

Guide by **BUZZFIXER**

# GETTING STARTED

WITH

MARKETING

AUTOMATION

FOR SMALL BUSINESS



# TABLE OF CONTENTS

---

INTRODUCTION

MARKETING AUTOMATION BASICS

PREPARE YOUR BUSINESS FOR MARKETING AUTOMATION

IMPLEMENTATION PLAN



**Welcome and thank you for downloading this free marketing automation guide.**

My name is Diana and I am the face behind **BUZZFIXER** and the team's main marketing automation consultant. I created this guide because I realize that almost every small business is not confident if they need to automate or how to do it. I wanted to help people realize the power of the tools we now have available and free themselves some time to work on their business.

When I first discovered marketing automation, I fell in love with the opportunities this type of software is providing businesses. I could easily see how to optimize the setups of my clients and leverage the tools for achieving better results. I was surprised to understand that most people have problems with finding the right path to start with marketing automation.

This guide offers 3 chapters of content that would help you discover your best tool, prepare for the implementation and then start using it more confidently. Use it as a reference point and as a reminder. And feel free to contact me if you need help with anything marketing automation related.

# CHAPTER ONE

---

MARKETING AUTOMATION BASICS:  
WHAT IS IT AND DO YOU NEED IT?

# WHAT IS?

## MARKETING AUTOMATION

Let's start with the basics – by defining what Marketing automation means and what exactly is this guide about. ***Marketing automation is a term that refers to software solutions focused on repetitive tasks that your marketing team (or person) should do.*** Think about newsletters, sales letters, invoicing, managing affiliate commissions and payments, posting on social media. Think about tasks and relationships between an interaction and the result you would like to achieve. Include in-depth analytics for each and every prospect on your database and his interactions with your content.

In example, someone signs up for your newsletter, you send him a confirmation link and only after he clicks on the link you deliver a great free content (like this guide). You would like to know how many people open the emails, click to download the guide, share it with their friends. Or maybe you want to continue interacting with this prospect sending him relevant additional content over the next weeks.

Or you are selling a membership to an online content, a book, coaching sessions, etc. You want to automate payment confirmation and content delivery, to make sure your clients are sent their access details and they can login to view their product.

Marketing automation does all that and a lot more – it is one of the greatest technologies we have available and there is a way for almost every business to leverage it. You could see if your prospect opened your sales page and send him a follow-up offer to convert him to a customer. You can reward valuable customers that buy your products regularly by sending them personalized offers. Or congratulate them on their birthdays or client anniversaries. The opportunities are endless and exciting – you just need to imagine it and probably there is an option to implement it.

Marketing automation software can be separated into three different categories based on main functionality: *marketing intelligence*, *marketing automation* and *workflow automation*. Marketing automation focuses on moving leads from the top of the funnel and transforming them into paying customers. This is what are we going to discuss in this guide.

There is another way to differentiate between the different types of software – based on their target business size. The different between Small Business Automation and Big Business Automation is not irrelevant – it is in the way you manage your interactions, your goals and expectations, prospect list size and campaign volumes.

---

“The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency.”

- Bill Gates

# DO YOU NEED?

## MARKETING AUTOMATION

Here is an interesting question – most consultants would say “YES! Right now is the exact moment you need to start implementing marketing automation solutions.” I would not be as excited.

Your need of marketing automation software depends on your business size, goals and where you sell. It depends on the way you collect leads and the way you contact them. And most importantly – on the size of your leads.

- **Business Size** – There is no business or team small enough to matter for automation. Some small businesses do better than others. In example, coaching is usually a business for independent consultants but those are among the best clients of business automation. Why? They need the technology to manage all their prospects and contact, webinars, training schedules, payments and membership websites.
- **Goals** – Is your business growing? What are the plans for the next 6-12-24 months? If you know in advance that your need of a better marketing tool is ahead, start planning early enough and give yourself time to implement and understand the software.
- **How you sell** – Are you selling online or offline? An offline market would not allow for as much automation as an online-based business.

Before jumping head first into the marketing automation heaven you should evaluate your real need and understanding of marketing automation. Here are some questions to answer:

- Do you contact your leads via email?
- Do you sell online?
- Do you need to manage repetitive marketing activities?
- Do you plan to open a membership-based site?
- Do you plan to start using affiliate programs to promote your products and services?
- Do you want to integrate your sales and marketing process?
- Are you ready to invest a significant amount of time into learning the day to day tasks you will use?

