Brevo

Brevo's Guide to Marketing Automation

Automate your marketing efforts to drive sales and strengthen customer relationships

Discover marketing automation

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 Brevo. It has never been easier to set up automations 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:

1. Save time and money on your marketing efforts.

2. Drive more sales.

3. Get to know your clients better and strengthen customer relationships.

4. Improve the user experience.

5. Automate repetitive tasks.

This ebook will teach you everything you need to know about marketing automation and how to use it for your business.

Happy automating!
The Brevo Team

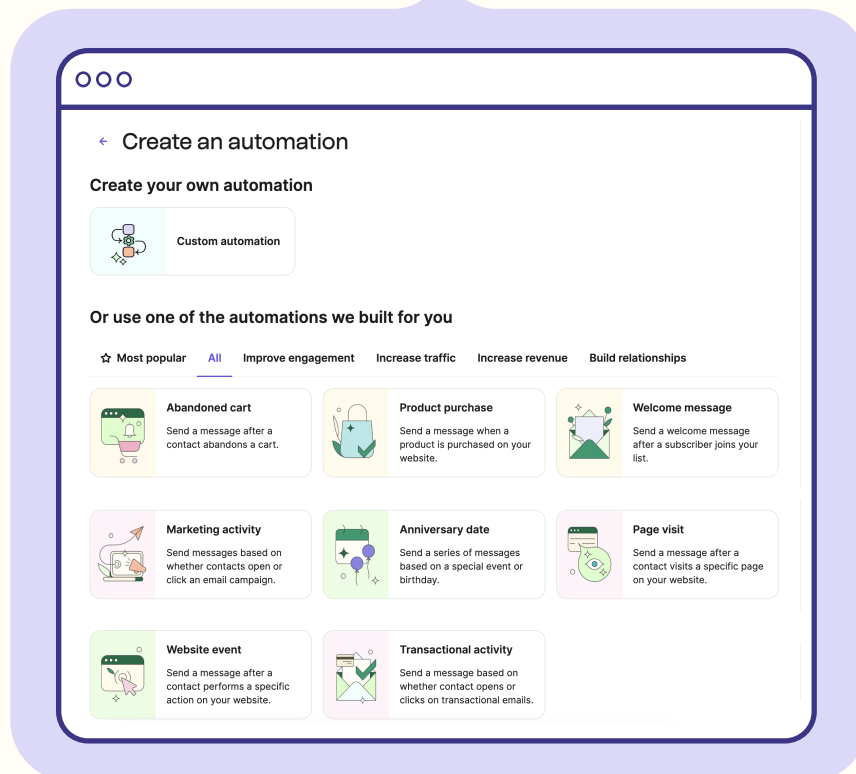# Introduction to Marketing Automation
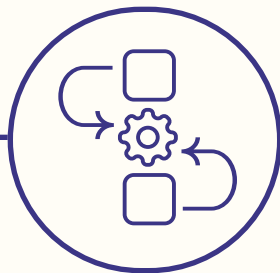
What is marketing automation?

Marketing automation

refers to the use of technology to automate repetitive marketing tasks. It not only boosts efficiency — it also makes it easier for companies to personalize the customer experience.

Here are a few marketing automation use cases:

1. Sending email, SMS, and WhatsApp messages.
2. Segmenting contacts into different lists.
3. Updating information in your contact database.

← **Create an automation**

Create your own automation

Custom automation

Or use one of the automations we built for you

☆ Most popular   All   Improve engagement   Increase traffic   Increase revenue   Build relationships

Abandoned cart
Send a message after a contact abandons a cart.

Product purchase
Send a message when a product is purchased on your website.

Welcome message
Send a welcome message after a subscriber joins your list.

Marketing activity
Send messages based on whether contacts open or click an email campaign.

Anniversary date
Send a series of messages based on a special event or birthday.

Page visit
Send a message after a contact visits a specific page on your website.

Website event
Send a message after a contact performs a specific action on your website.

Transactional activity
Send a message based on whether contact opens or clicks on transactional emails.

03

Why use marketing automation?

Drive efficiency

Marketing automation lets you complete routine tasks without any added effort.

Simply set the triggers and automated steps, then let technology take care of the rest. This frees up your time to focus on other tasks, such as planning your marketing strategy.

Reduce costs and boost ROI

In addition to saving you time, marketing automation plays a key role in cost savings.

