WHITEPAPER:
HOW TO AVOID MARKETING TECHNOLOGY PARALYSIS

A Guide for Marketing Technology Buyers

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HubSpot

CONTENTS

TECHNOLOGY.

It's supposed to be a marketer's friend — the tool that democratizes and empowers marketing everywhere.

Except — how often does that happen?

Instead of empowering, it paralyzes. Marketers see all the choices — marketing automation, social media, landing pages, content management systems, pay-per-click platforms, social tracking tools, social publishing tools, social advertising tools, marketing analytics, lead management tools, lead tracking tools — they get overwhelmed, and they freeze or veer off course into a doomed solution.

This whitepaper will help you avoid that fate. It will be your guide to sorting through technology clutter and answering the key question:

? HOW SHOULD I PICK THE RIGHT TECHNOLOGY FOR MY MARKETING TEAM?
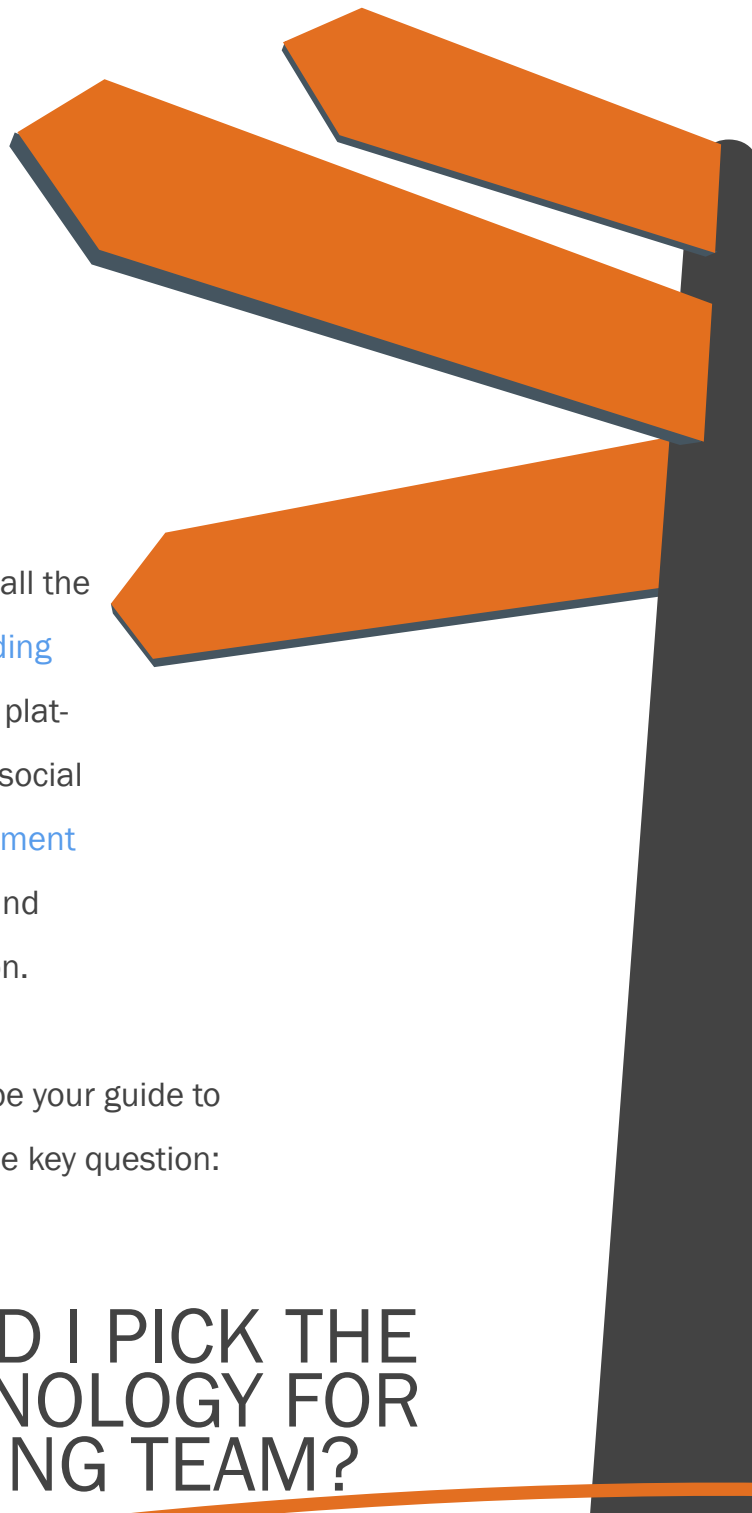
CHAPTER 1

HOW DID WE GET HERE?

What the &(*&!) happened? How did marketing technology become so freaking complicated?

The story starts with the typical 20th century marketing playbook that built companies like Apple, Cisco and Microsoft: buy your way into the mass communication channels, then flood them with your message. A handful of TV, radio and print channels had the attention of most buyers, so if you could broadcast a compelling message from those channels, buyers would line up outside your door.

OLD RULES

This acquisition-focused playbook is what we now call outbound marketing — marketing with a sledgehammer. As David Meerman Scott notes, the old rule of marketing was to "buy your way in with advertising" and "beg your way in with PR."

It turns out the rules of the marketing game have drastically changed.
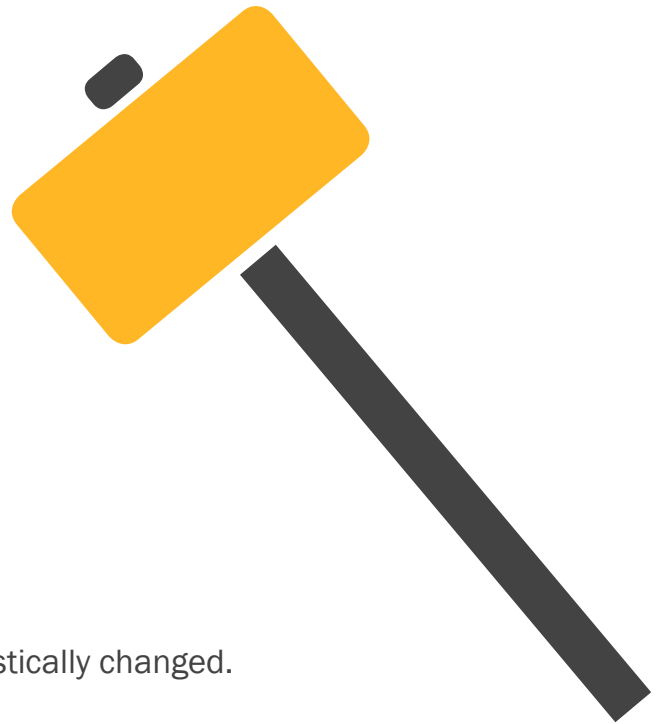
NEW RULES

Today's smartest marketers have a very different playbook.

They don't market with a sledgehammer, they do inbound marketing: they attract people with a magnet. They know their buyers are online (recent Google research reported that 71% of B2B buyers used the web to find out about new products) so they build online content and community assets (blogs, Facebook pages, YouTube channels) that attract highly targeted and engaged prospects to their businesses.

OLD TOOLS

This new inbound marketing playbook requires a new set of tools. In the traditional model, you hired an agency to create and place ads and you relied on media outlets for publishing and tracking.

