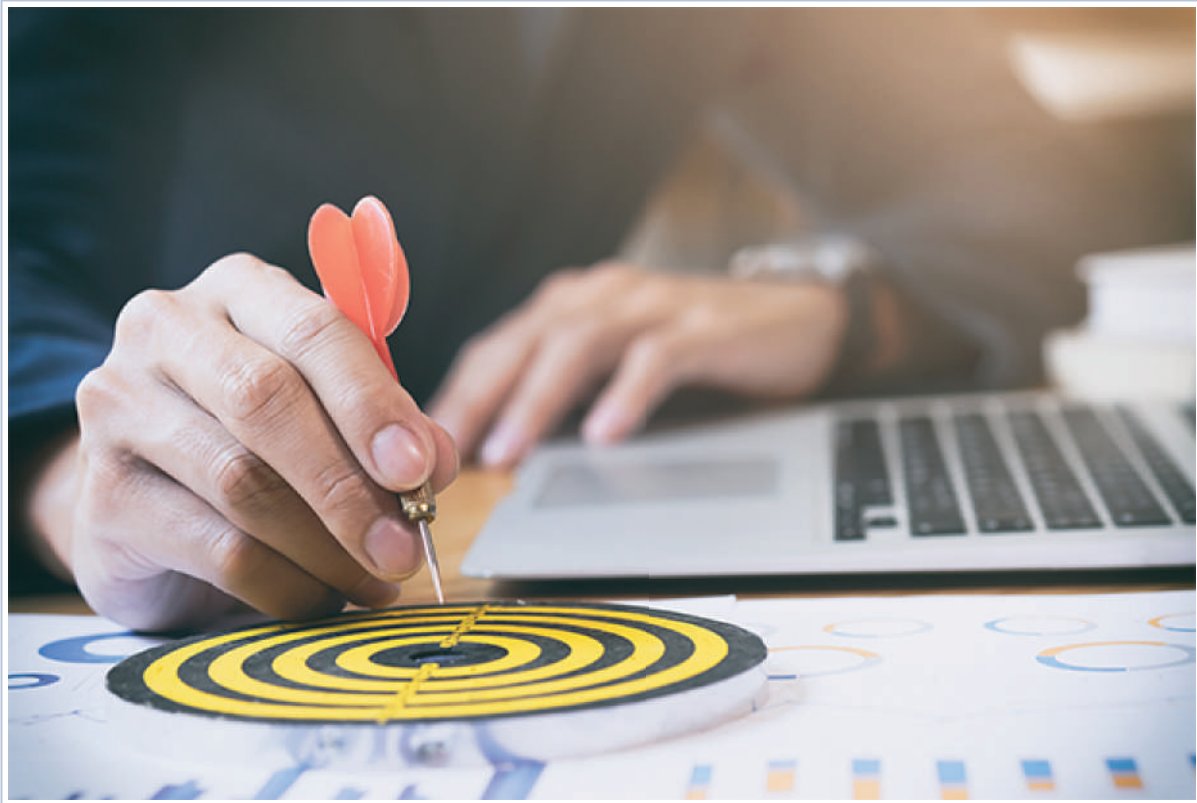




How to **Avoid** Common **MARKETING** Automation Mistakes





Depending on your experience, marketing automation conjures up one or two mental images: For newer marketers, they see it as a bright shiny object with limitless possibilities. And then for experienced marketers, they remember past failures they don't want to repeat. In reality, the more effective way forward lies somewhere in between these two extremes. To avoid wasting your time in marketing automation, make sure you avoid these common mistakes.

1.

Failing to Guide Marketing Automation with Segmentation

Segmentation strategies date back to the dawn of direct mail over a century ago. However, many marketing campaigns continue to have poor segmentation and fail to hit their target.

The Most Basic Segment

Let's consider a straightforward segmentation :

customer vs. prospect. Psychologically, there is a critical difference between a person who has purchased from your company compared to an interested window shopper. If you don't currently have these two segments in your system, it's an easy win. More importantly, prospect /customer segmentation does not have to create an undue burden on you. You can adapt and reuse offers and content assets for both audiences in many cases.

Sidebar :

72% of executives view audience segmentation as the top priority in their data strategy.

(Econsultancy in association with IBM Watson Marketing)

The Problem

The problem is that many Eloqua users think building customer and prospect segments are too out of reach, too complex, or too costly to undertake. Once users start thinking about segmenting by customers, they immediately jump to harder tasks. "Well, if we're going to segment by customers, we'll need to store every product they've purchased so we can segment by product. And then we might want renewal date. Surveys. And perhaps a loyalty index!"

But you don't need to start by boiling the ocean. Start with a simple goal and a quick win by pursuing first, **a simple customer segment you can include/exclude** and save the additional capabilities for a future project.

