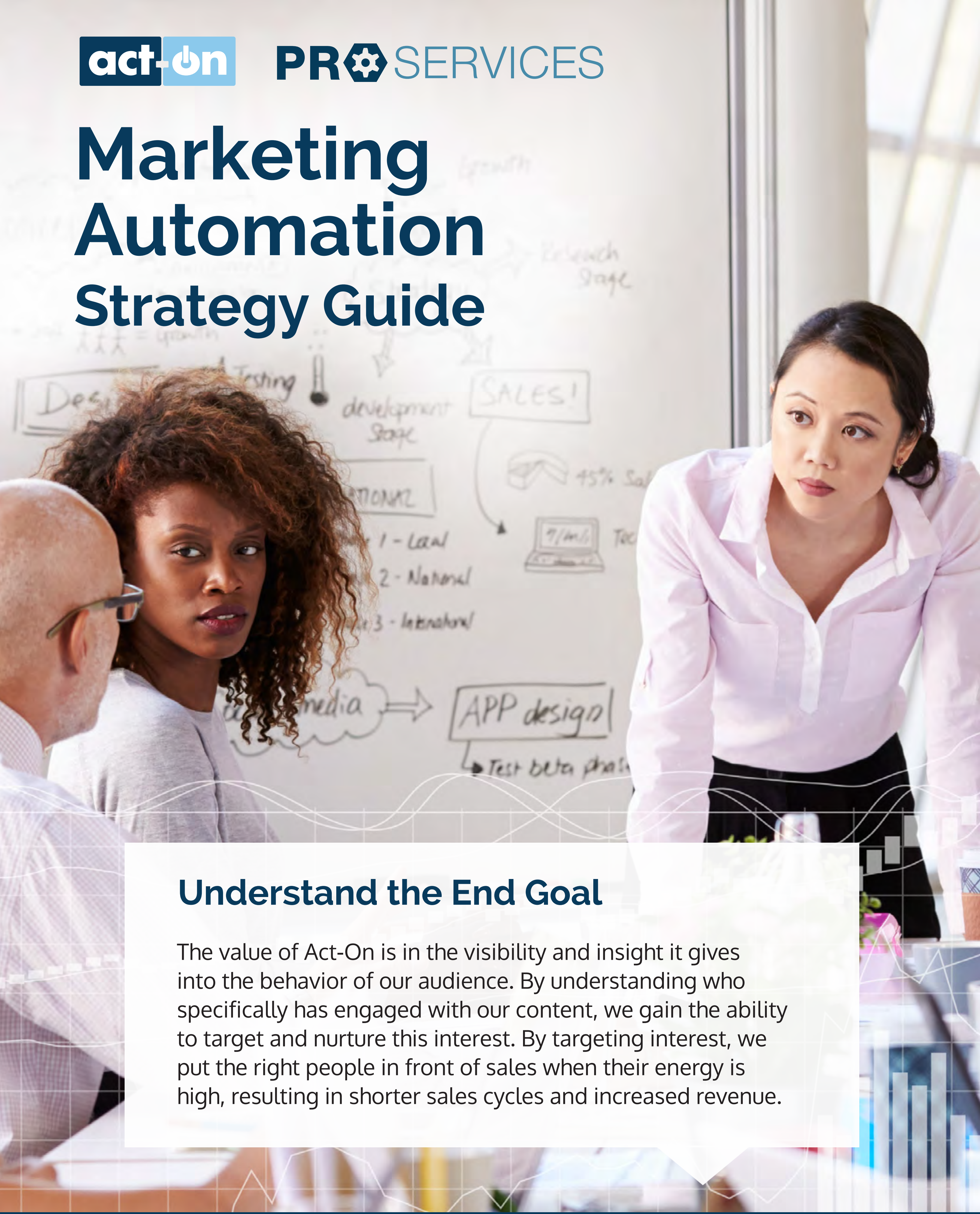


act-on PRO SERVICES

Marketing Automation
Strategy Guide

Understand the End Goal

The value of Act-On is in the visibility and insight it gives into the behavior of our audience. By understanding who specifically has engaged with our content, we gain the ability to target and nurture this interest. By targeting interest, we put the right people in front of sales when their energy is high, resulting in shorter sales cycles and increased revenue.

Introduction

Act-On Software is marketing automation software designed to help you better connect with your market by facilitating your brand efforts, demand generation efforts, and expanding your prospect nurturing efforts to remain connected.

This document is designed to be a guide in best practices for marketing using Act-On Software. We will cover marketing tactics and strategy, including the psychology of human decision making, and how to leverage this knowledge to improve conversion at every stage of your marketing funnel. We will explore what tactics to use, why we use these tactics, and how to do this in Act-On.

It is important that this document not be viewed as a comprehensive manual on operating Act-On or a training manual on the features, functionality, or capability of the platform, as there are other resources to accomplish these objectives.

PRO SERVICES

This document is a production of Act-On's Professional Services team. We offer full service digital marketing services exclusively to Act-On customers to help augment your current team.

A consultation call can be scheduled with one of our Marketing Automation Strategists by reaching out to your Customer Success Manager or Sales Manager.

What's Inside

TOC

Marketing Automation Principles

Most marketers have familiarity with marketing funnels, buyer journeys, and content marketing. In this section, we are going to develop these ideas in order to show how they are executed in Act-On. It is very common that marketers feel they “already know” much of what is discussed in this section.

Goal of Marketing Automation

The ultimate goal of any marketing activity is to increase conversions defined by key metrics as determined by the executive team. Whether this is B2C purchases, B2B relationships, or engagements with customers, our goals are going to be simple and straightforward.

6 Simple Goals

1. Define our target audience
2. Gain that audience’s attention
3. Identify who is actively engaging with us
4. Nurture that engagement into conversation
5. Track and measure conversion metrics
6. Leverage relationships to create customers

By understanding our audience, it becomes very easy to anticipate behaviors and prepare automated marketing programs.

In Act-On, this methodology is summarized into the stages “Attract, Capture, Nurture, Convert, and Expand.”

This is an effective marketing methodology as it directly correlates to the way humans make decisions, and allows you to create a highly customized automated marketing program that is personalized to the needs of your audience at all stages of their life cycle.

Preparation

Personas, Content & the Buyer's Journey

Speaking to a Defined Audience

Though we are developing mass communications, the goal is to engage in person-to-person marketing and communication. Following are principles that can be used in marketing that will allow you to position information in a highly effective manner for maximum impact during the buyer's journey.

Buyer Personas

To connect with a person, you must understand a person.

Though we are developing mass communications, the goal is to engage in "person to person" marketing and communication. As such, defining the audience by who they are, and the specific interests and challenges that they have, is critical to our process.

A buyer persona is a semi-fictional representation of your target client that enables effective segmentation, targeting, and content creation. Your buyer persona should include a short bio of a typical client, a description of the person, and includes information on the:

- Person's background
- Daily activities/behavior
- What's important to this person

Three Core Personas

Nearly every company has three core personas:

Decision Maker

The person who owns the budget approval.

Influencer

The person who recommends the solution.

User

The user or participant of a product/service.

Critical Questions for Personas

When defining buyers, there are three key questions to ask:

What problem does this person have that will cause them to need this?

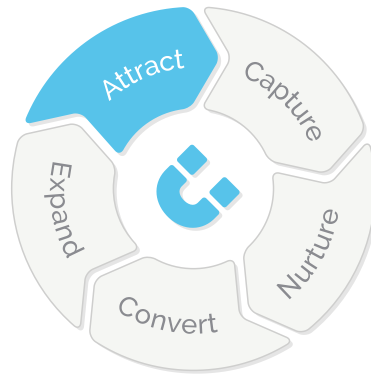
What solution do I provide to their problems?

Why am I their best option?

The answers to these questions will be insightful for your funnel oriented content strategy.

**Read More
@ Act-On Buyer Persona Guide**

Psychology of Content



Developing engaging content and messaging can be a challenge. The most common mistake made is that content is either written from the perspective of the organization, or it's written with the wrong priorities.

The most common content mistake is designing content to "educate," not to "persuade." These are vastly different priorities that require very different tactics. Simply offering a better way is never enough.

There are a handful of principles that can be used in our marketing effort that will allow you to position information in a highly effective manner for maximum impact on the minds of your audience. Here are a few key principles to keep in mind when developing any content:

Collective Credibility

The recognition, awards, and certifications your organization has earned should be proudly displayed. These add tremendous credibility on a subconscious level and can have a very substantial impact, especially in your prospect's decision making processes.

Fear of Loss

People are afraid to lose what they have unless there is an imminent threat that requires them to give it up. This means that an investment into a current idea or strategy requires them to lose what they feel they have worked hard to attain. Creating a feeling they will lose something they possess, or miss out on something good, they become primed for change.

Familiarity

People are wired to sort other people and organizations into "friend or foe" (in group and out group), and will make assumptions about who or what you are before considering what you have to say. Introducing yourself with a brand that resonates with your audience is critical to gaining their attention and trust.

Feelings First

The human brain is wired to process everything through a filter of "feelings first." No matter how much evidence or data is presented, most decisions are made based on trust, relationship, and confidence. By understanding that data doesn't speak for itself, we can appeal to and affect the emotional part of human decisions.

Overconfidence

People will default to believing their way is the best way, and the "way things are" is just fine. It is important to challenge these ideas in our marketing message with risks. The confidence in "the way we've always done it" can only be disrupted by introducing reasons to change.

Simply offering a better way is never enough

Content for a Buyer's Journey

As you are looking at your organizations content matrix, you may be wondering what you can use and what gaps might exist. As we look at the various delivery methods (e.g. whitepaper vs. infographic), it is also important to consider where in the customer lifecycle this content fits.

With Act-On, we will aim to develop stage appropriate content that helps to attract your audience, nurtures them through a learning process, and ultimately improves conversions in that area.

How Humans Make Decisions

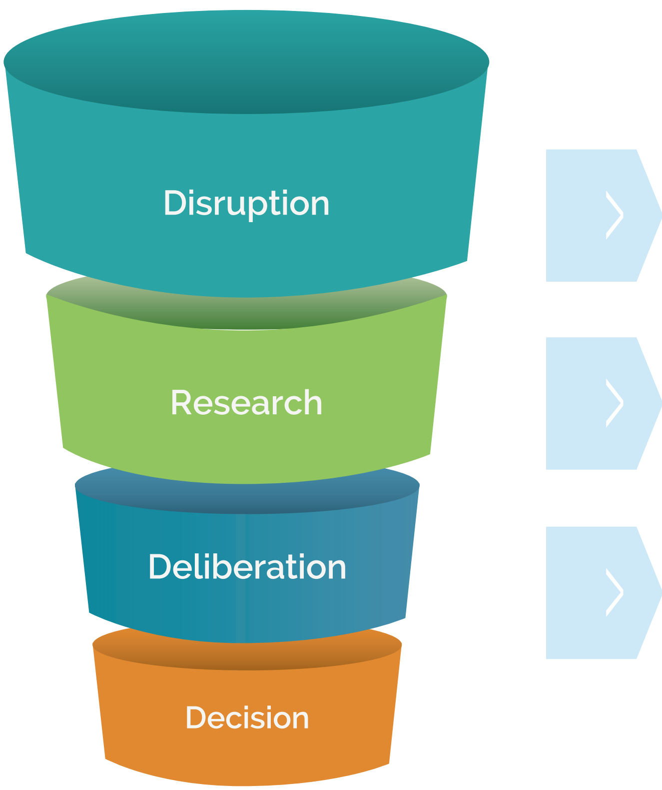
Status Quo
"I am unaware of any problem."

Disruption
"I have become aware of a problem, yet not sure what to do about it."

Research
"I am actively looking for solutions to this problem, and trying to sort through information."

Deliberation
"I've narrowed this down to a couple of options, and I'm weighing out the pros and cons of each."

Decision
"I have decided to act on the information I've collected."



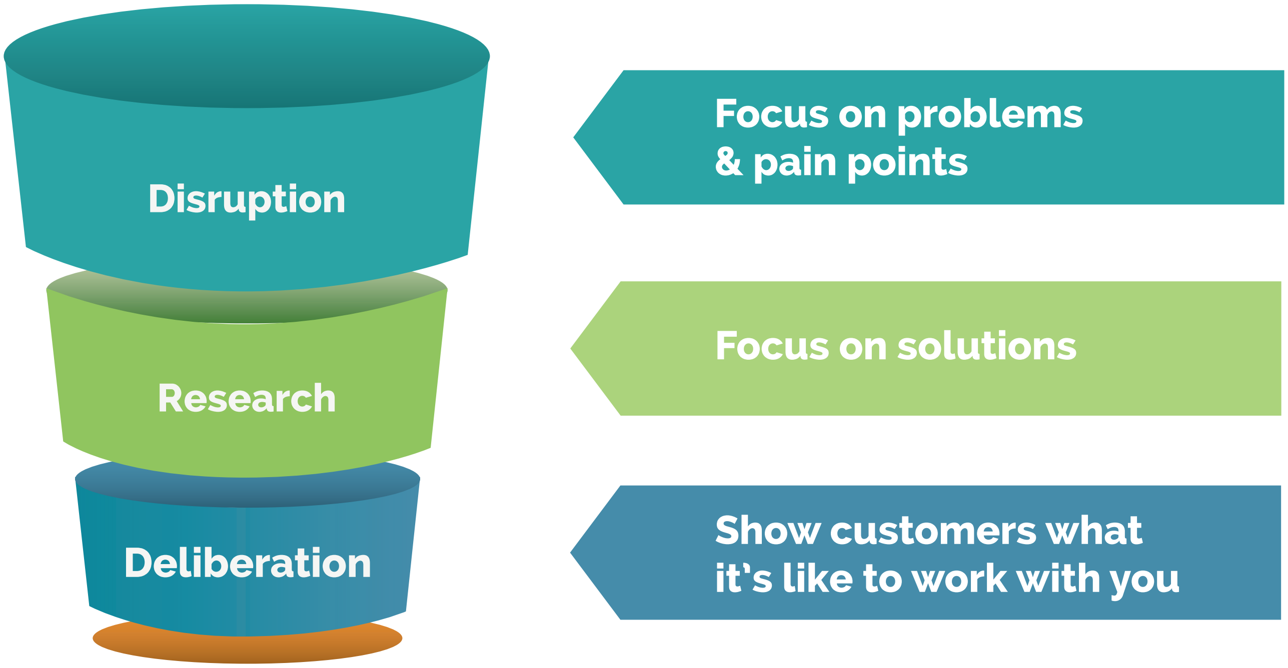
What problem is the buyer facing?
What would cause them to need our solution?

How does this solve their problem?
How can we help?

Why are we their best option?
Why should they decide Now?

As people move through this decision making process, their need for specific types of information changes. By sorting our audience into these levels of engagement, our marketing content and messaging can be customized and tailored to improve progression through the marketing funnel, and accelerate the prospect's progression to a purchase decision.

At each of these stages, the type of content delivered changes, as do the delivery mechanisms.



Asking unengaged audiences to make a buying decision is usually ineffective; however, focusing on this type of messaging and content once your prospect has previously engaged with marketing resources is highly effective at accelerating decision making time lines.