- Print Advertising
- Trade Shows
- Direct Mail
- PR Budget

NEW TOOLS

Today's marketers need to do their own publishing and tracking. Instead of buying access to media, they need to build their own media. That means building assets like blogs, search engine authority and social publishing channels like Twitter, Facebook and YouTube.

- Print Advertising
- Trade Shows
- Direct Mail
- PR Budget
- Blog
- Facebook Page
- Website
- Twitter Account
- LinkedIn Page
- YouTube Channel
- Marketing Analytics
- Website Analytics
- Email Marketing
- Marketing Automation
- Social Media Monitoring
- Social Media Publishing
- Lead Management
- Lead Generation
- Lead Tracking
- Search Engine Optimization

The new marketing playbook required to build those assets to attract visits, convert them into leads and customers, is vastly more complicated than the traditional playbook — more tools, more processes — so it's not surprising that marketers feel overwhelmed.

CHAPTER 2

A STRATEGY FOR MARKETING TECHNOLOGY

Marketing technology shouldn't be overwhelming. There are thousands of new apps and services for marketers to evaluate, but if you approach them systematically, it's easy to focus on the ones that can have a significant impact on your business.

Trouble is, most people don't approach marketing technology systematically. They approach it like kids approach new toys at Christmas time. They love 'em for a few months, then they leave 'em. That's okay for kids, but it's not okay for marketers. If you put the wrong resources into the wrong programs, you can run into problems.

POTENTIAL PITFALLS

What kind of problems? Consider the story of one UK software company that prematurely dove into marketing automation. Here are just three of the many problems it encountered:

NOT ENOUGH LEADS

Marketing automation is a process that helps you nurture leads. This company implemented marketing automation before they had leads to nurture.

NOT ENOUGH CONTENT

Marketing automation requires a constant flow of offer-based content in order to be successful. This company wasn't producing that kind of offer content, and thus wasn't setup to do marketing automation successfully.

NOT ENOUGH STAFF

Despite the name, marketing automation requires people. The software automates the flow of emails, but it requires people to run it. If you don't have the staff to run the campaigns, you won't be successful.

As the Joby Blume, the author of the post, writes, the company didn't have the right system in place for marketing automation to be successful.

> *We didn't have a marketing process to automate. Our marketing was very tactical. We might acquire a list or attend a trade show. What we did next was ah-hoc, not necessarily well thought through.*

This marketing automation mishap is just one example of technology that, when deployed without thinking of the marketing process, wastes a company's time and resources. Here are a few other common pitfalls:

THE SOCIAL MEDIA SUGAR HIGH

Many marketers get swept up in the promise of social media — the low cost, the vast scale, the personal connections — so they dive in. But diving in without thinking about social media's role in marketing leads to problems. Social media doesn't produce paying customers on its own. It needs to be paired with content like blog articles, analytics and CRM tools to create an entire process.

THE BEST BLOG NOBODY READS

Stories of blogging success are a dime a dozen, so many marketers dive into blogging with high expectations and lots of energy. But simply writing posts isn't enough to be successful. The blog needs to be optimized for search engines and shared via social media, so that people find it. It also needs to include calls-to-action to landing pages, so that blog visitors move down the funnel, becoming leads and customers.

THE EMAIL SPAM MACHINE

Many marketers use email as a crutch. They buy lists and blast them with messages until recipients unsubscribe. Narrow email tactics like these are expensive and unproductive (most lists expire at a rate of 25% a year, so if this is all you're doing, you'll have to keep buying new lists).

But that doesn't mean email is a completely dead channel. If you build a list yourself and nurture the recipients with relevant content over time, it will be far more productive for you.
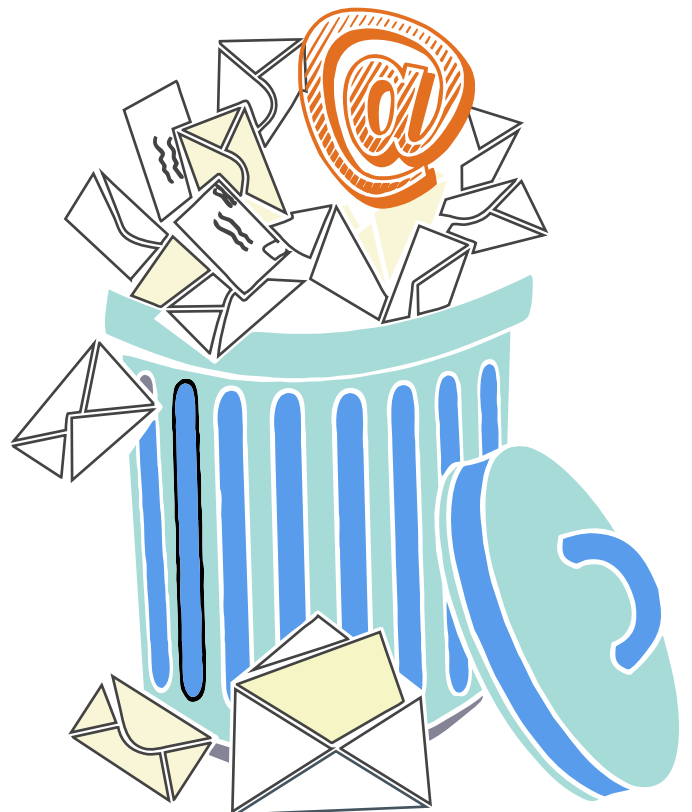
EMAIL AND MARKETING AUTOMATION

Guide leads from "interested" to "sales-ready" with HubSpot email, lead nurturing and marketing automation.
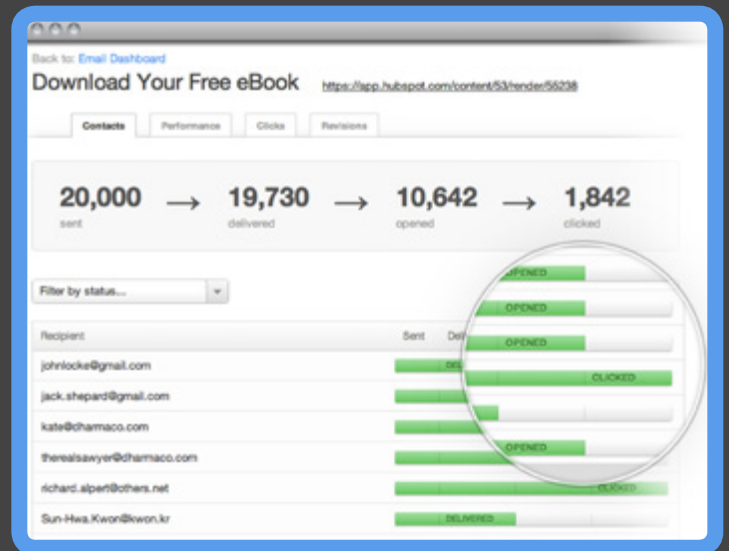
✓ **Email: Segment lists and target emails.**

✓ **Lead Nurturing: Warm up leads with a series of customized emails.**

✓ **Marketing Automation: Trigger personalized emails based on your leads' interests and behavior.**

Request A Demo

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THE FUNNEL IS KEY

The lesson from all these examples is clear:

Don't focus too much on the latest marketing toys. Instead, build a marketing process, and as new technology surfaces, figure out how it can help you improve your process.
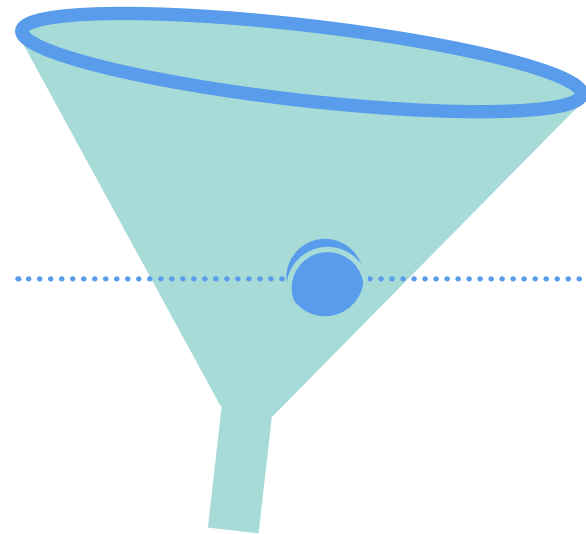
What's the right process? It's the same one sales and marketing have been focused on for over 100 years: the funnel. You can think of it in three stages of action:

GET FOUND - TOP OF THE FUNNEL

You want to do everything you can to get found by users. Most marketers measure their success at getting found by website visitors.