If you answered YES to at least one of the questions above, you might need to consider marketing automation for your business. But don't start your monthly subscription just yet – there are some other factors you need to consider.

**Are you excited to start automating your marketing?**

Photo by Hubspot



# CHAPTER TWO

---

PREPARE YOUR BUSINESS FOR  
MARKETING AUTOMATION

# TOP REASONS

## YOUR MARKETING AUTOMATION WILL FAIL

A lot of businesses fail at implementing marketing automation software or leveraging ROI. There are different reasons for it and here are the most common ones:

- **You failed with evaluation** – Maybe you decided you want to use a software even though you had no idea why? This is a classic scenario. You don't have anything to automate or you don't really need a complex system. Actually all the reasons marketing automation fails are due to wrong evaluation.
- **You failed at planning** – I've seen a couple of different reasons when it comes to planning. First, you might start too early or too late. But starting too early would result in too many monthly payments in advance, non-consistent results and usually, the need to redesign the whole automation process. I've seen this – a client decided to start with setting up the marketing automation software before he had all the other tools connected and working. Then we needed to redo all the sequences and form. In addition, his plan to launch on a certain date failed – due to him not being ready with the content and product he was selling. In addition to paying for double the hours for designing and implementing the automation, he ended up paying for the software 6 months too many. An investment that would take more time to return.
- **Your team is not ready** – You have a marketing team and you

decided they would automatically learn the software and implement it. Maybe this can happen, but most probably it won't. You would need to dedicate resources to train them, give them enough time to understand the different features and just then could they start working and testing the software. Otherwise you risk doing way too many mistakes, sending blank emails to all your clients, etc. Either dedicate enough time for training, hire a new employee to focus on the automation or find a great freelance consultant that can help you with the start and manage the transition with ease. Almost every software now has a Certification program – you can either find your consultant there or via a referral.

- **You decided on the wrong software** – Now, there is no right or wrong software. But there is software that is just not right for you. Evaluating the features you need, the number of contact you have, the volume of emails you would be sending – those are your first steps towards a successful software evaluation.

---

“Giving up is the only sure way to fail.”

- Gena Showalter

---

# WHERE TO START

## YOUR BUSINESS STATE AND OBJECTIVES

The right way to start planning your transition to marketing automation software is with creating a simple list of your business. Here are some questions for you to answer:

- What is your marketing funnel?
- How do you collect leads?
- How many leads do you have in your database?
- How often do you contact them?
- Your products – how many are they and how do you package them?
- How do you plan to grow your business in the next year?
- What kind of software do you currently use: landing pages, opt-in forms, email marketing, membership websites, payment gateways, page and link tracking software, etc.?
- Would you use a partner program (affiliates) for promoting you services and products? Or do you have one that you would need to migrate?
- Do you have the resources needed to migrate to a new software smoothly or would you need additional help?
- Do you have the resources to keep your marketing automation strategies up to date and evaluate results regularly?

All those questions might seem like a no-brainer to you but are actually overlooked by most of the businesses that report low ROI after they started using marketing automation. The step of evaluating your business, your team and your goals should come first – like when you are buying something big. When you start looking to buy a house you don't just go into every open house and neighborhood. You have a clear evaluation of the price you can pay, the number of bedrooms you want and where you want to live. You don't just buy the first estate you were offered – you know what you need, what you want and what you can afford. This is the right way to evaluate marketing automation software offers too.



**Gather the team and discuss what your goals and current marketing issues are.**

Photo by Hubspot

# EVALUATING

## OPPORTUNITIES AND SOFTWARE

Now that you have a list of your marketing and business goals and needs, you can start searching for the technology. Don't start reading reviews just yet – this should be the last thing to do.

Start with a list of the features you would need for a software to support in order to be valuable for you – use the questions in the previous chapter to understand your needs. Mark all of them based on priority – if you can live without it, then this should be at the end of the list. Then you should head up to this directory – [Marketing Automation Software Directory](#). Use the filter on the right to discover software for your business. You have the following filter option:

- **Number of users** – do you need only one login account or are more people on your team going to use the software? It is important to understand that different level access can be set only if you have a multiple account software.