In your attraction, engagement, and branding efforts (top of funnel) you will typically focus on big picture content using social media, advertising, PR, and other public facing resources. The goal of these efforts should always be to drive named individuals into Act-On through Act-On forms or clicks on Act-On emails, as the functionality of Act-On will allow rich, in depth behavior profiles to be created and enable further targeted marketing effort.

In your nurture, solution, and education efforts (**middle of funnel**), you will typically focus on educating prospects with research oriented materials, white papers, eBooks, and other specific product information relevant to their identified needs.

Even if you know that a prospect is an ideal candidate for this type of information, if they haven't previously engaged in your top of funnel, it is likely to have limited impact.

In your conversion, sales enablement resources (bottom of funnel), you will typically focus on asking your prospects to take an action, often this is setting an appointment with a sales person.

Complete Marketing Process Overview

Segmentation

The First Step to Automation

Act-On has one of the most sophisticated segmentation engines available on the market today. Creating segments is an investment of time that pays off big in the end! Follow these steps for thinking through six core segments of your automation.

Segmentation

The First Step to Automation

Act-On has one of the most sophisticated segmentation engines available on the market today. It allows you create dynamic segments that automatically refresh on any system engagement. For a full tutorial on segmentation in Act-On, we encourage you to visit the Act-On University training on segmentation.

Dynamic segmentation based on profile (intrinsic) and behavioral (extrinsic) attributes is typically the first form of automation Act-On customers start with. Using sub-segments, you can create very granular views into your database.

To the right is an example of using profile and behavioral segmentation on a list first by industry, then by persona, and finally by engagement.

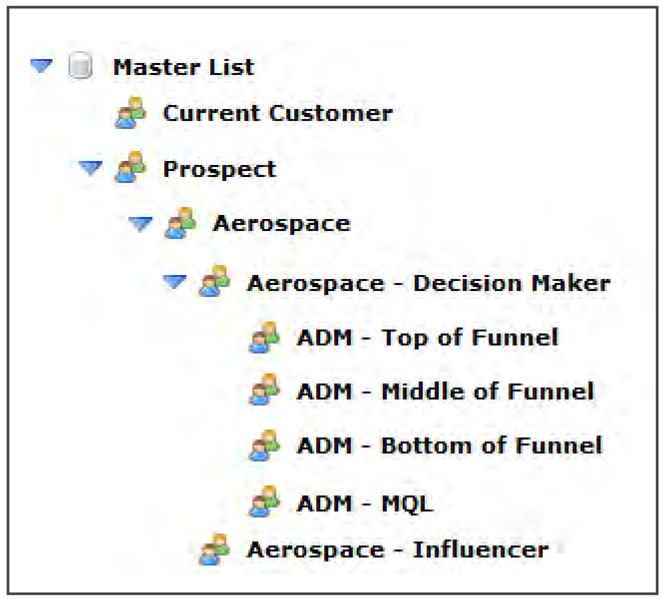
Defining your hierarchy in the planning stage will dramatically aid in automating processes as you move into advance marketing automation.

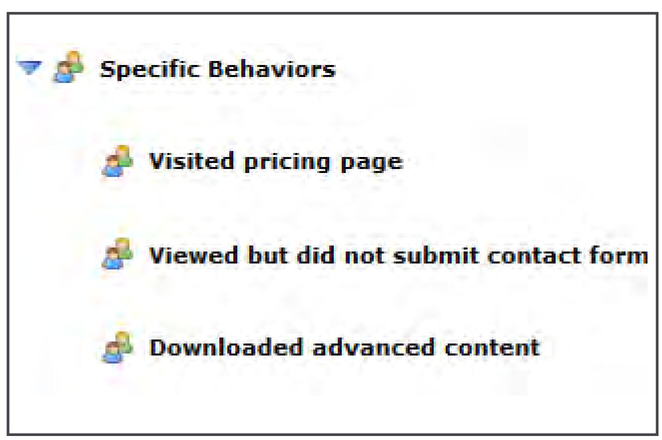
Behavior Based Segments

Some automated programs will be in direct response to specific behavior, like visiting a pricing page on a website. Much in the way you create segments from CRM or database field values, Act-On gives you the ability to analyze and segment the specific digital behaviors of your audience.

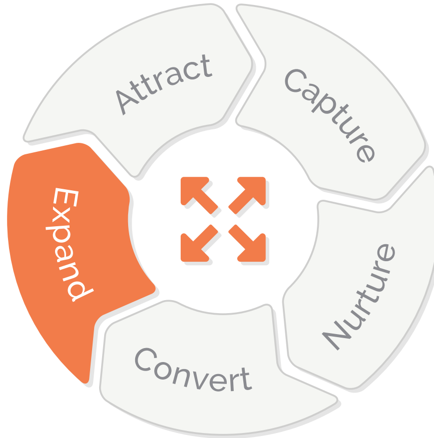
These segments can be used to trigger specific email nurture programs, or to exit people from programs they are in.

Act-On **data indicates** that targeted content at specific personas (versus "batch and blast") can **increase email open rates** by **300%** and click rates by **700%**.





Database Management



Master List

Act-On allows you to upload as many lists as you would like to; however, this doesn't mean that you should.

Creating independent lists can be helpful, yet more often than not, you should always be working from a Master List. Smaller lists should be uploaded to populate your dynamic segments. This will help keep your data clean and well organized. The use of data fields can also give you the ability to group specific types of leads together.

6 Core Segments

Engagement

Using lead scoring rules, an organization can define the top, middle, bottom of their marketing funnel, as well as the Marketing Qualified Lead (MQL) criteria that triggers a hand-off to sales.

Customer Status

You know who your customers are, so make sure that data gets into Act-On! Segmenting customers from prospects is core to preventing message confusion.

Persona or Role

This is absolutely the most important type of segmentation you can have. Persona based segmentation usually fits in three key categories:

1. Decision Maker: Budget and contract authority
2. Influencer: Recommends solutions and advocates your product/service
3. User: Benefits from or uses the product/services you offer

Industry

Tailoring your message with industry terms and relevant content can be a huge competitive differentiator. It is highly recommended that organizations define the industries that they sell to and customize the messaging and content for them. Often this is as simple as changing simple nouns. For instance; (depending on the industry) prospect = donor = patient.

Product or Interest

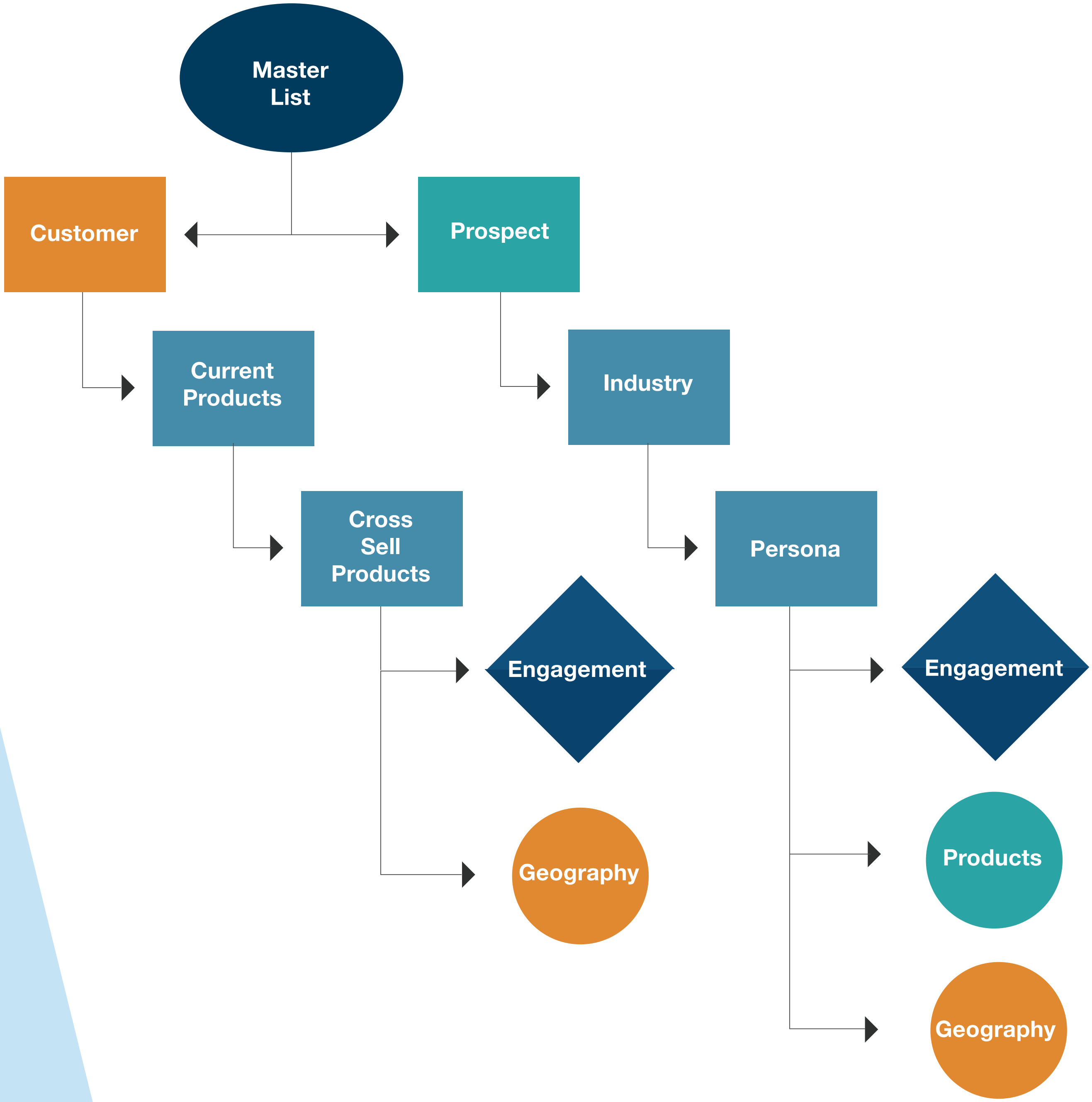
This type of segmentation is based off of tracked behaviors. These segments can be used to trigger specific email nurture programs, or to exit people from programs they are in.

Geography

Timing your messaging and your content distribution based on cultural norms and specific time zones is a great way to dramatically increase your campaign effectiveness.

Segmentation Hierarchy

Creating segments is an investment of time that pays off big in the end! We recommend working from a Master List and using a segmentation hierarchy as pictured below.



Additionally, we've created a step by step process for thinking through the six "core" segments. This guide was created as a step by step walk-through for mapping out your segments.

Read More @ Act-On Segmentation Guide

Lead Scoring

Pinpoint Your Hottest Prospects

Lead scoring makes it easy to sort out the hot prospects from the not. A good lead scoring system watches for online and offline buying signals, increases marketing's ability to pass qualified leads to sales, and helps sales focus efforts on the most likely buyers.

How It Works

Lead generation scoring uses a points system to assign values based on predetermined criteria, such as the person's industry and job title, website visits, content downloads, event attendance, form completions, or more. Points accrue over a set amount of time. The sum of these points is the lead score.

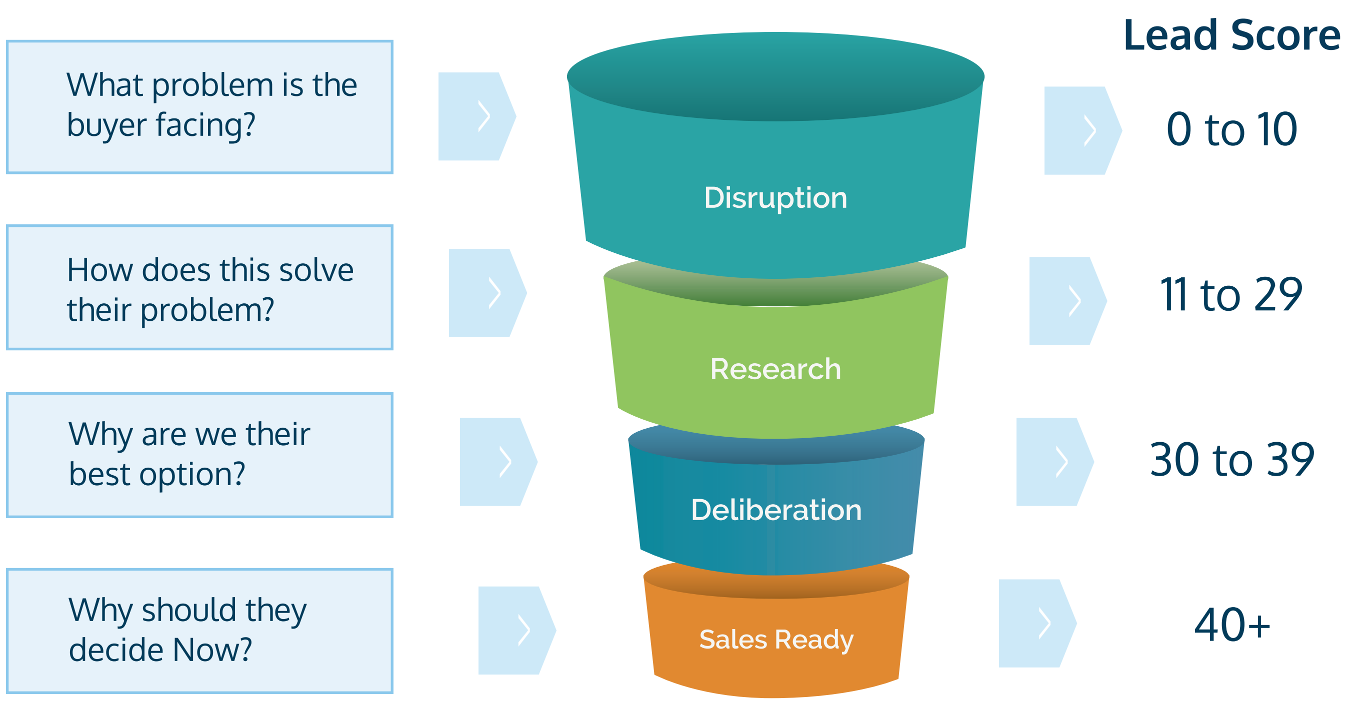
The lead scoring matrix should follow guidelines common to successful Act-On programs. Act-On recommends using a target marketing qualified lead score of 40.

With this methodology, lead scoring will become a fundamental tool for identifying the qualification of a lead based on their engagement. By deploying an Act-On recommended scoring methodology, leads will generally fall into funnel specific categories, which can then be segmented.

Lead Scoring Values

Behavior	Score
Was sent a message	0
Opened a message	1
Clicked on a message	5
Viewed a form	0
Submitted a form	10
Downloaded media	5-20
Visited a landing page	2
Visited a web page	8
Clicked a Social Post	2
Registered for a webinar	5
Attended a webinar	35
Clicked on a paid search ad	25

Lead Scores = Funnel Stages



Dual Lead Scoring

Dual lead scoring is often used when an organization wants to measure the relational aspects of two separate criteria.

The most common use for dual lead scoring is to leverage both intrinsic (profile based) and extrinsic (behavior based) attributes to evaluate the value of a lead for a sales or marketing effort.