CONVERT - MIDDLE OF THE FUNNEL

You want to do everything you can to convert website visitors to leads, and then to sales. Most marketers measure their convert stage in terms of visitor-to-lead conversion rates, leads, lead-to-customer conversion rates and customers.

ANALYZE - WHOLE FUNNEL VIEW

You need to do everything you can to analyze the performance of your sales and marketing funnel and improve it.

If you think about marketing technology decisions in terms of their impact on these three stages, the decisions suddenly become less mysterious.

? AM I READY FOR THE TECHNOLOGY?
DO I HAVE THE RIGHT PROCESSES IN PLACE
TO USE IT? WHAT WILL THE ROI BE?
WHAT WILL THE BUSINESS IMPACT BE?

You can answer these questions for any new piece of technology if you frame them in the lens of the funnel.

Explore **HubSpot** All-In-One Marketing Software — Free Demo

CHAPTER 3

MARKETING TECHNOLOGY TACTICS

Before you consider any serious investment in marketing technology, you need to answer one simple question: What are your goals?

Your technology investment will fail if you have wishy-washy goals — if you're just trying to "get more attention," "create more content," or "generate more leads."

How do you define attention? What kind of content are you going to create and how much? How many more leads do you want to generate? To make technology work for your business, you need to have specific quantitative goals.

SETTING UP GOALS

In most cases it makes sense to base your marketing goals on your business goals, which usually include revenue targets. If that's true for your business, you should be able to use your target revenue to get target traffic and leads numbers for your marketing team.

Let's take the example spelled out in the table below. Your business generated $8M in revenue last year, with an Average Revenue Per Unit (ARPU) of $1000. That means you sold to 8,000 customers. Your lead-to-customer conversion rate was 2%, which means you had 400,000 leads, and since your visitor-to-lead conversion rate was also 2% you had 20,000,000 visitors.

METRICS	GOAL THIS YEAR	LAST YEAR
Target Visitors	25,000,000	20,000,000
Visitor-to-Lead Conversion	2%	2%
Target Leads	500,000	400,000
Lead-to-Customer Conversion	2%	2%
ARPU	$1,000	$1,000
ANNUAL SALES	**10M**	**8M**

Now, let's assume you want to generate $10M in revenue next year. Assume your ARPU and all your conversion rates hold steady — do the math and you will see that you need to generate another 5,000,000 visitors to hit your goal. You need 25,000,000 visitors to your website to hit $10M in revenue, assuming everything else stays the same. That's the kind of goal you need to set.

FOUR SCENARIOS

How can technology help you achieve goals like that? Great question — and it happens to be exactly the question we'll answer in remaining portion of this whitepaper. We'll tackle the question using four different scenarios. Each scenario represents a different set of circumstances a marketer might find herself in, and each one has a different technology solution.

#1 NO FUNNEL DATA

#2 LOW TRAFFIC

#3 LOW VISIT-TO-LEAD CONVERSION RATE

#4 LOW LEAD-TO-CUSTOMER CONVERSION RATE

SCENARIO #1: NO FUNNEL DATA

Suppose you just took over marketing at Acme Widgets. You haven't had a chance to look at your current performance, but your boss is telling you to focus on marketing automation. Your colleagues are telling you to embrace social media. And others are urging you to focus on the tried-and-true — email marketing. Which do you choose?

None of the above! There's no way you can decide on a marketing technology investment when your funnel looks like the one in the table below. If you don't know what your funnel looks like — the kind of traffic you're getting, the kinds of leads you're getting and your conversion rates — your first technology priority should be instrumentation. You need marketing analytics.

METRICS	GOAL THIS YEAR	LAST YEAR
Target Visitors	?	?
Visitor-to-Lead Conversion	?	?
Target Leads	?	?
Lead-to-Customer Conversion	?	?
ARPU	?	?
ANNUAL SALES	**10M**	**8M**

SOLVE WITH **MARKETING ANALYTICS** SOFTWARE

● FULL-FUNNEL ANALYTICS

You need a way to view your full funnel. That means you need to be able to see your funnel by each stage (visitors, leads, customers), and you need to be able to break the funnel down by channel. This is important because you need to be able to get insight into the places where you can take action. Say your visit-to-lead conversion rate goes down .5% a month for two months. What's causing it? It's hard to tell unless you have the power to break that conversion rate out by channel.
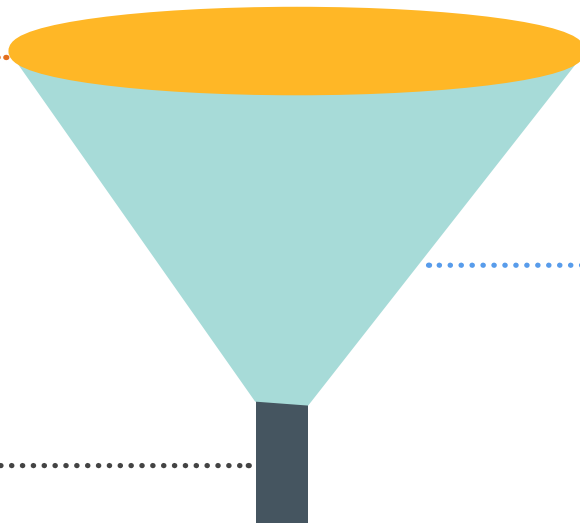
LANDING PAGE ANALYTICS

Full-funnel analytics is great for the high-level view, but you also need to be able to take a deep dive into specific landing pages, the actual point of conversion, to see what's working, and what isn't. Typically, you should track landing page views, submissions and customers, and compare these metrics across different landing pages over time. HubSpot's landing page dashboard (screenshot below) is one example of a tool that provides these kinds of insights.

CONVERSION ASSIST ANALYTICS

In addition to a view of the full funnel and the first conversion point, you need to have some insight into the forces (the content, mainly) that help move people down the funnel. Find out which blog articles, whitepapers and website pages were most frequently touched by leads and customers. Once you see this, you'll have a better idea of the kind of content that is effective in converting people and the kind of content that you should be creating.