Use automation to drive results and allocate resources more effectively. In fact, marketing automation has an ROI of $5.44 for each dollar spent (Source: Demandsage).

Create personalized customer experiences

Marketing automation makes it possible to create personalized experiences at scale.

With automation, customers receive relevant messages at the right time. This helps you create more meaningful interactions and build strong customer relationships.

The difference between email marketing, marketing automation, and transactional emails

Marketing automation vs. email marketing

Although classic email marketing and marketing automation have some similarities, they have different goals:

1   Marketing automation lets you send targeted, one-to-one emails that are triggered by specific actions. These messages usually have a specific goal. For example, you might use marketing automation to notify a contact of a price drop on products they've viewed before.

2   Email marketing involves sending campaigns to a list of contacts. The approach is called one-to-many and involves broad goals. Marketing emails might announce limited-time promotions, showcase new products, or share company news in the form of a newsletter.
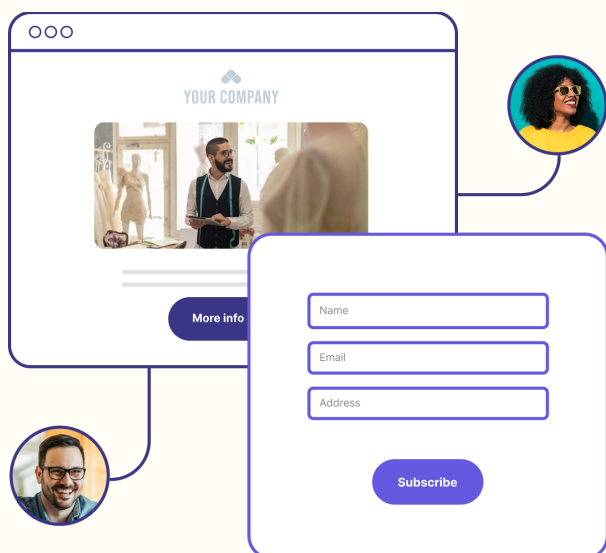
Marketing automation can be used for more than sending emails. You can also automate how you sort customers into contact lists, as well as assign them scores based on how interested they are in your business.

Marketing automation vs. transactional emails

Like transactional emails, automated emails are sent on a one-to-one basis. This sets them both apart from regular marketing emails (e.g. sales promos, newsletters), which are one-to-many.

Marketing automation and transactional emails have different purposes and triggers:

1. Marketing automation is for marketing purposes (e.g. welcome messages, birthday greetings). They're triggered based on contact attributes or behavior.

2. Transactional emails are informational (e.g. order confirmations, password resets). They're triggered by actions taken by a contact that need non-promotional responses.
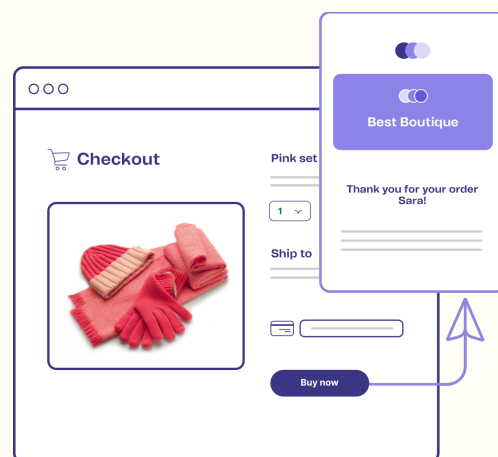
To recap

	Email Marketing	Marketing Automation	Transactional Emails
Purpose	Marketing	Marketing	Informational
Outreach approach	One-to-many	One-to-one	One-to-one
Personalization	Medium	High	High
Send time triggers	Manually set up by marketers	Triggered based on contact attributes or behavior	Triggered by contact actions
Technical skills needed	No	No	Configuration required
Use case examples	Marketing newsletters, Product promotions	Welcome messages, Onboarding sequences	Password resets, Order confirmations

06

How to set up marketing automations

Marketing automation works through the use of automations. This is a series of automated actions that get triggered by user behavior.

To set up an automation, you'll need to follow three basic steps:

1 Choose an entry point. This will decide which contacts enter the automation. For instance, the entry point can be a contact attribute, website visit, or email activity.

2 Set conditions. Here, you can add a delay before sending an automated email. You can also set If/Then conditions (e.g. if it's the customer's first purchase, then send an email with a coupon).

