



Complete Business Online

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# HOW MARKETING AUTOMATION CAN SUPPORT YOUR BUSINESS OPERATIONS



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# INTRODUCTION

For most businesses, marketing is directly connected to sales. Sales can only function if it gets the brand awareness, leads, and goodwill from marketing.

Business already understand the connection between marketing and sales. It is less common for a business to make the link between marketing and business operations. Yet, it can be immensely powerful in helping you run your business.

Marketing feeds into sales, but marketing can also feed into operations - leading to a more complete cycle.

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*This white paper discusses how marketing, especially marketing automation, plays a part in ensuring the smooth running of a business.*



# WHAT IS MARKETING AUTOMATION?

Marketing is full of buzz words and automation is one of them. Let's first define what this means.

At its core, marketing automation is an umbrella term for all technology that helps businesses streamline their daily marketing needs.

The idea is to build workflows and automated tasks that increase efficiency in an effort to grow business.

In other words, the term is actually pretty self-explanatory. Embracing the concept allows you to automate routine tasks in your marketing and communication strategy.

## MORE SPECIFICALLY, MARKETING AUTOMATION IS BUILT ON THREE KEY PILLARS:



**A Centralised Marketing Database:** The foundation of all marketing activity, this database is used to record all interactions with prospects and customers. The same database may also be used by sales to record individual customer's purchase history, by your support team to record individual issues, and by management for business information reports.