The screenshot shows a filter panel with a blue header and a white background. At the top, it says 'Filter Results (30)' with a downward arrow icon. Below this, there are three sections: 'Number of Users' with a dropdown menu set to '1'; 'Deployment' with two radio button options, 'Web-Based' (checked) and 'Installed'; and 'Features' with a list of ten items, each with a radio button. 'Email Marketing' is checked. At the bottom, there is a blue button labeled 'Filter Results' and a red link labeled 'Reset all Filters'.

- **Deployment** – Do you want to have the software as a standard application on your computer or do you prefer a hosted web-based solution (hint: web-based is what most of the businesses use successfully).
- **Features** – Now, here is where you should use your list of business goals and features you would need. This directory would not list every feature but you need to focus on the one you know you need – I selected Email Marketing as this is usually the basic you would need and use.

Now that you have this list (30 results for the pictured filters), you should start the initial evaluation of every tool on the list. This means that you should open their website, search for a list of their features and check with your wish list. If you have a match, bookmark the website or write it down in a document – it would be good to keep track of your evaluations and what you liked of each tool. You could also prepare a spreadsheet with all the features you want and check them for every tool you evaluate. It is important to be honest and create a shortlist of the tools that match your basic criteria.

After the initial functionality check you would probably have a list of 10-15 tools. You could go back to your list and start the second round – make a table and write down the pricing options, number of contacts and emails offered. Keep in mind that some software providers claim they support a feature but then it turns out you need to pay for it additionally (I'm looking at you, Infusionsoft!) Here is where some easy decisions would be made – too expensive packages, too little contacts and emails, too many add-ons that need to be bought.

Now you should have a list of 4-5 tools you approve of. The final stage is to schedule a live demo with all of them. Yes, it would take some of your time, but you would see how the tool looks and feel like, what can you do with it and exactly how complicated it is.

I would always prefer a demo before starting a trial – you don't have the option to see how it works with a trial and you might end up giving up on a great tool.

The last thing that I would suggest for you to do is check your software compatibility. You are surely using other marketing tools – i.e. landing page editors, that you might need to connect with your new marketing automation solution. Check the knowledge database and support forum of every tool you like – you might end up finding some incompatibilities that you wouldn't have thought of.

The most common problems are with affiliate tracking, webinar registration management, automated data transfer, opt-in forms, etc. Check your website plugins, your calendar and email client – the devil is in the details and you would not like it if you find a big problem after you invested months and money into the wrong tool.

Another hidden cost in marketing automation is the implementation consulting/training. Some providers require you to take this calls and the price is around \$1000. Other offer a couple of implementation calls for free where they consult you how to leverage their software for your business. Others offer no support at all but a good knowledge database and instructional videos. Decide on the importance of the implementation cost and ongoing support.

Did you do all your demo calls? Did you find a tool you like? It's business time – ask for a personalized quote based on your needs (if you need more or less of something you might get a good deal). Look around the web for people sharing great bonuses if you sign up via their affiliate links – those are usually consultants and might offer you a free consultation. Don't be shy and use the opportunity – you are not obliged to work with this person afterwards.

# CHAPTER THREE

---

## IMPLEMENTING MARKETING AUTOMATION

# IMPLEMENTATION

## PLAN

Congratulations! You have successfully evaluated your business goals and needs, made a profound review of over 30 different marketing automation software tools and now you are ready to sign the deal and start automating. Not just yet! There are some things you need to prepare before launching your first campaign with the new technology.

Most people would decide to start big and explore as many new functions from day 1. But I would suggest you start with what you already know and do and just recreate it inside the new system. Here is a short list to get you going:

- 1. Export contact lists** – You will need to export your contacts from your current system in a .csv file. Open the Migration guide for your new system and search for the tips on how to clean this file and prepare it for your database. Keep in mind that some of the data you have might be irrelevant – evaluate and delete. Another thing is that some of the fields you need (Account number, Base Price, etc.) might need to be created BEFORE the contacts import.
- 2. Import contact list** – Follow the guidelines of your software provider and when in doubt – ask support! They would be happy to help and prevent further problems and confusion.

