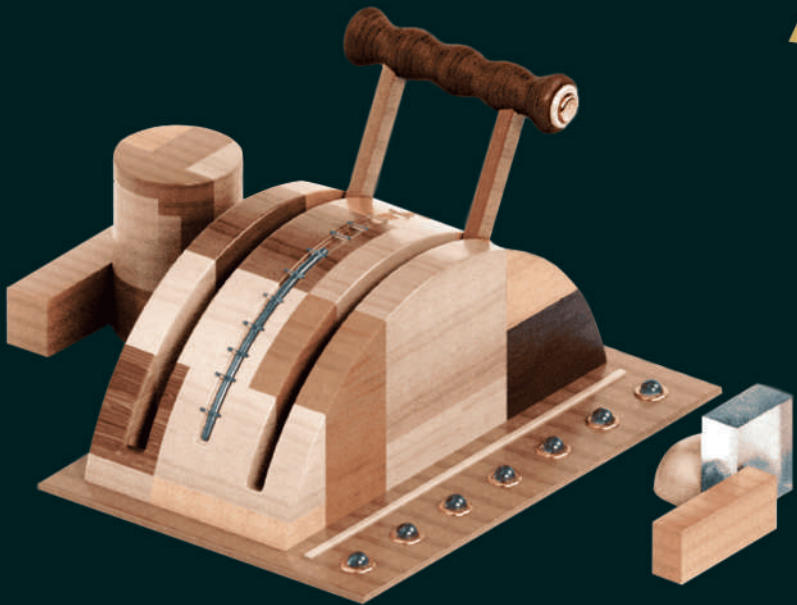




Understanding Marketing Automation

THE FUNDAMENTAL GUIDE

Drive sales and free up time for your Marketing Team





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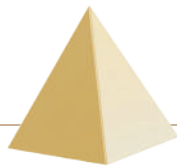
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Why do today what you could've automated yesterday?

Despite growing popularity, marketing automation remains unknown to many organizations that could greatly benefit from it.

When disruptive tools start to catch on in the digital marketing space, they're usually reserved for organizations that have the means and resources to implement complex marketing processes.

However, marketing automation is now more accessible thanks to tools like Sendinblue. It has never been easier to set up complex automation workflows in no time.

Whether you're an eCommerce company, a media website, or a manufacturer with a long sales process, marketing automation can help you:

- **Save time and money on your marketing efforts**
- **Get to know your clients better & strengthen client relationships**
- **Improve your site's user experience**
- **Automate mundane tasks to free up time for more important tasks**



This eBook will teach you everything you need to know about marketing automation and how you can use it for your business. Once you implement your automation workflows, all you will have to do is sit back and watch the results roll in!

In addition to the core topics and benefits, this eBook also covers more advanced use cases for marketing automation: lead scoring and dynamic segmentation. This will help you see the full potential of your marketing automation strategy.

Finally, we will also go over the challenges of using marketing automation in the post-GDPR era as well as possible integrations with CRMs.

Marketing automation can open a world of new opportunity for your business. We're excited to see what you accomplish with your strategy!

**Happy automating!,
Jérémy Cahen**

Chief Product Officer @

 **sendinblue**



PART ONE

Understanding
marketing automation



1



What's a marketer's worst enemy? Repetitive tasks that make it difficult to focus on the big picture and long term strategy.

Hence the core value of marketing automation: the ability to save countless precious hours while simultaneously building better customer relationships and improving your website's user experience through advanced tracking and perfectly-timed communication.

But, what is marketing automation?

Marketing Automation : definition

Marketing automation refers to the use of software to create workflows made up of predefined conditions that trigger the automated completion of certain marketing tasks. The triggers usually correspond to actions that your users take on your site or in your emails and the tasks that can be automated include the sending of emails and sms, the segmentation of contacts into different lists, or updating information in your contact database (e.g. lead score, interest level, etc.).





As stated previously, marketing automation works through the use of automation “workflows.” These workflows correspond to user behavior, for example, automatically sending a welcome email when a new contact signs up for an email list or following up through email with eCommerce shoppers who abandoned items in their cart before a purchase.



LEADS
SCORING



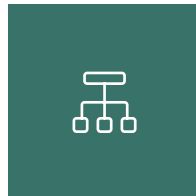
WELCOME
EMAILS



BIRTHDAY
EMAILS



ABANDON
CART



PERSONALIZED
SCENARIO



Note:

You may have already heard of the terms *autoresponder*, *trigger marketing*, or *automated emails*: all of these terms refer to the automation of marketing tasks, so we employ the term “*marketing automation*” to keep things simple.



What is the difference between marketing automation and classic email marketing?

Email marketing is usually defined as the sending of email campaigns to a list of contacts (one to many). These campaigns are usually addressing broad goals such as making a big announcement, promoting a seasonal sale or limited-time promotion, showcasing new products, or sharing the latest content and company news in the form of a regular newsletter.

To give you an idea, take a look at this example:

A classic email marketing campaign: content that is not targeted to specific users or responding to a particular action on the part of the user

The image shows a screenshot of a Peloton email marketing campaign. At the top, the Peloton logo is displayed. Below it, a red banner reads "LIMITED TIME OFFER". The main visual is a photograph of a woman in athletic wear leaning over a Peloton bike, looking at the screen. Below the photo, the headline reads "Get the Bike and Get Geared Up for Less". A sub-headline states: "We're making gearing up for your new Peloton experience even easier. **Take \$100 off any accessories** with your bike purchase, now through Sunday." At the bottom, there is a red button with the text "GET THE BIKE".



Marketing automation, on the other hand, enables you to send targeted mails (one to one) that are triggered by specific actions users take on your website or in emails. These messages are generally much more opportunistic and calibrated to a very specific goal related to actions that users take during the purchase process.



An example of the use of marketing automation for sending an email to notify a contact of price changes for products they've viewed before.

The screenshot shows an email from Canopy. At the top is the Canopy logo, which consists of a green circle with a white triangle pointing up, followed by the word "canopy" in a sans-serif font. Below the logo is the heading "Price Drops" in bold. Underneath is the text: "We thought you'd be happy to know that these great products recently dropped in price." A horizontal line separates this text from two product cards. The first card features a red, boxy storage case with two blue eyes and a red zipper. A green price tag in the top right corner shows "\$12". Below the image, the text reads "Beest Box Jumbo Storage Case" and "Was \$15 / Now \$12". The second card features a blue, spherical portable wireless speaker. A green price tag in the top right corner shows "\$40". Below the image, the text reads "Sphere Portable Wireless Speaker" and "Was \$80 / Now \$40".

