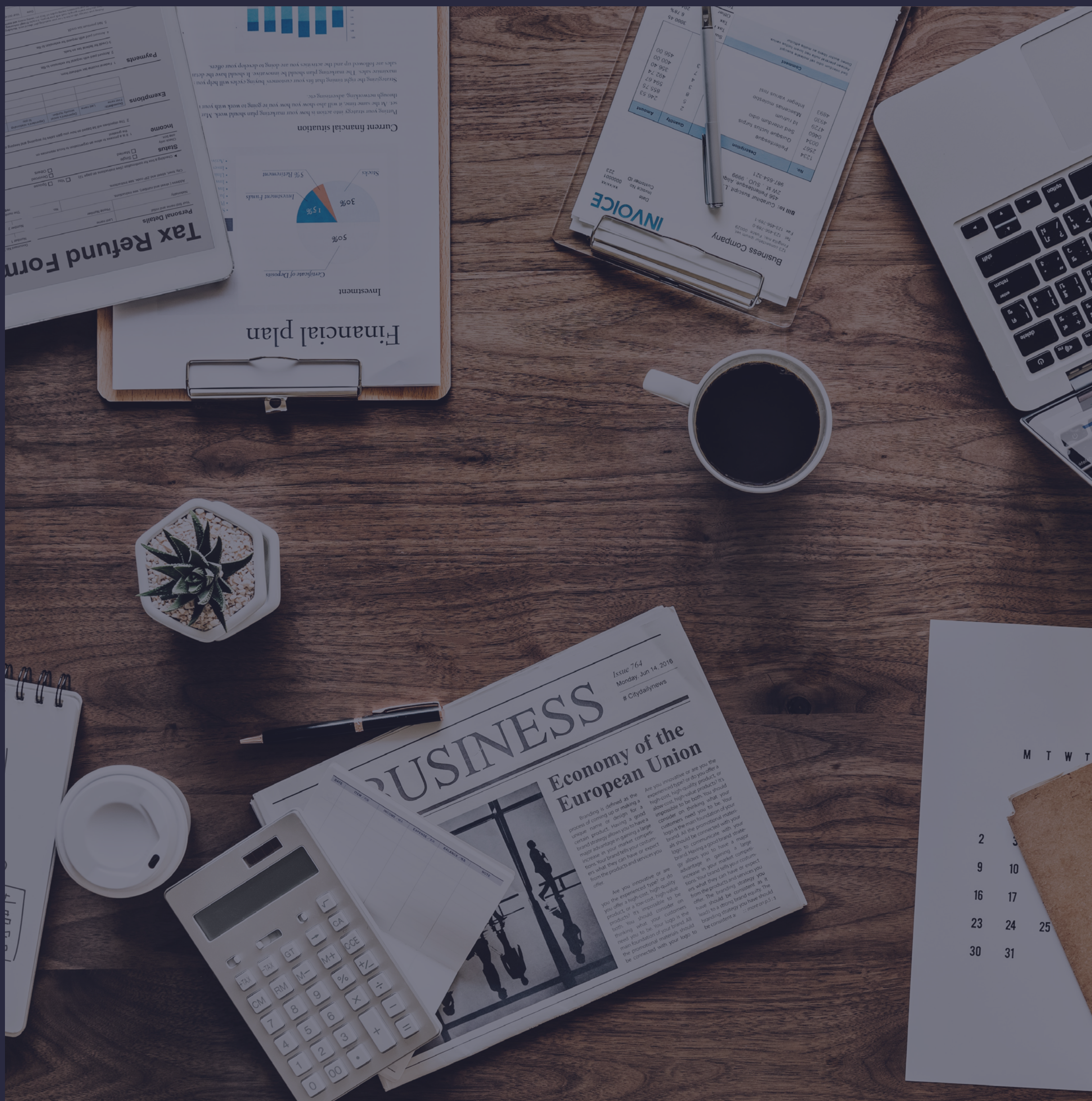
Net-Results
Marketing Automation



MARKETING AUTOMATION

IMPLEMENTATION GUIDE

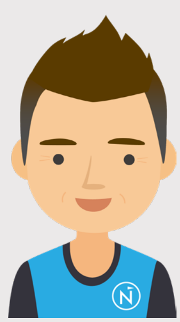
HI, WE'RE NET-RESULTS!

We're the first choice of people buying marketing automation for the second time. You're about to find out why.

Marketing automation requires more than just great software. It also needs a context for success. It takes strategy and preparation.