Creating a Customer Segment Can Be Simple

Sometimes our Eloqua customers will say, “Oh, it’s just too hard to get a list of customers into Eloqua.” But when we ask why, it’s often because they’ve conflated their project scope too quickly. As a result, it’s become much larger than is necessary.

For example, do you really need the following things to be done to create a customer segment in Eloqua, or **can these steps be skipped?**

- Having meetings to define what a customer is
 - What if they are really small customers?
 - What if they haven’t been active for several years?
 - What if they are only a services/support customer?
- Asking Sales Reps to go through and flag all their customers or which contacts at an account should be considered customers?
- Scrubbing the List of Accounts / Contacts?
- Creating a complex ERP integration?

Are These Good Ideas?

Yes, of course associating products with companies and contacts is helpful. What about defining what “customer” means, and integrating all of this with ERP? Probably! *But maybe not all today. Maybe going down these rabbit holes will slow you down too much.*

To get started fast, all of this complexity isn’t necessary. It may be a great vision to pursue over a year or two. But you can probably live by the 80/20 rule and get *most* of the value of customer segmentation today with a much simpler approach.

A Simpler Approach

What is that approach? Why not simply ask accounting, once a quarter, for a list of customer companies? This list may not be perfect. And it may not identify all the correct people. And it might not even identify ANY people! But you can still relatively easily, flag those companies as customers via an Eloqua upload, and set those contacts as customers. Presto! You are now segmenting by customer. Step one is done and useful within a couple of hours added to every quarter.

2. Poor Segmentation Strategy

Having a segmentation strategy has always been a marketing basic. Long before Eloqua, or even the internet, identifying your top, key audiences and what messages you should convey to them has been core to marketing. And of course, many still do this today, and even take it farther with “Buyer Persona’s” and additional levels of segmentation.

However, despite its long and common history, many today have become so enamored with technology, that they have forgotten to invest time in this basic requirement.

Can you, off the top of your head,

- List your top 3-6 audience segments or Buyer Personas?
- State the primary messages and goals for each?
- Know exactly and easily how to pull them out of Eloqua?
- Have a rough idea of the quantities in each?

Other Segments to Consider :

- **Industry.** You can use standard definitions of industries like the [North American Industry Classification System](#) or create your categories (e.g., venture-backed enterprise software startup companies funded in the last 24 months).
- **Geography.** The most popular options for geographic segmentation are country, state/province, city, and postal code.
- **Job Level.** Choose prospects with Manager or VP in their titles (e.g., sales manager, sales VP).
- **Job Role.** Choose prospects in Sales or Marketing (e.g. marketing VP, Sr Director of Sales).
- **Activity.** Choose segments based on their engagement with your marketing (e.g., prospects who have attended a webinar).

Use An External Tool

If you are working with large marketing lists with more than 10,000 contacts, then manual segmentation may be challenging to scale. To help marketers discover new marketing segments, we developed [4Segments](#). It allows you to visually review your segmentation so you can better see your options. In addition, we offer [job title beautification and normalization apps](#) for Eloqua that cleanup the job title field and separate job titles into separate job level and role.

3. Weak Personalization Testing

Have you ever received an email that began, “Dear FNAME?”

It is astonishing that such basic personalization mistakes still happen. As you use more custom fields in your email, then you run a higher chance of personalization mistakes. In addition, this mistake ruins your ability to make a good impression with a prospect. As a result, everything else you have worked on

Here are two general ways you can avoid this mistake.

- First, become fanatical about cleansing and improving your marketing data. The first step lies in recognizing the value of obtaining high-value data through your inbound programs.
- Second, create a campaign checklist and require staff to use it before pressing SEND.

If you need added motivation to invest in personalization data and programs, consider these findings reported by [Social Media Today](#) :

When an email is not personalized,
52% of customers say
they'll find somewhere
else to go.

Source: *ActiveTrail Benchmark 2017*

Segmented, targeted & personalized
emails generate **58%** of all
revenue.

Source: *DMA*

For further guidance on improving your marketing data quality, check out our article:
[“How to Avoid the Dirty Data Snowball Effect.”](#)

4. No Inbound Marketing Strategy

What can your marketing automation platform deliver without leads? Nothing! Optimizing settings, improving your system integrations and the rest will fall short if you don't capture leads. Unfortunately, there are some marketers out there who are so excited about marketing automation that they neglect to support it with an inbound marketing strategy.

In his article "[21 Best Inbound Marketing Strategies](#)," Brian Downard describes it as the creation of content and incentives that reach your prospects by addressing their specific pain points and generating requests for more information.

