



GS Gabriel Sales

MARKETING AUTOMATION IMPLEMENTATION



CHECKLIST



As a B2B sales and marketing outsourcing firm with over 12 years of experience, Gabriel Sales has been front row to the huge market shifts the industry has seen in recent years. One thing we are certain of through all of these transitions is that marketing automation software is a game changer.

Marketing automation software not only improves lead generation and conversion rates, it also streamlines your sales and marketing efforts into one easy to manage process. However, marketing automation only does this if you are able to implement it properly.

With multiple marketing automation implementations under our belt, across multiple types of sales (software, SaaS, professional services), here are the best practices to jumpstart your marketing automation success:

- To drive efficiency and results as quickly as possible
- To generate more highly qualified leads for your sales team faster
- To get the most out of all of your marketing and sales investments



Here is a sample implementation checklist to make sure you get the most out of your marketing automation software:

✓ Implementation Tasks

Strategy Team

- ☐ Establish a steering committee
- ☐ Build sales process map
- ☐ Define the top 10-20 sales objectives
- ☐ Score existing content
- ☐ Create new on-demand webcast(s)

Marketing Team

- ☐ Design lead nurturing programs
- ☐ Design landing pages
- ☐ Write various emails for follow-up and nurture campaigns
- ☐ Integrate PPC
- ☐ Maintain current flow of leads outside of the system
- ☐ Run campaigns for fresh flow of leads

Webmaster

- ☐ Implement tracking code into all pages (e.g., in a shared header file)
- ☐ Paste generated form codes (e.g., in sidebars, landing pages, etc.)

IT Admin

- ☐ Create vanity domain record (i.e., go.yourdomain.com)
- ☐ Implement email authentication (DKIM, Domain Keys, SPF and Sender ID)

Marketing Agency

- ☐ Implement digital marketing strategy
- ☐ Execute lead management and nurturing
- ☐ Produce creative landing page and email assets

Sales Leadership

- ☐ Coordinate technical sales training
- ☐ Coordinate tactical sales training
- ☐ Configure email plug-ins
- ☐ Work with marketing to set lead assignment processes

CRM Admin

- ☐ Install and sync CRM application plugins/connectors
- ☐ Set up and map fields (default and custom)
- ☐ Add marketing automation custom data to layouts

✓ Technical Set-Up

Implement Tracking Code

- ☐ Add the general tracking code you are provided with to pages for monitoring. Any actions regarding these pages will be recorded in your analysis

Custom Page Scoring

- ☐ Set up your baseline scoring model that allows your sales and marketing teams to filter through all of your activity to objectively identify the best leads

Create Vanity Domain

- ☐ Set up your vanity domain (e.g. <http://info.yourwebsite.com>), which your automation software provider uses to mask tracking links with your domain information

Email Authentication

- ☐ Set up email authentication to generate unique authentication records to significantly increase your email deliverability rate

✓ Email Templates, Forms, Landing Pages

Email Templates

- ☐ Create email templates your automation software can use for auto-responders, drip marketing programs and list/one-time blast emails

Forms

- ☐ Use your automation software's form builders/handlers to manage your forms
- ☐ Identify all existing forms that need to be replaced with your automation software or integrated with a form handler

Landing Pages

- ☐ Create landing pages with your current website builder or hosted by your automation software provider, using HTML or an easy drag-and-drop builder

Email Unsubscribe & Email Preferences Center

- ☐ Create pages where users can manage their email preferences or unsubscribe

✓ Training Sessions

- ☐ Attend training webinars and events that your marketing automation software provider offers

✓ Import Existing Contact Information

- ☐ Use a .CSV file to import your existing data on prospects into your automation software, allowing you to store, track, nurture, email, and report on your prospects within the marketing automation system

✓ CRM Integration

- ☐ Activate your CRM connector to integrate your CRM (e.g. Salesforce, Microsoft Dynamics, Sugar CRM, NetSuite, etc.) with your automation software
- ☐ If necessary, write a custom integration using an API

✓ Hosted Content

- ☐ Upload high-value digital content for consumption tracking and custom scoring

✓ Automation

List Segmentation

- ☐ Create lists using .CSV imports, dynamic segmentation, and automation rules

Lead Assignment

- ☐ Outline your lead assignment strategy based on factors such as location, form fills, content downloads, job title, etc.

✓ Paid Search Integration

- ☐ Integrate Google AdWords into your marketing automation software which synchronizes your AdWords data with individual prospects providing you with a comprehensive paid search ROI rep

✓ Site Search

- ☐ Provide the location of your live XML or HTML site map if you want your automation software to build and host a site search for your own website

✓ Install Additional Add-Ons

Email Plug-In Extension

- ☐ Download and install the email extensions or plug-ins (e.g. Outlook, Gmail Extension: Chrome or Firefox)

✓ Enable Other Third-Party Connectors (Optional)

- ☐ Enable any other third-party connectors you want to use, including webinars (Zoom, GoToWebinar), calendars (Calendly, Bookings), social posting (LinkedIn, Facebook, X), or others (Google Analytics, ZoomInfo, Drift, Twilio, Olark, SMS Magic (text))

Gabriel Sales™ has been successfully helping companies grow for over 20 years. We specialize in helping B2B companies with a multi-step sales process, build modern sales and marketing operations. We currently support sales organizations with 5 to 500 sales reps implement and optimize Salesforce.com and Marketing Automation Technologies. We provide Go-To-Market strategies and sales automation content production. Working with market leaders keeps Gabriel Sales™ on the cutting edge of the Digital-First Sales Transformation. Learn more at gabrielsales.com/about-us

Our team can fill any gaps you may have preventing you from a quick and efficient launch of your marketing automation software.



175+

Salesforce & Automation
Implementations

500+

Technology
Optimizations

1000+

Dashboards
Created

10,000+

Automated
Campaigns

1,000,000+

Scored Leads



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