In this chart, you see that profile scoring is used to gauge the quality of the company for each lead. Additionally, scoring is used to identify the level of interest of each lead. If you were to aggregate these into a single score, you would lose the value of both, as you lose visibility into why a lead has a particular score.

Furthermore, neither value tells a complete picture. Some engaged leads are a poor fit based on their profile. Other great profiles have no meaningful engagement.

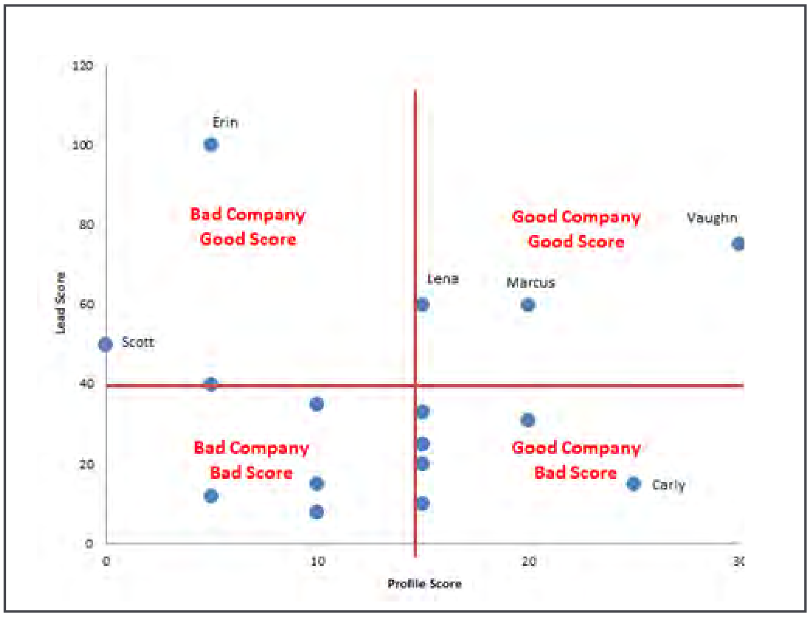
Contact List

Name	Profile Score	Behavior Score
John	10	8
Riley	15	10
Dave	5	15
Joe	10	25
Lindsay	15	25
Eric	10	35
Tanya	5	105
Angie	30	65
Phil	15	30
Vaughn	20	15
Dan	30	120

By combining these two attributes, segmentation can be used to identify the best leads, at the best companies. This concept is demonstrated below:

Additional Uses

- Prospect vs customer behavior
- Profile attributes
- Specific products
- Sales division
- Extended sales cycles



Account Based Lead Scoring

Understanding your target audience will always be the key to highly effective marketing. It's estimated that 6-8 people are involved in every B2B purchase decision. After you have defined your buyer personas, a key goal for every organization should be to understand how their personas fit together inside of a company, and how they act together as a single entity.

This will enable your marketing team to anticipate internal conversations and drive energy in the evaluation process

So What is a Good Score?

Account-based lead scoring is an effective tool for aggregating data into a single data point. This account score can be easily misinterpreted.

Consider this:

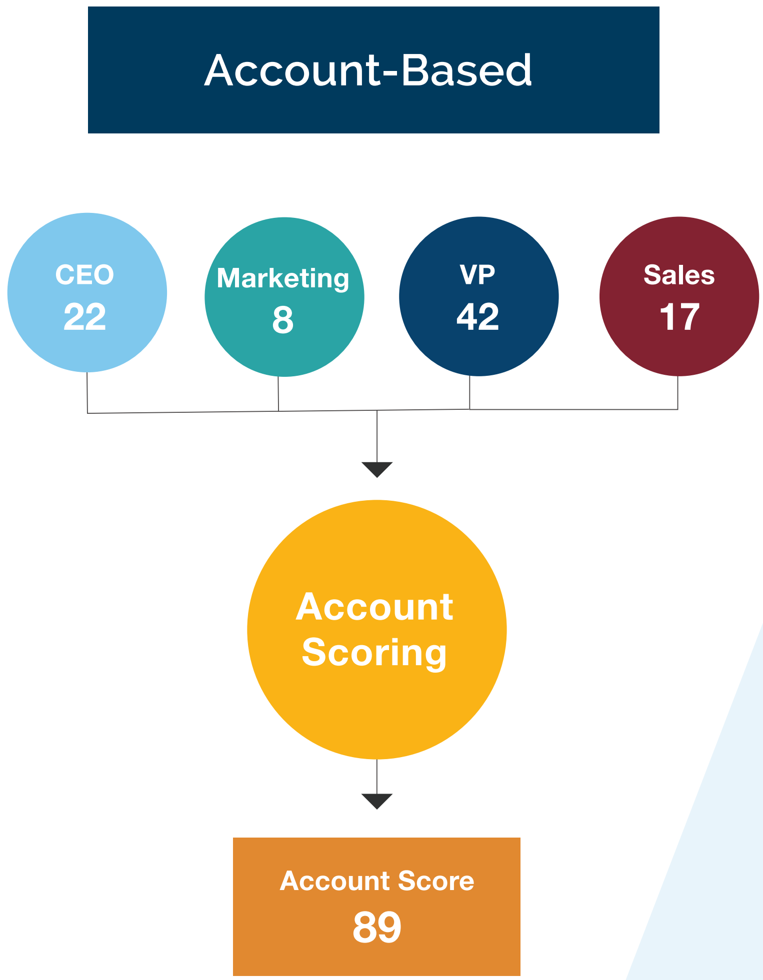
Company A - 500 Employees
Message sent to 500
50 opens at 1 point for each contact
Account Score = 50

Company B - 50 Employees
Message sent to 50
5 opens at 1 point for each contact
Account Score = 5

In these scenarios, the level of interest from each company was 10%, however, the score does not indicate this. For account-based lead scoring to be effective, you cannot view the score on it's own, rather you should view it in the context of the total audience, which requires segmentation. Account-based segmentation is covered in the account-based marketing section of this document.

Key Roles to Consider

- Executive Decision Maker
- Operations Leader
- IT Leader
- Marketing Leader
- Sales Leader
- Finance Leader



Account-Based Marketing

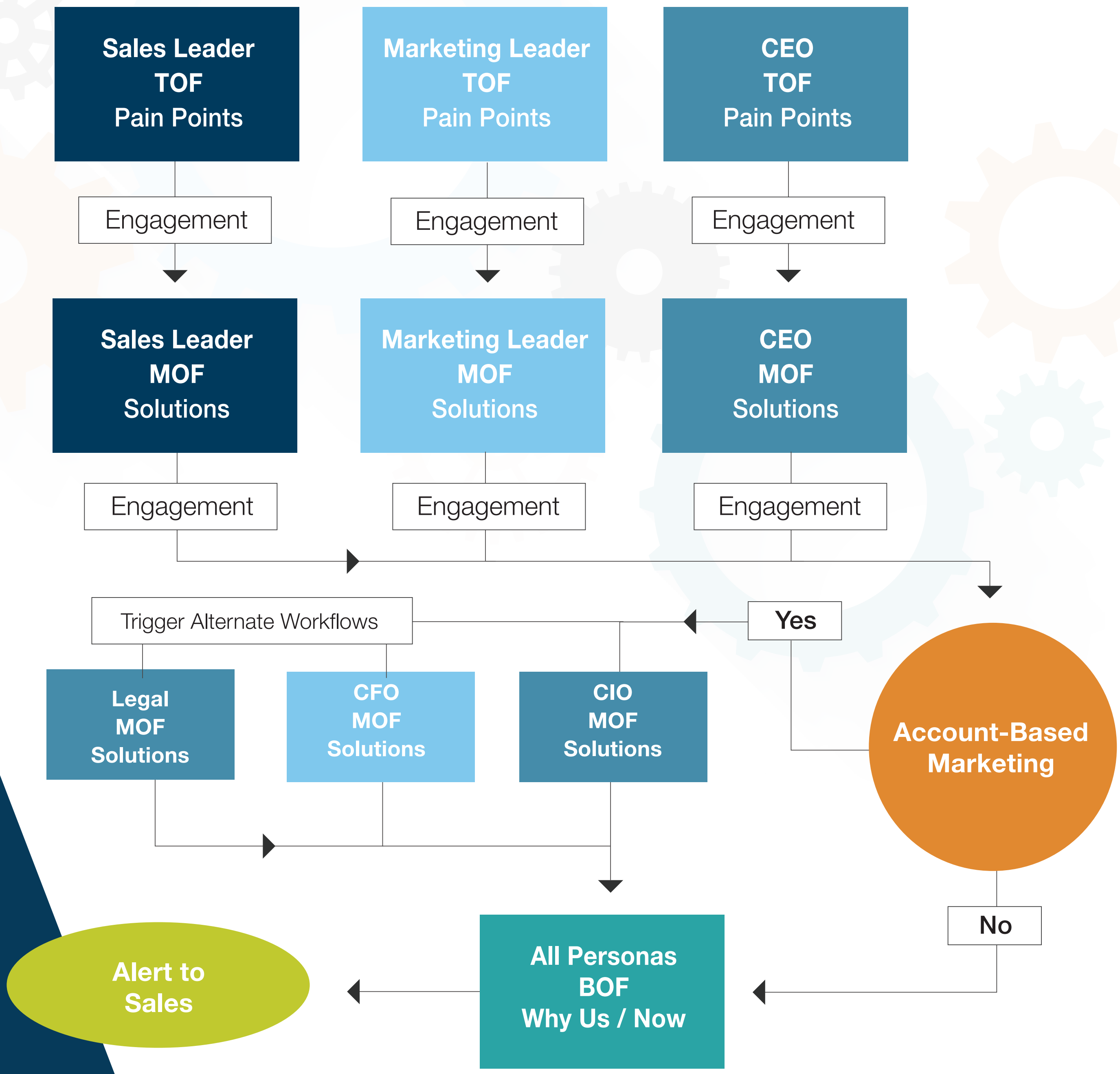
B2B's Hot New Thing

The evolution of account-based marketing (ABM) into the B2B mainstream is an important and timely event. ABM gives you a practical and scalable path to continue your growth – and you probably already have what you need to get started.

ABM Process

Account-based marketing is a marketing tactic wherein marketers look to expand their influence beyond a single point of contact in a company. The goal is to create a network of advocates in the target company that will accelerate the sales process.

In all likelihood, this process will start by working in conjunction with your sales team to manually manage each of these process triggers. Over time, this process can be streamlined and automated using automated programs, CRM fields, and segmentation triggers.



ABM Features and Tactics

Overview

Act-On account-based marketing is an easy to use feature set for natively integrated CRMs.

The module allows you to:
Link buyer behavior + data across a single account view.

- Easily create account based campaigns to improve nurturing + engagement.
- Automatically score accounts and trigger campaigns + workflows.
- Precisely target all decision makers within and account + deliver a unified experience across the organization.

Accounts Dashboard

This is a very new feature in Act-On that is expected to undergo several more iterative releases. Effective use in it's current state will largely be driven from the Accounts Dashboard.

In this view, you are able to easily identify your target accounts, their total number of contacts, and their account lead score.

At these time, sending to accounts is a process managed by human interface. Over the next several quarters, Act-On anticipates releasing additional functionality relating to account-based marketing.

Quick Guidelines

Formula: Account Score / Contacts = Average Score

Average Score	0 - 10	Send Top of Funnel Messages
Average Score	11 - 19	Send Middle of Funnel Messages
Average Score	20 +	Sales Engagement

Email Marketing Best Practices

Effective Email

Today, most of the buyer's journey is done digitally. You can set your sales team up for success by reaching out to your prospects via email marketing, and provide them with the information they need to make a purchasing decision in your favor. Let them know what you offer, and how you are different. Act-On has the tools for you.

Email Elements

An effective email campaign gives buyers the content that they need via email messaging. If your buyers aren't banging down your door to purchase your product, it doesn't mean they aren't interested. They may not know about you. If they do know who you are, they may not have yet discovered a compelling reason to give you consideration. It's your job to give them a good reason to take look. Attention to the following best practices will assist you.

Audience Definition Is Key To Effective Results

A targeted, personalized message will always be more effective. As often as possible, segment your audience based on what you know and target them on their interests. Examples of audience definition and segmentation in the health care industry would be:

- Decision Makers
- Internal Influencers
- Field Users
- Marketing Leaders
- Sales Leaders
- Engineers
- IT Teams

Email From Address Determines Credibility

The "from" address should always include a domain that matches the links in your email. Additionally, you should avoid commonly flagged senders such as marketing@ and info@.

Examples of specific aliases would be:
Joe Octavian - joe.octavian@ACME.org
ProServices Team - Bill.Zimbleman@act-on.com

Target Metrics

Unengaged Opens	10%
Unengaged Clicks	1%
Engaged Opens	20%
Engaged Clicks	5%
Subscribed Opens	40%
Subscribed Clicks	20%

Subject Lines Are Essential To High Open Rates

Subject lines should be about 50 characters in length, and directly resonate with the audience needs. Avoid the use of all capitals, exclamation points, and spam trap words, such as: buy, sign up, free, and Nigeria. For currently known subject line spam trap words see more.

Ask yourself,

"What would cause someone to need this information?"

Message Content Is Key To Audience Engagement

Messages should be short and direct. Avoid the use of overly large hero images that take up the entire top portion of the message as this reduces the audiences ability to be "hooked" by your message.

Remember that the top three inches of your email are the most valuable space and likely the only chance you get to grab attention.

Good email messages are typically between 150 and 300 words long. Break text into blocks and consumable chunks, see example next page.

Remember follow up, make sure that there is a plan so that the energy isn't lost.

CTAs Determine Click Rates

Always have a clear call to action. The audience must have a way to show their interest and take the next step.

- Avoid use of linked words
- Avoid direct HTML links
- Use CTA images or HTML buttons

Sending Times

Ideal sending days are Tuesday, Wednesday, and Thursday. Ideal sending times are between 7 AM and 10 AM. Always A/B test.

Subject lines are key to open rates

Good examples would be:

Topic: Marketers need help with innovative email tactics.

Subject: Three easy ways to fix problems in your email campaign.

Topic: Marketer's need help understanding Marketing Automation Strategy.

Subject: You just paid $15K for marketing automation – now what?

Next Steps and Action Items

Every email should have a goal and a follow up plan. What do you do with the likely 80% of your audience that doesn't engage?

What is the next step they should have taken? Who is supposed to follow up with responders. Make sure that there is a plan so the energy isn't lost.

Email Deliverability

Deliverability is a way to measure the success at which an email marketer gets a campaign into subscribers' inboxes. Your deliverability will be affected by three key factors: Authentication, Reputation, and Engagement. As you're sending, you should monitor your deliverability metrics.