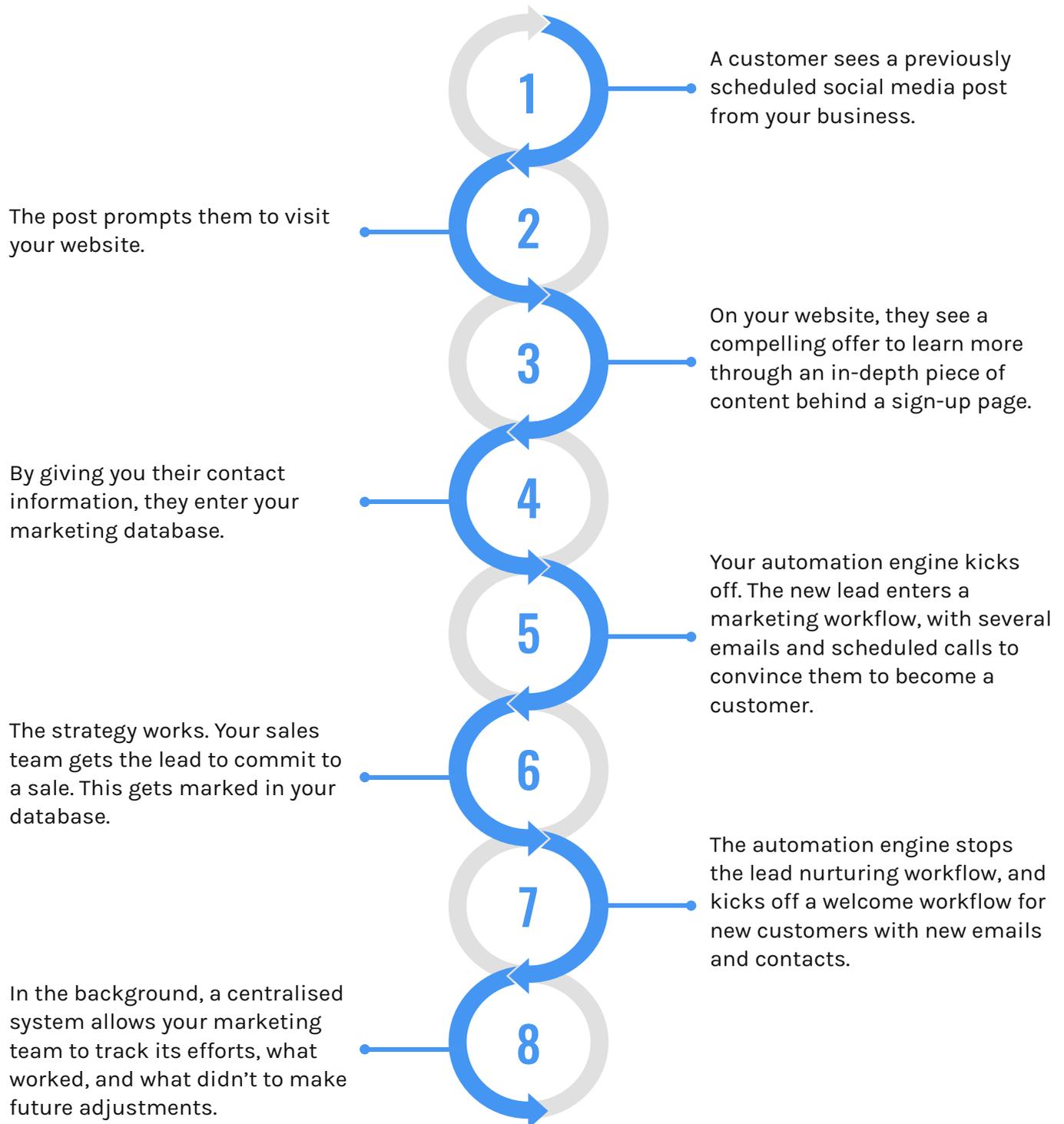


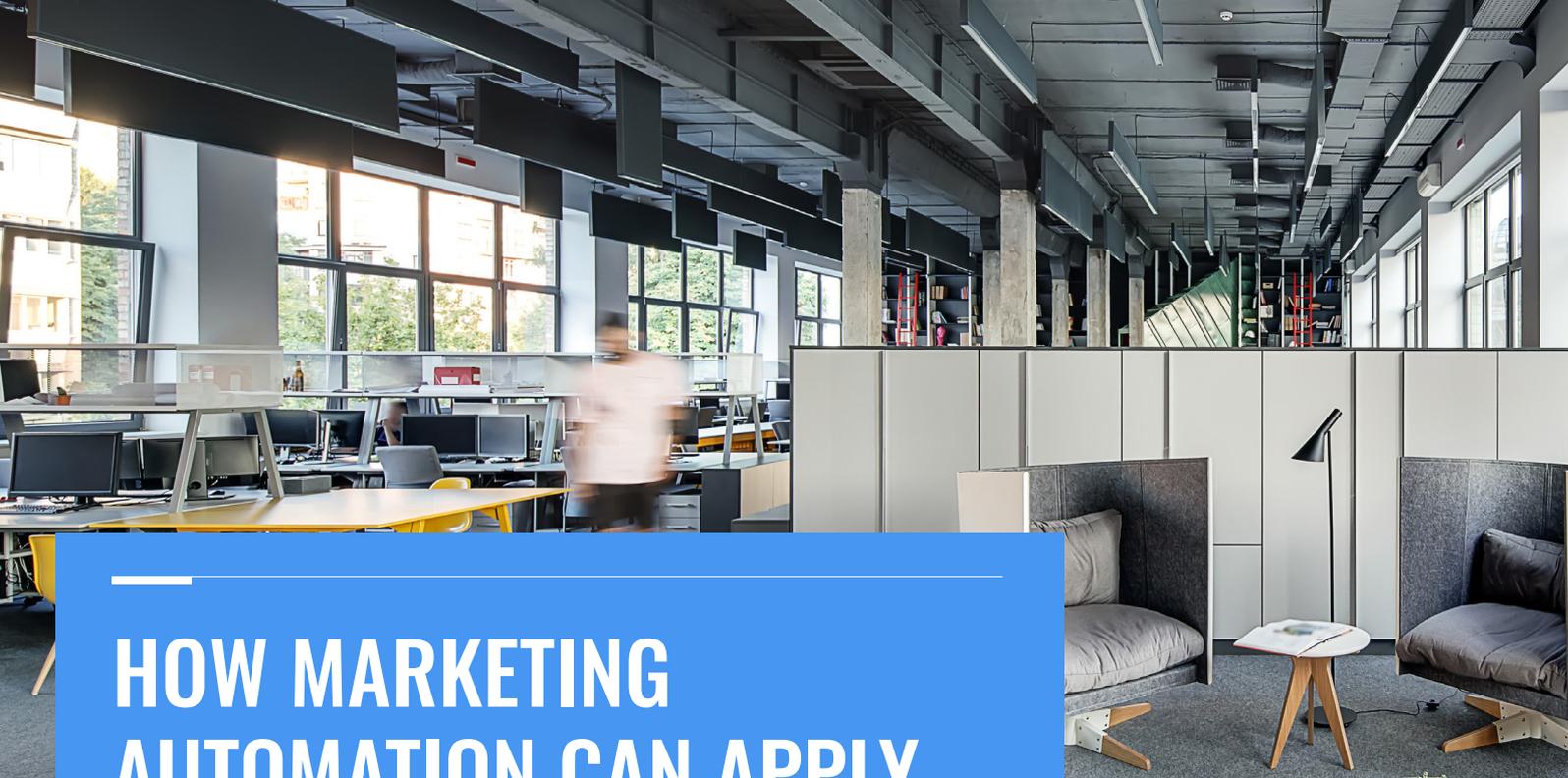
**A Marketing Automation Engine:** The engine defines and triggers individual campaigns and customer interactions across online and offline channels. More likely than not, it links in directly with your database.