Additionally, marketing automation isn't just limited to the automated sending of emails. You can also use it to automatically add users to a specific list in your contact database based on their behavior, assign them a score according to their perceived interest level in your business (more on this later), and many other methods for fine tuning the relationship between you and your customers. We will cover all of this and more over the course of this eBook, so don't worry!



Now that you know the basic definition of marketing automation, let's try to gain a better understanding of the underlying mechanisms of marketing automation software.

How does marketing automation actually work?

The first step for automating any marketing task is creating a marketing automation *workflow*.

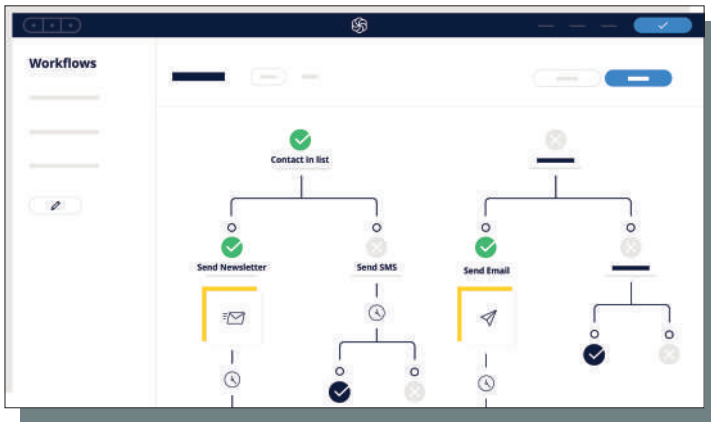
Each workflow starts with an *entry point*, which corresponds to a conditional trigger that sets the workflow in motion. For example, you might have a workflow that use the subscription of a new contact as an entry point. Another example would be the action of a user adding a product to their cart in your eCommerce store. Whatever the case, this entry point will trigger the rest of the conditions in your workflow that follow.

Once you've selected your entry point, the rest of your workflow will unfold accordingly. This can happen in either a linear fashion, or as a complex tree made up of conditional statements (i.e. "If / Then" statements) that branch out into two different paths and continue to multiply with additional conditions.

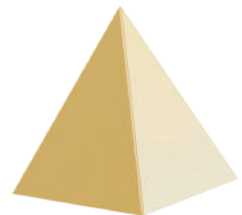


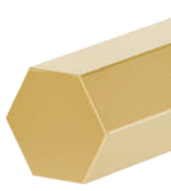
Too abstract? Don't pull out the aspirin bottle just yet! We'll get more concrete as we move along.

Each element of your workflow is made up of different defined scenarios that correspond to a very simple question: did this contact satisfy condition x? If the response is "yes," the contact will continue down the branch corresponding to this scenario. If the response is "no," the opposing branch is activated (or the contact exits the workflow if there is no other branch).



There are two types of conditions you can use to create these branches in your automation workflows:





Identity

These conditions correspond to information that you have stored in your contact database. For example, you can use a contact's date of birth as a condition to send a special birthday email to them at the right time.



Behavior

These conditions correspond to a certain type of behavior or specific actions taken on your website or in your emails. For example, you can send a private invitation for your customer loyalty program to customers who have bought X products in the past Y months.

Depending on the outcome of each condition (yes or no), you can trigger different tasks for the marketing automation software to take on your behalf:



Send an automated message



Add the contact to a new email list

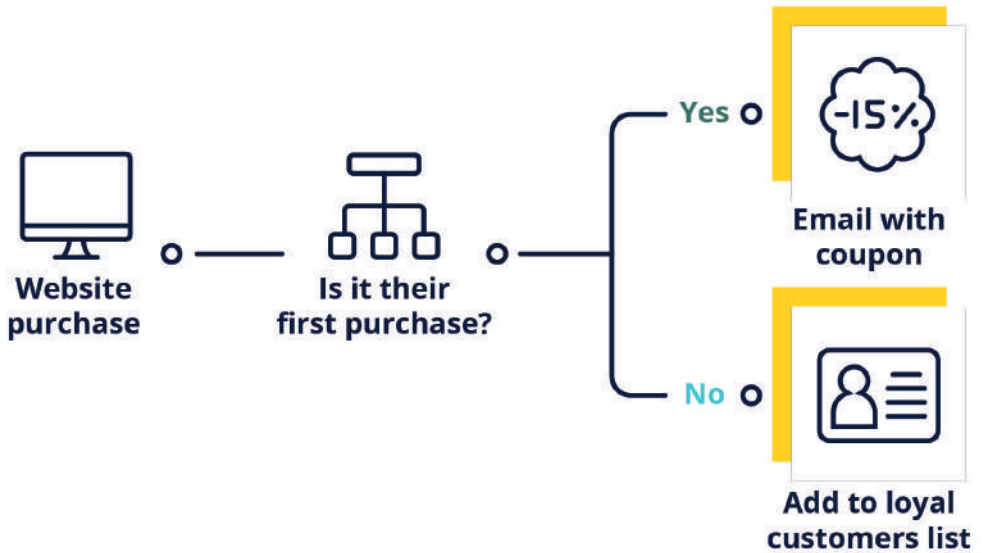


Add or subtract points from your contact's lead score

Marketing automation software also lets you add timers and delays for the tasks you've automated to make sure you've got your timing perfect. For example, if you're creating an onboarding email series, you can program your workflow to send the first email message immediately after signup, then follow up with a second email after one week, and so on.



Still with us? Good! Now, let's take a look at an example.



Example: create a list of loyal customers for your eCommerce site

Here is how the workflow works:

- 1 The contact enters the workflow by making a purchase on your website (this is the entry point)
- 2 The workflow checks to see if this is the customers first purchase
- 3 **If yes:** the customer is sent an email containing a 20% off coupon code to encourage another purchase on your site.
- 4 **If no:** the customer is added to a list of loyal customers in your email customer database



This new list of loyal customers will group all of your customers who have made multiple purchases on your site. From there, you can use the action of being added to this list as the entry point for another workflow (e.g. sending an invitation to join your customer loyalty program).

You can get as creative as you want with the combination of conditions that you use to build simple or complex workflows that automate your email marketing for you.

If that sounds too complicated for you, don't worry! Sendinblue also has a number of pre-made automation workflow templates that you can use out-of-the-box to easily automate common marketing tasks.

Who can benefit from marketing automation?

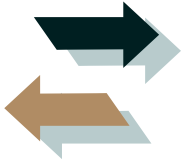
There are countless ways that you can use marketing automation to save you time and improve your marketing strategy and customer relationships. The only limit is your imagination!