Authentication

The following authentication protocols are configurable for your emails:

- SPF: Sender Policy Framework
- Sender ID
- DK/DKIM: Domain Keys/Identified Mail
- DMARC: Domain-based Message Authentication, Reporting & Conformance

Email engagement

Email engagement is the degree to which your email subscribers are interested in and acting on your email messages
Positive engagement includes:

- Add to the address book | safe sender lists
- Clicks & opens of your mail
- Sales conversions
- Frequency of mail and consistent volume
- Email folder management

Reputation

The following authentication protocols are configurable for your emails:

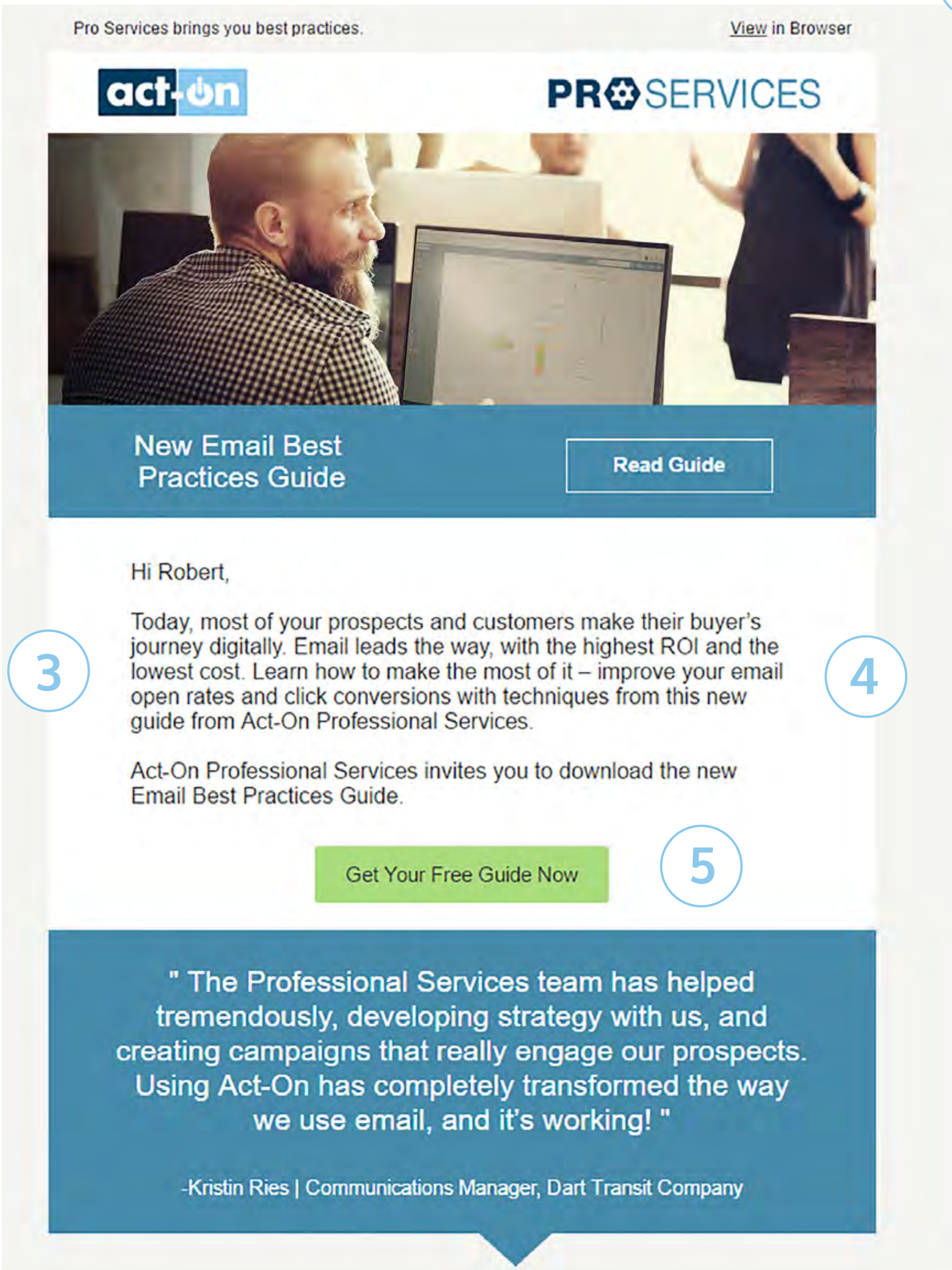
- Authentication adoption
- Email volume
- Complaint rates | hard bounce
- Spam trap hits
- Blacklist inclusion
- First and third party content
- Consumer engagement
- Domain reputation
- IP reputation

Metrics

Key Metric	Acceptable Rate Percentage	Acceptable Rate Amount
Spam Complaints	Less than 0.1 %	Less than 1 per 1000
Hard Bounces	Less than 1 %	Less than 1 per 100
Soft Bounces	Less than 10 %	Less than 1 per 10

Best Practice Email

1 Bill.Zimbleman@act-on.com | Three easy ways to fix problems in your email 2



1 - Sent to prospect from member of Act-On

2 - Easy to consume – risk centric subject line

3 - Reinforced content summary – quantified into step based instructions

4 - Content is short, and pulls reader to clear "do this next" steps

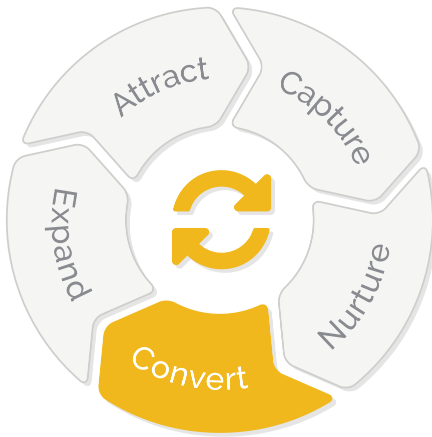
5 - Clear call to action that instructs reader on expectation

Landing Page Best Practices

Getting to Know Visitors

Like much in marketing, landing pages are a blend of art and science. The investment you make in time and resources to produce effective landing pages will pay you back with leads that convert and that deliver workable information.

Landing Pages



Landing pages are the foundation that supports successful inbound marketing campaigns. It is with a landing page that you will make the connection – and getting a conversion. Think of landing pages as conversion tools, which are some of the most potent ones that you have. On the page you will make an offer, such as; "Learn how to," by offering something of value, such as an eBook, video, podcast, or any kind of content that your ideal buyer will appreciate.

If the visitor wants the content enough, then they will trade their contact information to get it. They get valuable content and in turn you have converted a suspect to a known contact.

6 Core Aspects

Compelling Offer

The offer is the content your prospects trade their information for. It should be closely tied to your brand's value proposition so you can attract people who want what your company sells. Be sure to test different offers.

Fine Tuned Copy

Your headline should be simple and specific. It should offer a benefit, not a feature, and ideally be so strong that the motivated reader will fill out the form right then and there. Your body copy should describe the offer and the benefits that it will deliver to your prospects.

On Page Form

The form has fields that allow you to collect information about your prospects. You should ask for a name and email address at a minimum. What else you ask for depends on all kinds of factors, including your industry, what you sell, how long your sales cycle is, and so on.

Strong Call to Action

A CTA should be bold and make it easy for people to understand what to do next. Your CTA, whether it is text, a button, or an image, should clearly indicate the action and the reward. Be sure to test different CTAs to determine whether "Download now" or "Get the eBook" is going to be more effective and deliver more conversions.

Streamlined Design

It's important to design the page so that the visitor's attention is centered on the form. Refrain from making the page cluttered with too many images or too much text. Also, optimize for mobile devices. A responsive design,will increase the reach or your page.

Social Proof

Include social proof of your value claims by sharing a third-party endorsement, customer testimonial and links to social networks. Visitors like to know that other people have used and like what you offer.

What to Say

There are four key components of effective landing page copy. The header copy, an introductory paragraph, benefit statements, and a call to action.

Strong Headline

A headline needs to describe the offer and benefit in plain language. A visitor needs to understand what you're offering in three seconds or less by glancing at the headline. Make sure that any offer or promotion you make wherever the reader finds your link (in social media, on a web page, in an ad) connects with what's in the headline.

Introduction

The introductory paragraph is used to introduce the product, service, or offer in more detail. It is used to create the "story" for the reader and to give more information about the details of the offer or promotion.

Use Benefit Statements

Benefits are very important in helping the reader understand how your product, service, or offer will help them. The most common mistake is listing features instead of benefits. The reader is interested in how you can make their life better, not in how many buttons your widget has. Here you should tell the reader how you'll solve their problems.

Clear Call to Action

What do you want visitors to do on this page? Download your eBook? Register for a webinar? View a video? Purchase an item? Whatever your objective, the call to action must clearly point out the action you want the visitors to take and make it easy for them to take it.

Calls to Action

Include action verbs:

Download	Order
Reply	Learn
Try	Call
Sign up	Get
Join	Act

Create a sense of urgency or scarcity:

Now	Instant
Today	Only
Limited	Right away
Hurry	Exclusive

Provide Irresistible Offers

Your offer should be compelling enough to make the visitor want to take the action you desire once they view your landing page.

There are many types of offers that you can develop and test on your landing pages. Here are popular ones you might explore:

- Content: eBooks, videos, webinars, white papers or surveys
- Subscriptions: newsletters, blogs, promotional emails or alerts
- Pricing-related offers: discounts, sales, close-outs or coupons
- Trials: limited trials or product samples
- Tools: calculators, online evaluations, surveys or audits.

Note that the offer is often a key determinant of whether the page will have a good conversion rate, so learn what your audience finds valuable.

Best Practice Landing Page

Landing pages usually consist of a few common elements. These include the offer, copy, the form, and the design of the page itself.

When creating landing pages, think of these elements and guidelines as your building blocks.

1

Compelling Offer

Section 2 – Bullet points, infographic, or discussion

Section 3 – Value proposition, middle of the funnel resources

Content the prospect came to see from source resource

2

Fine Tuned Copy

Simple and specific

3

On Page Form

Goal: convert an unknown **visitor to a known contact**

4

Strong Call to Action

Goal: convert an unknown **visitor to a known contact**

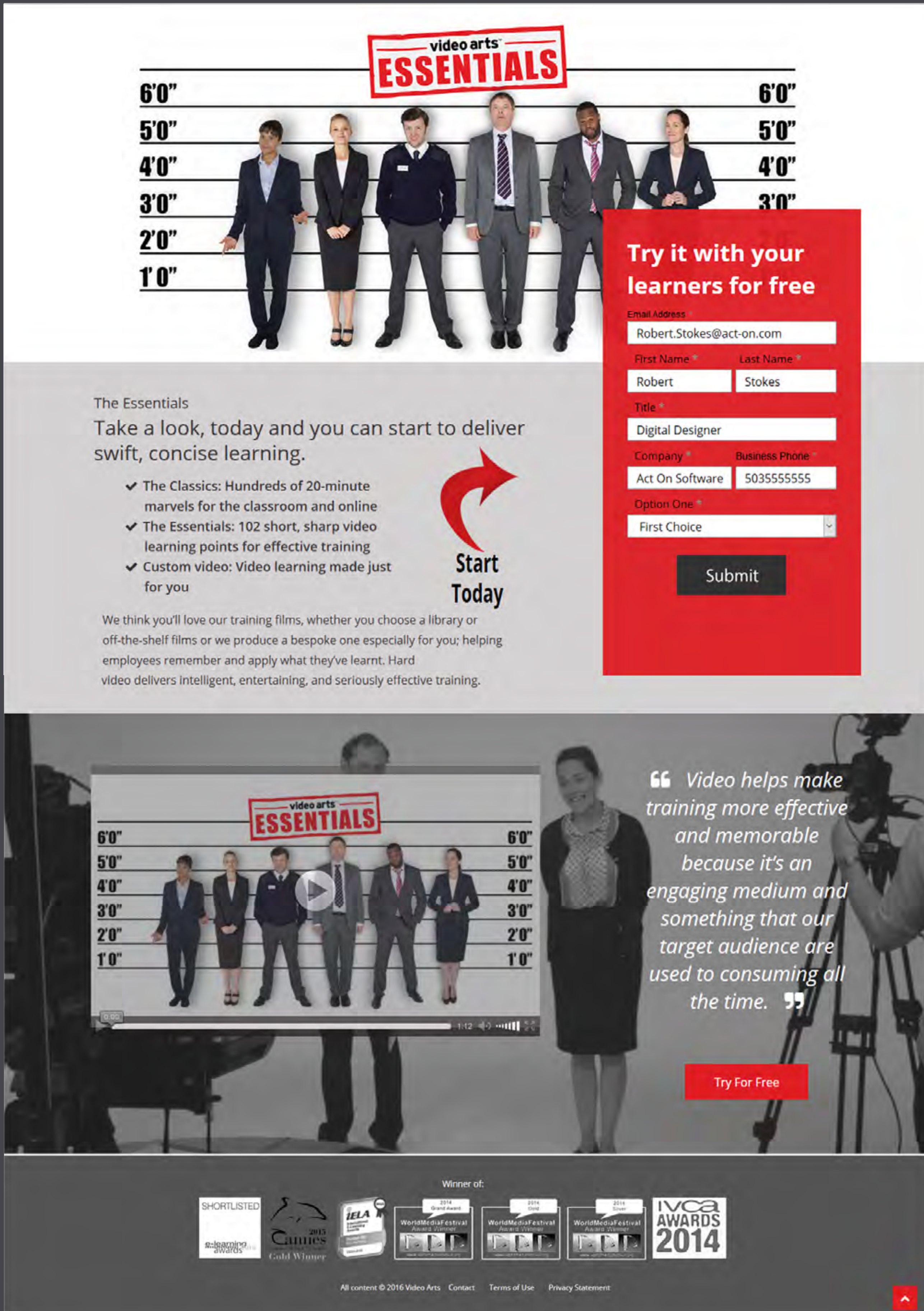
5

Streamlined Design

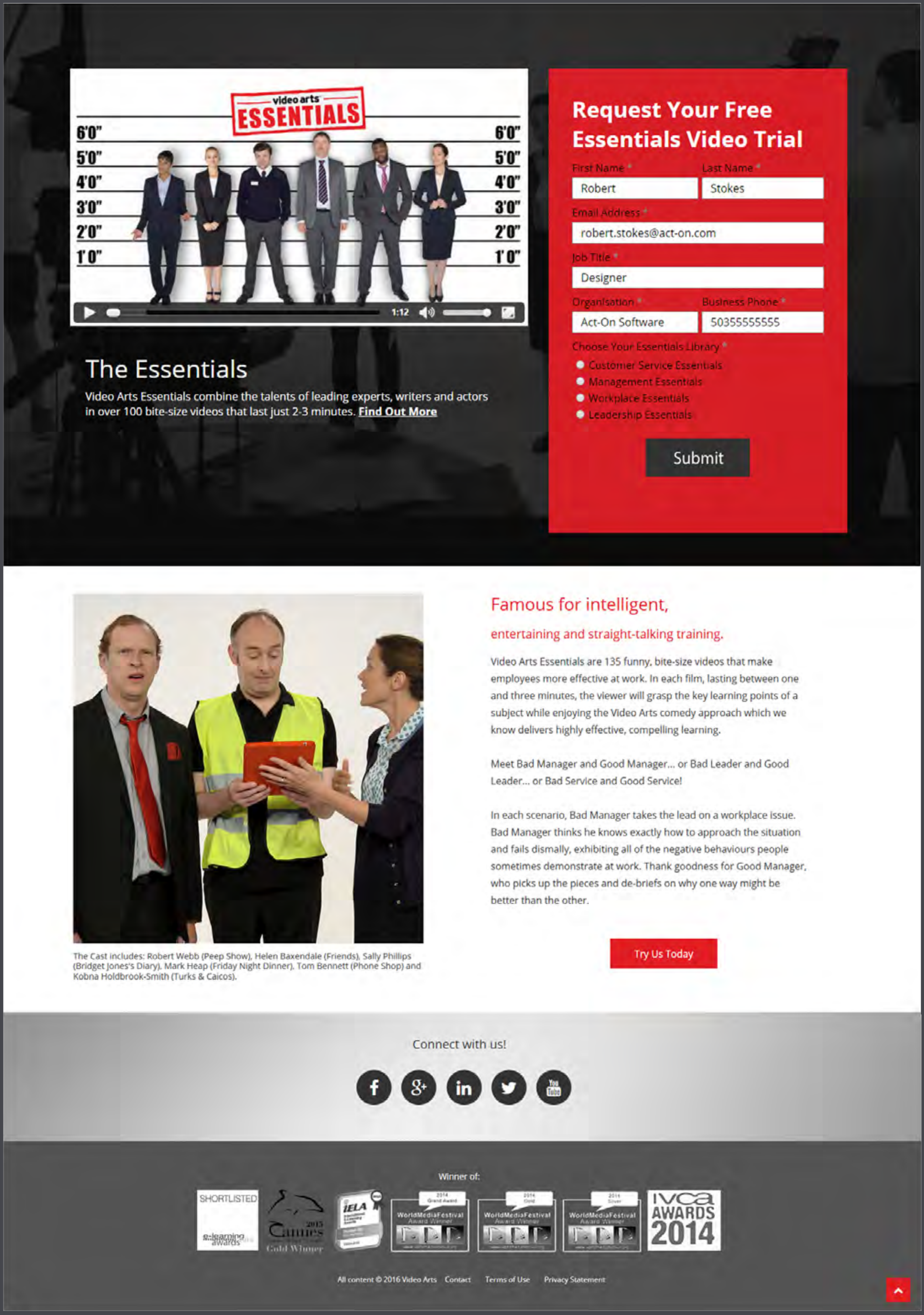
that is optimized for desktop and mobile devices