3 Define an action. Common actions include sending an email, SMS, or WhatsApp message. You can also set up the automation to remove contacts from a list, update a contact attribute, and more.

Most businesses use marketing automation software to set up automations. For example, Brevo offers a range of automation features, including an easy-to-use automation editor. From there, businesses can trigger timely messages, from abandoned cart emails to birthday greetings. This helps them boost ROI, engage customers, and work more efficiently.

Select an entry point to your workflow

Email Activity

Contact Details

A Contact Submits a Form

An event happens

Website Activity

Another event happens

Start this workflow when an event happens.

Custom Event (Track Event)

purchase

Add conditions to the selected JS event

Track event attrib | product | Equal to | Roller blades

Identified Contacts (Call Identify)

How to use Events

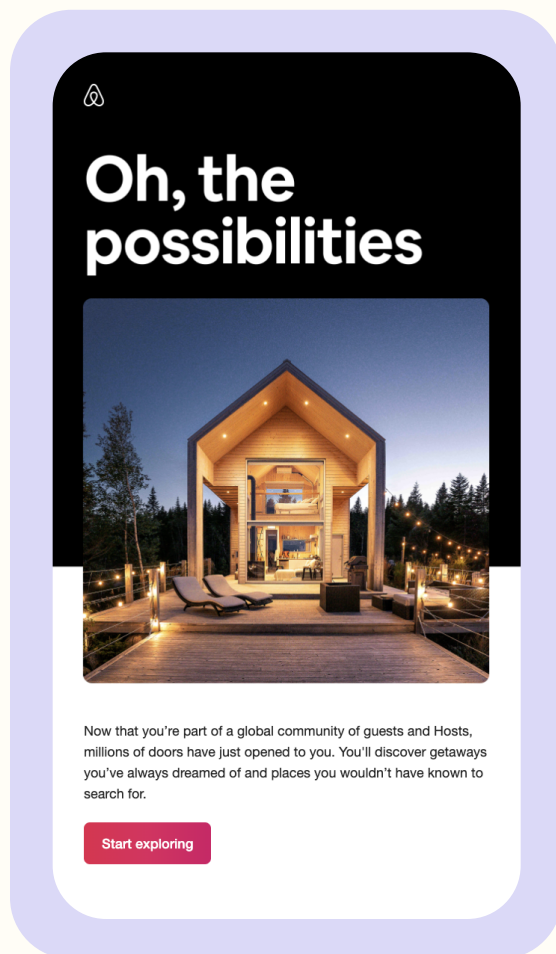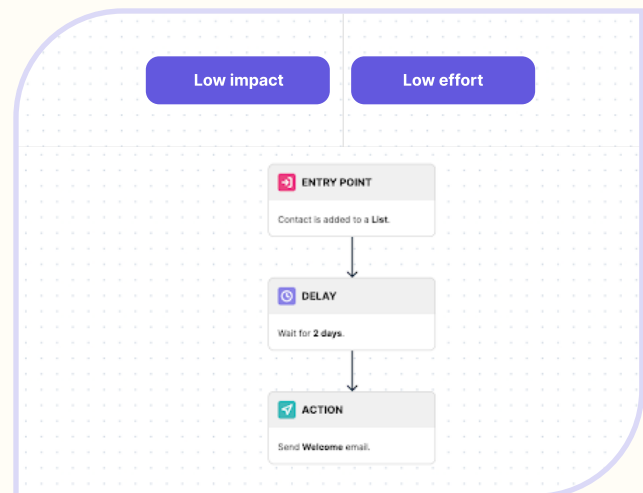BACK | OK

Common Marketing Automations

Welcome email

Welcome emails are messages sent to new customers after they sign up for your email list. This is an opportunity to introduce your business while learning about your customers' needs and preferences.

Tips for welcome emails

1. Make readers want to explore more about your business or content.

2. Encourage engagement with future email campaigns.

3. Guide the reader on the next steps they should take.

Oh, the possibilities

Now that you're part of a global community of guests and Hosts, millions of doors have just opened to you. You'll discover getaways you've always dreamed of and places you wouldn't have known to search for.

Start exploring

Example of a welcome email from Airbnb

Low impact

Low effort

ENTRY POINT
Contact is added to a **List**.

DELAY
Wait for **2 days**.

ACTION
Send **Welcome** email.