In this Implementation Guide, we'll share with you the exact step-by-step processes that we use for onboarding our new customers. You'll get a proven framework for making your own marketing automation implementation a success - completely free!

I sincerely hope you'll use this guide to unlock the potential marketing automation has for your business.



MIKE WARD, CEO

P.S. Want to see marketing automation in action?

BOOK A DEMO

ABOUT NET-RESULTS

Net-Results is the first choice for people buying marketing automation for the second time.

We know exactly what you need (and don't need) to be successful as a marketer. You don't just need great software; you also need a context for success. **We are that context for that success.**

Net-Results means a great platform that has everything you need. It means **a Customer Success team that will actively help you** make the most of that platform. And it means 100% transparent pricing, without hidden costs or sneaky add-ons.

Sound good?

BOOK A DEMO

CONTENTS

A QUICK RECAP

CUSTOMER JOURNEY

The Customer Journey is a series of stages within which your (prospective) customers interact with your business. Throughout these stages, the kind of information your prospect or customer needs changes. Just like his or her state of mind and specific problems they are trying to solve.

In this Implementation Guide, we'll help you get a clear view of your customer's journey. If you have different kinds of customers, simply go through the steps in this guide for each of them. We recommend that you set up a different Customer Journey for each separate customer type, as getting this right is crucial to your success with marketing automation.

SALES & MARKETING

As a marketer, your sales team will be your best friends in all of this. And if all goes according to plan, you'll be getting into their good graces as well.

Besides generating leads, the primary use of marketing automation is to deliver better leads to your sales team. In order to set up marketing automation effectively, it's important to involve your sales team. Ask them what kind of leads they want. Ask them what information they would like for leads to have consumed, before talking to a sales rep. Ask what they don't want, too.

Keep talking to your sales team as you progress through this guide. *And* continue to talk to them afterwards - it's unlikely you'll get this right immediately, but by trial and error you can make marketing automation a success for *both* teams.

A QUICK RECAP

MARKETING BOTTLENECKS

What are the processes you would like your marketing automation software to improve? In addition to creating a strategic context for your marketing automation implementation, this Implementation Guide will also take a practical approach towards fixing stuff.

Where are you leaving money (or leads) on the table? What needs to go faster, or automatically, for your team to thrive?

LEAD SCORING

Getting the right leads to sales is heavily dependent on your lead scoring model. As you create clarity about the type of leads your sales team wants, you'll be able to attribute points to lead characteristics, activity and engagement.

Just like anything else in marketing automation, lead scoring is not a one-off exercise. After you've set it up, you must continue to evaluate its relevance and adjust your scoring model accordingly.

Note that lead scoring is *most* effective when you have a greater volume of leads than sales is comfortable with. In other words: sales would like *better qualified leads* instead of just *more leads.*

LET'S GET STARTED

In order to get the most out of this guide, we'll start with some **self-assessment.** The first exercise is a quick scoring sheet covering the main topics of this Implementation Guide. After that, we'll ask some fundamental questions regarding the state of your current marketing and sales setup.

All of this is meant to challenge your current perspectives, as well as show you **what's possible if you start nailing these strategies**. As mentioned before, if you have multiple target customers, repeat the entire process for each one, separately.

MARKETING BOTTLENECKS IDENTIFICATION

How good is your grip on where your bottlenecks are?

1 2 3 4 5

SALES + MARKETING COMMUNICATION

How well are your sales and marketing departments currently cooperating?

1 2 3 4 5

LEAD SCORING

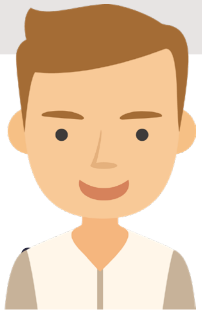
How well is your lead scoring model set up?

1 2 3 4 5

CUSTOMER JOURNEY

How well-defined is your customer journey?

1 2 3 4 5



Quick Tip from AJ on our Customer Success Team:

Make sure to rate yourself honestly!

MOVING ON...

WHERE DO YOU STRUGGLE?

QUESTIONNAIRE
MARKETING BOTTLENECKS

The questions below cover crucial topics when it comes to implementing marketing automation successfully. Don't gloss over them, but try and answer each of them as thoroughly as you can.

What areas of your marketing funnel are consistently lacking volume, quality, and/or attribution?

What other software do you use for marketing activities? (CRM, Oktopost, etc.). How is this activity tracked?

What marketing tasks are the most time consuming for you?

