

What is sales and marketing automation...

...and why should I care?

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Agenda

1. The world's quickest intro
2. Housekeeping: Q&A, Audio, Recording
3. Why does sales and marketing automation matter?
4. Five ways it transforms how you market and sell
5. Choosing the right software
6. Tips to start sales and marketing automation right now

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Why does sales and marketing automation matter?

“I wish I could get more cold calls and attend more tradeshow.”

- No customer ever





A definition

- Mechanization of time-consuming tasks using software or AI.
- Helps manage responsibilities that your team members do regularly.

Combined with a customer relationship management system (CRM) and excellent content, **marketing automation enables your company to create personalized customer experiences** that help you grow.

HubSpot

Progress®
Sitefinity®

Marketo™
An Adobe Company

salesforce pardot

mailchimp



Key benefits

Marketing

- Greater personalization
- Campaign targeting
- Campaign effectiveness
- Campaign measurability
- SEO

Sales

- Qualified leads
- Lead nurturing
- Close rate
- Collaboration
- Knowledge management

Business

- Productivity
- Accountability
- Employee satisfaction
- Customer satisfaction
- Reduced overhead
- Financial growth

Greater ROI for sales and marketing efforts



#1

**It makes it easier for your customers
to do business with you.**



#2

You can personalize your customer interactions and experiences.



#3

Your website gets transformed into a lean, mean converting machine.