- 3. Wait for the list to be approved** – Most of the marketing automation providers would lock your contact list for approval and anti-SPAM check. Only after they decide you have a genuine list that is not bought or stolen from the internet, they would allow you to send out email campaigns.
- 4. Export and import your messages** – Do you have standard emails that you send to your clients? Or an autoresponder/re-engagement sequence? Copy-paste those emails (some tools would allow you to use the HTML code) and check for mistakes.
- 5. Recreate sequences and groups** – You should recreate the sequences you were using until now and the way you were grouping contacts. Some systems use tags, other lists or groups – make sure every content and contact is where it belongs before starting your campaigns.
- 6. Migrate all additional data** – Opt-in forms, landing pages, membership websites and affiliate programs – whatever you have, migrate it now.
- 7. Plan and launch your first campaign** – Now you can try launching a test campaign – to your team or a small number of clients. This would allow for easier fixing of the small technical glitches that might or might not occur and the anxiety that would most definitely be there.

I hope that didn't hurt and you are still willing to continue with your marketing automation journey. Now you can move on with understanding the real deal behind your great software and getting inspired to do more with it.

# INTERACTION FLOWCHARTS YOUR BUSINESS MAP

Let me introduce you to something that is going to make the big difference in how you implement and leverage your marketing automation strategies: **flowcharts**.

What are flowcharts – flowcharts are the maps to your business processes – automated and manual. Each prospect goes through a predefined interaction road (or should go!) that leads him to the purchase. Every possible step and detour needs to be present on a map – this would allow you to see, understand and optimize your business. It is fairly hard to optimize a process you don't understand. If you don't know the steps that are included, you are most surely going to skip at least one of them during implementation. This could result in a lost customer, missed opportunities and low ROI.

**How are they valuable for your business** – First, don't think you need a single flowchart that contains all the interactions and connections. If you have 4-5 steps, that can be fine. Every single interaction – newsletter subscription, purchase, demo request, e-guide download; should be part of a different map. Those separate maps would allow you to see the connections between your successful and not-so-successful conversions, where are you missing something and where are there too many additional steps. Those flowcharts would even allow you to optimize your own business .

**How to use them** – The flowcharts you are going to create are just a tool and they would not magically fix your problems. This being said, do not concentrate on making the most beautiful charts, but rather a rough sketch of your current interactions. Then find the common elements between different projects and see what you can learn from them. Maybe you are missing a step in your sales process, or skipping an important nurture campaign that could result in great revenue? Do not underestimate the power of visual representation – it would save you time when discussing with your team, presenting the new plans to your manager or even teaching your intern or virtual assistant. Flowcharts are pure gold when it comes to productivity and optimization.

**How to create them** – There are two main roads you can take when creating a flowchart. One is to draw by hand – with a pencil and a piece of paper. This is a great way to do it, but not interactive enough and changes are rather hard to be made. If you want to be able to edit fast and easy, you need an online tool. The best one out there is [LucidChart](#) – it has a free and paid version. The free one suits almost any business as it offers charts with up to 60 elements. You could also upload images and your personal designs, which makes it great for every task you could ever imagine. Just add the elements you need, draw the connections between them and you have a flowchart!

If you are going to use [ONTRAPORT](#) as your marketing automation system, you would be happy to know that they offer their own flowchart icons for free download. What makes them great is that there is a special icon for every basic ONTRAPORT interaction – form, task, email, sequence, rule, landing page, call, etc. This would allow you to create your flowcharts really fast and with the best visual elements out there. [Click here](#) to go and download those icons.

# LEVERAGE

## ALL AVAILABLE FUNCTIONALITY

If you aim for the best ROI from using a small business automation software, you should evaluate its build-in functionality and the tools you are already using. You might find that you are paying for something that can be optimized via your marketing automation program. There are a lot of examples:

- **Form builder** – Do you use [GravityForms](#)? They are great your marketing software just made them unnecessary for you. Why? You could easily create more beautiful and powerful forms with your new tools. This means you can save another \$40+ per year,
- **Survey software** – Do you use SurveyMonkey to collect responses from your clients? With your marketing automation software you don't need to collect responses with a separate tool – you can do it directly with a form and a landing page (or on your own website). All information can be later exported for easier insights and chart creation.
- **Newsletter tools** – I assume you would directly stop your subscription to your old email marketing tool. Still, a lot of people keep both due to the different themes and templates that they have available. But most of the small business automation tools are starting to offer free email templates too (i.e. Ontraport). In addition, you could easily export all of your HTML templates to any of the other tools and have exactly the same design – your clients won't even know you switched to the new provider.