6

Social Proof that other people have used and like the offer



Sample Landing Page Video Arts inbound marketing landing page with display form.

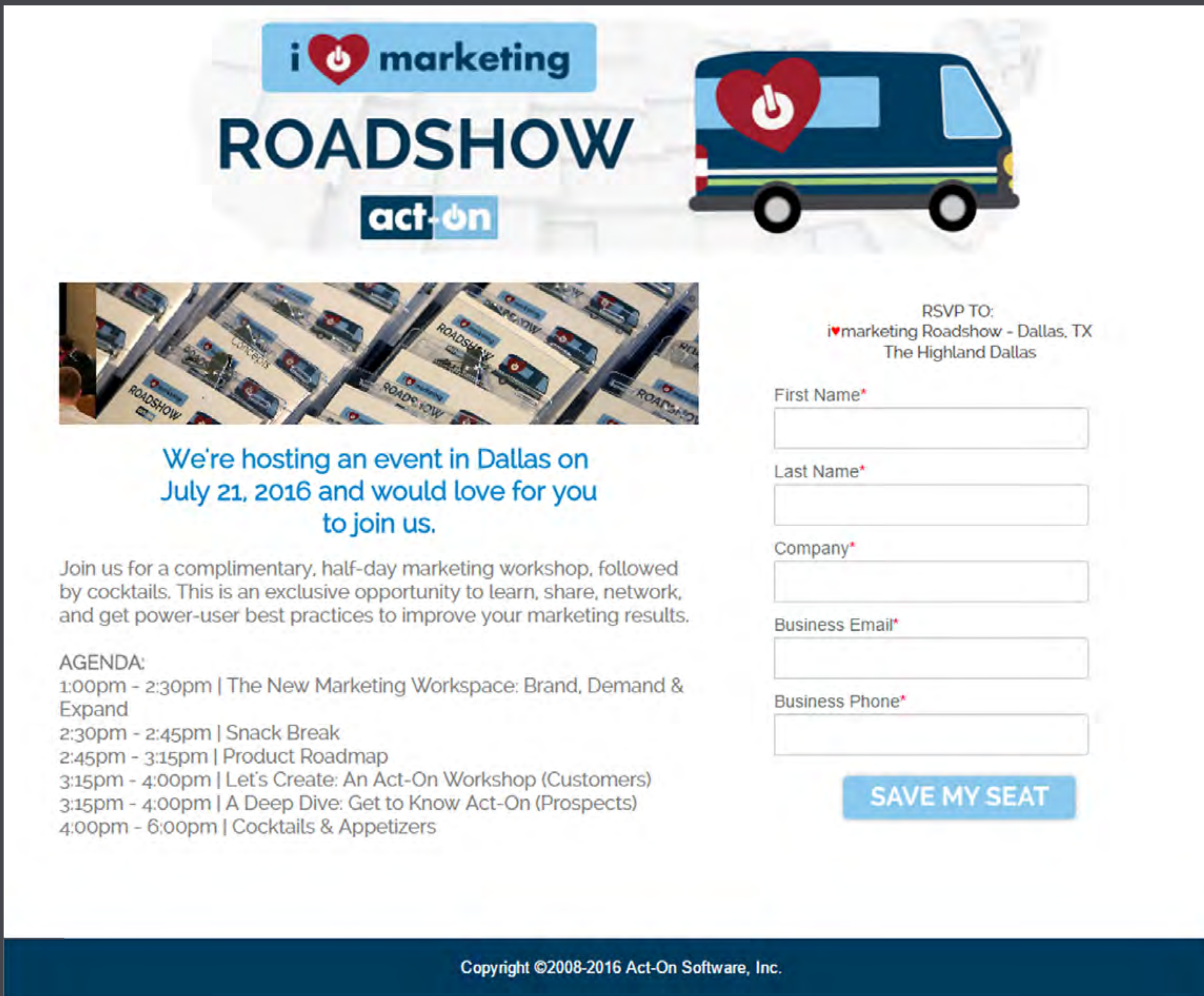


Sample Landing Page

Video Arts automated program landing page with display form.

Sample Landing Page

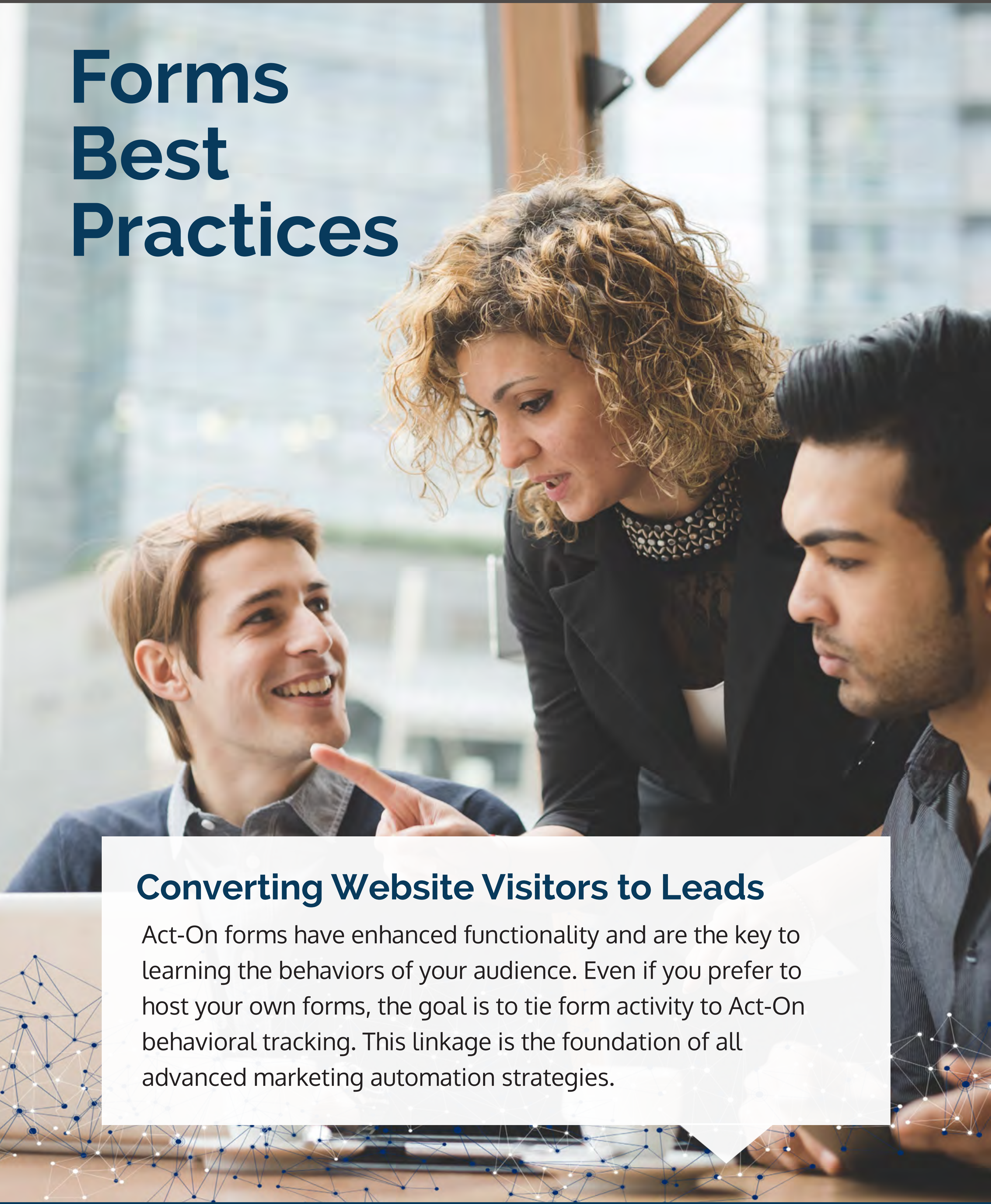
Act-On Software automated program landing page with access form.



Sample Landing Page

Act-On Software event landing page with signup form.

Read More
@ Act-On Building Better Landing Pages



Forms Best Practices

Converting Website Visitors to Leads

Act-On forms have enhanced functionality and are the key to learning the behaviors of your audience. Even if you prefer to host your own forms, the goal is to tie form activity to Act-On behavioral tracking. This linkage is the foundation of all advanced marketing automation strategies.

Form Intro

In order to build a relationship with your audience, you need content – lots of it – and you need to make it available across various media and multiple channels. Lots of organizations make a common mistake: They wait until an audience member is 80% – 90% of the way through the decision making process before they create an opportunity to get the prospect's information using a "Contact Us" form.

Here, we will explore other form strategies to help maximize audience engagement and nurturing.

Presentation

Forms can be presented using several methods. Depending on your needs, these options provide different benefits that will be covered in this document.

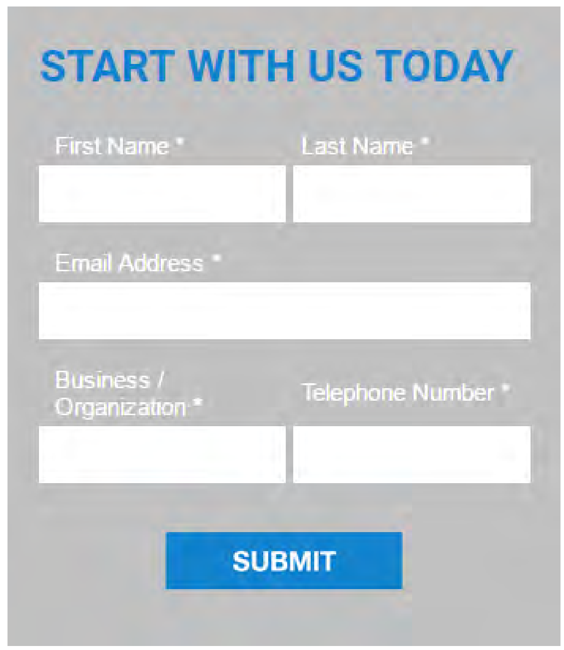
Display forms are forms that are visible when a user views a web or landing page, and the completion of the form is the call to action. Gated URLs are triggered by clicking on a link that subsequently "pops up" a form between the user and the desired content.

Types of Forms

There are several basic types of forms which will be discussed for your content marketing strategy:

- Sign-up forms
- Access forms
- Contact forms
- Progressive profile forms

When a member of your audience submits an Act-On form, the Act-On marketing automation platform connects that user's behavior on your tracked marketing, sales, and retention assets to their email and identity.



Asking for Information

The amount of information that you request should be appropriate based on your relationship and offer content. As an example, asking for a Social Security Number is appropriate for a bank loan, not a white paper. The less information that you request, the higher your form conversion rate will be. Using tactics like progressive profiling, you can learn a lot about your audience over time.

Types of Forms

The Key to Determining What Type of Form to Use

Understanding what we are trying to accomplish is the key to understanding how information should be displayed and what our calls to action should be.

Sign-Up Forms

Sign-up forms are presented alongside content and provide a way for the individual to register or sign up for a resource or event that will happen later, or be delivered later.

Access Forms

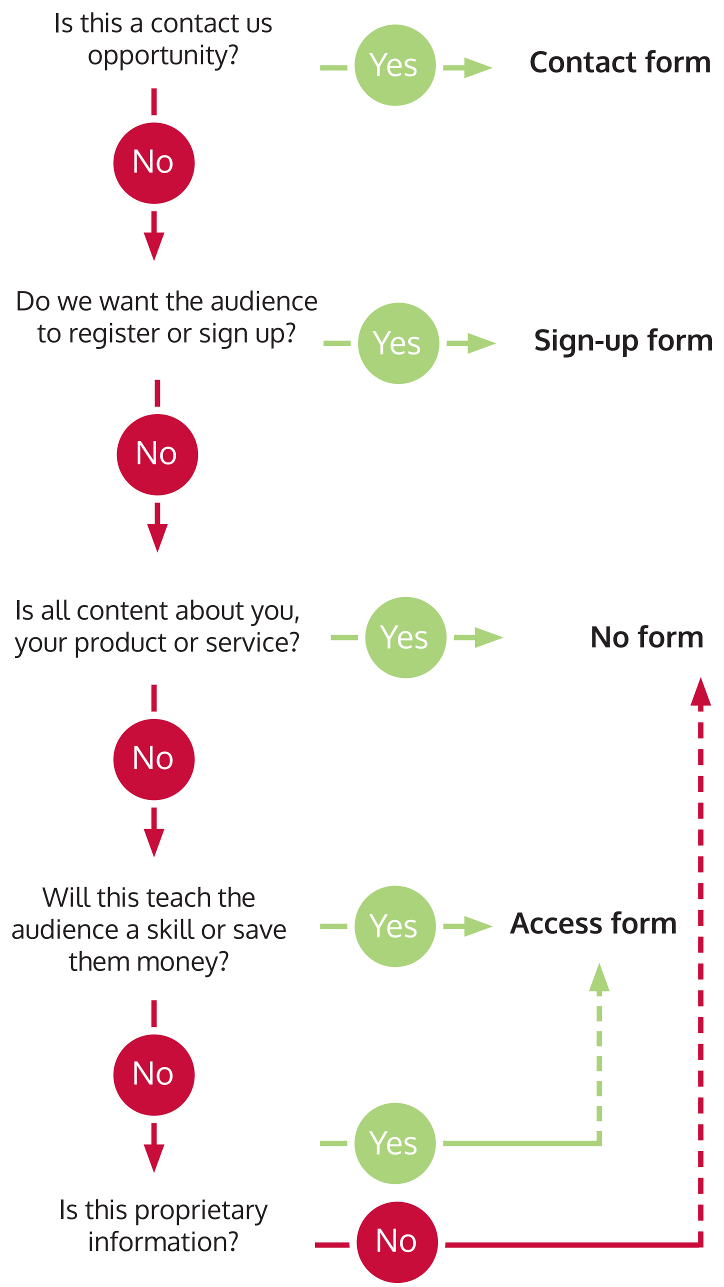
Access forms let people have access to content right away, for example an on-demand video, or a downloadable eBook. Access forms use web pages or landing pages to provide a synopsis of the content being offered, a value proposition for why the individual should want the information, and the call to action is to submit the form visible on the screen.