Any marketer looking to increase the number and lifetime of their customer relationships can simplify the process of achieving this goal with the help of automation. However, automation can also help mature businesses with a clear vision of their conversion funnel become more profitable.





To be more specific, you should consider a marketing automation solution if you:



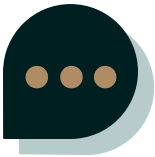
Already generate a large number of leads regularly:

Marketing automation is particularly powerful for transforming leads into customers, mostly thanks to lead scoring and lead nurturing workflows.



Want to improve your email marketing strategy:

You can significantly increase your email engagement rates with the help of dynamic segmentation and automated contact list management enabled by marketing automation.



Want to improve your customer relationships:

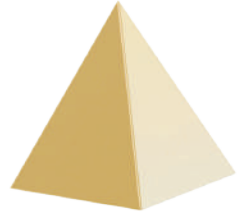
By sending emails in response to specific actions or characteristics, you can more easily address the needs of individual customers at a time when they're most receptive.



Try marketing automation with Sendinblue for free.

Visit: app.sendinblue.com/account/register

today to begin exploring our solution!



To sum things up

Here are the main things you should remember about marketing automation:

- ✓ Marketing automation refers to the automation of repetitive marketing tasks that can be addressed using sets of predefined conditions: qualifying leads, following up with abandoned cart shoppers, etc.
- ✓ These tasks are automated by implementing automation workflows in your marketing automation software
- ✓ Contacts enter a workflow after triggering a specific entry point
- ✓ From there, they are filtered through various conditions corresponding to their identity (gender preference, age, location, number of purchases, etc.) or their actions.
- ✓ Workflows are created to complete tasks according to the specific needs and characteristics of each contact that enters the workflow.

You should now have a clearer understanding of what marketing automation is and how it can be useful for growing your business.

The question now is: which marketing automation software solution is best for you? You'll probably notice that many of the options on the market remain very costly, catering only to large enterprises. SendinBlue offers a more affordable tool that is extremely easy to use, all while avoiding any sacrifices on functionality.

You can start using marketing automation with SendinBlue absolutely free for up to 2,000 contacts entering your workflows. So what are you waiting for?

PART TWO

Setting up your first
automation workflows



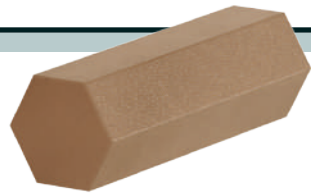
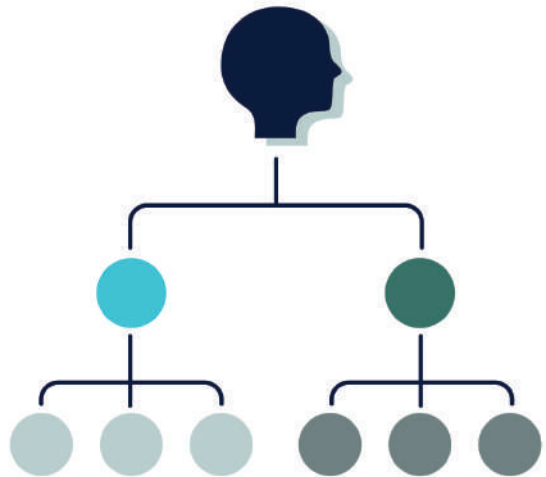
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After theory comes the implementation! In this section, we will help you set up your first workflows, starting with the basics.

What is an automation workflow?

A marketing automation workflow is a series of automated actions (sending emails or SMS, updating a contact attribute, moving a contact to a new list, etc.) that are triggered by certain conditions or actions taken by your website visitors. For example, one of the most basic workflows is automatically sending a welcome message when a new contact signs up on your site.



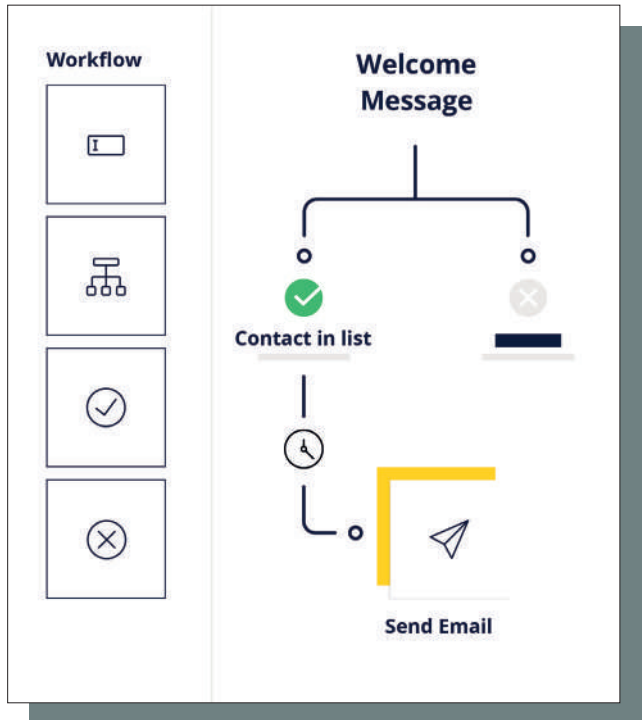


Workflow 1: Welcome email

The first contact that you make with a lead is essential for converting them into a customer further down the road. In marketing speak, we call this onboarding.

When a new client signs up on your website, it's the best opportunity to forge a strong connection at a time when they're most interested in your offering and message.

With marketing automation, you can easily automate this welcome message and have it sent to any new client immediately after they sign up on your website.



Template for the automated welcome email automation workflow

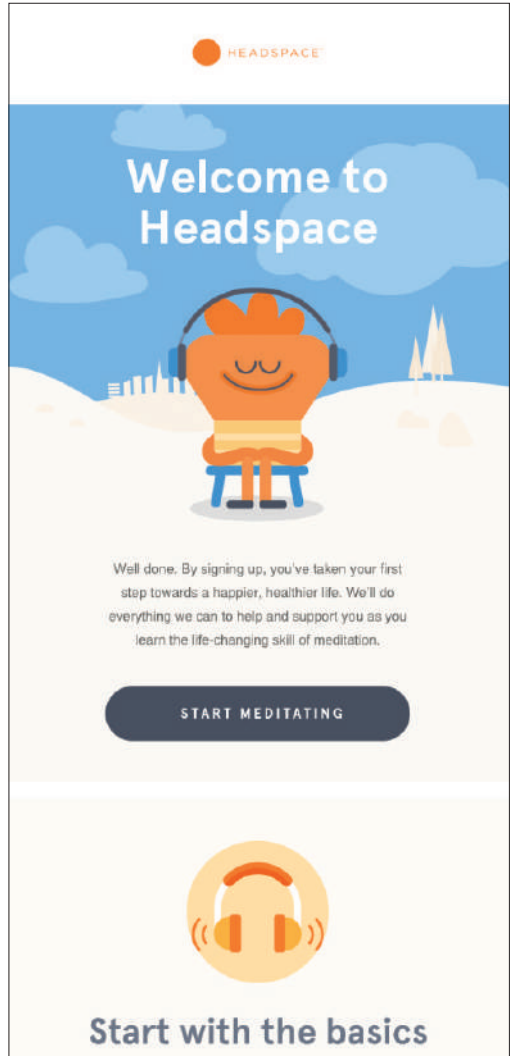


Welcome emails lay the foundation for your customer relationships and give you the chance to introduce yourself, all while learning your customers' needs and preferences.