**Analytics and Testing:** Marketing departments capture a significant amount of data about their efforts and campaigns. They then use that data for visualisation, optimisation, and improving their ROMI.

## HERE'S HOW MARKETING AUTOMATION MIGHT PLAY OUT IN REAL-TIME





# HOW MARKETING AUTOMATION CAN APPLY TO BUSINESS OPERATIONS

At its best, marketing automation doesn't just take routine tasks out of your hands. It also centralises your data, implements processes to leverage that data, and continually optimises itself to improve ROI.

Those principles are vital to modern marketing efforts. As it turns out, they're just as effective for business operations.

How you run your business will, in many ways, define its success. Using marketing automation tactics can improve productivity, enable better visibility of issues, and develop a more robust and scalable set of processes.

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## STEP 1: ALIGN YOUR OBJECTIVES

Every division within your business has different goals and objectives. They don't need to be identical. They just need to be arranged to fit together.

For marketing to support other departments, your team needs to know what these objectives are. That includes an understanding of priorities, budgets, and time frames.

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## STEP 2: ALIGN YOUR DATA

Your marketing team probably already uses a database of its prospects and consumers. Your sales team, HR, operations and customer support may also tap into that database as well as having versions of their own.

Here's the problem: if you track everything in separate silos, you cannot possibly expect to build out a more centralised strategy.

Instead, identify and build out a database that becomes your single source of truth. Feed in data from marketing, support, HR, and all other teams. Make this your treasure trove of data from which all marketing and communications effort flow.

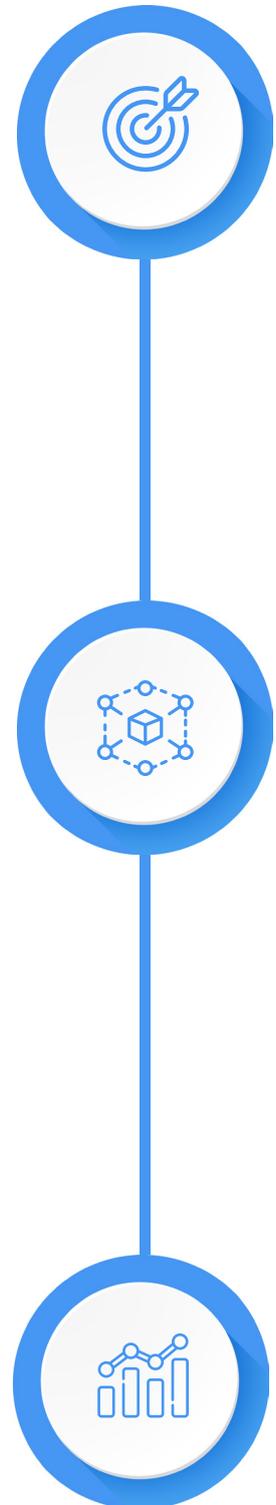
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## STEP 3: ALIGN YOUR SUCCESS METRICS

Your marketing team will be very familiar with metrics like Return on Marketing Investment (ROMI), brand metrics, or customer acquisition trends. What does the rest of your business look to achieve?

