



Professional Services

# Marketing Automation Strategy

Strategic & tactical planning to  
set directions to best leverage  
your automated marketing.



# Marketing Automation Strategy Services

Marketers know automation in their marketing is important, yet more than half of business don't have defined plans, or a tactical strategy around it.

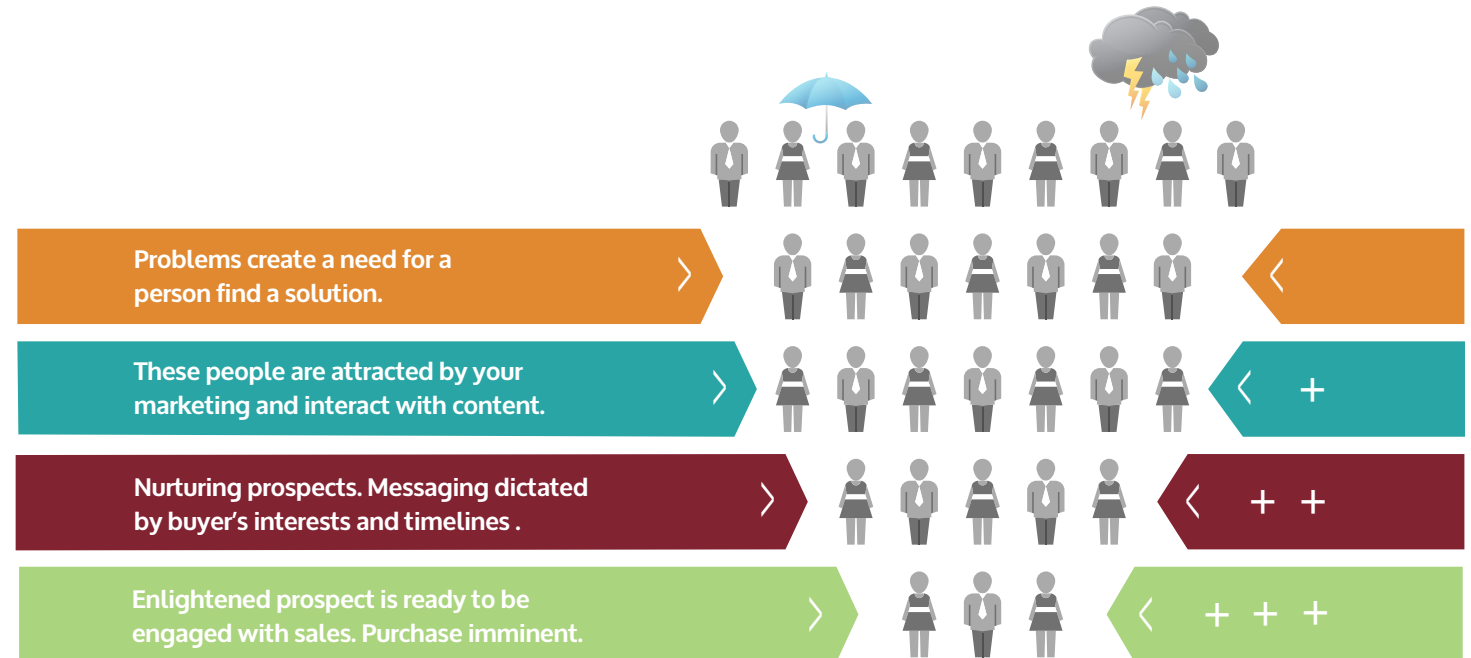
If you have no clear strategy in place, don't panic. Developing an automation strategy may require resources, however it is extremely worthwhile. And, Act-On Professional Services can help.

We will work closely with you to understand your business, target markets, buyer profiles, goals and content needs and help you develop a foundational marketing automation plan. We will make recommendations and map out a detailed strategy to drive success of your marketing automation programs and lead management processes. If you need more than marketing automation strategy, we can help you with a comprehensive strategic marketing plan.

With options of services, our team is ready to help you plan and execute your next automated marketing initiative. Whether you need help creating a strategic marketing plan, advice for planning campaigns, tips for developing a successful content strategy, or an extra set of hands to help you implement tactics or manage leads and improve demand generation.

## A defined strategic systematic approach will significantly improve marketing automation return on investment.

Generally, as people begin to read or interact with your content and messaging, many companies assume this is interest in their services. The reality is, these people are really only indicating that they have a problem, and for a moment, they are researching whether or not you can help them.