To be effective, your welcome message should:

- ✓ Make readers want to explore more about your business or content
- ✓ Encourage engagement with future email campaigns
- ✓ Guide the reader on the next steps they should take

To exemplify this, take a look at how Headspace greets new users in their welcome email, by reminding them what the app is all about and providing a clear call-to-action.



Explore our website and discover all the features that Sendinblue has to offer. Visit sendinblue.com/features today!





Workflow 2: Birthday email

Birthday emails are one of the simplest automation workflows to set up for your business. If you already have the birthdays of your customers stored in your database, all you need to do is create a birthday email template and set up a workflow to automatically send it to your contacts on the date of their birthday according to how it's stored in your contact database.

This workflow can help you strengthen your customer relationships while also driving more sales on your website – all with very little investment on your end.

To ensure that your birthday email doesn't come off as overly promotional or intrusive, it's important that you differentiate the content as much as possible from your other marketing communications.



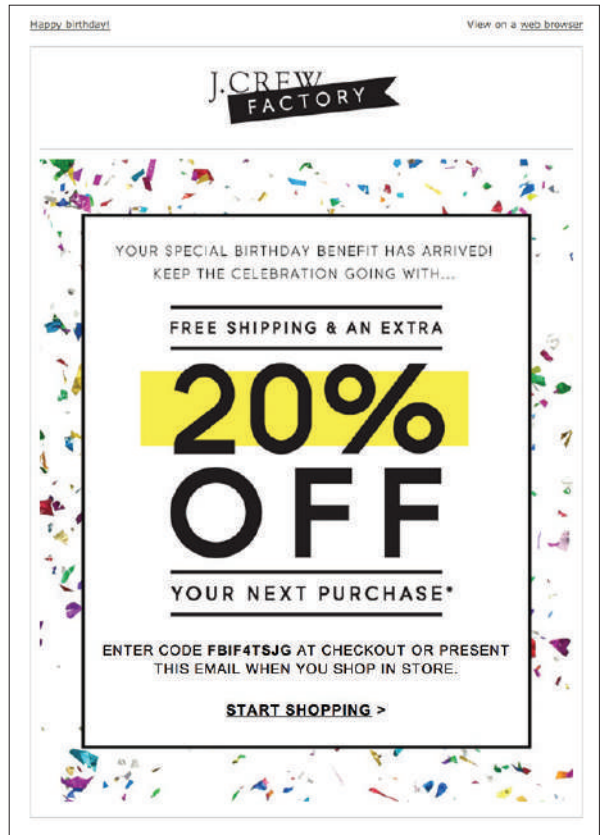
Template for the automated birthday email workflow



To achieve this, The two most important best practices that you need to follow are:

- ✓ Offering a gift
- ✓ Personalizing the email content to the recipient

For example, you can offer contacts a discount on their next purchase with a personalized gift coupon, as exemplified by J. Crew below:



Further reading: 6 ways automation can improve your customer retention.
[Visit sendinblue.com/blog/customer-retention-marketing-automation](https://sendinblue.com/blog/customer-retention-marketing-automation)
to discover the article.



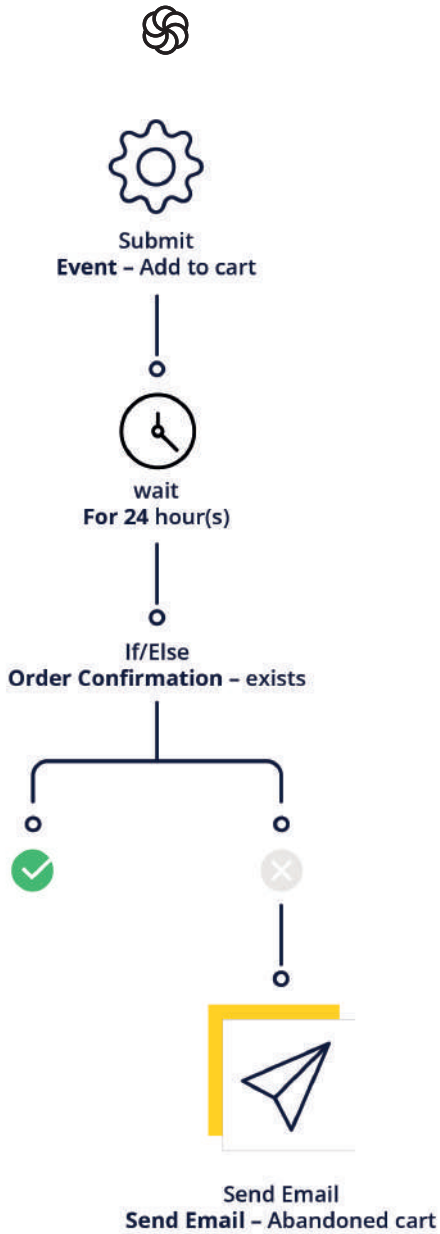
Workflow 3: Abandoned cart follow-up

According to studies, *60-80% of visitors on eCommerce sites end up leaving the store before making a purchase* after adding items to their cart. This is known as an abandoned cart.

While this might be seen as an unavoidable loss of revenue, these users added products to their cart, which shows a higher level of intent to make a purchase. Because of this, most analysts estimate that *around 60% of these lost sales are recoverable*.

This is why if you're serious about boosting the sales on your eCommerce site, you need to start following up with potential customers who abandon carts in your store and encourage them to come back and finalize their purchase.





Template of the automation workflow for following up with abandoned carts



Marketing automation enables you to accomplish this with ease by implementing a simple abandoned cart workflow that works like this:

- ✓ A visitor adds products to their cart in your online store, indicating that they are interested in making a purchase of those (or similar) items.
- ✓ An email is automatically sent if the purchase has not been completed after a certain period of time (e.g. 3 hours).