Alignment in this area is crucial to success. Start focusing on customer satisfaction, employee engagement, retention, and other operations-based metrics.

In other words, make sure your entire business is working toward the same family of goals, and tracking success the same way.





# APPLYING MARKETING AUTOMATION TO BUSINESS OPERATIONS FUNCTIONS

*Let's consider the above concepts in action. The following are three very real examples of marketing automation in functions beyond sales.*

## AN AUTOMATED BOOKING PROCESS

Don't allow your marketing efforts to stop once you get a prospect to the door. An automated booking process is the perfect example of how marketing automation tools allow you to go further:

- ✓ Let your customer pick a preferred location, date and time.
- ✓ Capture customer-specific requests.
- ✓ Route the booking to the right employee for confirmation.
- ✓ Automatically confirm and remind the customer about the appointment.
- ✓ Records all data centrally.
- ✓ Find drop-off spots and trends on missed appointments to improve your bookings over time.

### NEXT LEVEL:

#### DON'T STOP AT THE BASICS

Imagine your business is experiencing issues at one location. With a centralised booking process, your marketing team can change the messaging and warn your customers about a potential issue. They can promote an alternative option, or attempt to reschedule. This central control can help to smooth out issues and better manage customer experiences.

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## AUTOMATED CUSTOMER SUPPORT

Your support team is responsible for responding to customer questions, queries and complaints. With access to that data, your marketing team can:

- ✓ Pre-empt customer questions by sending timely emails with explanatory links or copies of relevant documents like tracking references or invoices.
- ✓ Analyse support ticket trends to create online self-help and FAQ documents.
- ✓ Trigger an automated email if someone seems to be experiencing problems on the website.
- ✓ Track the source of support tickets to highlight bottlenecks or resolvable issues.

**NEXT LEVEL:**

### ANTICIPATE THE NEXT STEP

Many marketing automation tools offer ways to display a personalised "Heads Up" message to a website visitor based on predefined rules. For example, if a visitor moved from your pricing page to your contact form but never completed it, you can display a message offering to call them back if they provide their contact details.

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## AUTOMATED FEEDBACK MANAGEMENT

Reviews have become a core part of online interactions. Ignore them at your peril.

90% of consumers read reviews online before frequenting a business.

Marketing and support departments can team up in managing these reviews. That includes responding, but also gathering insights into where your business can improve. Through marketing automation, you can:

- ✓ Aggregate review data from multiple sources and for multiple business locations.
- ✓ Set benchmarks, monitor for trends and 'heat-map' the data to see over and under-performing areas.
- ✓ Detect anomalies where a positively reviewed business begins to receive negative reviews.
- ✓ Extract verbatim data to supplement management reports with detailed examples of customer feedback.

**NEXT LEVEL:**

### OPTIMISE YOUR RESPONSE

The right software captures review data in real-time. You can even escalate negative reviews to a higher priority, so you can jump on them and respond quickly and comprehensively. Consumers who are satisfied with the response to a negative review can actually become brand advocates for future interactions.



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# EXPAND YOUR VIEW OF MARKETING THROUGH AUTOMATION

Too often, we take a narrow view of marketing.

It doesn't have to be limited to driving brand awareness or new customers. It's about optimising every touch point they have, and every process that occurs in the background to streamline that touch point.

That's where marketing automation comes in. Approach it the right way, and it can become a powerful tool not just to attract customers, but to improve your entire business.

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## ABOUT CBO

Complete Business Online is a full service digital marketing agency.

We help businesses automate processes, improve revenue and attract more customers.

If you want to find out how we can help your organisation, contact us today.



## Complete Business Online

IT'S NOT JUST MARKETING. IT'S PERSONAL.

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