What other marketing processes do you want to improve?

What defines marketing success in your company?

Who is your ideal customer? (What are their demographics, what are they looking for, etc.?)

What education needs to take place to get someone from awareness to acquisition? From acquisition to advocacy?

What kind of information does your ideal customer need after purchase? What communication do you have with them after they buy?

What offers, resources, marketing campaigns, workflows, funnels do you currently have in place?

Is sales' ideal customer the same as marketing's? If not, what's different?

How effective is the passing of leads from marketing to sales? Is the pass clearly defined? What requirements need to be met before a lead is passed?

Would your sales team agree on your assesment of the effectiveness? Why (not)? Would management agree with your assessment?

Are there any other departments (support, account management) you'd like to involve in this implementation? What would you need to ask of them?

Which channels contributed to acquiring your current customers?

What pieces content contributed to acquiring your current customers?

What are the general steps your current customers took to become customers?

Based on your earlier assessment of your marketing processes, how would you need to change your lead scoring model to improve said processes?

MARKETING BOTTLENECKS WORKSHEET

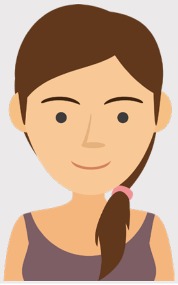
Now we're getting to the meat of things. **In this first worksheet, we'll dive into your current marketing processes and how we can improve them.** This practical approach can help you get immediate value out of marketing automation - all while you're working on a longer term strategy utilizing the software.

You're currently doing things a certain way. Instead of throwing that all out in favor of a new strategy and software, we believe in **"keep your old shoes on before you get your new ones."**

So, let's take a look at what you're doing right now. How are you generating traffic? How are you converting them into leads? How are you turning leads into customers?

How can we use marketing automation to improve those processes? What isn't working right now? What's taking you too much time?

In other words: let's go looking for some "low-hanging fruit"!

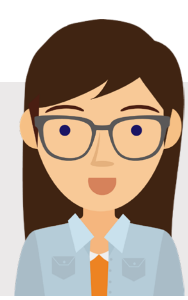


Quick Tip from Rachel on the Customer Success Team!
Some great examples of low-hanging fruit are setting up your CRM integration correctly and utilizing custom fields to assign specific attributes to a contact - making your whole life easier in the long run!

SOME EXAMPLES

PHASE	AWARENESS	CONSIDERATION	ACQUISITION
STEPS **Big questions:** How do you know that a prospect is in a particular phase? What actions are they taking in that phase? Are they filling out forms? Downloading assets? Opening emails? How do you know when they move from one phase to the next?	**EXAMPLES** Prospect visits the Net-Results web page through a blog post that's shared on social media	**EXAMPLES** Prospect fills out a Net-Results form (on a Net-Results landing page) to download a whitepaper. They recieve emails from "This Workflow" - a follow up campaign from the form submission.	**EXAMPLES** Prospect schedules a demo through a Net-Results form-fill.
TRACKING **Big questions:** How are you tracking how prospects move through these steps? Where are the gray areas? What parts *can't* you define? How are you tracking email opens/ downloading assets/ form fill-outs?	**EXAMPLES** UTM from the social media share shows how the person came to our landing page Net-Results shows website visitors, what pages they visited, and for how long	**EXAMPLES** The activity stream shows which pages they visited and tracks the UTM from the social media post we made. Email notification sent by Net-Results when a form is filled out If they open an email, the activity is shown on the Campaign Dashboard	**EXAMPLES** The form information is recorded for the user The information is pushed to our CRM as a "lead." Sales/marketing gets notified by email.

Quick tip from Meredith on our Customer Success Team:
Consider the platforms, teams, and moving parts that have to be involved to track everything. Where are your forms housed? Is that connected to where your landing pages are? Can it be simplified?



NOW IT'S YOUR TURN!

PHASE	AWARENESS	CONSIDERATION	ACQUISITION	LOYALTY	ADVOCACY
STEPS How do you know that a prospect is in a particular phase? What actions are they taking in that phase? Are they filling out forms? Downloading assets? Opening emails? How do you know when they move from one phase to the next?					
TRACKING How are you tracking how prospects move through these steps? Where are the gray areas? What parts *can't* you define? How are you tracking email opens/ downloading assets/ form fill-outs?					

WHAT IS A GOOD SCORE?