CHANNEL-LEVEL ANALYTICS

You also need to be able to measure each of your channels according to their own metrics. You want to measure the performance of your blog (maybe visits to each post), the performance of your email campaigns (clickthrough rates), your social media campaigns (clicks) and any other channel you're using. They key with channel-level analytics is to avoid focusing on them too much. Use them to optimize specific channels, but be sure to use a full-funnel view to decide on the resources you allocate to each channel.
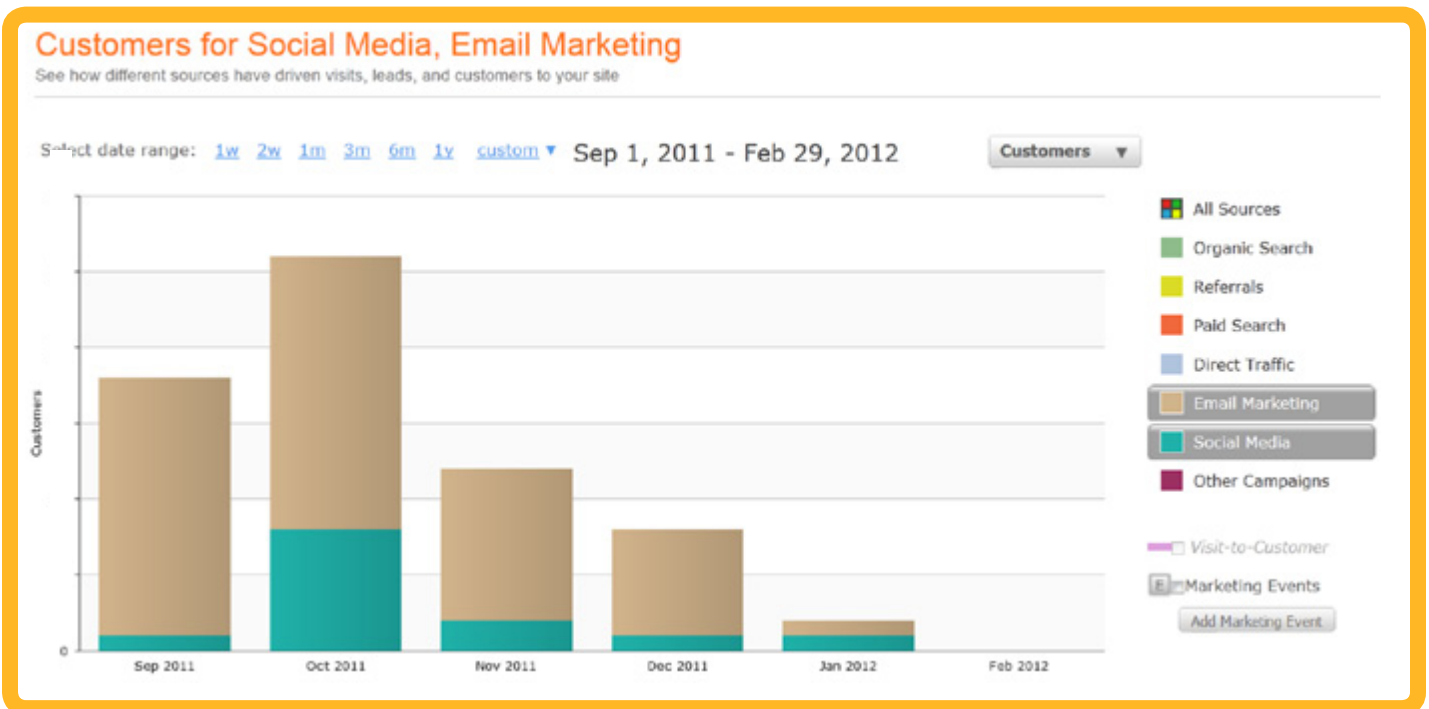
INTEGRATION

Finally, look for marketing analytics tools that integrate as much of your marketing activities as possible. Are you tracking leads generated by webinars? Social media? SEO? Can you track each of these channels together with comparable data? Only when you view the leads, conversions and customers generated by each of these channels in the same place can you judge their relative effectiveness.

SCENARIO #2 : LOW TRAFFIC

Now assume you put a robust marketing analytics package in place. You have perfect insight into your funnel and the problem is clear: You don't get much traffic into the top of your funnel. A decent chunk of the people who visit your site convert to leads — even better, a crazy 75% of people who become leads on your site end up converting to customers. Your problem isn't converting leads to visitors, and it's not converting to leads to customers. Your problem, as you can see in the table below, is simply getting people to your website.

METRICS	GOAL THIS YEAR	LAST YEAR
Target Visitors	25,000,000	3,333
Visitor-to-Lead Conversion	2%	2%
Target Leads	500,000	67
Lead-to-Customer Conversion	2%	75%
ARPU	$1,000	$1,000
ANNUAL SALES	**10M**	**$50,000**

So what's the best technology to help you attract visitors to your website? In the traditional playbook, the answer was simple: buy traffic. Today, the smartest marketers are focusing on search engine optimization, blogging and social media.

SOLVE WITH **SEO, BLOGGING** & **SOCIAL MEDIA**

HubSpot's 2012 State of Inbound Marketing report showed that these three channels were most frequently cited by marketers as channels with a below average cost-per-lead, and channels that were growing in importance.

WHAT TO LOOK FOR IN **SEARCH ENGINE OPTIMIZATION** TECHNOLOGY

Search engine optimization is no longer the sexiest new online marketing technique (social media stole that honor a long time ago), but it's still a critical traffic-generating factor for any website.

There are two basic pieces of search engine optimization — on page and off page. On-page tactics focus on the code you can actually change on a page. The good news is that on-page SEO is easy to control; the bad news is that it's not critically important. Off-page SEO revolves around the links that go into your site. The good news is that off-page SEO is super important. The bad news is that it's hard to master. As a marketer, you need need to do both.

There are three main factors to consider when evaluating technology to help you with on- and off-page SEO:

KEYWORD ANALYSIS

Keyword analysis should be the first step of any SEO process. Keyword analysis will help you understand which keywords you're ranking for now, and which keywords you should try to improve your rank for. To get this kind of insight, you need to be able to generate a report of all your keywords, and compare them by traffic, difficulty and current rank. Those factors should dictate what keywords you need to focus on.
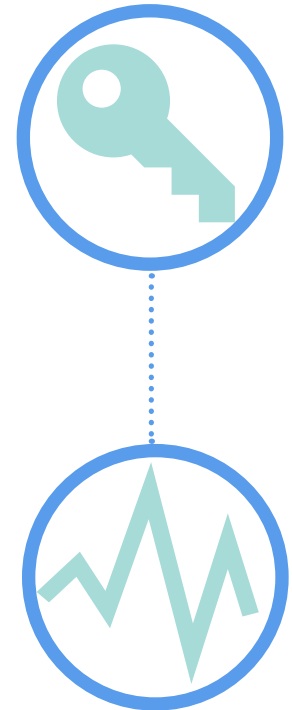
You don't want to waste your time trying to rank for keywords that you're not currently ranking for, that are highly contested and that generate relatively low traffic levels. Instead, you want to focus on keywords that you're already ranking for but could have a higher rank, that generate large volumes of traffic, and that aren't very competitive. A good keyword tool will help you find these keywords.

WEBSITE TOOLS DESIGNED FOR SEO

Keyword analysis tools help you develop metrics and plans for SEO; the right website tools will help you actually implement your SEO plan. When picking website tools, make sure that (a) it's easy to change page attributes like the title, the meta description and the keywords, and (b) new pages are created with default optimization like keywords in the url address and automatic sitemap generation. These are all on-page SEO elements that you can fully control and optimize.