There are several strategies you can use to convince your customer into coming back and finishing their purchase:

- ✓ Reminding them of what they left in their cart.
- ✓ Providing reassurance on common concerns that might have prevented them from completing their purchase (delivery time, return policy, customer reviews of the products, etc.).
- ✓ Offering a discount on their purchase.
- ✓ Notifying them if the product is low on inventory or if there is a sale that is about to expire.






Sur la Table
THE ART & SOUL OF COOKING

View in web browser

SHOP | COOKING CLASSES | STORES

Still Browsing?




Come back soon to pick up that item you've had your eye on:


GREENPAN HEALTHY CERAMIC NONSTICK SKILLETS, SET OF 3

KEEP SHOPPING »


YOU MIGHT ALSO LIKE...



GreenPan Healthy Ceramic Nonstick Skillet Set, 8" and 10"
\$79.95



GreenPan Healthy Ceramic Nonstick Mini Skillet, 5"
\$9.95



GreenPan Healthy Ceramic Nonstick Skillet Set, 10" and 12"
\$99.95

Above is a great example of an abandoned cart email from Sur la Table

Want to reduce your cart abandonment rate dramatically? Don't miss our article on how to achieve it with drip emails. Visit sendinblue.com/blog/reduce-cart-abandonment to learn more.

PART THREE

Take your automation
to the next level with
lead scoring and
dynamic segmentation



3



You should now know the basics of marketing automation and how to launch your first automation workflows to start improving the conversion rate on your website.

In this section, we will go over the topics of lead scoring and dynamic segmentation to show you how you can construct more advanced workflows to achieve even more with your marketing automation strategy.

These advanced workflows will help you:



Gauge how close each of your leads are to making a purchase and tailor your communications according to that level of interest.

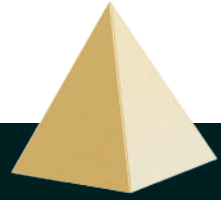


Automatically sort leads into specific lists according to their receptivity to your marketing messages and interest level, various actions that they take on your site and in your emails, or their demographics.





Definitions



Lead Scoring: definition

Lead Scoring involves assigning each of your contacts a score that reflects their conversion potential and interest level in your product or service.

The score attributed to your contacts is automatically calculated by taking into account things like:

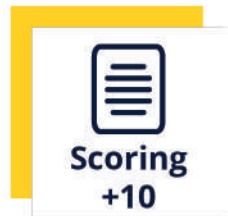
- ✓ Contact attributes (gender preference, age, other demographic criteria).
- ✓ Specific behavior (email engagement, visits to certain pages on your site, etc.).



Welcome
email



Email
link click



When a customer opens a welcome email and clicks on a link in this email, 10 points are added to their lead score.



Segmentation and dynamic lists: definition

Dynamic segmentation is the automatic sorting of contacts into specific lists in order to improve the targeting of your marketing messages.

There are several triggers that can be used to automatically add a contact to a list:

- ✓ Lead score.
- ✓ A specific action (opening a certain marketing email, visiting a specific page on your website, etc.).
- ✓ Other contact attributes (gender preference, age, demographics).



When the contacts reach a lead score of 80 points, add them to a list of "interested leads."



Create your lead scoring model

Businesses receive dozens of leads and new contacts each month. The challenge? Trying to determine which contacts in this crowd have a higher potential for conversion.

The solution: Put a lead scoring system in place with marketing automation to sort out the most promising leads from the pack!

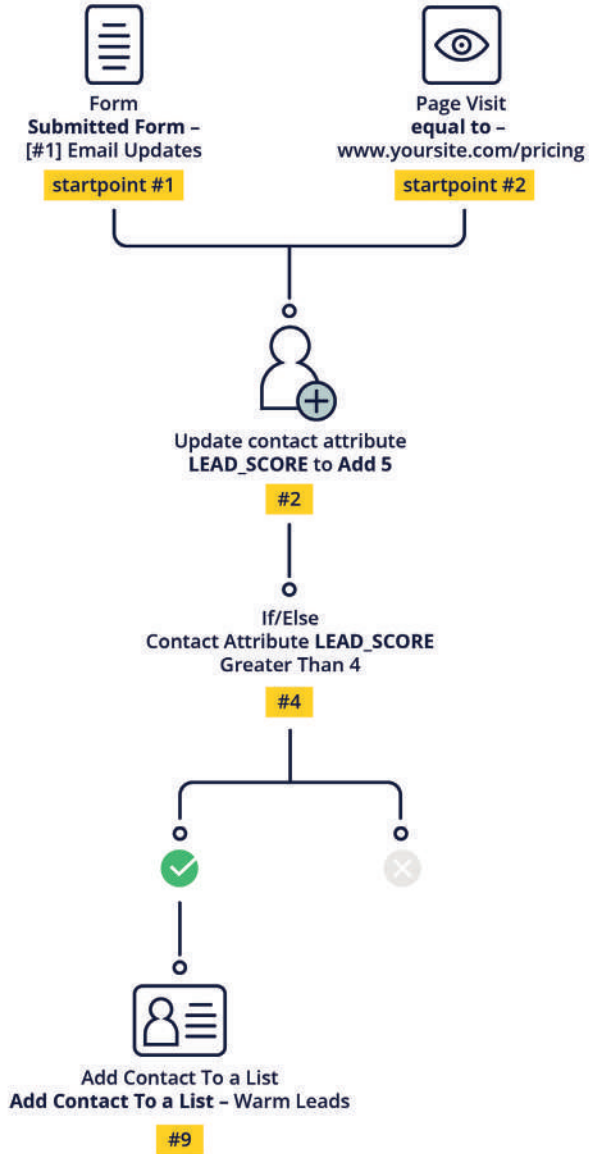
As stated above, lead scoring means the attribution of a score for each one of your contacts. To do this, you need to assign a certain number of points to specific actions and contact characteristics that are indicative of a higher conversion potential or greater interest in your brand.

It's up to you to decide exactly which actions you want to assign points to and how many points these actions are worth, for example:

- ✓ Subscribing to your newsletter: +2 points
- ✓ Clicking on a transactional link: +3 points
- ✓ Adding a product to their cart: +10 points

Gradually, your customers will accumulate points to their overall score as they continue to interact with your brand. Once they reach a certain score, you can classify them as a qualified lead (i.e. ready to make a purchase).





Example usage of lead scoring in a marketing automation workflow.



How to properly build out your lead scoring model?

