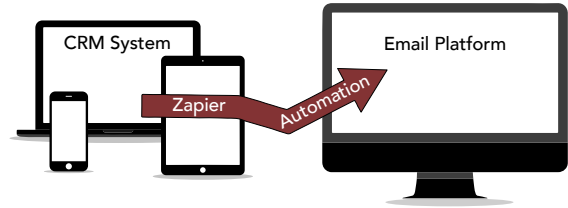
What Is Marketing Automation?

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, HubSpot

Zapier

Update your email platform with CRM contact information



Zapier

Start with the data entry into the CRM

Contact Summary Information		Add/Edit Image View LDAP	
Contact Name: Super Woman	Company: Test_Client		
Direct Phone:	Company Phone:		
Email: superwoman@superheroes.com			
Contact Information Additional Information History Add Contact Move Contact Edit Delete			
General Information		Business Address	
Name: Super Woman	Address 1:	Map Directions	
Nickname:	Address 2:		
Company Name: Test_Client	State / Prov:		
Contact Source:	Postal Code:		
Key Responsibilities:	Country:		
Project References:	Direct Phone:		
Status: Active	Extension:		
URL:	Cell:		
	Other:		
	E-mail Address: superwoman@superheroes.com		

Zapier

Then Zapier ZAPS the data

New Cosential Contact to MailChimp ON

1. TRIGGER

- New Contact
- Cosential
- New Contact
- Cosential Courtney @ [CKear...
- Text This Step

+

2. SEARCH OR CREATE

- Find or Create Subscriber
- MailChimp
- Find or Create Subscriber
- MailChimp (1.0.13) CKearney ...
- Edit Options
- Text This Step

zapier

Zapier

Data is now in the email system

Search Campaigns and Contacts

Everything ✕

Advanced search keywords

Super Woman : superwoman@heroes.com

Cosential Contact Database

View Profile

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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

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Text Expander

Let your computer type for you

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Text Expander

Let your computer type for you

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Text Expander

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Statistics

TextExpander saves you time and effort:

Snippets expanded: 15,708

Characters saved: 451,125

Hours saved: 18.80 at 80 WPM

Show on graph: Snippets expanded

Date: May 2019

Tweet My Stats

Hi Courtney,

Here's how you've been doing with TextExpander in the last month:

732 snippets expanded

1h saved

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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

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Phases of Automation
Benefits

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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

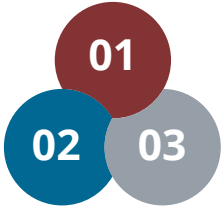
- Winning & Keeping**
- Saves Time and Money**
- Internal Clients**
- Working as a Team**

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Prepare to Automate
Culture begins with...

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Prepare to Automate



01 You

02 Others

03

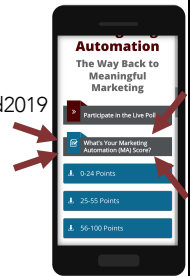
Actions are contagious
Others will join you
They too will pay it forward

Market your MA goals
What are they?
Communicate, communicate, communicate

Make the Change

Interactive Session

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- Click What's Your MA Score?

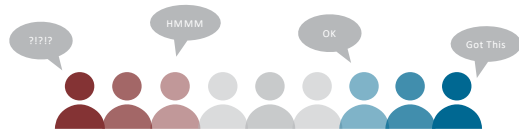


Marketing Automation Score

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

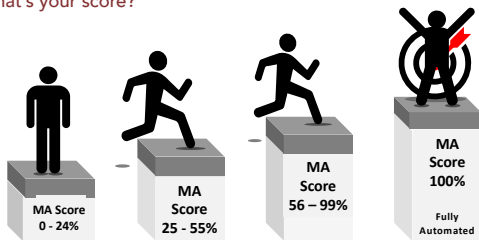
MA Spectrum

Where do you fall?



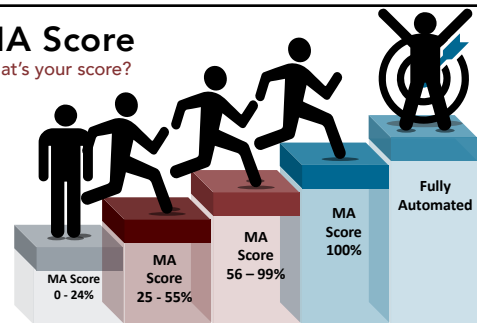
MA Score

What's your score?



MA Score

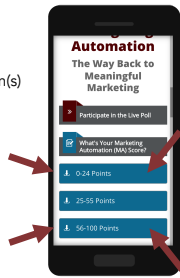
What's your score?



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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Additional Resources

What others are saying

“14.5% increase in sales productivity and a 12.2% reduction in marketing overhead”

~ Nucleus Research



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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

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Implementing MA



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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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