PAGE-LEVEL SEO ANALYSIS

The final key piece of SEO technology is page-level analytics. You need to be able to assess the SEO quality (and inbound links) of each of the pages on your website. Ideally, you'll be able to get a report on each of your pages, listing inbound links, their authority, as well as keywords the pages rank for, and any SEO errors on the pages.
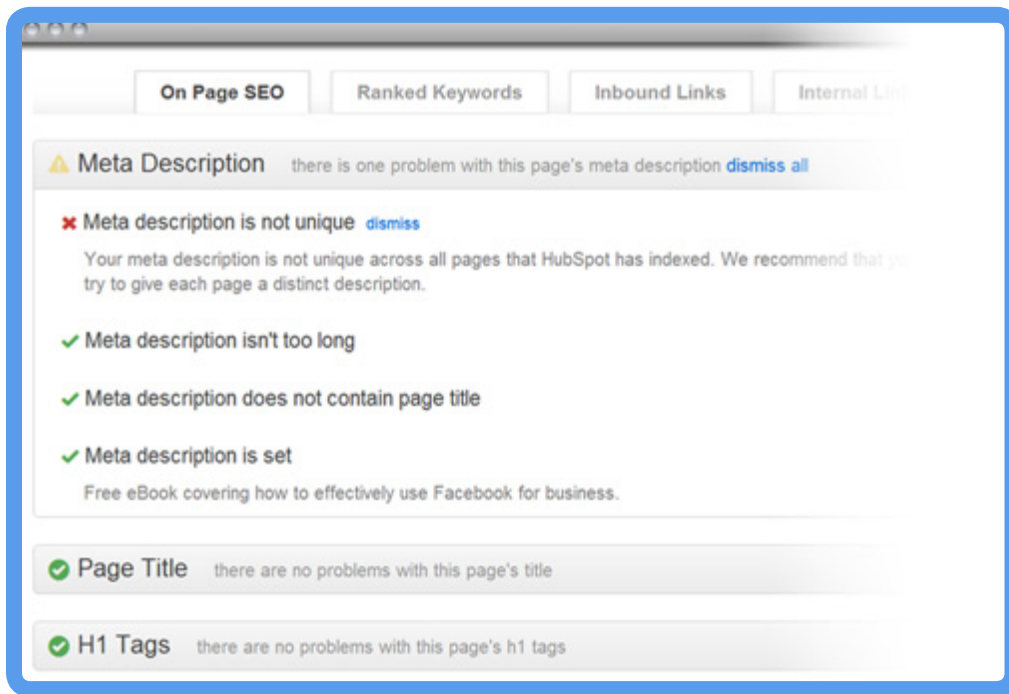
INTEGRATION

Although not critical, life is a lot easier when your SEO tools are integrated with the rest of your marketing tools. For example, if your page-level SEO tools are integrated with your website man-agement software, it will be a lot easier to fix any errors that the report turns up. Or if your SEO tools are integrated with your marketing analytics tools, you can see the leads and customers generated by each of your keywords.

WHAT TO LOOK FOR IN **BLOGGING** SOFTWARE

SEO is a critical part of building traffic to your website, but it shouldn't be your only strategy. SEO tactics need to be coupled with content, ideally a blog.

Why is a blog so important? Think of lottery tickets. If you're focusing only on page-level SEO, you have a fixed number of opportunities to rank for, and that number is limited by the number of pages you can manage.

If you're blogging, the number of pages is not fixed — it keeps growing every time you publish a blog post. Every time you publish a blog post, you buy yourself a new lottery ticket for the search engine ranking lottery. Here are a few things to look for when evaluating blogging software:

● EASY TO USE

You need to be comfortable using your blogging software multiple times a week. Writing is hard enough, so you don't need to make matters worse with difficult software. Make sure it's easy to create, edit, publish and schedule a post. Managing comments should also be simple.

BUILT-IN SEO TOOLS

Business blogs should be designed with SEO in mind. The post URLs should have good SEO structure and page-level SEO features. You should have an easy way to add or change keywords for specific posts. Ideally, you'll also be able to get SEO feedback like keyword suggestions as you write.
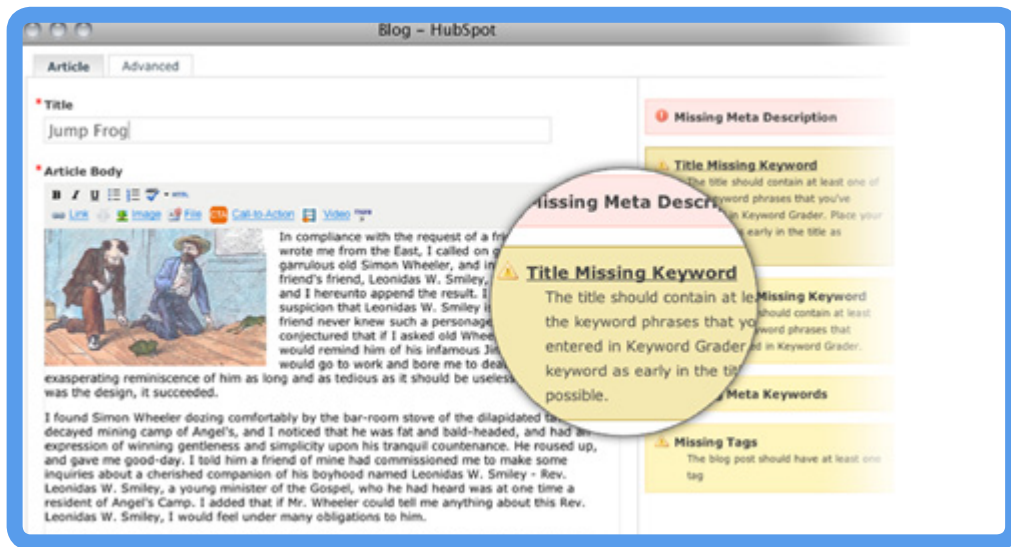
SOCIAL SHARING AND EMAIL SUBSCRIPTION

Social sharing is a critical, and a fairly standard, piece of any blogging platform. Most blogging platforms make it easy to share your posts by social media. In addition to social media following, make sure your blog readers can subscribe to your blog by email.
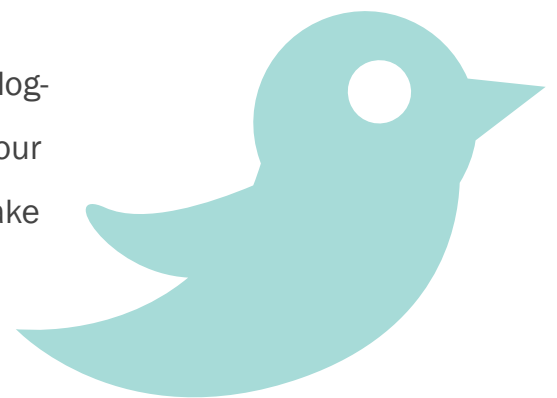
INTEGRATION

Look for a blogging tool that integrates well with the rest of your marketing activities. Integration with your marketing analytics tools will help you track the blog posts that drove the most leads. Integration with a marketing services marketplace will make it easy to outsource content.

WHAT TO LOOK FOR IN **SOCIAL MEDIA** SOFTWARE

Blogging and SEO are important traffic drivers — but they often struggle without a third element: social media. To produce consistent traffic growth, businesses need to build communities of fans and followers on social networks. Once they have the networks in place, they need to share their SEO-optimized content with those communities and use the content to attract new visitors to their site. Here are key factors to consider when investing in social media software:

A WAY TO MONITOR SOCIAL NETWORKS

The first rule of social media software is listening. Many marketers do this on the original social sites — on LinkedIn, on Facebook, on Twitter. But hopping across different applications can be complicated and time-consuming. Ideally, you'll be able to monitor most social media discussions of your business in a single application.

