

Time-giving Automation

The Way Back to Meaningful Marketing

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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 |

MA Score Results

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

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Marketing Automation Resources

0 – 24 points :: Prepare for Automation

You are at the beginning stages of marketing automation (MA). We recommend you focus on the preparation step of implementing MA.



Prepare to Automate

Changing the culture and preparing your firm from MA starts with you. First you must shift your mindset from "who will do a task" to "how will it get done" then developing and maintaining the right habits. Thankfully you don't need any budget or approval to change your habits and thinking.

Take time to develop the following habits before moving forward with you MA efforts:

- Learn to ask the right questions
- Keep automation tools open at all times to populate and monitor (CRM, etc.)
- Take note of what actions and tasks you are repeating
- Document what missing information is reoccurring, where you find it and what you do with it once it is found
- Pay it forward to yourself, coworkers and company; pledge to diligently document
- Be patient and give new habits and actions time to spread and become contagious
- Market your MA goals and campaign the change
- Communication is vital to the success of MA

Scoring less than 25 points means you likely do not have a marketing / business development process and/or system(s) in place. This means your processes are undocumented and likely not mapped. These items are a great place to start.

A CRM system is one of the most common marketing/business development systems. Additional systems are HubSpot, Sprout, Hootsuite, Zapier, Mailchimp, Constant Contact, myEmma and SurveyMonkey.

If you do not yet have a CRM feel free to use the Competitive Analysis Worksheet on the next page. As an independent CRM consultant, Courtney Kearney created the following document in 2017 and regularly verifies and reviews the information to keep it as up-to-date as possible. If you see anything incorrect or inaccurate, please [email Courtney](#) as she wants to represent the most accurate data possible.

If you do not have your firm's project lifecycle documented and mapped, take the time to sit down with operations and create the documentation. Start with how you convert potential clients into clients as well as how you maintain and keep the clients.

Once you've won a project, how does that client interact with your firm? What is their experience interacting with the firm before, during and after a project? Once you have the process mapped and the answers to all your questions documented, the next step is to review the lifecycle to see where you can capture key project facts and data. Afterwards, review the process again for parts you can automate; remember to focus on how it will get done and not who. Automation is about developing and maintaining the right habits.

If you have multiple software channels and platforms, regularly review how they integrate. If they do not pass data to one another, should they? Is there duplicate data entry or inconsistent data causing integrity issues? Which system is identified as the single source of truth? Is it clear to users what information is entered where and why?

Automating communication and notifications can connect offices, business units and divisions allowing for increased transparency. A centralized data source is key when managing multiple locations. For example, it is no longer feasible to share one Excel file for all your pursuits with a more complex structure. Using automation from that single source of truth increases data integrity and reliability.

According to Nucleus Research, “marketing automation drives a 14.5% increase in sales productivity and a 12.2% reduction in marketing overhead.” See the Salesforce article these stats are quoted in and additional MA publications shared on <https://ckearneyconsulting.com/heartland2019>.

Feature	Explanation	AEC CRM's						Generic CRM's			
		Cosential	Deltek Vision	BST	Deltek Alera	SalesForce	SugarCRM	Pipedrive	Insightly		
Outlook Integration	MS Exchange, Ethos plugin, full Outlook contact sync	✓	✓	✓	✓	✓	✓	✓	✓		
API/integrations	Integration with all essential database systems through JSON Based API	✓	✓			✓	✓	✓	✓		
Cloud Based	Access database on any device with web access	✓	✓		✓	✓	Limited	✓	✓		
Custom Fields	Customize, create or rename existing fields	✓	✓	✓		✓			✓		
Proposal Automation	Integrate accounting, project records to prepare marketing proposals	✓	✓								
Mobile Application	Add/dict. activities/contacts, opportunities. Search project records, mapping capabilities	✓	✓			✓	✓	✓	✓		
Work Flows	Trigger alerts/notifications to assigned users, Workflow assignments based on stages	✓	✓	✓		✓	✓				
Monthly Pricing Per User	Pricing per user	\$25-\$55, \$95	Hidden	Hidden	Hidden	\$75, \$150, \$300	\$40 / \$65	\$12-\$75	\$15-\$129		
Personnel	Personnel module for resume data	✓	✓	✓							
Publishing	Generate documents in Word or iDesign	✓	✓								
Project Management	Project Life cycle tracking	✓	✓	✓	✓						
Reporting	Flexible reporting engine, no programming required	✓	✓	✓	✓						
Revenue Forecasting	Soft backlog revenue forecasting	✓	✓	✓	✓						
Email Marketing	Targeted email marketing campaigns based on contact mailing lists	✓	✓	✓	✓						
Card Scanner Mobile App	Business card scanner to capture companies and contacts	✓	✓								
Spreadsheet-Like Interface	Editable spreadsheet-like user interface	✓	✓								
Support	24/7 online, phone support included in all plans at no added cost	✓									
Contact Management	Associate key relationships between personnel and contacts	✓	✓								
Customer Success	Dedicated customer success rep for on demand assistance	✓									
Pre-Built Dashboard	Pre-built interactive dashboard widgets	✓									
Implementation	In-house implementation staff with AEC experience, background	✓									
Accounting Integration	Data Connector with an AEC Centric Accounting System	✓	✓								
Document Storage	Unlimited cloud storage of documents at no cost	✓									
Website											
Live Chat	Access to live support on website	✓	✓	✓	✓	✓		✓	✓		
Contact Us Form	Submit help requests and trouble tickets	✓	✓			✓		✓	✓		
Searchbar	Quick search for records	✓	✓			✓		✓	✓		
Webinars	Regular training webinars on CRM specific topics	✓	✓			✓		✓	✓		