Birthday email

Birthday emails are an easy way to strengthen customer relationships while driving sales. They're also one of the simplest automations to set up. You just need to have your contacts' birthdays saved in your database.
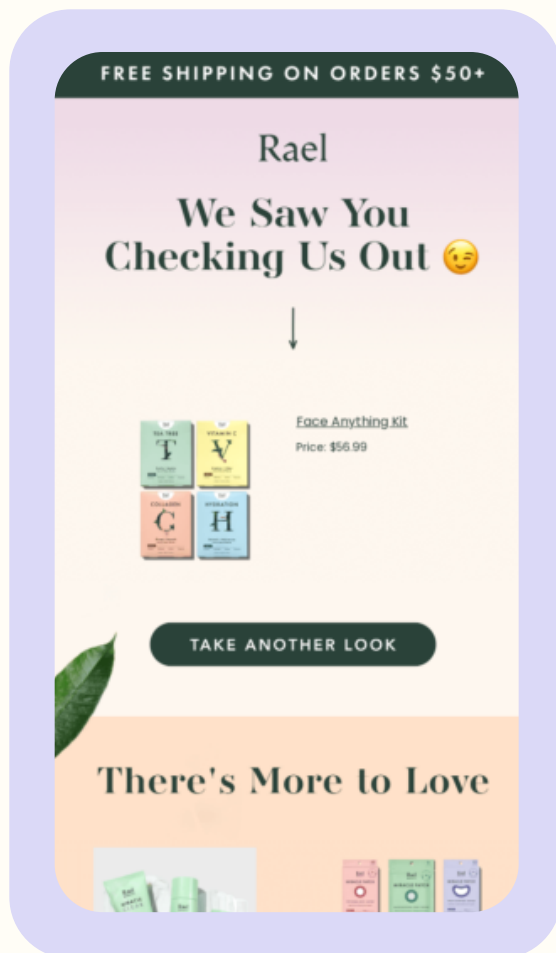
Tips for birthday emails:

1. Offer a gift
2. Offer a discount on their purchase
3. Personalize the email content to the recipient
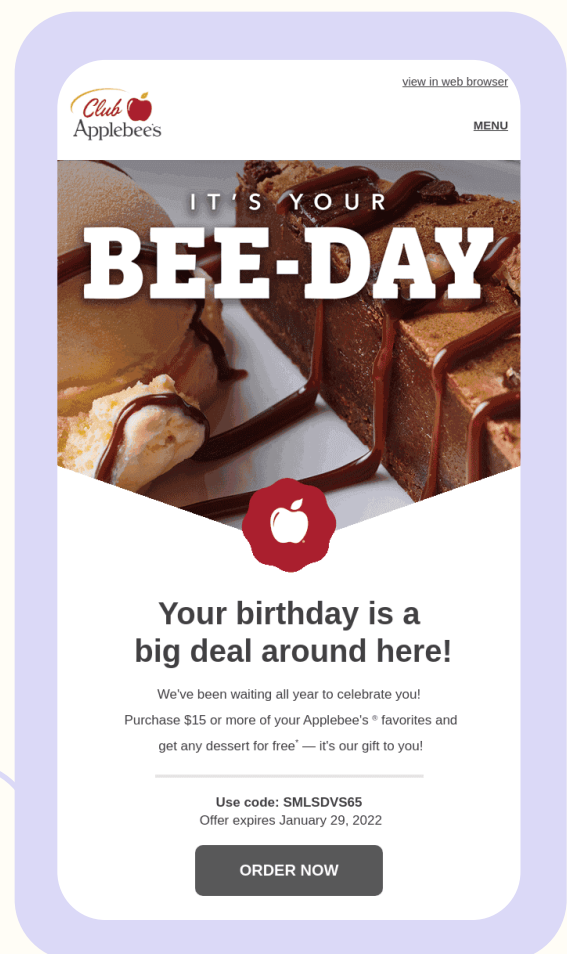
Example of a birthday email from <u>Applebees</u>
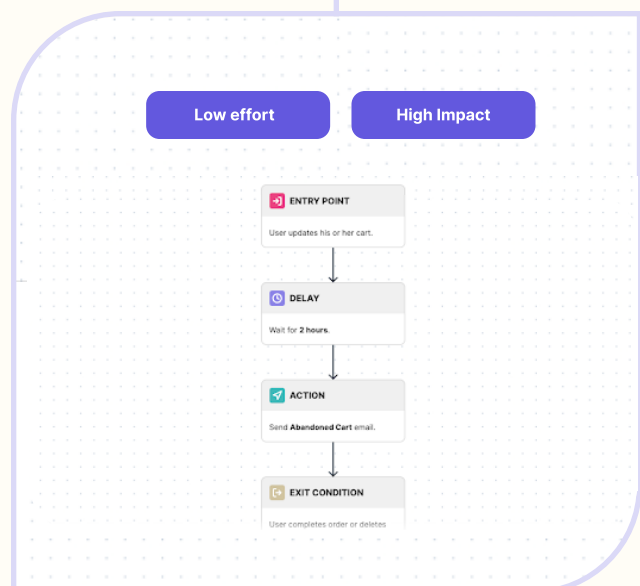
Abandoned cart emails

