



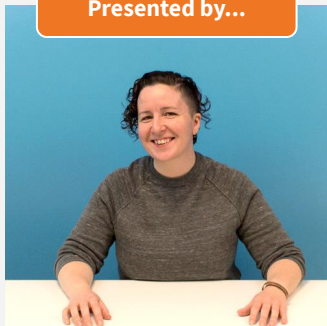
Master Class in B2B SaaS:

# **Super Slick Sales and Marketing Automation Tactics**

# Hello and Welcome



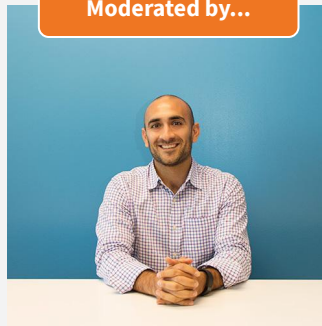
**Presented by...**



**Clare French**

Clare heads up the Growth team at WebMechanix and holds a deep passion for martech and automation.

**Moderated by...**



**Arsham Mirshah**

Arsham is the glue that unites the marketing, development, and administrative teams, keeping WebMechanix running efficiently and ready for growth.

# Presentation Roadmap



1. The Flywheel Model of Acquisition and Retention
2. Why Product Data + Marketing Data = Revenue Glue
3. Three Must-Have Nurture Campaign Types
4. Sales & Marketing Alignment [Four Sales Enablement Ideas]
5. One Very Cool Integration

# From The Funnel to The Flywheel



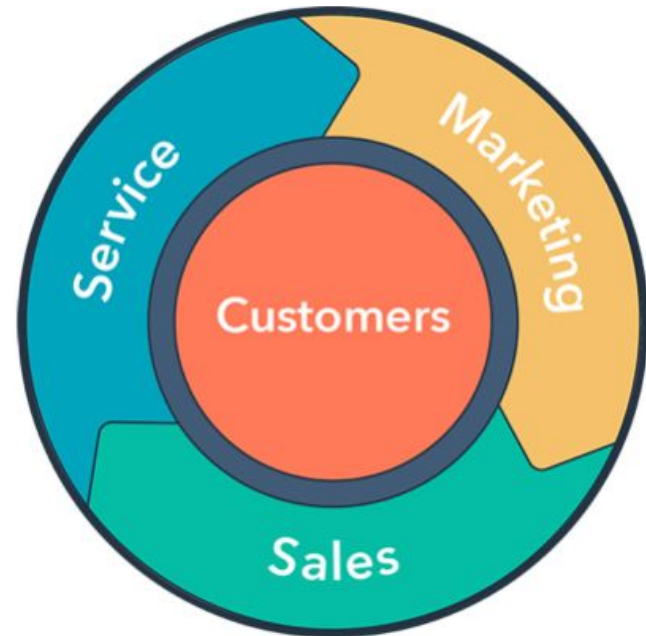
## The **Funnel** Model

Narrow view, customers are afterthought



## The **Flywheel** Model

Holistic view, customers center of universe





Product Data + Marketing Data =  
**Revenue Glue**

A stylized illustration of a human brain, split vertically. The left hemisphere is light gray and features a network graph with various colored nodes (red, green, blue, yellow, orange) connected by thin red lines. The right hemisphere is a light tan color and is surrounded by vibrant, multi-colored paint splashes in shades of red, orange, yellow, green, blue, and purple. The background is a solid dark gray.

A Few [Other] Thoughts...

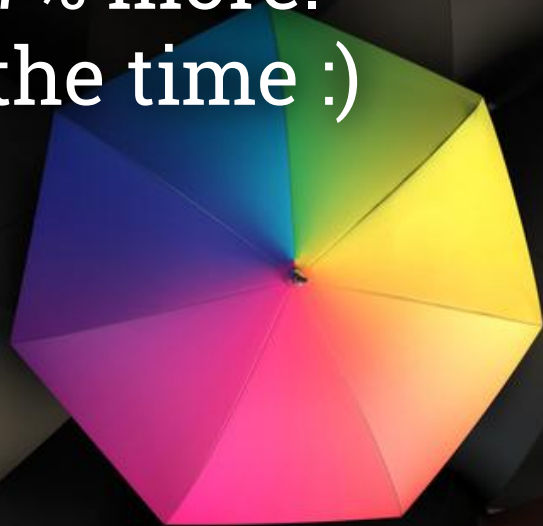
With automation,  
you can have your  
cake and **have**  
**robots feed it to you.**







Nurtured **leads** spend 47% more.  
Email is ALWAYS worth the time :)



source: [ANNUITAS](#)





A 5% increase in **customer** retention  
can lead to a 25-95% gain in profits.

source: [Bain & Company](#)

# Lifecycle Nurture Campaign Types



[for leads **and** customers]

CONSIDERATION



ONBOARDING



RE-ENGAGEMENT



# Consideration

[for **leads**]



## Goal

“Retarget” leads who have have not yet become a sale.