An effective marketing program walks with the buyer on this journey by helping them to: quantify their problem, understand how your product or service provides a solution, and differentiate why your solution is best for them. Trying to manage this process for hundreds or thousands of individual leads is impossible without using marketing automation. Professional Services will help you develop a systematic approach to anticipate and accommodate your buyer at every stage of the buyer's journey, making your digital marketing more effective and increasing your ROI.

# Strategic consulting & tactical planning to meet your marketing goals

We've developed services packages that help you plan and execute your marketing initiatives. Marketing Program Assessment (MPA) that focuses on your entire plan. And, Marketing Automation Program Strategy (MAPS) that dives deeper into specific automated programs.

## MPA

### Marketing Program Assessment \$ 4,000

The MPA consulting package is for marketing teams that are deliberate with their marketing automation deployment. A strategy expert will work with you to understand your customer demographic and behavioral personas, and organize your list architecture and segmentation to reflect these strategic initiatives.

- » Define marketing automation goals and metrics
- » Create segments with existing customer database, including customer pain points, interests, lead source, product interest, define audience, and assess database by persona
- » Perform demand gen or marketing automation gap analysis. Including: Assess relevance and quality of the defined audiences, quantify assets and content to be used for funnel stages, deliver a recommendations report on lead flow process with forms mapping, lead scoring set up, as applicable, social media connectors, alerts set up, automated programs and workflows, resources to execute on the program
- » Provide a recommendations report on offers and calls to action strategy
- » Identify informational, education, thought leadership content available for target audiences and buy cycle stages
- » Provide platform and campaign-level review and analysis

Package includes marketing programs assessment for one business vertical, additional consulting hours are recommended for customers with multiple target audiences.



**51% of businesses are using automation strategies, and 58% of B2B companies are planning to use it.**

— Emailmonday  
Digital Marketing Study

A strategic MA plan can give you a competitive edge on nearly half of your competitors.



# MAPS

## Marketing Automation Program Strategy

\$ 7,000

The MAPS consulting package is ideal for marketing teams who are looking to maximize their investment into marketing automation. Our strategy expert will work with your team to document your target buyer personas, define the buy cycle stages relating to a marketing automation communication strategy. Based on this discovery process, messaging and content topics will be defined, and automated workflows will be documented to provide your marketing team clear direction as to what offer content should be developed in Act-On to maximize audience responsiveness. Our expert will assist you to:

- » Define marketing automation goals and metrics
- » Perform background research on industry and client provided competitors
- » Make recommendations for additional content or content changes
- » Target audience definition including definition of segments and buyer personas using Act-On template
- » Buy cycle definition and buyer's journey map
- » Create program strategy map including email messaging strategy
- » Diagram what needs to be built, how leads flow between programs/channels, how to move customers through the buy cycle stages

This engagement develops three key personas and the content/messaging strategy for one business vertical. Additional consulting hours are recommended for customers with multiple target audiences.



58% lack of strategy  
42% sales alignment

**“Lack of an effective strategy** is the most significant barrier to marketing automation success for **58%** of best in class businesses. An effective strategy requires a unique combination of experience and skills.”

— Three Deep Marketing & Ascend2 research study

**Additional:** Content and data migration, and custom design are not included. These would be additional services and will need to be estimated. Templates are branded to match the styles of your current website; any templates produced will be created using pre-designed email and landing page layouts. This does not include copywriting, custom design work, or any production content.

Act-On customer relationship management (CRM) software integration is for Salesforce, Sugar, and MS Dynamics. Any CRM integration will need to be estimated. Prices are subject to change.



## Additional Services

### Fast-track Onboarding

Delivering a branded toolset in a smart time frame, with deployment options that best leverage your marketing campaigns.

### Campaign Dev & Programs

Get help with automating the processes that drive successful campaigns, whether nurturing leads or moving customers through the sales cycle.

### Custom Training

Learn from several training tools and options for you to get the most out of Act-On, from instructor-led training to self-paced on-demand videos.

### Deliverability & Reputation

Make sure your emails arrive in the inbox and your sender reputation stays pristine with Act-On's expert email deliverability consulting.

### Content, Creative & Design

We can help with email and landing page production assets or templates, as well as content such as white papers, blog posts, and social media.

### Onboarding Migration

From account setup to content and data migration, we'll make sure you're primed for success as quickly as possible. We are ready to help.

Want to turbo-charge your Act-On performance? Please consider these other services. For a full listing of services, see our complete [price guide](#).



## Professional Services

Serving Act-On subscribers with best-in-class strategy and creative. Driving customer success with effective methods to enrich their customer experiences during each stage of the sales funnel, from lead generation to closed deals.

## About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value.