Abandoned cart emails are reminders sent to customers who added products to their online shopping cart but didn't complete the purchase. The purpose is to encourage customers to buy the items and drive sales.

Tips for abandoned cart emails:

1. Remind them of what they left in their cart.

2. Recommend similar products.

3. Offer a discount on their purchase.

4. Notify them if the product is low on inventory or if there is a sale that is about to expire.

5. Address common concerns that might have prevented them from completing their purchase (delivery time, return policy, customer reviews of the products, etc.)

FREE SHIPPING ON ORDERS $50+

Rael

We Saw You Checking Us Out 😉

Face Anything Kit
Price: $56.99

TAKE ANOTHER LOOK

There's More to Love

Example of an abandoned cart email from Rael

Low effort   High Impact

ENTRY POINT
User updates his or her cart.

DELAY
Wait for **2 hours.**

ACTION
Send **Abandoned Cart** email.

EXIT CONDITION
User completes order or deletes

Lead scoring and dynamic segmentation

Lead scoring is the process of assigning scores to leads based on contact attributes or behavior (e.g. email opens, website visits). The lead score reflects each lead's conversion potential and interest in your business on a scale of 0-100. The purpose is to determine which contacts in your audience have a higher potential for conversion.

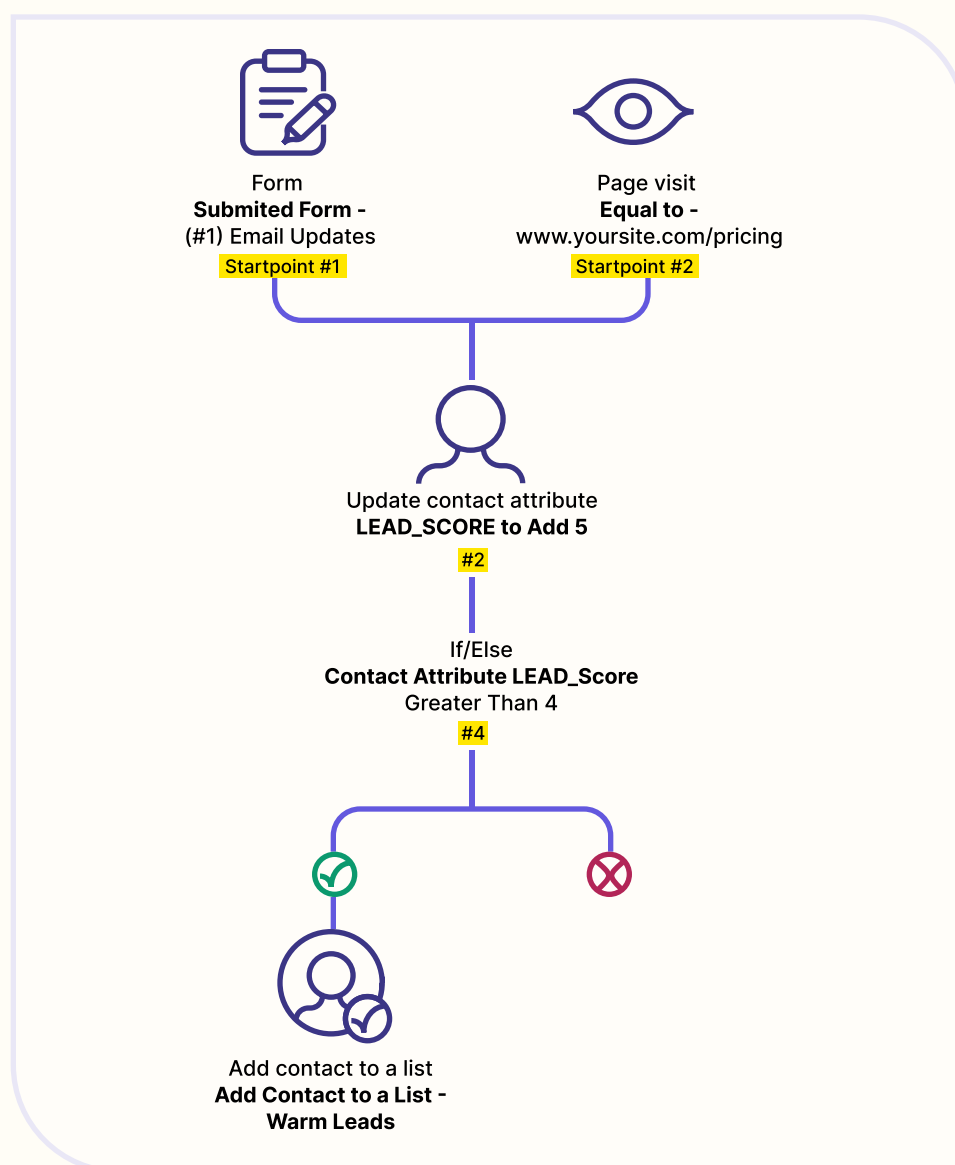To assign lead scores, you'll need to set up a lead scoring model. First, decide which actions you want to assign points to. Then define how many points each action is worth. For example:

1. Subscribing to your newsletter: +2 points

2. Clicking on a transactional link: +3 points

3. Adding a product to their cart: +10 points

4. Opens a welcome email and clicks on a link: +10 points

Welcome
Email

Email
link click
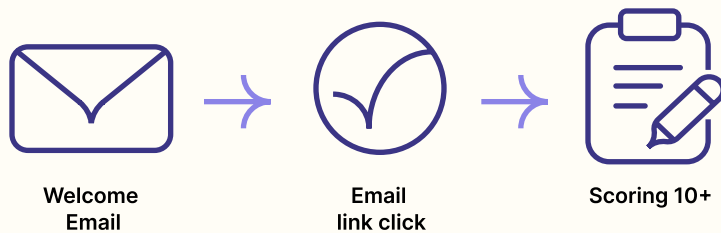
Scoring 10+

Now that you have your lead scoring model in place, you can automatically sort leads into lists based on their score. This process is called dynamic segmentation. With dynamic segmentation, it's easy to update marketing segments in real time. This helps you target your campaigns and personalize your messaging.

Here's an example of marketing automation for dynamic segmentation. In this scenario, contacts get added to the Warm Leads contact list once they gain a high enough lead score:

Form
Submited Form -
(#1) Email Updates
Startpoint #1

Page visit
Equal to -
www.yoursite.com/pricing
Startpoint #2

Update contact attribute
LEAD_SCORE to Add 5
#2

If/Else
Contact Attribute LEAD_Score
Greater Than 4
#4

Add contact to a list
Add Contact to a List -
Warm Leads

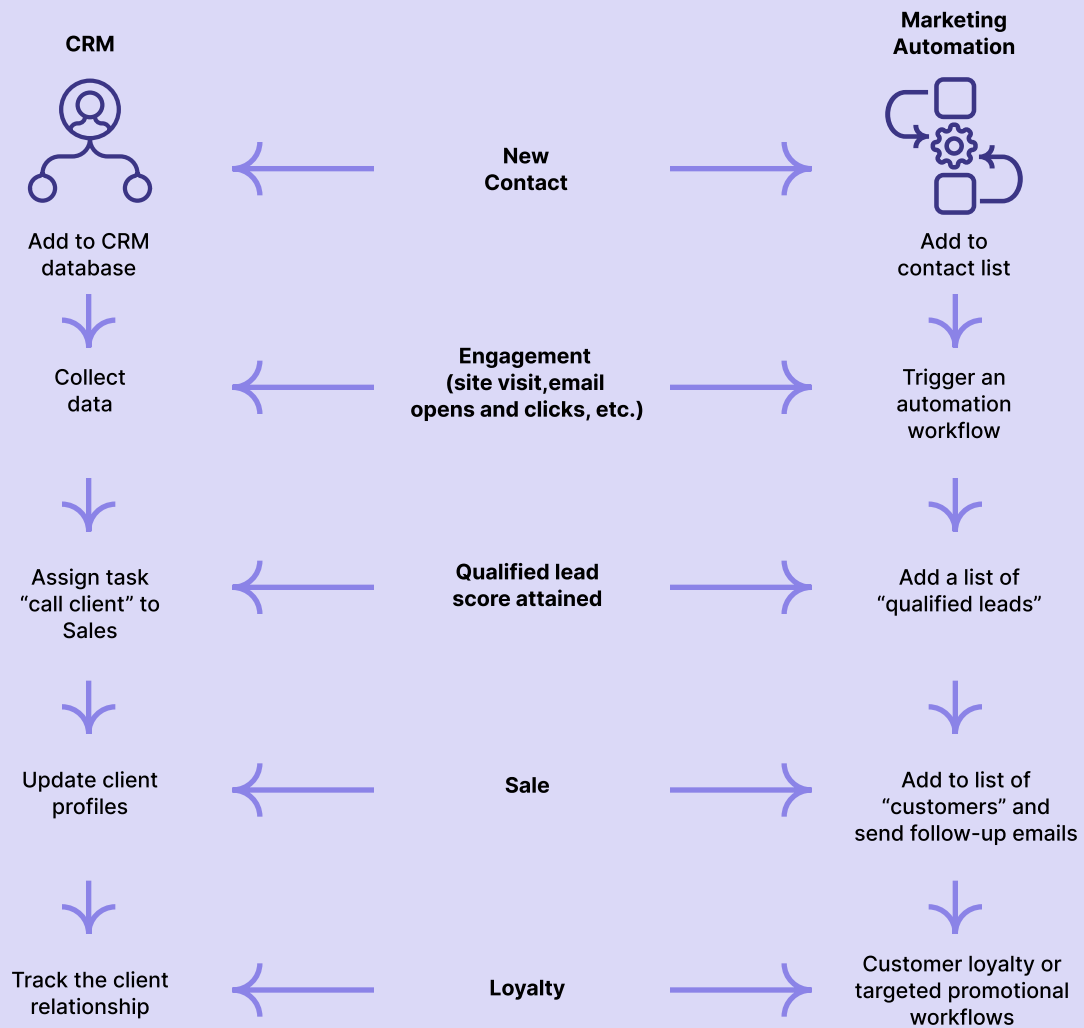# Putting marketing automation into practice

Marketing automation or CRM?

Marketing automation and Customer Relationship Management (CRM) software may seem similar at first. Both play key roles in helping you build strong customer relationships. However, they serve two different purposes.

	Marketing Automation	CRM
Best for	Automating marketing communications	Streamlining the sales process
Helps you	Manage and automate your marketing campaigns. All you have to do is complete the initial setup of your automations, then let the software do the rest.	Manage your sales process. They give sales teams the information they need to complete tasks within a sales process for each prospective lead.