INTEGRATED, MULTI-CHANNEL PUBLISHING

Chances are your customers and prospects are clustered across different sites (not everybody lives on Facebook; not everybody lives on Twitter). If you want to reach all your customers and prospects, you need to publish to Facebook, Twitter, LinkedIn and to any other site where you have a concentration of users. It's a lot of work to publish a single piece of content on multiple sites, so you should make sure your social media publishing tools allow you to publish to all of them at once.

EASY SOCIAL MEDIA FOLLOWING

Building a following is a critical part of social media. The bigger and more engaged your network, the greater your ability to use social media to generate traffic for your site. You should have an easy way to encourage your community to follow you on your website, on your blog, in your emails and in other places that you generate lots of new traffic.

REACH TRACKING

Reach is a key metric for marketing teams. It's an indication of your marketing team's power to generate traffic and attention. A great piece of content will have a much bigger impact if it's driven by great reach. Your social media tools should make it easy to track the aggregate reach of your social media channels.

INTEGRATION

Social media shouldn't just be an app you use, it should be integrated into everything your marketing team does. Your website, blog and landing pages tools should be integrated with your social media publishing tools so that they easy to track. You should have a way of tracking social media activity of contacts in your marketing database. And you should have a way of tracking leads and customers generated by social media

SCENARIO #3: LOW VISIT-TO-LEAD CONVERSION RATES

Imagine you're now at a different company, you're getting tons of traffic, and when people fill out the lead form, you're converting a healthy number of them to customers — it's just that, as you can see in the table below, there aren't that many people converting from visitors to leads.

METRICS	GOAL THIS YEAR	LAST YEAR
Target Visitors	25,000,000	2,000,000
Visitor-to-Lead Conversion	2%	1%
Target Leads	500,000	20,000
Lead-to-Customer Conversion	2%	5%
ARPU	$1,000	$1,000
ANNUAL SALES	**10M**	**$1,000,000**

SOLVE WITH
# **CONVERSION** TOOLS

WHAT TO LOOK FOR IN **CALL-TO-ACTION** TOOLS

Calls-to-action are the critical first step in the lead conversion process. If you don't have good calls-to-action, you're never going to get people to move off of your blog and take that next step toward becoming a lead. What do you look for in technology for CTAs? Here are three things:

● EASY TO PUBLISH AND MANAGE LOTS OF CTAs

Volume is the key to high CTA conversion rates. You need to create different offers (CTAs) for different people and different contexts — and you need to able to rotate them through your site, track the success of each and pick winner. Of course, you can do all of that manually, but it's a hassle, and if it's a hassle, you won't do it as much as you need to.

● BE ABLE TO COLLECT CTA DATA

It's one thing to be able to publish lots of CTAs — it's another to be able to track the traffic of your CTAs. You need both. You need to be able to see how many CTAs you're publishing and the results for each of them.
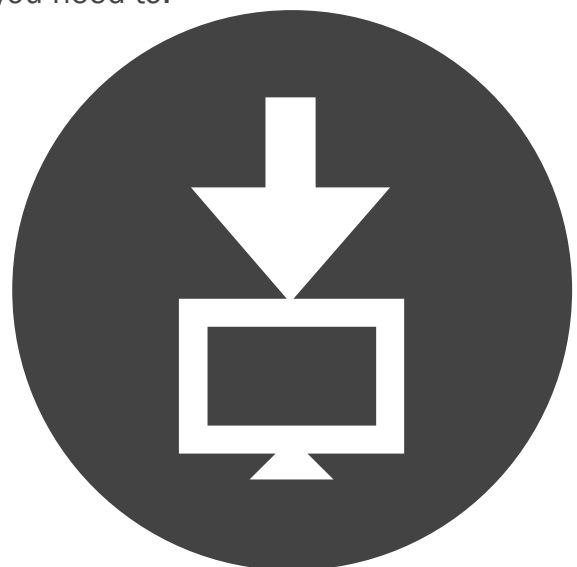
A/B TESTING FOR CTAs

Everybody has opinions on CTAs. Yet opinions don't get you very far. Instead, you need to run A/B tests of your options and see which one actually gets clicked on the most (produces the highest conversion rates).

INTEGRATION

Your calls-to-action publishing and management tools should have seamless integration with your website management tools. And, perhaps more importantly, your CTA tools should be integrated with a services marketplace so you can easily source design talent to help produce CTAs.

WHAT TO LOOK FOR IN **LANDING PAGES**

So you've got your CTAs setup, you're collecting tons of data about the CTAs, and you're running A/B tests to improve the conversion rates. What more can you do to make sure your conversion rates are cranking? Setup and optimize great landing pages. Here's what to look for in landing pages:

## EASY TO PUBLISH AND MANAGE LOTS OF LANDING PAGES

To optimize your landing page conversion rates, you need to publish a lot of them and change them easily. Many marketers try to create a successful sales and marketing funnel without much control over their landing pages. If you want optimized landing pages, it needs to be easier for more than one person on your team to create and edit landing pages.

A/B TESTING FOR LANDING PAGES

The best way to optimize landing pages is to run tests. The most efficient way of running landing page test is built-in A/B testing tools for your landing pages.

| A | 6.4% Conversion Rate |
| B | 13.6% Conversion Rate |
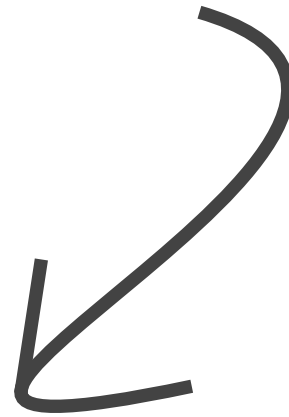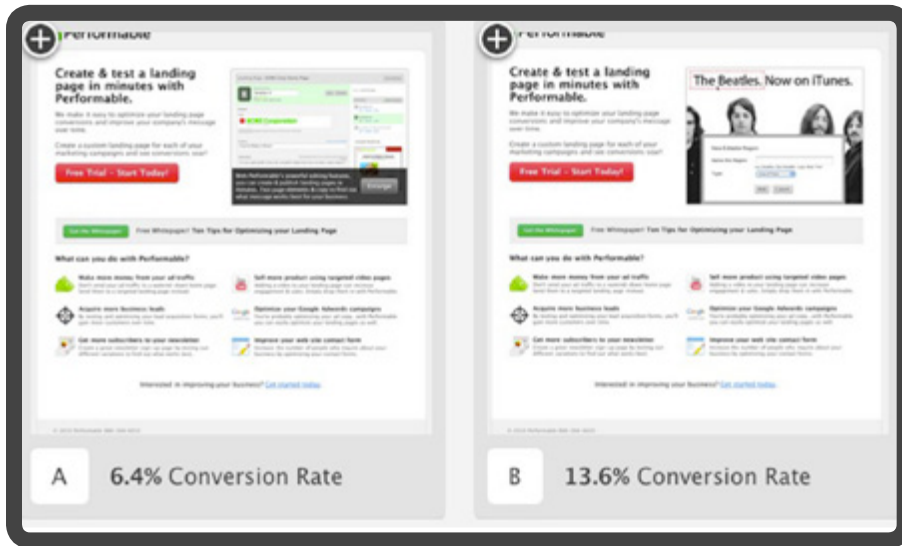
FLEXIBLE PUBLISHING

You should be able to publish your landing pages the way you want: on a third-party site, on a subdomain of your main website or on your main website. Or maybe you want to simply embed a form on your site. Your landing pages should be flexible enough to meet your needs.

