

# An introduction to marketing automation

# INTRODUCTION

me, marketing automation, mautic.



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Marketer. Recovering Salesman,  
Developer and Consultant. Love  
helping people, help people.

# What is marketing automation?

Helps you **save time** by handling repetitive marketing and sales tasks on pre-defined schedules, and by **gathering** critical and useful information into a central location to help sales teams **focus** on the right potential customers and leads at the right time.

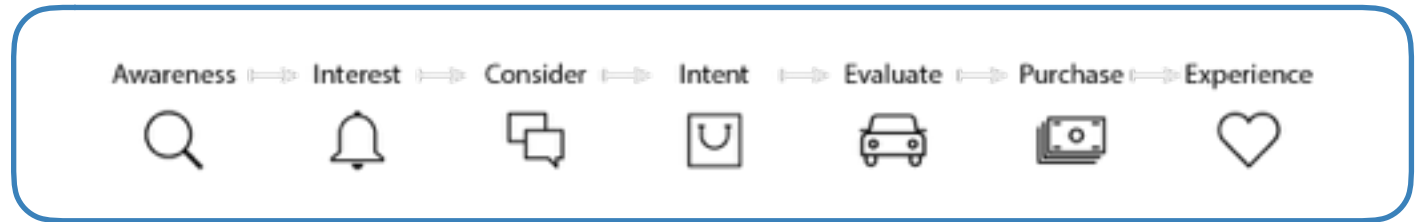
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Basic Idea: Marketing automation saves time and increases sales.

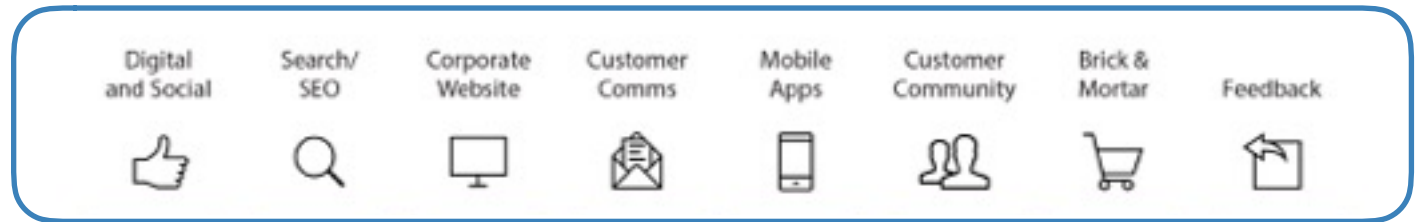
# Marketing Goals:



# Touch-points:



# Channels:



# The competitive landscape

There are many proprietary and **Software as a Service** systems offering Marketing Automation, targeted at **enterprise** with high prices, without **self-hosted** or **free** options

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Mautic offers SaaS & Self-Hosted (free)



# What is Mautic?

Mautic is the only **free, open source** marketing automation solution

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Lead nurturing and tracking, marketing campaigns, dripflow programs, landing pages, social media monitoring and more.

# KEY FEATURES

the short list.



# Monitoring

Watching and tracking what visitors to your website do on your site and also what they have done **elsewhere**.

# Lead Specific Details

Two types: **anonymous** and **known** visitors. Known visitors have more detail both automatically and manually added.

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- Mautic has custom fields to allow you to track any info you want.

# Points

Points are the **key feature** of a strong marketing automation workflow.

Points give **weight** to potential leads.

# Campaigns

Campaigns are the **workflows** you use to nurture leads along the sales cycle. Campaigns can have both **timed** and **triggered** events.

# Emails

Emails are one of the primary **communication channels** with potential leads. Part of campaigns & workflows.

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- ☑ Mautic allows you to **choose** your mail service provider!

# Forms

Forms are a **primary means** to convert an anonymous visitor to a known visitor [potential lead].

# Landing Pages

Also known as squeeze pages, or call-to-action pages these typically hold a **form** and give something of **value** to your potential leads.

# Assets

Assets are those resources you will provide to your site visitors. **White papers, videos, infographics** are a few examples of assets.

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- ☑ Mautic tracks **detailed statistics** on each asset.



# Reports

You will need to be **aware** of how well your marketing is working and reports give you the **insight** you need.

# MAUTIC BASIC USE

five steps to getting started with maotic.

# 1. Add tracking code

Either **directly** add HTML to your website, or use one of the community created **plugins**.

```
http://yourdomain.com/path-to-mautic/p/mtracking.gif
```

## 2. Collect lead information

**Anonymous** visitors need to be converted to **known** visitors. You can use **forms** and **landing pages** to collect specific information.

# 3. Nurture leads

You need to nurture leads through **campaigns** and other **points of contact**. Use workflows, assets, and landing pages to provide value to your leads and improve your relationship.

# 4. Integrate points

You should **define** the **most useful** point values to properly weight your potential leads.