#4

**You can build on what works,
and stop doing what doesn't.**

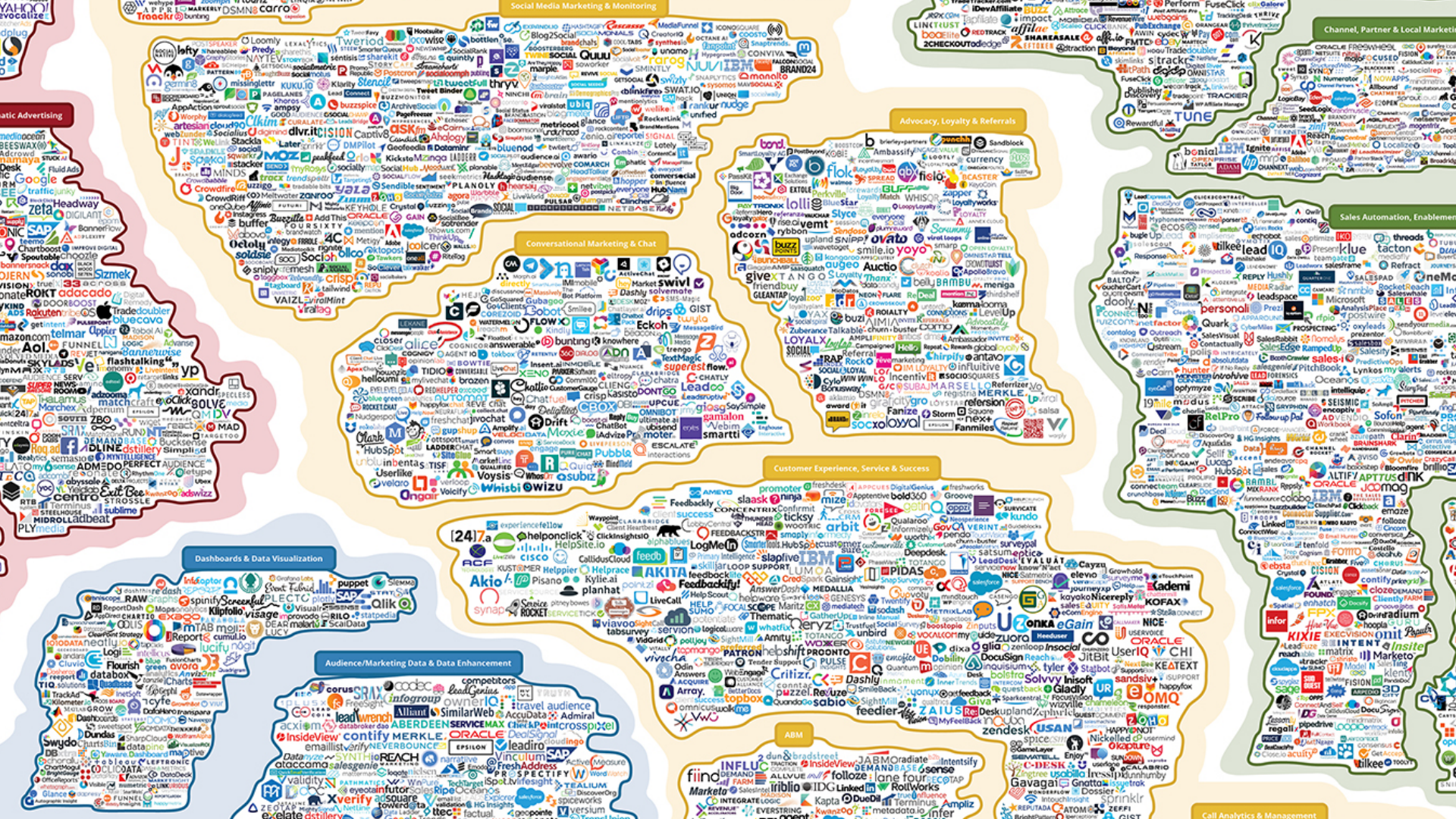


#5

The marketing and sales gap disappears.

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Choosing the right software

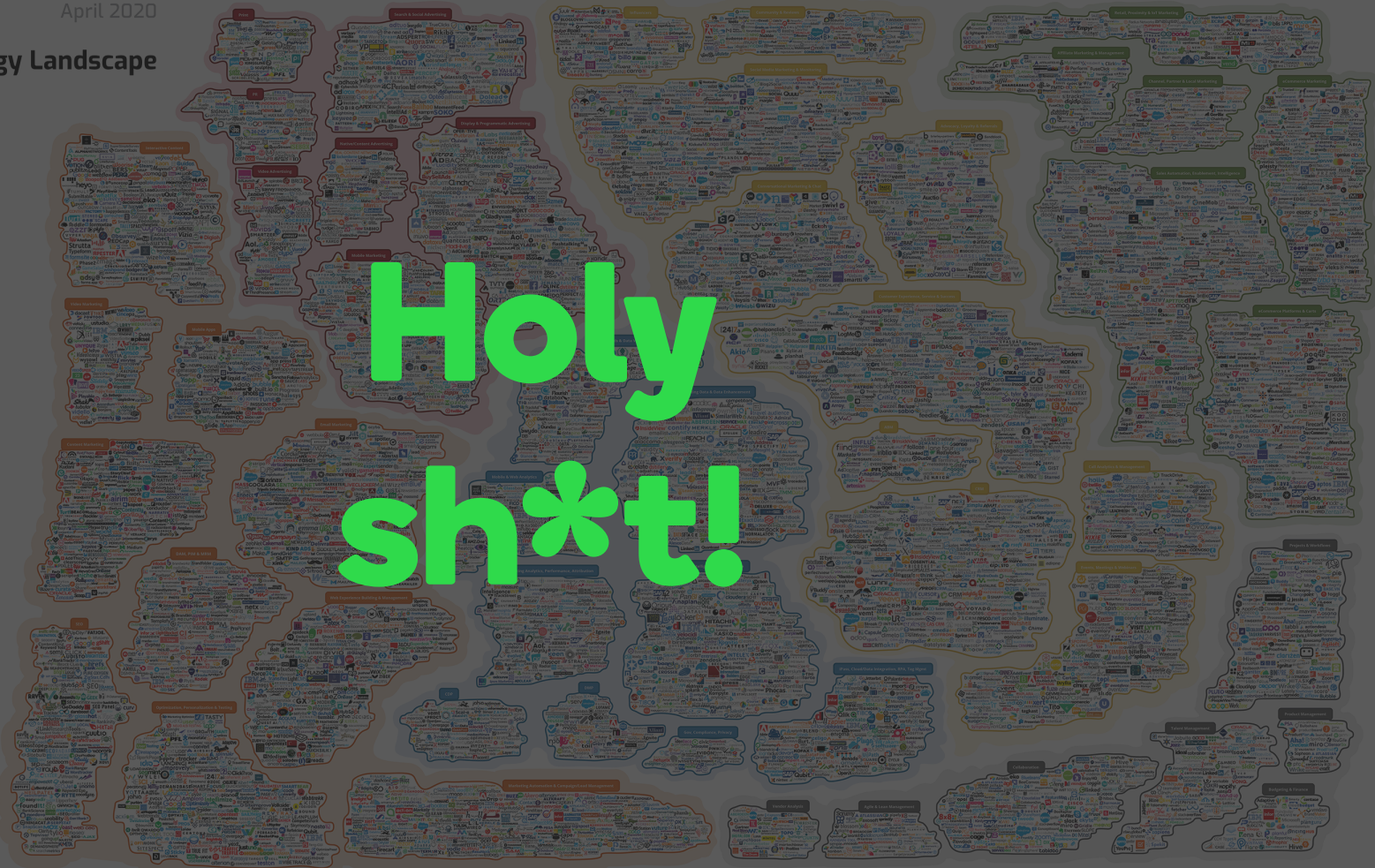
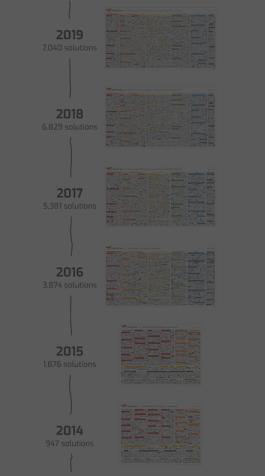