Whether you're starting from scratch or have set up lead scoring before, this section will help you determine what a good score is. If you have previous lead scoring - determine who the top 90th percentile of your customers are and find what the average score of those customers is. Repeat for 70th and 40th percentiles. If you're starting brand new, assign the top 90th percentile as 100 points, the top 70th as 70 points and the top 40th as 50 points.

PERCENTILE OF PROSPECTS	AVERAGE SCORE
90TH PERCENTILE	
70TH PERCENTILE	
40TH PERCENTILE	

WHAT ACTIVITIES INDICATE SALES-READINESS?

Take a look at your most sales-ready prospects or customers who have recently closed and conduct a quick audit of their activities and behaviors. (Example: did 80% of your customers come from one lead magnet? Did they all schedule a call with your sales team?)

	ACTIVITIES OF NOTE
PROSPECT 1	
PROSPECT 2	
PROSPECT 3	

NET-RESULTS SCORING

CONTACT SCORE

Otherwise known as "the fit," this category helps you determine **which contacts are a good fit for your sales team**. The Contact Score rules only apply once: for example, when your contact joins a particular list, that changes their score - but not if they joined that list a second time.

A great use of Contact rules is to make sure that the contact has the attributes you're looking for in leads: job title, company size, industry. **You can set up the rules to add points for attributes you want, and subtract points for attributes you know won't work for your business.**

ACTIVITY SCORE

The Activity Score helps you see if a contact is **active on your website**. They help you identify implicit activity by your contact: they're not making a conscious choice, but they're giving off signals by browsing certain pages, nonetheless.

Depending on your use case, an active contact might need reaching out to! Examples of applying actions: when a contact stays on your website for a longer period of time, or views certain pages on your site (such as pricing or product pages). **Activity Scores are applied every time a certain action takes place, so they can apply multiple times.**

ENGAGEMENT SCORE

The Engagement Score help you identify **explicit actions by your contacts**. These actions take conscious effort by your contact. That means they're (potentially) of higher value than implicit actions. A very engaged contact is expressing clear interest in your materials.

Some examples of an Enagement Score Behavior include submitting a form, downloading content and watching a video. But also clicking a link in an email is a clear explicit action. **Like an Activity Score, Engagement Score is applies every time the action takes place.**

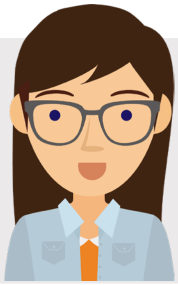
3-D LEAD SCORING

Together, the three categories (Contact, Activity and Engagement Scores) give you a full understanding of:

1. How well a contact fits your ideal customer profile,
2. How active they are on your website,
3. How engaged they are with your content and your business.

Your scoring model should take these three categories into account and only deliver fitting, active and engaged leads to your sales team.

Quick tip from Meredith on our Customer Success Team:



You can also set up "thresholds" along the Customer Journey: moments in time where you could have a sales rep reach out for a preliminary, no-strings-attached chat. A certain lead score combined with a trigger-rule causing an alert to be sent to a rep will do the trick.

WHAT PROMOTES/DEMOTES?

	PROMOTE	DEMOTE
CONTACT SCORE	Title does contain "C_O" - CMO, CTO, CEO, CFO, etc. (+12) Is a Member of *MARKETING CRM LIST* (+7) Email address does contain @ AND unsubscribe/bounce status is false. (+2)	Title does contain "Student" (-10) Custom field purchase authority does not match "decision maker" (-8) Country does not match "United States" (-4) CRM Account Industry does not match "Healthcare" (-1)
ACTIVITY SCORE	Specific Page Viewed Does *PRICING PAGE* for "any duration" (+12) Visit Duration is greater than 3 minutes OR number of page views is greater than 4 (+8) Viewed *PRICING PAGE* but didn't convert (+1)	Specific Page Viewed Does Match "Careers" Page (-10) Did not open "Email #1" (-5) Views "Login page" (-3)
ENGAGEMENT SCORE	Requested a Quote (+10) Downloads "Buyer's Guide" (+8) Watches "Introduction Video" (+5) Did submit *FORM NAME* (+3) Did click in any campaign (+1)	Email unsubscribe (-15)

LEAD SCORING
EXAMPLE SCORES

CRITICAL (15-25 POINTS)

Attribute/Behavior	Value	Score
Industry	Healthcare, financial, high tech	+20
Product	Using competitive solution	+20
Title	Director or VP	+15
Purchase Authority	Decision Maker	+15
Timeline	Identified, 3 months	+15
Watches Demo		+25
Views pricing page		+20

IMPORTANT (7-15 POINTS)