If you really want your lead scoring to work well, you must have a deep understanding of your customer journey. Without this knowledge, you won't be able to know the most important steps that clients take before making a purchase with your business.

As you build out the model you will use for your lead scoring, ask yourself these 3 questions:

Is your customer buying process short or long?

The duration of a purchase cycle can vary wildly between different products. A customer might take a few minutes to choose a t-shirt, several days to choose a washing machine, and several months to invest in a complex SaaS solution. You need to take this factor into account when building your lead scoring model.

What are the key steps to conversion?

Ask yourself what actions do customers take that indicate a higher level of interest in your business or that they're closer to making a purchase. Do they visit a specific page (e.g. product pricing)? Do they open more of your emails? Examine your customer data to find out more.

Who are your top customer profiles?

Examine your customer data to find out which profiles and attributes make up your core customer audience: look at age groups, professional backgrounds, geographic locations, education level, etc.



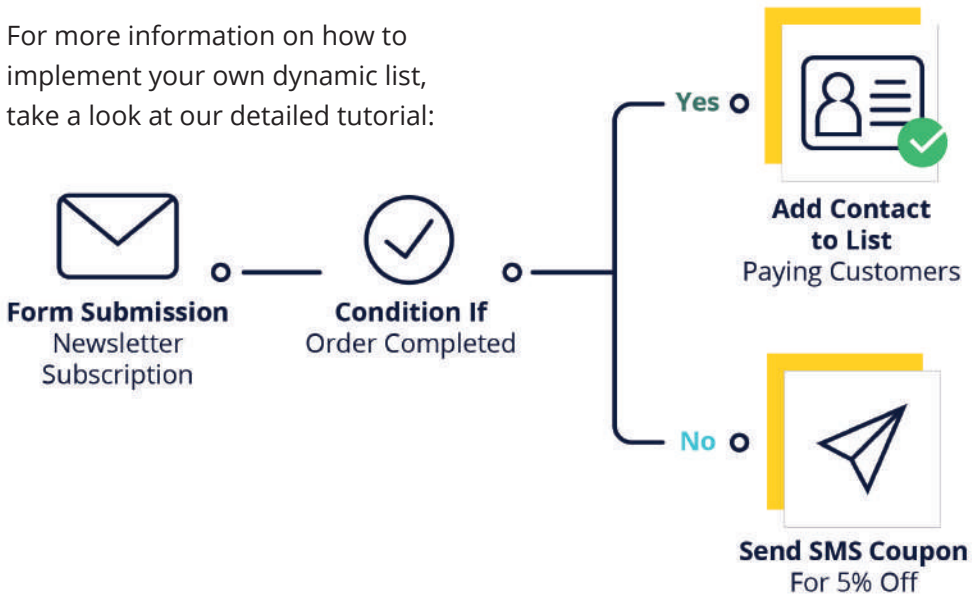
Automate your email list segmentation with dynamic lists

Now that you have your lead scoring model in place, you should consider setting up a workflow to automatically sort your leads into a new list once they reach a certain score. This process is called *“dynamic segmentation”*.

A dynamic list is a contact list that is automatically filled with contacts using criteria that you define:

- ✓ Based on lead score
- ✓ Based on specific actions that contact takes

For more information on how to implement your own dynamic list, take a look at our detailed tutorial:



Interested in learning more about lead scoring models?

Visit our blog today for more information:

sendinblue.com/blog/lead-scoring-model



Dynamic segmentation with lead scoring

Contacts close to making a purchase

With this workflow, you can track the lead score of your contacts and automatically add them to a list of “qualified contacts” once they reach a certain score.

Once you have this list, all that’s left for you to do is send them a promotional message encouraging them to make a purchase. You can take this one step further and create several contact lists that correspond to different tiers of interest level according to different point values. With this system, you can use different types of offers to move leads closer to a conversion.



*Contact reaches a lead score of 80 points
→ Add them to your list of “qualified leads”.*

Example : Once a lead reaches 20 points, add them to a list of “new leads” and send them educational content loosely related to your business or solution. After reaching 50 points, they can be moved to your list of “warm leads.” Here you can send them more targeted information about your product directly.





Contacts who have lost interest

You can also carry out re-engagement campaigns by setting up a dynamic contact list specifically for inactive leads.



Contact reaches a score of -50 → Add them to a list of “inactive leads”.

Example : Remove points from a contact's lead score every time they fail to open one of your emails. Once a contact has a sufficiently negative score, they should be added to a list of inactive leads, where you can try and win them back with a re-engagement campaign.



Dynamic segmentation with specific actions

Visiting a specific page on your website

The pages that leads visit on your site can give you a lot of information about what they're looking for from your business. Don't ignore it!



*Contact visits a page on your website → Add them to the list
"Interested in... [page topic]".*

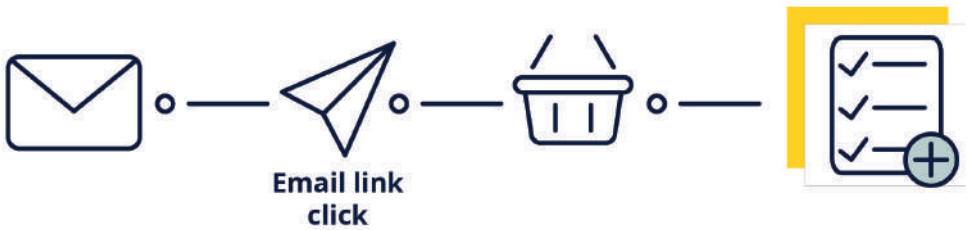


*Example : When a contact visits a specific article several times,
offer them a promotion for a product related to the content of that article.*



Email engagement

The level of engagement that contacts have with your email campaigns is a great way to understand their needs.



*Opens an email campaign → Clicks on a link in the email
→ Makes a purchase → Add them to a list.*

Example : Your client buys a product that was being promoted in your email. Consider sending them more content similar to this email promotion.



Next steps?

As you saw in the workflows above, one of the most interesting benefits of marketing automation is the ability to assign contacts to specific lists according to their specific behavior (and by extension, needs).

Using this technique, you can drastically improve the performance of your bulk email marketing campaigns with the help of better segmentation powered by your marketing automation workflows. That's because creating dynamic lists allows you to send content in your emails that is more relevant to the recipients and targeted to their needs, ultimately leading to better engagement.

Now it's your turn to implement your own complex segmentation and lead scoring workflows, taking into account the specific barriers to conversion and unique customer journey that your leads experience.

The possibilities are endless! If you need more inspiration on which workflows you should implement for your business, check out our blog where you can find articles with more examples of marketing automation use cases.

Visit sendinblue.com/blog/category/marketing-automation for more!



