lead**liaison**

Revenue Generation Software

Marketing Automation Preparation Checklist

Marketing automation is a very powerful solution for many sales, marketing, and executive teams. The value of marketing automation is amplified when used properly along with planning and a process. Studies have shown only 25% of respondents get full value from their investment in marketing automation, which parallel the early days of CRM implementations. To help maximize your return on invest we compiled a checklist to help you start preparing for marketing automation.

Checklist

- □ Gather your list
    - i. Gather you list of leads from media inquiries
    - ii. Gather your list of leads from website inquiries
    - iii. Gather your list of leads from tradeshows
    - iv. Gather your list of leads from your sales team
- □ Make sure your lists are organized with the data separated. For example, first name, last name, company, email, phone, and address in different fields/columns
- □ Assess how you interact with prospects and customers
    - i. Document the B2B buying process for your company. Understanding how your buyers buy and what phases they go through is very important to the lead nurturing process
    - ii. Build a flowchart to document how a lead moves into and out of your funnel and into a customer. Document how marketing creates a lead, qualifies them, and nurtures them until they are ready to buy.
- □ Group your customers into a list
    - i. Identify important information about your customers in the list such as revenue, duration of the sales cycle, products purchases, and services purchased
- □ Identify your digital presence.
    - i. Make a list of your web page links that need to be tracked
    - ii. Make a list of your landing pages
    - iii. Make a list of your web forms
    - iv. Make a list of the social media outlets you participate in
- □ Do an audit of your marketing content
    - i. Gather all of your email templates used for prospecting or communicating with customers.
    - ii. Gather all of your whitepapers and data sheets
    - iii. Gather your videos
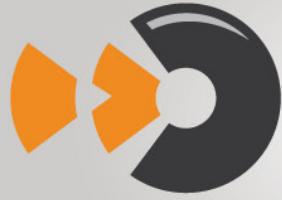
iv. Gather your presentations

☐ Adopt a revenue generation framework. A revenue generation framework provides the necessary technology to deliver improved sales and marketing results. Identify a revenue generation framework that includes the following solutions:

  i. Sales prospecting
  ii. Database segmentation
  iii. Lead tracking
  iv. Lead qualification
  v. Lead routing
  vi. Lead nurturing
  vii. Inbound marketing
  viii. Metrics for analysis

☐ Define your new process in a Service Level Agreement (SLA). A SLA is a contract between sales, marketing, and executive teams which documents your entire lead management process. You can download a SLA template from Lead Liaison at http://www.leadliaison.com/best-practices/lead-generation/service-level-agreement/