Contact Forms

Contact Us forms are typically used in the last stage of a nurture process and are a very clear indication of serious intent. Contact Us forms often request detailed information from users as it relates to a customer engagement.

See examples of these Act-On forms in Landing Pages

Here is a simple flow chart to help determine IF a form should be used, and if so, then what type of form.



Form Presentation

When to Use Display Forms and Gated Content Forms

Display Forms

A display form is visible when a user views a web or landing page, and the completion of the form is the call to action. The additional content drives submission commitment.

Gated URL

Alternately, one can use the Act-On gated content link to create a form, which when used as a link to content in the media library a form is triggered that subsequently "pops up" between the user and the desired media asset.

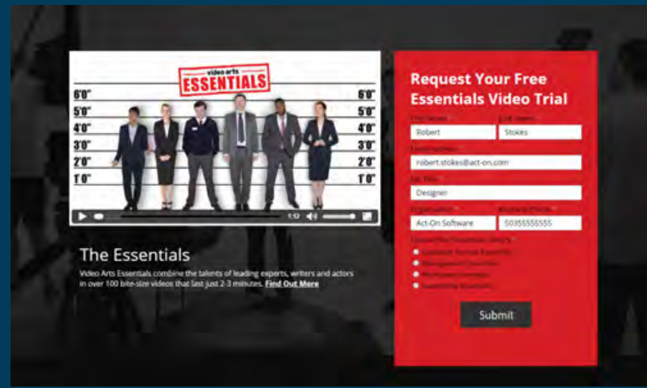
By selecting the "gated content URL" option in Act-On media library, you can easily make a gated URL hyperlink.

Progressive Profiling

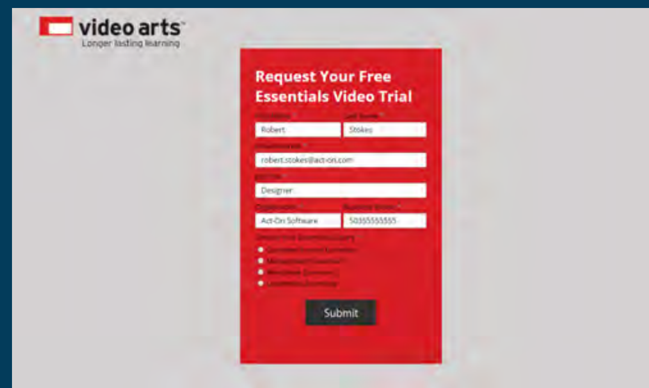
Using gated URLs, you can configure Act-On to ask for different information based on what you already know about your audience.

For example, if you already know first name, last name, and email address; Act-On may automatically ask for city, state, and zip code.

Read More About Progressive Profiling

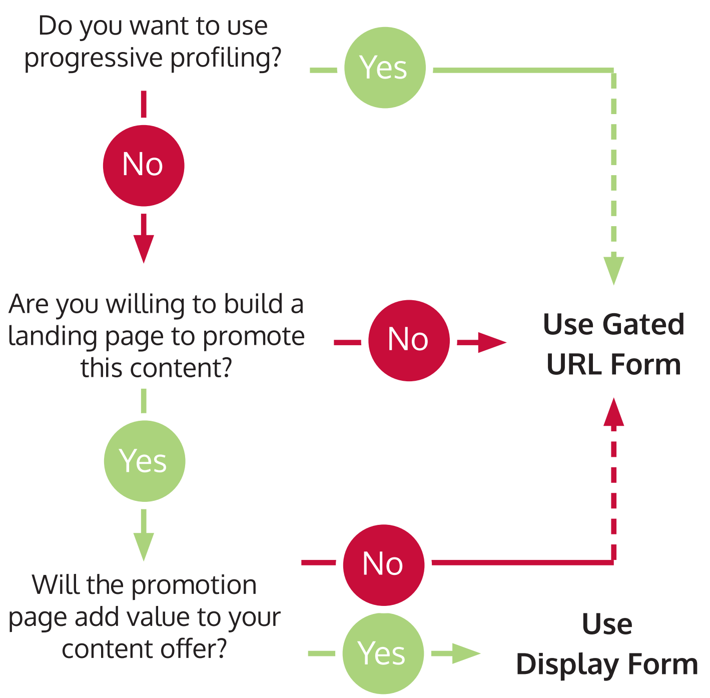


Display form



Gated URL form

To help determine which makes the most sense for you, please consider the following flow chart:



Asking for Information

It is critical that the information you request in a form is appropriate to the funnel stage.

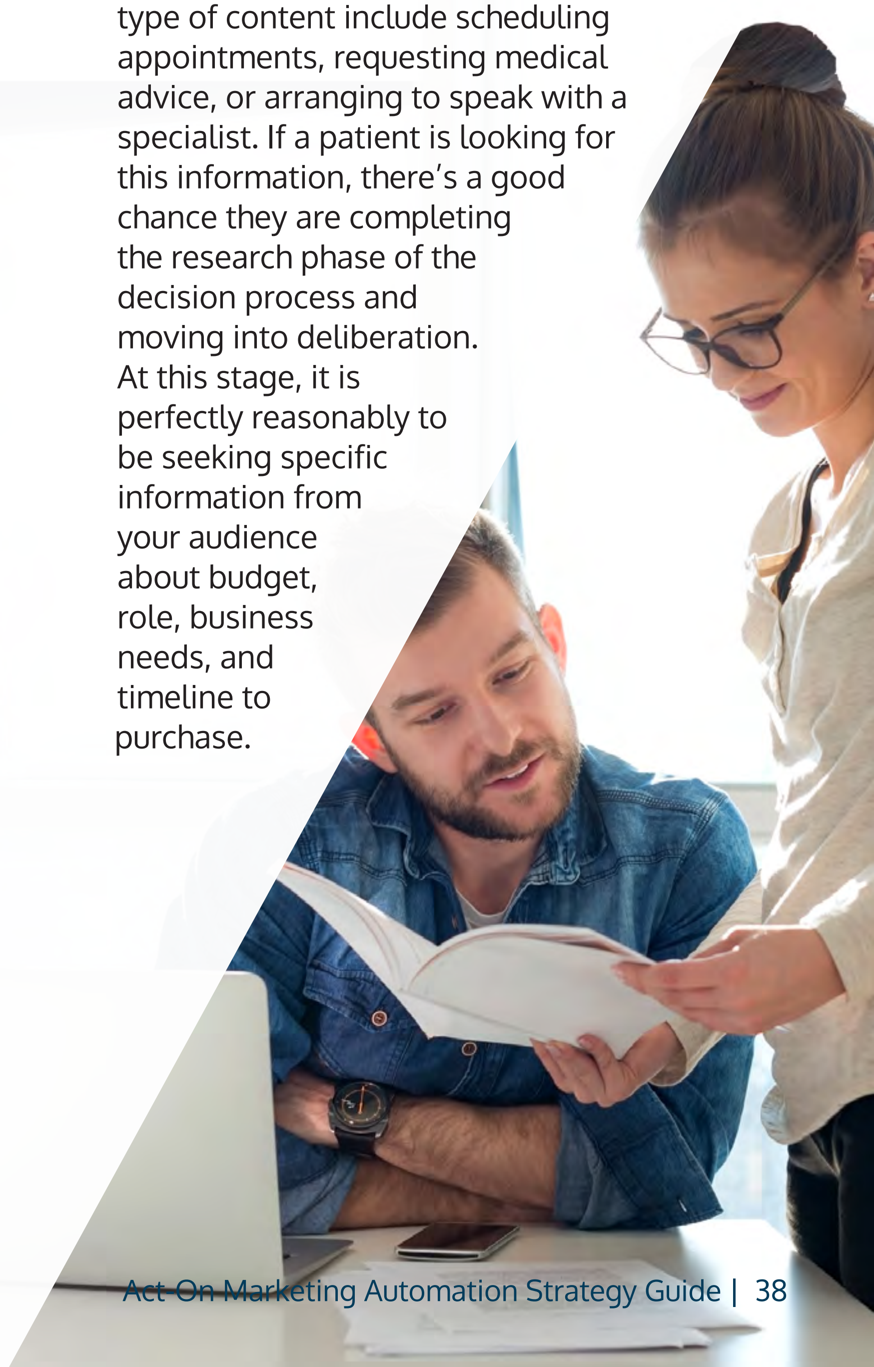
The primary goal of your content will probably be either to create new interest or to help interested individuals take a next step. You should make process stage a major factor in your form strategy, so that you can apply the right content to get more conversions.

Content designed for general interest (top of funnel) should be deployed as free content (which means it doesn't require the individual to give information to see it). This content should provide compelling reasons for your audience to want more information. Once you establish your brand as a source for great content, then offer more, and make this additional information require a simple form asking for first name, last name, and email address. This will convert your individual to a known visitor.

Content that promotes an organization or services (middle of funnel) is more valuable to your audience, and therefore the price of entry should be higher. In order to have maximum effectiveness, the forms you use for this content can be more robust. In this stage, you will often request first name, last name, email address, and relevant information for more targeted marketing.

Why are we using a form here?

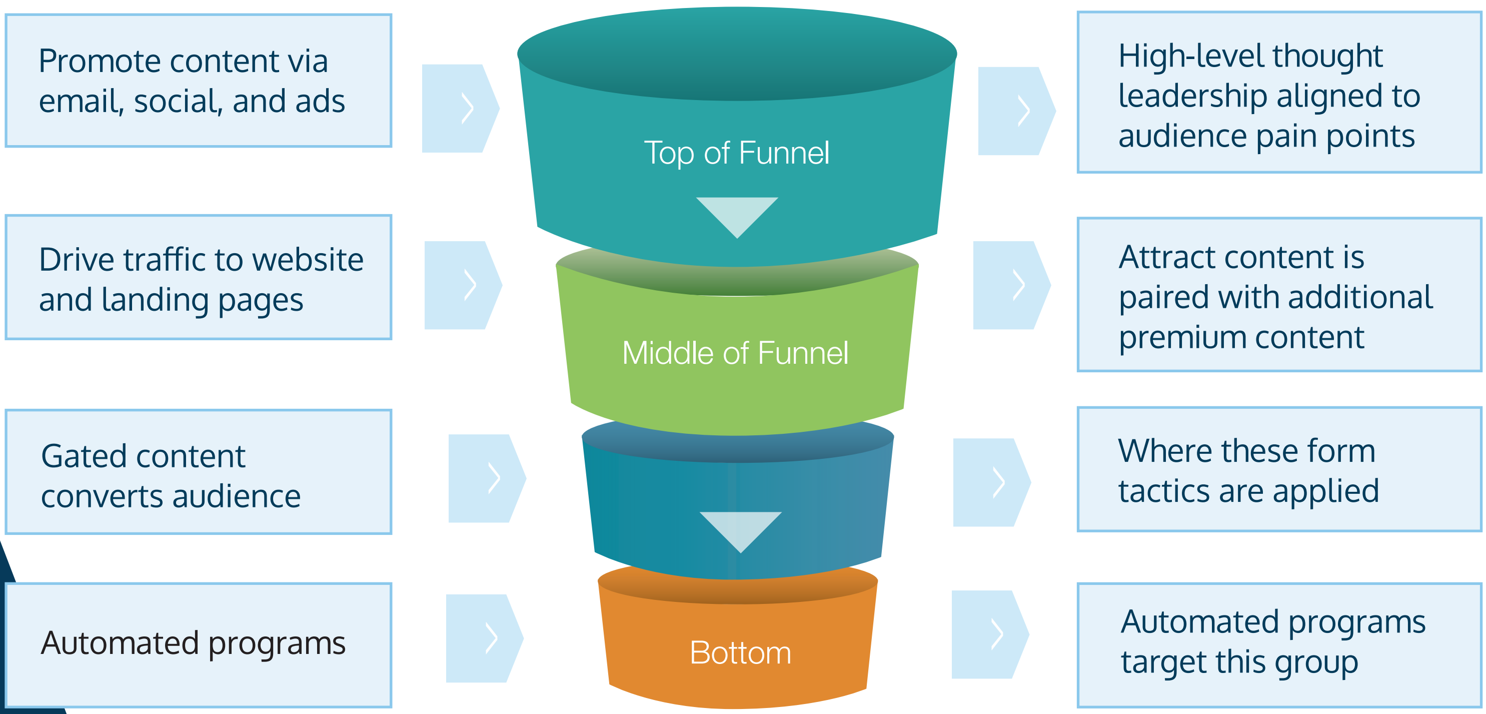
Content designed for direct engagement (bottom of funnel) will have longer, more detailed forms. Good examples of this type of content include scheduling appointments, requesting medical advice, or arranging to speak with a specialist. If a patient is looking for this information, there's a good chance they are completing the research phase of the decision process and moving into deliberation. At this stage, it is perfectly reasonably to be seeking specific information from your audience about budget, role, business needs, and timeline to purchase.



Inbound Lead Conversion

Good marketers know it takes content and forms to convert website visitors into leads. However, many marketers inadvertently bury these conversion points 3 - 5 “clicks” into their websites. Effective website visitor conversion needs to happen early in the website user experience. Content that is deliberately promoted on the first or second page of a user experience is far more likely to be engaged with than content on the third or fourth pages.