PART FOUR

Questions regarding
the adoption of
marketing automation



A large, white, stylized number 4, positioned in the lower half of the page. It is the central focus of the design, rendered in a bold, sans-serif font. To its left, a portion of a textured, light blue rectangular object is visible, extending from the edge of the frame.

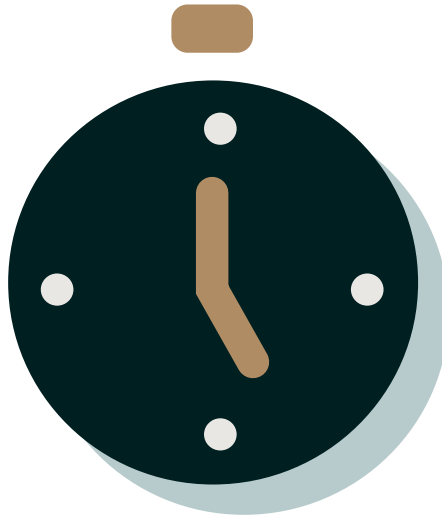


If you've made it this far into the eBook, that means you're potentially interested in using marketing automation for your business.

As you begin integrating marketing automation into your business' overall marketing strategy, there are a few questions that might emerge:

- ✓ Is marketing automation a better solution for your needs compared to tools that are CRM-oriented?
- ✓ How can you implement a marketing automation strategy while remaining in compliance with the GDPR?

We will address the concerns of both of these points in this final section!





Marketing automation or CRM?



Marketing Automation

Is the automation of marketing tasks using sets of predefined conditional triggers. For example, sending an automated email (marketing task) when a user leaves unpurchased items in their eCommerce cart (predefined conditional trigger).



CRM (Customer Relationship Management)

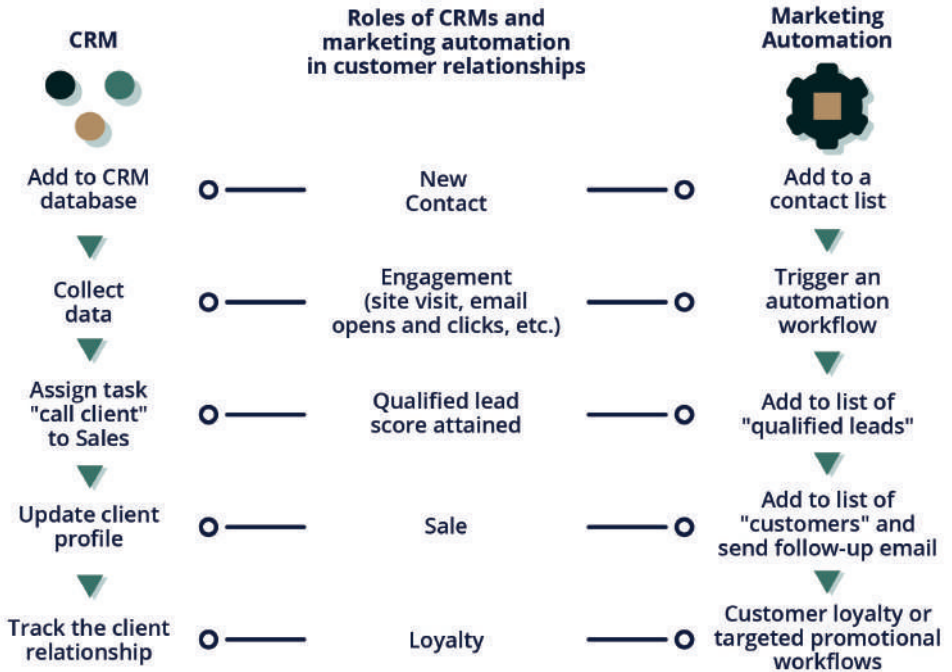
Are tools that enable you to collect, process, track, and analyze information regarding each of your prospective customers in order to better manage customer relationships.





Many people use the word CRM to describe both of these technologies. The reason for this is that many tools integrate the functionality of both marketing automation and CRM.

For many businesses, notably SaaS and other B2B businesses, setting up a CRM system is a necessary right of passage. But, the less expensive option of marketing automation can sometimes be a more effective choice for satisfying the needs of SMBs, and this still gives you the option to integrate with a number of CRMs in the specific cases that call for it.

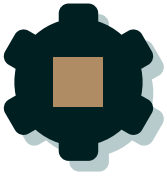


Infographic: The roles of CRMs and Marketing Automation in the management of customer relationships



Two tools, two unique use cases

Because marketing automation and CRMs are often grouped together in the same software suite, it's important to understand what separates their functionalities:



Marketing Automation works to manage and automate your marketing campaigns. All you have to do is complete the initial setup of your workflows and let the software do the rest of the work.



CRMs help you manage your sales process and the underlying tasks the make up this process. They're generally helpful in providing sales teams the information they need to manage the different tasks within a sales process for each of their prospective leads.

Marketing automation: A tool for automating marketing communications

Marketing automation helps you save time by automating repetitive marketing tasks that would otherwise eat up a lot of time:

- ✓ Refining the targeting for marketing campaigns (emails, SMS, Facebook ads, etc.) and launching them
- ✓ Dynamic segmentation of your contacts
- ✓ Scoring and nurturing your inbound leads





As we mentioned earlier, the automation of these tasks is accomplished through the implementation workflows that use predefined conditions to trigger their completion.

With the help of lead scoring and dynamic segmentation, marketing automation makes it easy to create a more targeted and fine-tuned marketing strategy that responds directly to your contacts' attributes (e.g. age, gender preference, location) and their behavior and interests (e.g. previous campaign engagement, number of past purchases).

Therefore, marketing automation technology is not only very useful for nurturing prospects and moving them towards the goal of conversion, but it can also be very effective in cultivating more loyalty among contacts who are already customers as well.

CRM: A tool for streamlining the sales process

CRMs are, first and foremost, a place to store your customer and lead data. It's essentially a database where you can track the progress of your communications with prospects, keep any relevant details that might be helpful in the sales process, and decide on the next steps of engagement.

Most notably, CRM functionality includes:

- ✓ Access to the “profile” of every contact in your database
- ✓ Tracking of the evolution of your relationship with each of your contacts
- ✓ Mapping your conversion funnel and the different steps of your sales funnel
- ✓ The stage into which each of your contacts lies in your sales process





While marketing automation automatically applies the conditions and actions of a workflow to groups of contacts who satisfy the conditions of the workflow, CRMs allow sales teams to assign individual representatives to each contact for targeted follow-up (cold calling, individual outreach emails, demos, etc.).