Marketing Technology Landscape

The Martech 5000

Total Solutions	8,000
Advertising & Promotion	922
Content & Experience	1,936
Social & Relationships	1,969
Commerce & Sales	1,314
Data	1,258
Management	601

Access all the data of this landscape & more at martech5000.com



Holy sh*t!

Let's make this simple.



Your choices:

1. Standalone or “best of breed” software
2. All-in-one or “full funnel” systems

Build Your Flywheel

- Start with what you're already using.
- As you scale, consider what the risks and rewards of other technology.



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**How to start your sales and
marketing automation *right now.***



Personalized Tip Sheets

www.flywheelstrategic.com/sam



Not yet?





Not yet?

Build the Business Case

1. How does your team spend its time?
2. Does your technology help you?
3. Can you survive the status quo?
4. Is your content supporting your business?
5. What expenses can be reallocated?
6. Who is likely to champion internally?

Find the opportunities.
Identify roadblocks.
Doing nothing is an option.
Make the relationship matter.
Don't introduce more costs.
Be a leader.

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**How to optimize your sales and
marketing automation *right now.***

Slow start?





Slow start?

Build Momentum

1. Have you built alignment?
2. Are you solving pain points?
3. Are you celebrating?
4. How are you training?
5. What processes are in place?
6. What's your roadmap?

Confirm with personas and journeys.

If it ain't broke, don't fix it.

Motivate with metrics and quick wins.

Make it relevant and digestible.

The tool is not the answer.

Build your flywheel.



Recap

Enables your company to create personalized customer experiences

1. Easier for customers
 2. Interactions are personalized
 3. Your website can get to work converting
 4. You know what works and what doesn't
 5. No gap between sales and marketing
- Build Your Flywheel
 - Best of Breed or Full Funnel
 - Just starting? Build a Business Case
 - Slow Start? Build Momentum

Personalized Tip Sheets

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Your questions

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