Promotion Flow of an Effective Campaign



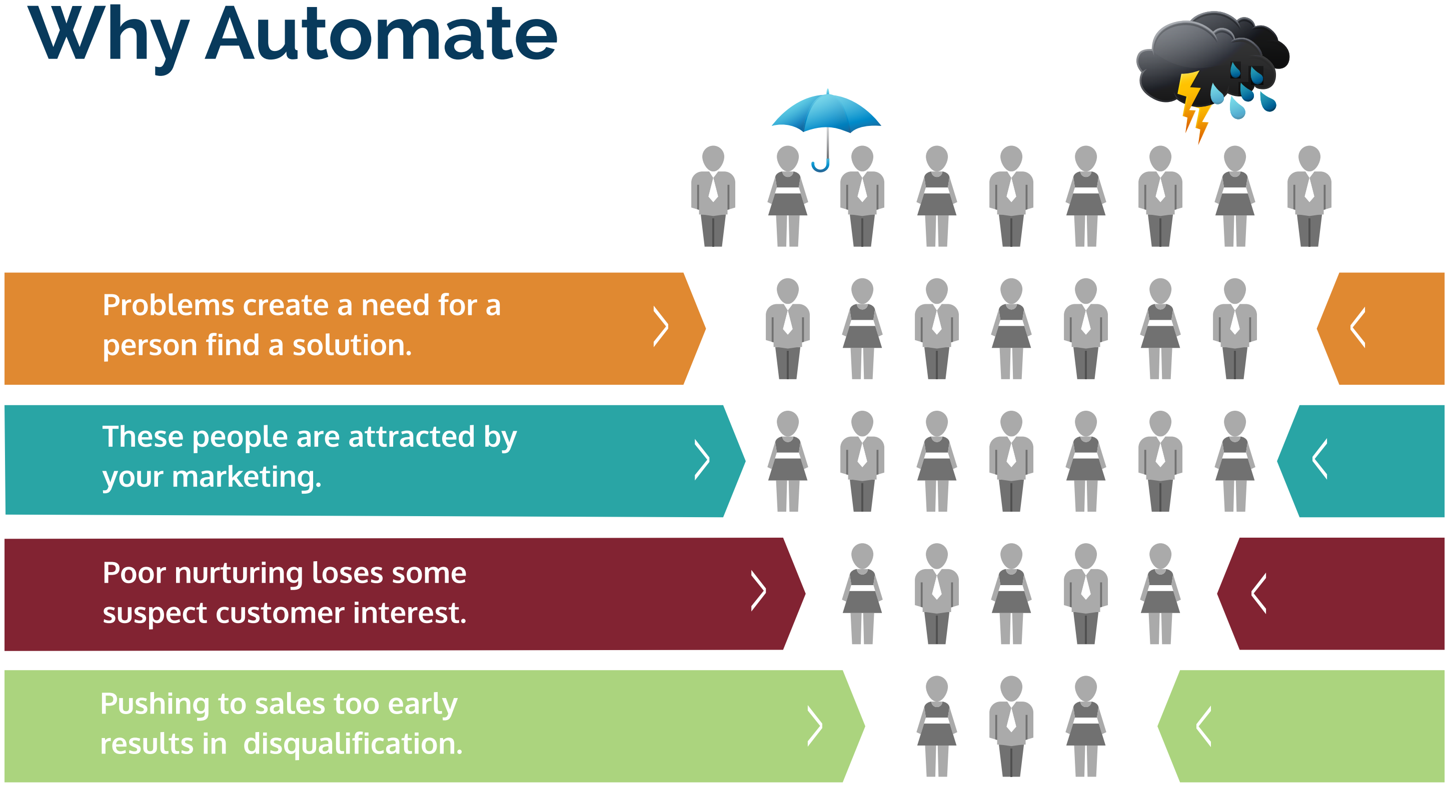
Act-On forms have enhanced functionality and are the key to learning the behaviors of your audience. The goal is to tie form activity to Act-On behavioral tracking. This linkage is the foundation of all advanced marketing automation strategies.

Automated Nurture Strategy

Moving Leads to Action

With Act-On forms capturing interest, databases connected and structured, and a whole world of prospects looking to partner with you for their needs, it’s time to leverage automation and nurture your audience’s interest into action.

Why Automate



A conventional digital marketing funnel is fragile and full of revenue leaks.

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 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
- 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.

However, with Act-On, a systematic approach can be designed to anticipate and accommodate your buyer at every stage of the journey, eliminating these revenue leaks and missed opportunities from your marketing funnel.

A conventional digital marketing funnel is fragile and full of leaks.

Automation Strategy

With Act-On forms capturing interest, databases connected and structured, and a whole world of prospects looking to partner with you for their needs, it's time to leverage automation and nurture your audience's interest into action.

Preparing to Automate

In order to automate processes and communications, you have to set the expectations for your programs. Here's a few pro-tips:

1. Define who you are targeting
2. Define why you are targeting them
3. Define the outcome you want
4. Define how you will report on this outcome

What do I automate?

Automation is a programmatic approach to standardizing processes that require expensive human activity. While almost anything can be automated, most organizations start with the most critical elements. These include:

Lead Generation
Lead nurturing
Sales enablement
Marketing to sales hand off
Customer welcome and/or onboarding
Customer up sell and cross sell
Database management and segmentation

Reflecting on a complete marketing process, please review that same process annotated for automation on the next page.

What if I need help?

If you're trying to learn the tools, the Act-On University has great self paced training tools.

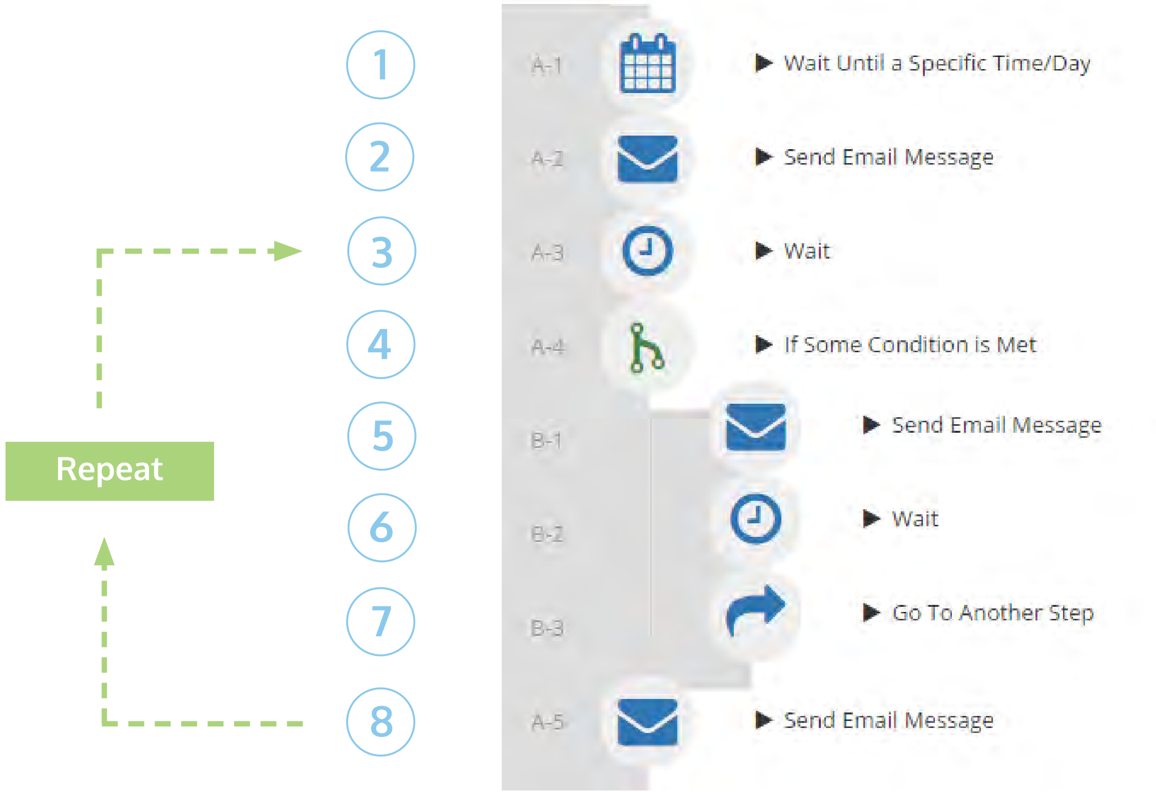
If you need additional help, we recommend working with your CSM who can provide the next level of support and education.

If somethings not working the way you think that it should, then our Technical Support Engineers are probably your best option.

If you need advanced strategy, or some creative assistance, you can always contract work to Act-On Professional Services.

Areas to Automate Overview

Good Workflow



This simple workflow can increase engagement by up to 50%

1. Define a day of the week and time of day that your target audience will likely be reading email.
2. Send your first unique email, using the first subject line for this email.
3. Wait for 1 to 2 weeks between sends.
4. Act-On will automatically check the email report. People who opened the message will go to Step 8 (A-5), those who did not will branch to Step 5 (B-1).
5. Those who did not open the message will receive the same message again, sent with a new subject line.
6. Wait for 1 to 2 weeks between sends, this keeps all messages on the same cadence.
7. After the wait step, the program will automatically route people back into the main workflow at Step 8 (A-5).
8. This is the next unique email in the program, just like Step 2. Repeat the process from Step 3 through Step 8 to build a complete program.

Lead Generation

In this example, we are targeting a cold list of directors and executives with the goal of selling a marketing and sales tool. Our goal is to build a base-level of engagement, measured in content interaction, which are tracked with lead scoring.

A review of Act-On customer data indicates this method gets an average of 300% more opens and 730% more clicks than "batch and blast" product messages.

Step 1 – Answer Theses Questions

Why would these people need our product? What are the problems that they are having with which we can help?

Example Answers:

- Company has increased revenue goal
- Not enough brand/product awareness
- Sales cycle is too long
- Not enough leads in marketing pipeline
- Sales is complaining about bad leads

Step 2 – Review Content Matrix

What content can we provide on these topics? What content do we need to create to address these topics?

Example Answers:

- 4 Ways to plan revenue goals
- 6 Tools to help you build awareness
- 3 Steps to avoid long sales cycles
- 65% of companies have these kinds of funnel leaks
- Quick Guide to sales and marketing

Step 3 – Prepare Landing Pages

It is important that you provide this information outside of the email. Most commonly, these assets are presented with a landing page, although some organizations will use other tactical assets like blogs, surveys, or links to whitepaper downloads.

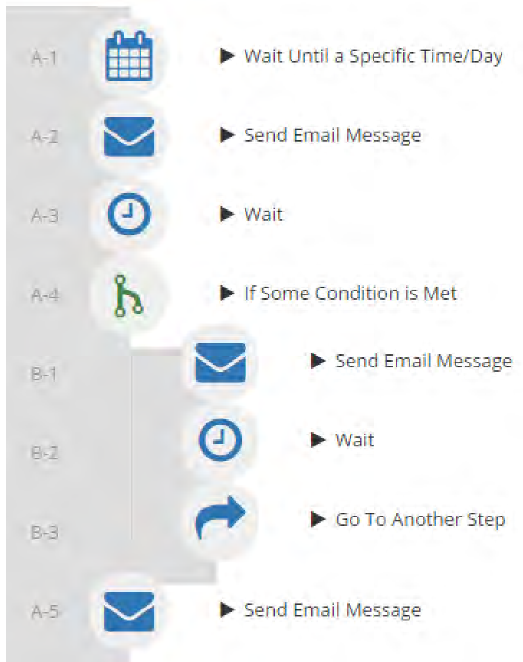
Step 4 – Prepare Your Messaging

Lead generation emails are typically about 150 words long and promote the content that is housed on the landing page.

Step 5 – Assemble Automation

In this case, we're working with 5 messages, which is a great start. Ideally, a lead generation program will have 12 unique messages, although these messages may often promote 4-6 content assets.

Source List = "Top of Funnel" segment
Exit Condition = "Not in Top of Funnel"
Workflow = Standard



Lead Nurture

In this example, we are targeting a the same directors and executives with the goal of selling Act-On. However, we are only messaging those who clicked or engaged with our lead generation campaign.

Our goal is introduce products and services as solutions, measured in content interaction and website visits, all of which are tracked with lead scoring.

This process will become second nature, the workflow doesn't change. The messaging, target audience, and desired outcome does.

Step 1 – Answer These Questions

How will our products or services help this prospect solve their problem?

Step 2 – Review Content Matrix

What content can we provide on these topics? What content do we need to create to address these topics?

Step 3 – Define Target Content

It's still important that you provide this information outside of the email. You'll still use landing pages and blogs, yet often we are also promoting specific pages on your website.

Step 4 – Prepare Your Messaging

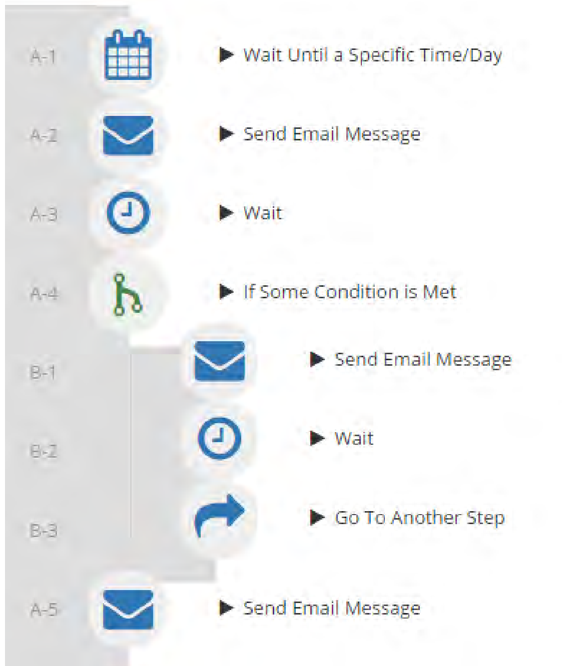
Nurture emails are still short, and can be up to 300 words long. Remember to provide enough information to garner interest, yet keep the goal to obtain a click. This will help you better report on program success.

Over the life of a 7 message nurture program, an average of 57% of recipients open a message, and 26% will engage with calls to action.

Step 5 – Assemble Automation

In this case, we're working with 5 messages, which is a great start. Ideally, a nurture program will also have 12 unique messages, although these messages may only promote 4-6 content assets.

Source List = "Middle of Funnel" segment
Exit Condition = "Not in Middle of Funnel"
Workflow = Standard



Sales Enablement

In this example, we are also targeting directors and executives with the goal of selling a marketing and sales tool.

Our goal here is to prepare the prospects to talk with our sales team, and we are only targeting those prospects who have engaged with our nurture content.

This process will become second nature, the workflow doesn't change. The messaging, target audience, and desired outcome does.

Step 1 – Answer Theses Questions

Why are we better than this prospects other options, which includes our competition?
Why should this person act now, and not later?

Step 2 – Review Content Matrix

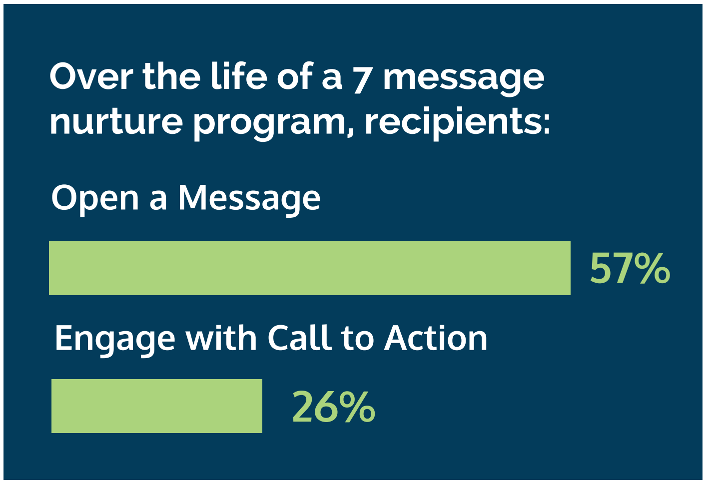
What content can we provide on these topics?
What content do we need to create to address these topics?