Your Inbound Strategy might consist of :

- Reviewing segments, like those discussed in our first post, Failed Segmentation, and determining which channel your prospects are most likely to respond through.
- Attracting visitors through blogs, social, digital advertising, live events, and webinars.
- Converting leads with specific offers and calls to action.
- Closing opportunities through integration, automation, and analytics to refine processes.
- Delighting customers and turning them into advocates.

5.

Missing or Incomplete Compliance Monitoring

GDPR has been in effect for almost a year. And in 2020, the California Consumer Privacy Act (CCPA) becomes law. Also, increasingly customers are [demanding more control over their customer experience](#). As a result, marketing automation programs and processes that ignore these either compliance or customer requirements will suffer.

If you have a significant presence in Europe, you will want to develop a proactive monitoring process. For instance, you will need to monitor data deletion requests when an EU resident asks to be deleted from your company's records. Further, you also need to be able to explain how your Eloqua marketing automation processes individual data.

Relying on so-called black box processes where you cannot explain the results can potentially impact your company financially. Don't get caught like those mentioned by Neil Hodge at Compliance Week in his article, "[What can we learn from the biggest GDPR fines so far](#)."

On the other hand, if you have minimal exposure to GDPR, you may choose to take a more gradual approach. Start with educating yourself further on GDPR compliance for marketers. For an introduction, download our white paper : [8 GDPR Mistakes that Eloqua Marketers Make](#).

If you want to learn more about the impact of the California Consumer Privacy Act and other US legislation, we suggest watching our webinar "[Eloqua Compliance in 2020: California, Nevada, New York and beyond](#)."

6. You Have Too Many Marketing Automation Tools

In the past decade, there has been an explosion in the marketing software industry. Whether you are interested in optimizing online advertising, email performance, or website conversions, there are thousands of tools to consider. Since 2011, it's grown so large that Chief Martech published the "[2019 Marketing Technology Landscape Supergraphic](#)" with over 7,000 products.

If you examine websites run by Fortune 500 brands using tools like [BuiltWith](#) and [SimilarTech](#), they will show you just how many different platforms are used. For these companies, a typical marketing technology stack can include traffic measurement, website optimization, data append, behavioral analytics, and tools to track identity across multiple devices and platforms.

For a Fortune 500 company, running multiple marketing automation tools often makes sense because they have the expertise and resources to use them effectively. However, smaller companies should be wary of taking on too many tools if they do not have the knowledge or people to use them effectively.

Unused marketing automation software wastes money and may slow website performance. Above all, we encourage you to regularly assess your suite of marketing tools. At the very least, we recommend running some A/B tests to selectively disable certain web technologies to see their impact on your conversions.



Just as you can have too much of a good thing when it comes to marketing automation tools, you can also have too little. If you have gone over a year without testing a new tool, it is time to get back to the market. To guide you through this exploration, check out our past article : [The seven "Must Have" partner apps for Oracle Eloqua.](#)



7.

Relying Exclusively on Internal Marketing Automation Expertise

Once you become comfortable with marketing technology, you run the risk of becoming too comfortable. According to some experts, [complacency is the silent business killer](#). Ask yourself: are you running the same types of campaigns, and rely on the same performance metrics? Running your systems the same way year after year may mask a growing threat: that you're falling behind. How? You are failing to explore all of the capabilities available to you – and you are not limited to the ideas your own marketing team brings to bear.

Offering professional development opportunities to your marketers is one approach. For instance, this might include attending marketing technology conferences. Another is establishing a mentoring program between your senior and new marketing staff. However, if you have a smaller company, launching an internal training program just for marketers may not be an option. That's a good time to look for [external consulting assistance](#).

Also, what if your marketing technology platform's built-in capabilities impose limits on your creativity. You might consider using [Oracle Eloqua add-ons](#) that build on and extend your existing platform, solutions that create new opportunities to drive growth.

In Conclusion

Marketing automation systems and tools are powerful technologies that can help drive desired outcomes. However, don't get distracted by shiny new tools or grow hesitant from past mistakes. First, start with good segmentation. Second, take time to examine your data and avoid personalization mistakes. Third, confirm your inbound marketing strategy, make certain you know your entry points and confirm leads are flowing. Fourth, don't ignore compliance, failure to do so can lead to serious financial penalties. Fifth, ensure the size and scale of your technology stack match your available resources. And finally, don't grow complacent or stop improving yourself and your marketing systems.

If your marketing campaigns keep producing disappointing results no matter what you try, then we invite you to [contact us](#) to discuss ways to improve your marketing outcomes.

About Us

4Thought Marketing is a product innovator specializing in the Oracle Marketing Cloud. We help customers translate business objectives into strategies that produce results. Our services include Marketing Automation and Compliance Consulting, Marketing Technology Best Practices, Oracle Eloqua Cloud Apps and Add-ons, Integrations, Campaign Services, Staff Augmentation, Data Management, and Eloqua Implementations.