Functionalities	• Run targeted marketing campaigns across channels (emails, SMS, Facebook ads, WhatsApp etc.) • Sort contacts via dynamic segmentation • Score and nurture inbound leads	• Access the profile of every contact in your database • Track your relationship with each contact • Map the stages of your sales funnel
Use cases	Send an automated email when a user leaves unpurchased items in their cart	Allow sales teams to assign individual representatives to each contact for targeted follow-up

Roles of CRMs and marketing automation in customer relationships

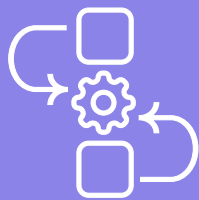| CRM		Marketing Automation
Add to CRM database	← **New Contact** →	**Add to contact list**
↓		↓
Collect data	← **Engagement (site visit,email opens and clicks, etc.)** →	**Trigger an automation workflow**
↓		↓
Assign task "call client" to Sales	← **Qualified lead score attained** →	**Add a list of "qualified leads"**
↓		↓
Update client profiles	← **Sale** →	**Add to list of "customers" and send follow-up emails**
↓		↓
Track the client relationship	← **Loyalty** →	**Customer loyalty or targeted promotional workflows**

Why combine marketing automation and CRM?

While marketing automation and CRM software are distinct tools with different purposes, you don't have to choose one or the other. The two types of software can be used in tandem to support different parts of your sales and marketing funnel.

Use a marketing automation tool for lead generation and lead nurturing. This helps build relationships with potential customers before sending them to sales teams.