Step 3 – Define Target Content

The content you provide here will be exclusively value proposition or competitive positioning. Often, this is included in the email, as your primary CTA will be a scheduling, contact, or pricing asset.

Step 4 – Prepare Your Messaging

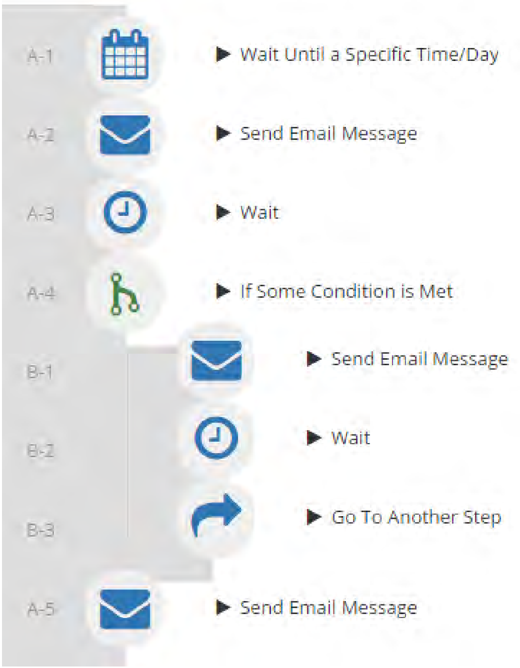
Sales enablement emails are typically about 150 words long and typically sent dynamically from the sales person assigned to the prospect. Very commonly, these messages are simple and mimic a "plain text" message to further enhance the personalized feel.



Step 5 – Assemble Automation

Most sales enablement programs have a total of 4 -5 messages and align with your internal sales process.

Source List = "Bottom of Funnel" segment
Exit Condition = "Open Opportunity"
Workflow = Standard



Marketing to Sales Handoff

Automation to human handoff is a critical step of every business process.This is the core of marketing and sales alignment

As leads warm and meet a defined Marketing Qualified Lead status, it is imperative that you create a process for lead conversion. In most B2B applications, this is usually a handoff to a sales team. This process should be a joint effort of marketing and sales.

Step 1 – Define Process of Assigning

Act-On is not a CRM, and as such does not have lead assignment capabilities. In many situations, lead assignment happens using CRM rules, in others, this is a manual process. It's important that marketing and sales agrees on a lead assignment process so that the marketing team can automated the handoff of the prospect relationship and alert process.

With natively integrated CRMs, Act-On is designed to automatically recognize this lead assignment. In other scenarios, you will want to make sure this information gets added to your contact database, and create segments based on sales rep assignment. See; figures 1 and 2.

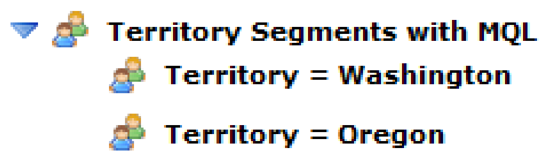


Figure 1: Segments by Territory for AP routing

Figure 2: Automated Program alerting via email

Step 2 – Determine Process of Delivery

If you have a natively integrated CRM, leads that reach your marketing qualified lead (MQL) segment can have tasks assigned to them directly in CRM OR can have fields updated CRM. See; figure 3.

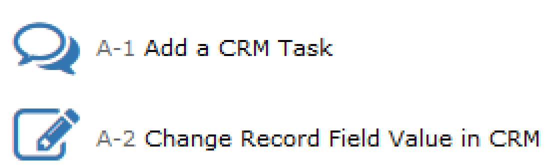


Figure 3: AP alert via task with field update

If an email alert needs sent, these can be directed to an individual based on the segment they appear in. Alternately, you can alert a single person who will be responsible for coordinating sales follow up.

Customer Welcome and Retention

When a new customer signs their agreement, there is usually a lot that goes into the beginning of the relationship to get the customer up and running. As this relationship matures, there are certain risks to every organizations customer retention. The goal of this program is welcome new customers, get them up to speed with expectations, and hopefully, retain the business for life.

In lead gen, we earn customers by connecting with pain points. In retention, we keep customers by eliminating pain points.

Step 1 – Answer Theses Questions

What keeps our customers from succeeding?
What creates delays when customers start with us?
What information do they need now?
What causes customers to leave?

Step 2 – Prepare Messaging

Very rarely does a company invest in this type of content before asking these questions. You're program should have content designed to:

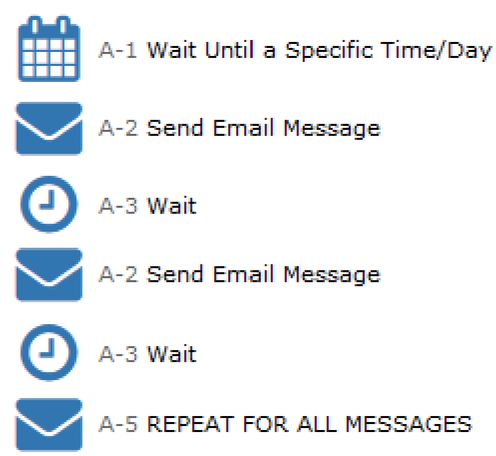
- Welcome the customer and provide critical info
- Explain what is needed for success
- Address risks and delays in the onboarding process
- Prevent the disruption that causes churn

It is very common to provide this information directly in the email. As these recipients are usually known to Act-On, and the need to solicit message diminished, except for reporting purposes.

Step 3 – Determine Timing
Customers will be paying attention, even anticipating these messages. Determine a sending schedule with a weekly frequency, that gradually slows to monthly cadence.

Step 4 – Assemble Automation
The number of messages in an onboarding and retention program varies greatly, however, we strongly recommend planning 6 to 12 months of messages. You should use a weekly schedule for the first month, biweekly schedule for the second and third month, and a monthly schedule ongoing. This program usually has a total of 17 messages in it.

Source List = "Customers" segment
Exit Condition = "Not in Customers segment"
Workflow = Linear Drip



Upsell/Cross Sell

It's very easy to over complicate the upsell and cross sell process. At its core, this effort is just a lead generation exercise that targets your existing customers. Success in this area will come from your ability to segment your database to identify customers who meet the requirements for upsell potential.

Step 1 – Existing Products

To maximize the revenue from your existing customers, you must first define which customers have which products. This is often done through simple list segmentation.

Step 2 – Potential Products

After you have segmented your database by customers that have a product, define the criteria that would qualify a customer for additional products.

Example: A software company sells a standard subscription to a software as a service (SAAS) service (Product A). The marketing team has determined that customers with more than 100 employees are good candidates for an "enterprise" version of its service (Product B).

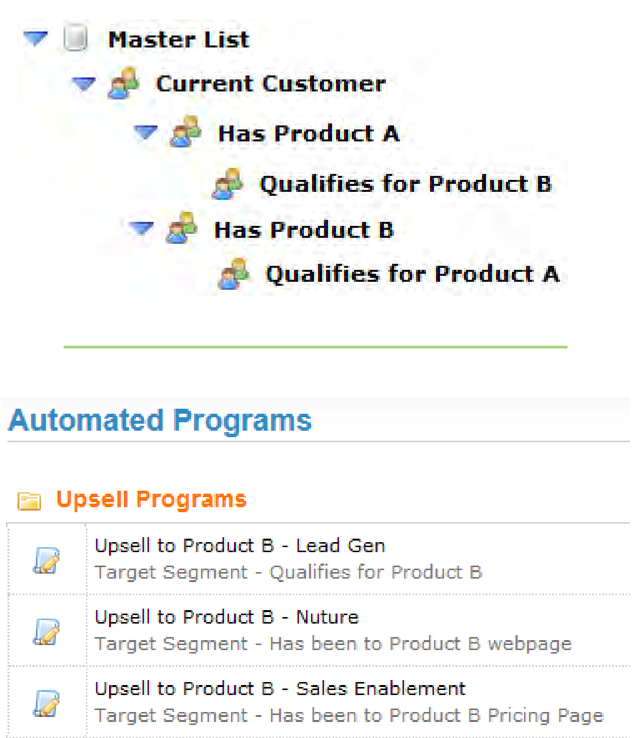
This company should segment all customers that have Product A, then create a sub-segment where "Employees > 200 " and "Product B = False."

Step 4 – Implement Programs

While there will definitely be adjustments to the way email messages are positioned, as well as program triggers, this workflow is identical to the Lead Generation, Lead Nurture, and Sales Enablement programs discussed earlier in this document.

Up selling your customers is just lead generation, nurturing, and sales enablement with a captive audience. Like all things, it's just segmentation.

Source List = "Current Customer" segment
Exit Condition = "Not in Customers segment"
Workflow = Upsell Programs



Reporting

Measure What Matters

Measuring the performance of your campaigns is fundamental to good marketing. It lets you calibrate how you're doing, learn what works and what doesn't, and optimize future efforts for maximum impact. See how to make informed strategic decisions, and calculate ROI with Act-On reports.

Website Visitor Report

	July 2016	August 2016	September 2016
People Visiting	2,151	1,286	4,082
Known	50%	28%	35%
Anonymous	50%	72%	65%
Conversions	184	205	309
Bounces	34%	1%	33%
Companies	526	284	631

Key Elements of This Report

The website visitor report is the most effective benchmark of your inbound traffic, and helps you understand what percentage of your audience you have a meaningful connection with known visitors.

Known Visitors

People who are known by email address to the Act-On Platform. These individuals have had a meaningful engagement with your forms or emails and as such we have complete insight into their behaviors.

Anonymous Visitors

People whose behavior is being tracked, but are not yet known by email address to the Act-On platform. The goal is to leverage content marketing to see these visitors converted to known visitors.

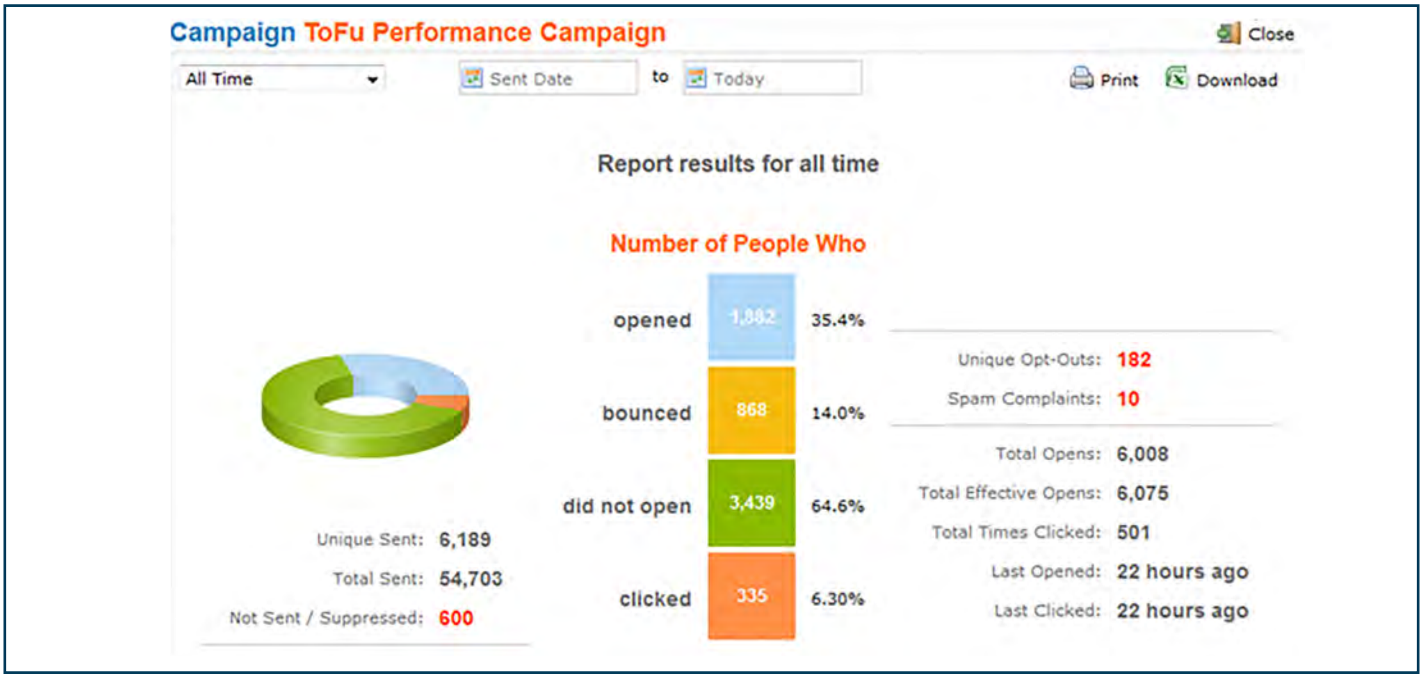
Benchmark Stats

As a general rule, a minimum target of 10% is a good known visitor rate.

Organizations that are successful with marketing automation will often see

known visitor rates in the range of 60% +/-.

Act-On Campaign Report



Why would I use this report?

The campaign report is the easiest way to benchmark how an outbound email campaign is performing. This is especially useful as you begin to build automated programs specific to stages of your marketing and sales process. This isn't an open and click report, it measures total audience engagement. Think, "out of my target audience, how many people have..."

Change of Thinking

Never look at a single email as a "campaign." It's not. Emails are touch points, sentences in a larger paragraph that comprises your campaign.

Average Performance

Act-On has conducted research on average performance of various types of campaigns. These average benchmarks are achievable for any organization.

Campaign	Open	Click
Lead Gen	30 %	5 %
Nurture	60 %	25 %
Sales Enablement	70 %	25 %

Additional Resources

Act-On University

Act-On University is the most commonly used resource by Act-On users. In the University, you will find articles, documentation, and videos on the complete feature set of Act-On. This resource will allow you to develop mastery of Act-On tools and technology.

Act-On Center of Excellence (ACE)

ACE is a resource designed to help make marketers more effective in their strategic methodologies. With nearly 1,000 pieces of curated content, it contains inspiration and advice for your new campaigns, reporting, and ideas.

Customer Success

An Act-On Customer Success Manager can assist with all types of questions and are your go to resource for tactical discussions and strategic applications of the software.

Technical Support

Act-On Technical Support is comprised of the brightest minds in the industry, and provides expertise in platform functionality. This resource is great for quick questions.

PRO SERVICES

Act-On Professional Services offers full service digital marketing services exclusively to Act-On customers, to help augment your current team. A consultation call can be scheduled with one of our Marketing Automation Strategists by reaching out to your Customer Success Manager or Sales Manager.

The value of Act-On is in the visibility and insight it gives into the behavior of an audience. By understanding who specifically has engaged with content, we gain the ability to target and nurture by interest.

Act-On allows you to do that.

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. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.

Connect with us to learn more

www.act-on.com @ActOnSoftware | #ActOnSW

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