**Important:** You should **constantly** be updating, improving and modifying your point values to be more accurate.

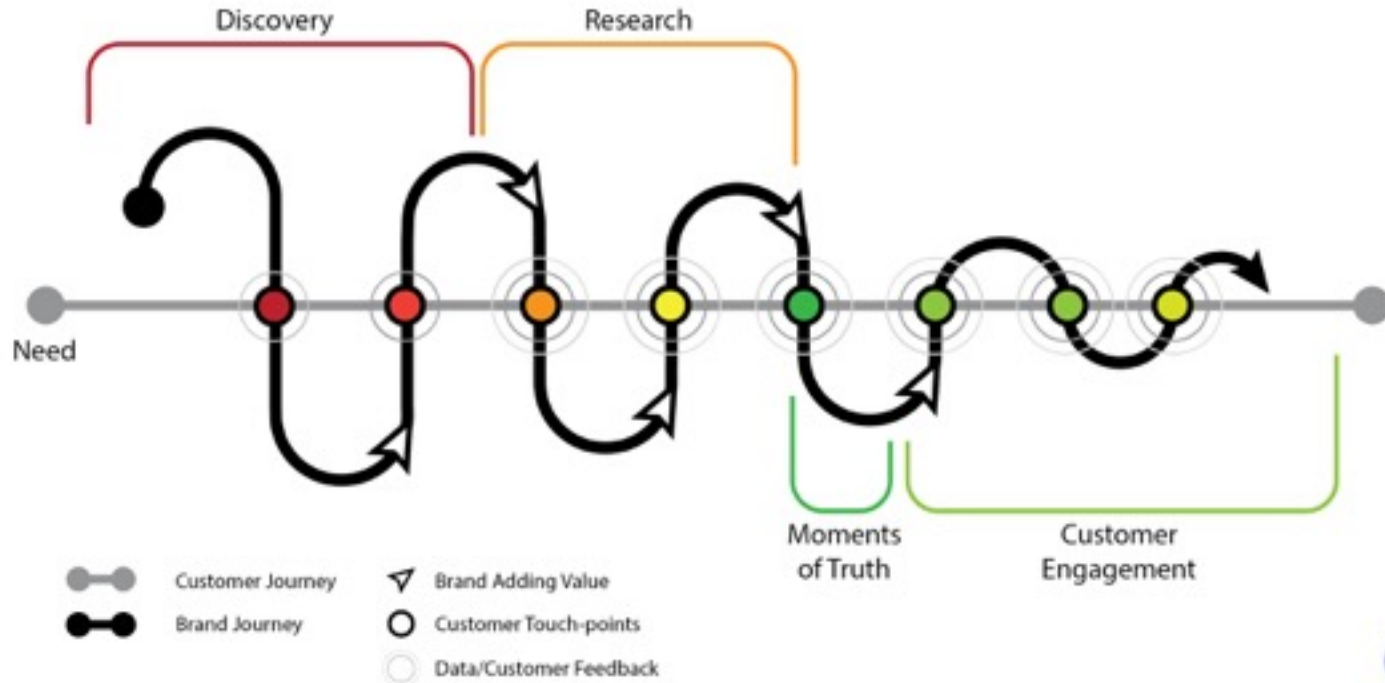
# 5. Define outcomes & goals

Create the **ideal outcome** or the **goal** you want to achieve with each successfully nurtured lead.

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**Example:** Moving a lead from Mautic to your **CRM** of choice.

# End-to-End Attribution





# Use Case

Pet Shop which sells a range of products and services including:

- Pet food & supplies
- Pet toys
- Veterinarian services



# Pet Shop Automation

- Customer IP logged when browsing - anonymous lead
- On completion of sale, product & customer details pushed into Mautic, no longer anonymous.

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**How:** Tracking pixel on website using plugin, post-purchase data pushed into Mautic with API or manual upload

```
http://yourdomain.com/path-to-mautic/p/mtracking.gif
```

# Collecting lead information

- Name, address etc gathered from purchase record.
- Follow-up email asking information about pet
  - Breed, size, how often they buy food
  - Pet's favorite toys, pet's birthday, their birthday.

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**How:** Workflow set up in Mautic, triggered when a first purchase is made of pet items (could narrow down to only pet food products). Point customer at a landing page with form to complete - log IP address, email, and pet information

# Follow-up

- Set trigger to email **x1 week before next food order**
- Set trigger to send birthday gifts for pet & owners

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**How:** Email queued to send based on information provided - we know breed of pet, age/weight, know roughly how much food per day, and what product was purchased so we know when it will be running out. Send coupon before food runs out, **up-sell favorite toy** or similar. Up-sell on important dates - e.g. birthdays

# Catching missed opportunities

- Didn't replenish from your pet food store? Find out why!
- If no sale is registered x weeks after pet food would need to be resupplied, trigger email to find out why.

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**Why:** Customer has no record of a purchase within x weeks of past sale therefore we're potentially losing their business. Try to find out why, entice them back with an offer/coupon for next time they resupply. Maybe we got dates wrong?

# Understanding your customers

- Trigger specific mails at times of year - vacation cover, flea/worming due, annual checkup, special events, customer or pet's birthday.
- Link to useful assets/content relevant to them and their pets.

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**How:** Market research, reviewing sales of items which have a renewal date, asking if their pets have had an annual health check and if not, book them in with your in-house vets for a discounted rate.

# TAKING A CLOSER LOOK

leads, campaigns, emails,

# QUESTION & ANSWER

mautic, marketing automation, me.



Thank you!