- **Landing pages** – Do you use [LeadPages](#), [Unbounce](#) or [Instapage](#)? Those are all great tools but cost \$30/month. Most marketing automation services offer built-in landing page creators. Keep in mind that some are really basic and have limitations, while others are developing constantly and even offer themes similar to quality and ease of modifications to LeadPages. You need to evaluate how often do you create landing pages and what specific designs do you need – maybe you’ll find yourself saving another \$40/month.
- **Link tracking** – Do you want to know when people visit a specific page on your website? Are you interested in reaching to those prospects with special offers? You have the power with your marketing automation software. If you are using another tool, you don’t need to anymore. Now you can not only know how many people visited that page, but also who exactly and contact them with an offer or a discount code.
- **Affiliate management** – If you promote your services and products via partners who know and trust you, there is no need to join an external affiliate management service – almost any small business automation software offers those partner programs. They take almost no time and effort to set up and allow you to track all transactions and commissions directly. An additional plus is the fact that you can directly send the unique promotional links and contents integrated in an email, know who of your partners opened and clicked on the email and decided to participate in promotion.
- **Shopping cart** – Yes, if you have a big ecommerce store, a separate shopping cart might be the better decision. But if the case is you sell a short number of independent products (like books, trainings or memberships), you don’t need the investment. Your integrated shopping cart should be just enough – plus, you could always upgrade easily later on.

- **Campaign tracking** – Do you have a document with all the UTM codes and links for a promotion you are running? Yes, Google Analytics is a great tool to track traffic and conversions, but if you want to track sales – implement it using your marketing automations system.
- **CRM** – Probably you prefer to keep your simple CRM (be it a spreadsheet or online program), but this is the worst decision. When you combine all your data in one place, you would receive more powerful insights about your customers. Migration might take time and effort but it is really worth it.
- **Task management** – Do you find yourself going back and forth sending emails to your colleagues about a client related task? Maybe your system has built-in task management system. Yes, it might not be as complicated as Basecamp or some other tools you are using, but you should leverage your marketing tool to the maximum. Send yourself tasks, predefine outcomes, insert specific forms to be filled up after a call – those are just simple things you can achieve with most of the small business automation solutions out there.

---

How many tools is too many? When you forget that you have an account somewhere – it is already useless.

---

# DO YOU NEED AN EXTERNAL CONSULTANT?

One of the main reasons why people are postponing the use of marketing automation software for their small business is the fact that they are not confident they would be able to manage the migration and integration themselves. You are probably worried that it would take too much of your time, slow down your main campaigns and require a lot of work to get going and really be on autopilot. Yes, you are partly right.

Almost all marketing automation software providers offer training for their new clients – although some require you to pay around \$1000 for the service (and it is a non-negotiable fee). The training would help you understand the basics of the software, suggest personalized implementation ideas and strategies and makes you feel much more confident when doing simple and not-so-simple tasks. If you choose to go by yourself, be prepared to invest more than one month of your time if you want your software fine tuned.

Or you could hire a consultant – the expert could design all your plans and settings based on your business plan, design flowcharts, suggest optimizations and, of course, implement all that into your system. Most automation providers have a list of certified consultants that they have personally trained. They would even recommend the best contractor for your specific project. Sounds great, right! Keep in mind that a certified consultant would have higher rates – but it is worth it.

Last, but not least, you can hire a non-certified freelance consultant. It would require some more research from your side – and a pinch of trust. Search for people with a good portfolio of similar projects and a lot of happy clients. You could and should always research people who left testimonials on their website and even contact them for a reference. Many businesses choose to work with a freelance expert as they can rely on availability, timely response and good rates. But don't go searching for the lower rate – at least not for your initial implementation. A consultant with more experience would not sell his knowledge for less than it is worth.

---

## NEED EXPERT ADVICE?

Contact me and let me know what your doubts about integrating marketing automation for your business are – I will give you my expert opinion and help you advance your marketing – for FREE!

---

**Get Free Advice**