More generally, CRMs enable businesses (and more specifically, sales teams) to model their conversion funnel to the different steps of the sales process, then map contacts to the steps in this model and assign these contacts to members of the sales team. For example, you can use a CRM to assign one of your sales reps the task of reaching out directly to a prospect once that prospect reaches a specific stage in the sales process.

Today, many CRMs also allow you to implement certain aspects of marketing automation, but they tend to be very costly and less user-friendly compared to standard marketing automation solutions.



To recap:



Marketing Automation	CRM
Marketing tool	Sales tool
Facilitates the automation of marketing communications	Track and manage customer and prospect relationships
Limited contact management functionality	Individual contact management
Dynamic segmentation of contacts using conditions	Based on a customer data model and sales process
Implement different workflows for various marketing and sales processes	Streamline and visualize the sales funnel
Most impactful for eCommerce sites and blogs	More impactful for SaaS and B2B





What is the best solution for you?

Choosing which solution is right for you will depend on the type of sales process that your customers go through:



Short process with minimal to no contact with sales (eCommerce, B2C):
Marketing Automation

Long process with intervention from sales team (SaaS, B2B):
CRM

Marketing automation: A priority for eCommerce merchants and bloggers

If you're selling a product that doesn't require a particularly large investment, marketing automation will have a more significant impact on your sales.

The abandoned cart workflow is a perfect example of how marketing automation can quickly boost online store's revenue. By setting up this workflow, you can achieve great results with very little investment. In fact, you can set up a basic automated abandoned cart email in just a few minutes!

But, as we've mentioned before in this eBook, marketing automation isn't strictly reserved for driving sales and sending messages – it can also be very helpful for marketing your content and media. In the case of bloggers, marketing automation can be used to automate welcome messages and “nurture” new subscribers by adapting the content they're served based on their interests and previous engagement.

CRM: A priority for B2B and SaaS companies

However, if your business follows a long and complex, multi-touch sales process involving intervention from your sales team, adopting a CRM solution should probably be a higher priority.



For example, this would likely be the case for SaaS businesses (online software platforms), particularly those selling B2B tools.

This is because it's a much heavier decision to invest in an expensive tool with monthly recurring costs than to purchase a pair of shoes. Many prospects won't make the purchase without first being contacted by a salesperson to guide them through the process, demonstrate the product, and provide any additional information as needed.

With this type of sales-intensive process and complex product, a CRM is an essential tool for knowing which actions need to be taken with which prospects and by whom, while also enabling full visibility into the progress of your relationships with each individual prospect or customer.

Blending your marketing automation and CRM strategies

For more advanced businesses, the best solution is still to use both of these solutions in tandem with the help of software integrations between the two technologies.

Linking your CRM and marketing automation tools together enables you to cover every step of your conversion funnel, from the moment you collect a prospect's contact information all the way to through your onboarding series and customer loyalty campaigns.

In this case, the primary goal of marketing automation is to feed qualified leads into your CRM so that your sales team can follow up with them only once they've actually reached a certain level of interest.

Sendinblue offers several CRM integrations, including Salesforce, Everwin, CXM, Intercom, and more.



Be GDPR-compliant with your marketing automation

The new European Union law regarding data privacy, known as the **General Data Protection Regulation (GDPR)**, entered into effect on May 25, 2018, prompting a massive change in how businesses can market themselves online and communicate with customers. The impact also affected how businesses are able to use certain marketing tools – particularly marketing automation.

Notably, the law stipulates that consumers have the right not to be subject to an automated decision based on profiling without first being informed and providing explicit consent to this processing.

In order to allow entry of your contacts' data into a marketing automation workflow, you must inform them of the specific processing for which you plan to use their personal data and obtain their explicit consent to this processing at the time when you're collecting their email address.

To do this, update your subscription forms with separate opt-in checkboxes for each type of processing that you plan to implement, accompanied by a sentence affirming the contact's positive consent to this specific processing. For example:

I accept to receive targeted emails based on my website navigation behavior and perceived interests.

You should also consider updating your usage terms and privacy policy in order to provide more transparency to your customers and contacts on the different ways you process and use their personal data.



Finally, you also need to provide an easy way for contacts to “opt-out” or refuse to receive automated messages. With Sendinblue, unsubscribe links are automatically integrated into every email that is sent from the platform, so there’s no need to worry too much about this.

In the example below, you can see the before and after of a newsletter subscription form with the addition of a specific opt-in checkbox for receiving targeted emails through marketing automation.

Newsletter Subscription + Automated Marketing Emails

✓

SIGN UP FOR OUR EMAILS

email@domain.com

I would like to receive the [Site Name] newsletter every week.

I would like to receive to receive targeted promotional emails according to my on-site behavior and interests.

Submit

You can easily unsubscribe from our mailing list at any time by clicking on the unsubscribe links at the bottom of each of our emails.

If you also want to send targeted promotional emails to contacts using marketing automation, you must receive specific authorization from the contact for this through a separate opt-in checkbox.

✗

SIGN UP FOR OUR EMAILS

email@domain.com

I would like to receive to the [Site Name] weekly newsletter, as well as targeted promotional offers.

Submit

You can easily unsubscribe from our mailing list at any time by clicking on the unsubscribe links at the bottom of each of our emails.

Don't use one generic opt-in for collecting consent from contacts for different uses of their personal data.

Now it's your turn!

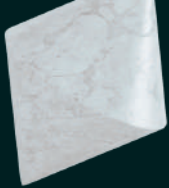
We hope that reading this eBook has helped you realize the massive potential marketing automation holds and how you can use it to enhance your marketing activities.

At a time when consumer attention span is shrinking, communications from brands have started to be perceived as more and more intrusive, especially when they are sent indiscriminately with a lack of any personalization.

Thanks to marketing automation, you can separate yourself from this lot by sending the right message, to the right contact, at the exact right time. It will also help you greatly increase the effectiveness of your campaigns and improve your customer experience as well.

However, above all else, marketing automation lets you save time by automating repetitive marketing tasks, allowing you to refocus your marketing strategy on the essential: your customer.





And it has never been easier to get started with marketing automation! With Sendinblue, you can set up highly effective marketing automation workflows and start seeing results in just a few minutes.

Best of all, you can try it free for the first 2,000 contacts who enter your workflows! What are you waiting for?

We are excited to see all of the ways that you harness the limitless potential of our marketing automation tool for your own business. So, don't hesitate to share with us your best ideas for new automation workflows! And of course, if you have questions, our dedicated customer care team is standing by to help!



Happy automating!

Team

 **sendinblue**