INTEGRATION

Your landing pages need to feed your marketing database and your CRM. In other words, contact information submitted on your landing pages needs to be automatically put into your marketing database and CRM. If you don't have that automatic connection setup, you're going to create a whole lot of new work for yourself. You'll end up spending your time downloading and uploading CSV files from the system.

FORMS AND LANDING PAGES

Research shows that companies with 30 or more landing pages generate seven times more leads than those with fewer than 10. HubSpot makes it easy to build sophisticated landing pages so you can create more pages, improve your conversion rates and generate more leads.
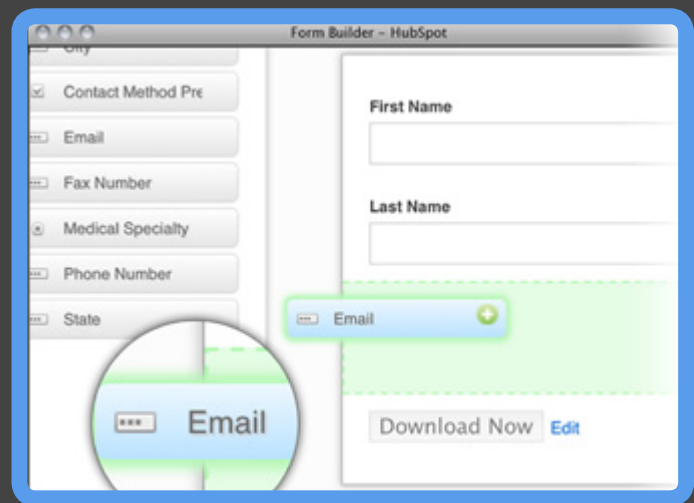
- ✔ **Customizable lead capture forms and auto-response emails**

- ✔ **Built-in call-to-action (CTA) builder**

- ✔ **CRM Integration for closed-loop reporting**

- ✔ **Integration with email and lead nurturing**

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SCENARIO #4 : LOW LEAD-TO-CUSTOMER CONVERSION RATES

So you figured out your traffic problem and your visitor-to-lead conversion rate, but, as you can see in the table below, you're still not generating the customers and revenue you want to be generating. You need to focus on technology that will help you convert leads to customers.

METRICS	GOAL THIS YEAR	LAST YEAR
Target Visitors	25,000,000	2,000,000
Visitor-to-Lead Conversion	2%	5%
Target Leads	500,000	100,000
Lead-to-Customer Conversion	2%	1%
ARPU	$1,000	$1,000
ANNUAL SALES	**10M**	**$1,000,000**

SOLVE WITH NURTURING TOOLS

WHAT TO LOOK FOR IN **EMAIL MARKETING** SOFTWARE

There is no shortage of email marketing software options, and you could read volumes about the differences between the various flavors. Here are the most important things to consider:

● CHOOSE SENDING AND TRACKING TOOLS THAT YOUR TEAM CAN MANAGE

There are lots of different levels of sending and tracking in email marketing software. You have to make sure you pick the sending and tracking tools that you can manage. Make sure you don't get stuck with a sending and tracking tool that goes beyond your needs and that is too complicated for you — or that is under powered. The best way to find this fit is to run a trial of a potential new vendor.

● IF YOU'RE USING A SHARED IP, MAKE SURE YOU HAVE A HIGH SENDER SCORE

For most marketers, a shared IP address is the way to go. It's far more cost-efficient, and less complicated to manage. Only there's a catch: If your email service provider's shared IP has a low Sender Score, many of your emails won't be delivered. Make sure you find out if your ESP has a good Sender Score.

MAKE SURE IT'S EASY TO MANAGE LISTS

Many email marketing programs make it difficult to manage lists. You have to export your lists from one app, then load them to another app, then deal with all the footing issues. You want a seamless way to manage lists, ideally within the email creation process itself.

MAKE SURE YOU USE SUPPRESSION LISTS

Be sure any new email service provider you use allows you to upload suppression lists. A suppression list will prevent from sending to all addresses on your main list that have unsubscribed. If you don't upload a suppression list, you'll end up emailing people who have already unsubscribed. Those recipients will be unhappy and mark your message as spam, and that will hurt your Sender Score and deliverability rate.

YOU SHOULD BE HAPPY WITH YOUR TEMPLATES

Many marketers sign up for a new email service provider only to discover, halfway through producing their first email, that they can't live with the template. Set up a trial with your new email service provider and make sure you're happy with the templates they have available.

CUSTOM FIELDS IN EMAIL

The ability to customize and personalize email messages doesn't have to be a complicated feature. If you collect your leads in the same application as the one that you send your emails from, you should be able to add custom fields in just a click.

INTEGRATION

Look for an email tool that has good integration with your marketing database and your list management tools. Without that integration you'll end up wasting a lot of time going back and forth between different tools, downloading and uploading lists. Also, ensure that your email tool has good integration with your marketing analytics platform.

WHAT TO LOOK FOR IN **MARKETING AUTOMATION**

Marketing automation is another key tool to help improve your lead-to-customer conversion rate. If you're able to create well-timed, relevant, personalized interactions with leads, you're going to engage them, build their trust and turn them into customers.

Of course, marketing automation runs the risk of appearing overly automated and spammy, so you need to be careful. Here's what you should look for in marketing automation software:

BE CLEAR ON THE STAFFING LEVEL IT REQUIRES

Marketing automation automates the email flow, but not the process of managing those email flows. Make sure you're clear with your marketing automation vendor about the amount of time it typically takes to manage the types of marketing automation campaigns you need to run to achieve your goals.

You don't want to sign up for a marketing automation package, then get a big bad surprise when you discover how much time it takes to run it.

DON'T PAY FOR TOOLS YOU DON'T USE

Many marketers sign up for expensive automation solutions loaded with deep, sophisticated features, but end up only using a handful of them. Make sure you buy the tools you use. If you buy too much, the complexity will be overwhelming and will get in the way of doing what you wanted to do.

MAKE SURE YOU HAVE CONTENT OR CONVERSION ASSIST REPORTING

Content is the fuel for marketing automation campaigns. It's the stuff that produces engagement in your emails and draws prospects in. Most marketers guess which content will create the best engagement with their users. Don't do that. Use tools like Conversion Assists reporting to measure which pieces of content are helping to convert the most prospects to leads and customers. Then use that content in your automation flow.

GET SUPPORT FOR THE TRIGGERS ACTIONS YOU WANT

Marketing automation typically means setting up flows of actions to take on a prospect once they hit a specific trigger or condition in your system. Before you commit to any specific system, make sure it supports the triggers and actions you want. Key actions to look for are emailing, list actions (adding a contact to a list) and contact actions (changing a value in the contact record).

INTEGRATION

Your marketing automation platform should be tightly integrated with your email marketing, list management, and marketing database tools. For example, you should be able to use emails created in your email marketing tool as part of your marketing automation flow. Your contacts lists should be able to trigger automation actions. And, of course, all this should be measurable in the same marketing analytics platform that you use to measure everything else.

