YOUR FRICTIONLESS FUNNEL CHECKLIST

FOUR BUSINESS PROCESS CONSIDERATIONS

First things first. Before you implement automation, ensure your organization has the following in place:

- Leadership alignment and willingness to invest in full funnel marketing to increase conversions.
- The buyer journey is mapped.
- Definitions for each buyer stage are clear.
- Consensus around anticipated responses (timing and actions) to buyer needs.

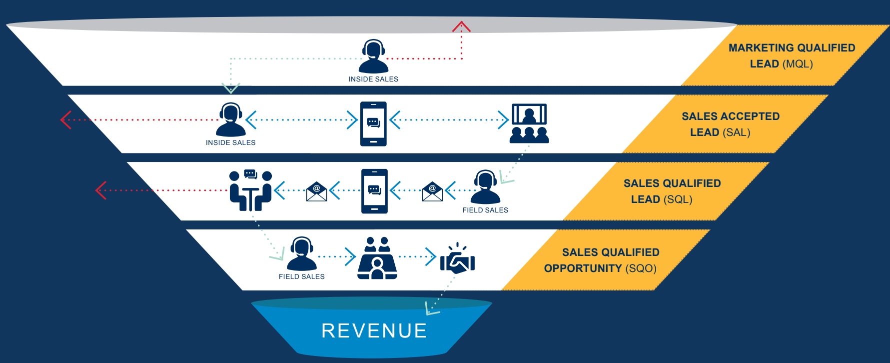
THREE MARKETING AUTOMATION TIPS

Orchestrate your funnel. Marketing's role is to stay one step ahead and anticipate the buyer's need by serving relevant content to move them through the funnel. To do that:

- **MAP CONTENT TO FUNNEL STAGE**
  Each piece of content should be tagged to a stage (awareness, interest, consideration), to help determine where buyers are in their journey with you.
- **RANK CONTENT ENGAGEMENT**
  to determine present stage and timing around transition to subsequent stages. Apply automation rules around when to serve that content.
- **TRIGGER RE-MARKETING**
  Content is personalized based on frequency of engagement and served across multiple channels (email, social, website etc.).

THREE SALES AUTOMATION RULES

Simplify your follow up. Any good sales team needs rules in place to standardize engagement expectations, with the CRM triggering sales actions. Start with these:



- **SET LEAD ASSIGNMENT & NOTIFICATION RULES**
  based on lead score, territory & other factors relevant to your company.
- **SET REMINDER WORKFLOW RULES FOR SALES FOLLOW UP**
  Each stage should have a SLA defined that includes both acceptance/rejection and timeline for expected follow up from sales.
- **SET ESCALATION & REROUTING RULES**
  When the SLA (follow up timeline) is exceeded, escalate to manager or reroute to another rep.

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