

# 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:**

## ✓ Delegate Implementation Tasks

### Strategy Team

- Establish steering committee
- Build sales process map
- Define top 10-20 sales objections
- 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 system

- Run campaign 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 layout

## ✓ 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 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 as auto-responders, in drip marketing programs and as list 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 a service like Digital Demand Center™ 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 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 by looking at what factors make a good lead for your sales team (e.g. location, signing up for content, job title, etc.) CRM

## ✓ 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 report

## ✓ 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, Apple Mail, Thunderbird)

### Lead-Deck / Real-Time Prospect Monitor

- For real-time prospect and visitor alerts, download and install LeadDeck for real-time prospect and visitor alerts

## ✓ Enable Other Third-Party Connectors (Optional)

- Enable any other third-party connectors you want to use, including webinars (ReadyTalk, GoToWebinar, WebEx), social posting (LinkedIn, Facebook, Twitter), or others (Google Analytics, GoodData, Twilio, Olark)

At Gabriel Sales, our team can fill any gaps you may have preventing you from a quick and efficient launch of your marketing automation software. We have a project management framework set up and ready to go that is centered on strategic planning best practices. With our 12 years of experience, we can help your company avoid the pitfalls and produce better results.

Contact Gabriel Sales at 720.279.7511 for more information.