WHAT TO LOOK FOR IN YOUR **MARKETING DATABASE**

As a marketer, you need to be able to manage all of your contacts. You need a place to collect all of the leads that you accumulate, add data to their record as you accumulate it.

Which emails did a contact click on? Which pages on the site did they visit? When did they tweet about you? All this information should be stored in your contact database — and if you do it the right way with the right tools, it will help you improve your lead-to-customer conversion rate.

Here are the keys for tracking your marketing database:

ROBUST CONTACT TRACKING

Your contacts are the core of your business — they're the people you are trying to build relationships with so that you can nurture them down the funnel. The more information a contact database tracks, the more it will help you in that nurturing process. Before you decide on a marketing database tool, go through all of your marketing activities, and make sure that as many of them as possible are being collected in your new marketing database.
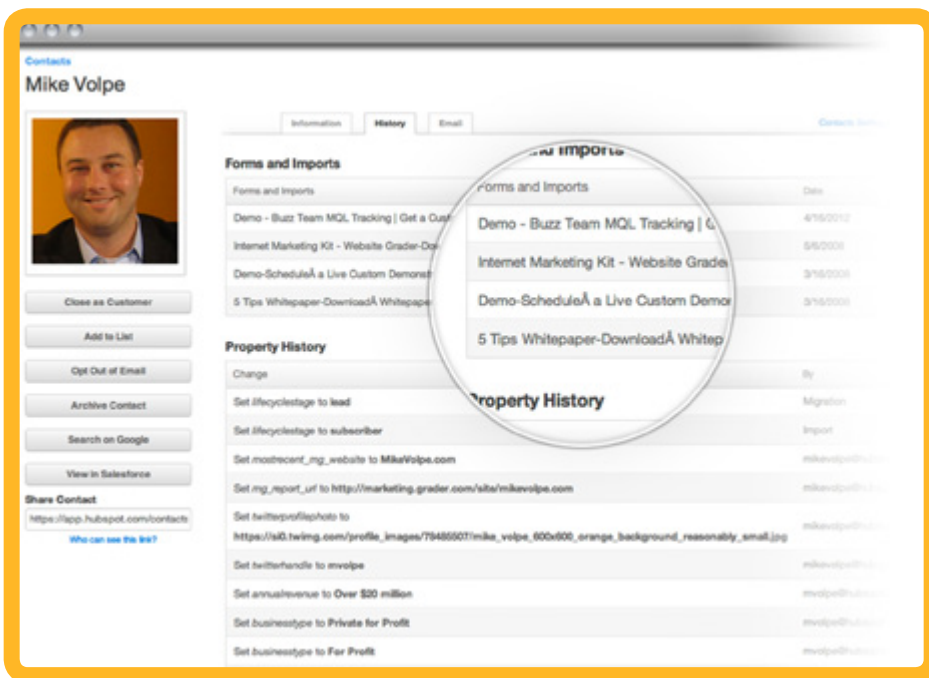
ROBUST LIST-BUILDING CAPABILITIES

You need to be able to slice and dice your database, so that you can zero in on specific segments of leads and actually do the work of nurturing. You should be able to create dynamic lists (a list defined by a set of criteria that is updated with every new contact that matches the criteria); static lists (a list that meets a specific set of criteria a specific point in time); and list imports (lists that come from an external source via a manual upload).

IT SHOULD FEEL LIKE SENDING EMAIL, NOT DATABASE PROGRAMING

Your marketing database should be easy to use. Too many marketing database programs are all database and no marketing.

You don't need to sacrifice one to get the other. Anybody on your team should be able to navigate their way around your marketing database and become an expert.

INTEGRATION

To be most effective, your marketing database needs to be the hub of all your marketing activity. It needs to be integrated with all your marketing activities because it's the place where you need to record all the activities of your contacts — that means, blog activity, social media activity, webinar activity — you name it.

In addition to collecting a record of all your prospects' activity, you need to be able pass that activity into your CRM. So make sure that your marketing database also has a great integration with your CRM.

CONCLUSION

Marketing technology doesn't need to be an enigma. It doesn't need to be a gamble. And it doesn't need to paralyze your team.

As we've seen, there are clear technology solutions for the four primary situations marketers find themselves in:

SCENARIO **#1**: NO DATA

The solution to getting insights into your sales and marketing funnel and collecting data is:

- FULL-FUNNEL ANALYTICS
- LANDING PAGE ANALYTICS
- CONVERSION ASSIST ANALYTICS } MARKETING ANALYTICS
- CHANNEL-LEVEL ANALYTICS
- INTEGRATION

SCENARIO #2 : LOW TRAFFIC

If you find yourself in this scenario, look for:

- KEYWORD ANALYSIS
- WEBSITE TOOLS DESIGNED FOR SEO
- PAGE-LEVEL SEO ANALYSIS
- INTEGRATION

} SEO TOOLS

As well as:

- EASY TO USE
- EASY, BUILT-IN SEO TOOLS
- SOCIAL SHARING — AND EMAIL SUBSCRIPTION
- INTEGRATION

} BLOGGING TOOLS

And of course:

- A WAY TO MONITOR SOCIAL NETWORKS
- INTEGRATED, MULTI-CHANNEL PUBLISHING
- EASY SOCIAL MEDIA FOLLOWING
- REACH TRACKING
- INTEGRATION

} SOCIAL MEDIA TOOLS

SCENARIO #3 : LOW VISIT-TO-LEAD CONVERSION

If you're suffering from low visit-to-lead conversion, look for:

- EASY TO PUBLISH AND MANAGE LOTS OF CTAS
- BE ABLE TO COLLECT CTA DATA
- A/B TESTING FOR CTAS
- INTEGRATION

} **CALL-TO-ACTION TOOLS**

As well as:

- EASY TO PUBLISH AND MANAGE LOTS OF LANDING PAGES
- A/B TESTING FOR LANDING PAGES
- FLEXIBLE PUBLISHING
- INTEGRATION

} **LANDING PAGES**

SCENARIO #4 : LOW LEAD-TO-CUSTOMER CONVERSION RATE

To solve for low lead-to-customer conversion, look for:

- SENDING AND TRACKING TOOLS
- A HIGH SENDER SCORE
- MANAGING LISTS EASILY
- USING SUPPRESSION LISTS   } EMAIL MARKETING
- FLEXIBILITY WITH TEMPLATES
- CUSTOM FIELDS IN EMAIL
- INTEGRATION

Also, look for:

- CLARITY ON THE STAFFING LEVEL IT REQUIRES
- DON'T PAY FOR TOOLS YOU DON'T USE
- CONTENT OR CONVERSION ASSIST REPORTING   } MARKETING AUTOMATION
- SYSTEM SUPPORT FOR THE ACTIONS YOU WANT
- INTEGRATION

And lastly, look for:

- ROBUST CONTACT TRACKING
- ROBUST LIST-BUILDING CAPABILITIES
- I SHOULD FEEL LIKE SENDING EMAIL, NOT DATABASE PROGRAMMING
- INTEGRATION

} **MARKETING DATABASE**

If you follow this strategy — you frame your technology decisions in terms of the full marketing funnel, then make the appropriate technology investments — technology paralysis will be a thing of the past. You'll be able to apply the right technology solutions for your business, and you'll be able to focus on marketing, not complicated systems.

Of course, it's often helpful to have an expert guide you through the process and get you started. If you'd like help, contact one of our HubSpot inbound marketing specialists.

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MARKETING ANALYTICS

DON'T LET TECHNOLOGY
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