Attribute/Behavior	Value	Score
Location	US	+8
Company Revenue	100 million to 499 million	+8
Title	Manager	+7
Timeline	Identified, more than 3, less than 8	+5
Downloads buyers guide		+8

INFLUENCING (1-7 POINTS)

Attribute/Behavior	Value	Score
Location	English Speaking, Non US	+4
Timeline	Identified, more than 8 months	+3
Title	Analyst, Coordinator, Specialist	+4
Company Revenue	Less than 100 million	+1
Watches any video		+2
Downloads any white paper		+2

NEGATIVE (5-15 POINTS)

Attribute/Behavior	Value	Score
Title	Student	-15
Location	Non English Speaking Country	-10
Email unsubscribe		-15

LEAD SCORING WORKSHEET

CONTACT SCORE

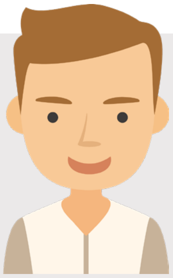
Attribute	Score

ACTIVITY SCORE

Behavior	Score

ENGAGEMENT SCORE

Activity	Score

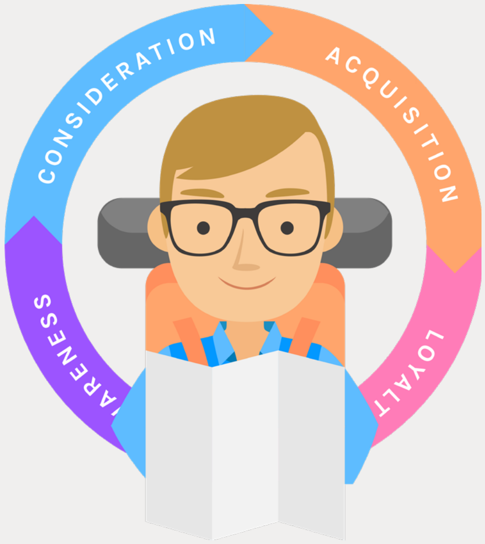


Quick Tip from AJ on our Customer Success Team!
Try to see if you can scale your points systems based on how important an activity, behavior, or attribute is. On the previous page, "Critical" Attributes/ Behaviors should be twice as important as "Important " Attributes/Behaviors.

THE CUSTOMER JOURNEY

Marketing automation is a machine. Machines need fuel. **If marketing automation is the engine of your lead generation strategy, great content is its fuel.**

How do you create great content? By knowing where your prospective customer is at in their Customer Journey - and mapping your content accordingly.



Each stage of the Customer Journey represents a state of mind for your prospect. A prospect that read one blog post probably isn't interested in a sales brochure. They're not thinking about that right now. But they might be interested in a whitepaper that further expounds up the problem he or she was researching on your blog.

The Customer Journey Worksheet will walk you through the stages of the Customer Journey. It forces you (ever-so-gently) to see things through the customer's eyes in each stage: what are they thinking? Feeling? What goals are they looking to accomplish?

If your content is able to tune into the customer's state of mind, you're guaranteed to win their hearts and ultimately their business.

CUSTOMER JOURNEY MAP OUTLINE

PHASE	AWARENESS	CONSIDERATION	ACQUISITION	LOYALTY	ADVOCACY
ACTIONS What is the customer doing? Where are they looking for answers?					
CONTEXT What do we know about them at this point?					
QUESTIONS What is the customer thinking?					
MOTIVATIONS What is the customer feeling? What are their goals and desires?					
BRAND RELATIONSHIP What are the touch-points and barriers?					

WANT THE BLACK AND WHITE, PRINTABLE VERSION? CLICK HERE

IT'S A LOT TO TAKE IN, ISN'T IT?

There's no way around it, implementing marketing automation can be tough. There are a lot of processes and people involved. It's up to us marketers to make sure it all comes together and actually helps the entire business flourish.

If you don't want to go at it alone... well, you don't have to! We use this exact Implementation Guide with our new customers. We'd be delighted to guide YOU through it, implementing marketing automation in YOUR business.

Here's the best part: you don't even have to buy our software to get our help. That's right! We hand out the full onboarding experience for everyone who signs up for a FREE 14-day trial of Net-Results.

Of course, we're hoping that you'll find us, and our platform, so awesome that you'll happily stick around. :)

All it takes from here is signing up for a free demo with our product team. They'll show you the platform, talk to you about your business and set you on the road to success.

Get to know us, our platform and our team!

BOOK A DEMO