From there, the CRM stores the leads' engagement history. This gives sales reps the information they need to provide a seamless customer journey and close more deals.
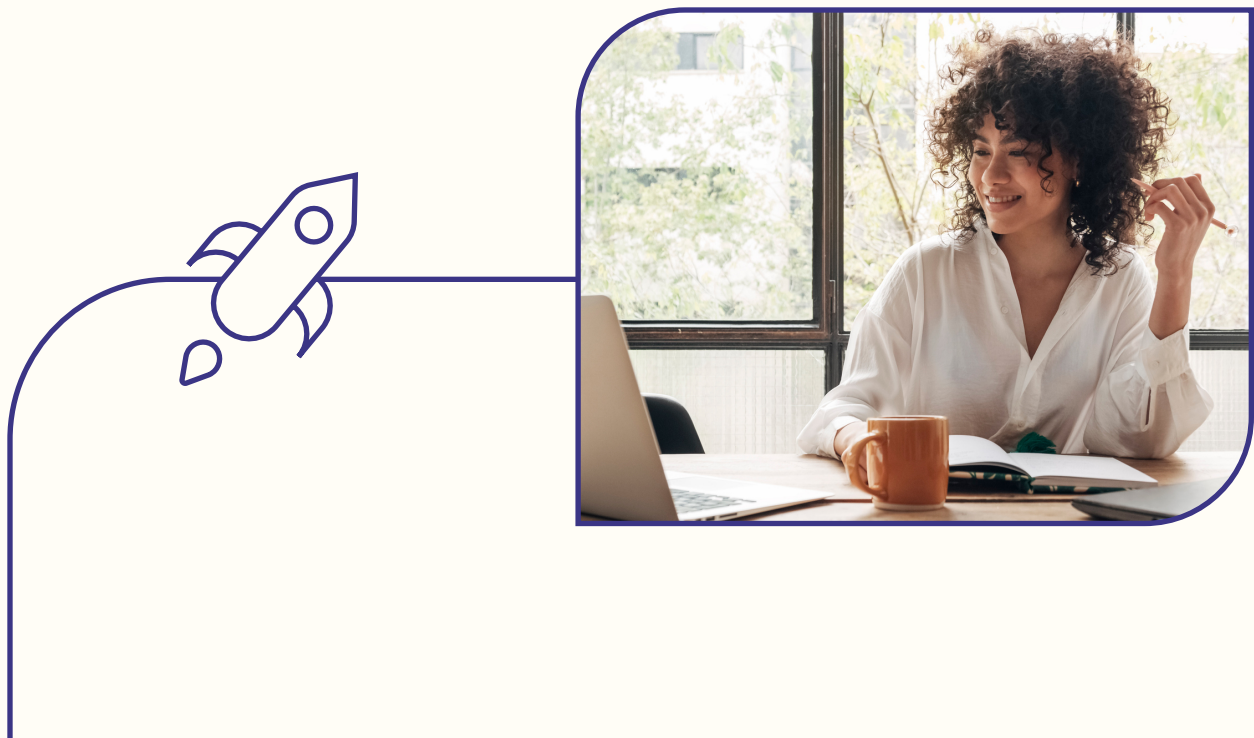
Marketing Automation

CRM

Key takeaways for marketing automation

There's no secret that marketing automation offers a host of benefits for your business. Here's everything you need to know about marketing automation in a nutshell:

1 Marketing automation lets you save time by automating repetitive marketing tasks. This allows you to refocus your marketing strategy on what matters most: your customer.

2 In addition to saving time, marketing automation helps you drive sales by personalizing the customer experience — sending the right message to the right contact at the exact right time.

3 Most popular marketing automations include welcome emails, birthday emails, abandoned cart emails, and lead scoring.

4 Although marketing automation and CRM software have different goals, they're best used in tandem to manage relationships across the customer lifecycle.

Now it's your turn!

Ready to get started with marketing automation? Brevo's approachable CRM suite offers an all-in-one marketing and sales solution.

The platform integrates marketing automation and CRM capabilities, so there's no need to switch between different software solutions as leads move down the funnel. Brevo lets you nurture leads from when they first encounter your brand up until they become loyal customers.

With Brevo's intuitive automation editor, automate key marketing processes and messages. Choose from our pre-built automation templates or build your own.

Create a free account

And see how Brevo can help you unleash the power of marketing automation

Brevo