## Ideas

- Next steps
- Valuable content
- Book sales meeting



# Consideration

[for **customers**]



## Goal

Deepen the customer/product/company relationship while increasing lifetime customer lifetime value (LCV).

## Ideas

- Cross-sells
- Upsells
- Referral requests
- Testimonials



# Onboarding

[for **leads**]



## Goal

Welcomes free trial leads and introduces them to the product.

## Ideas

- Top features
- How to's
- To-do's
- Points of contact/engagement



# Onboarding

[for **customers**]

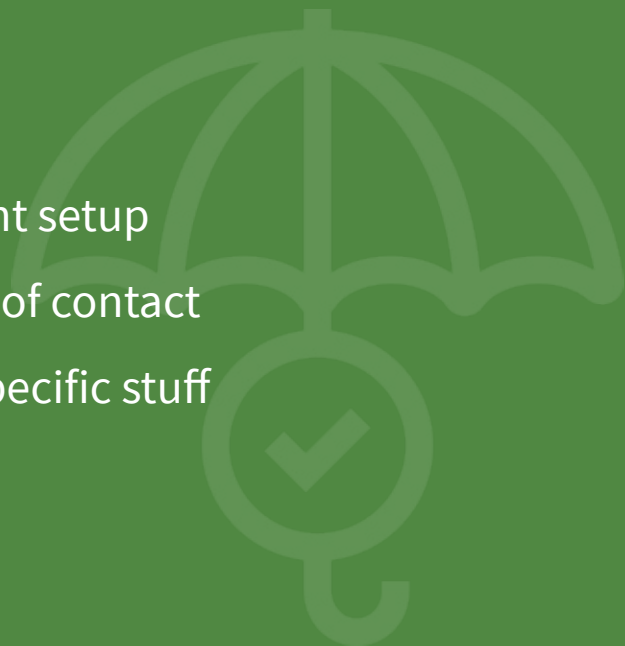


## Goal

Focuses on the most important action for a new customer.

## Ideas

- Account setup
- Points of contact
- App-specific stuff



# Re-Engagement

[for **leads**]



## Goal

Ask dormant leads to come back outright **or** promote valuable content.

## Ideas

- Valuable content
- Offer
- Checking in





# Re-Engagement

[for **customers**]



## Goal

Checks in with dormant customers to ask if everything is okay.

## Ideas

- Valuable content
- Account manager outreach
- New feature updates



[for **questions**]



# Sales & Marketing Alignment

Automation isn't just for marketing.

**Sales folks need nurturing, too :)**

# Lead Escalation



Alerts sales folks to new lead activity:

- Visiting a specific page
- Clicking an email link
- Score changes (+/-)
- Re-visits site after x days
- New contact from company visits



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 web**mechanix** [sample]

Hello Sales Team :)

This contact is super engaged... Here's a little info about their recent activity, should you choose to reach out:

Create Date: April 30, 2019

First Conversion: Master Class in B2B SaaS | Landing Pages eBook

Number of Visits: 4

Number of Pageviews: 17

Number of Form Submissions: 3

Number of Emails Sent: 11

Number of Emails Clicked: 8

Email: example@webmechanix.com

[Check It Out in HubSpot →](#)

Your Friend,  
The WMX Marketing Robot

# Deal Advancement



As contracts get closer to getting inked, alert relevant folks and teams:

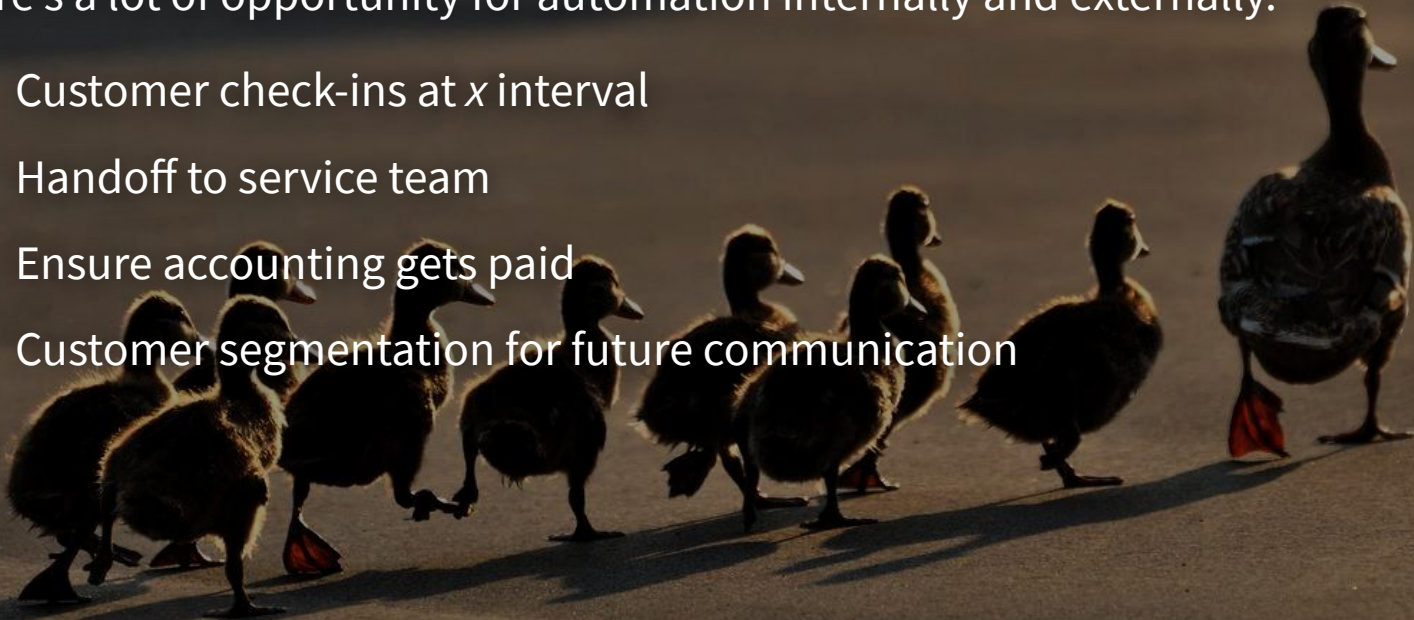
- Verbal commitment
- Contract sent
- Contract viewed
- Contract signed
- Payment /needed received

# Post-Sale Follow Up



There's a lot of opportunity for automation internally and externally.

- Customer check-ins at  $x$  interval
- Handoff to service team
- Ensure accounting gets paid
- Customer segmentation for future communication





# Activity Dashboards/Roll-Ups



Alerts about sales activities by team member, like:

- Calls made
- Emails sent
- Meetings booked
- Contracts sent
- Two-way communication established



And Here's  
The Really  
Cool Thing...



# Robust Slack Notifications



## Woah!

- Zapier enables highly flexible notifications using any field you desire
- Much more robust than native HubSpot notifications from Slack
- Real-time threading to escalate leads
- Extends already useful tools



# Zapier + Slack = HubSpot Zen



[Dashboard](#) or [View Task History](#)

WMX - HubSpot MQLs to Slack

Add a note

1. TRIGGER

New Contact in List

2. ACTION

Send Channel Message

+ Add a Step

Channel (required)

If you use a Custom Value, you can also use the channel name instead of its ID.

wmx-mqls

Message Text (required)

Specify text of the message to send. Check out the [formatting help doc](#) for advanced options.

The board is lighting up with a fresh lead...

\*Name:\*

\*Email:\*

\*Company:\*

\*Website:\*

\*Title:\* No data

\*Industry:\* No data

\*Number of Employees:\* 50

\*Revenue:\* 10000000

\*Inferred Location:\* minneapolis, minnesota

\*Visited Service/Contact Page:\* No data

\*First Conversion:\* Download Negative Keyword List Spreadsheet: Free Download

\*Original Source Type:\* ORGANIC\_SEARCH

\*Original Source Data 1:\* Unknown keywords (SSL)

\*HubSpot Record:\* <https://app.hubspot.com/> 245995 /

Happy hunting!

# Voilà!



Rich Lead  
Data



Real-Time  
Escalation



**ROI Bot** APP Apr 4th at 6:19 PM

**Name:** [REDACTED]  
**Email:** [REDACTED]  
**Company:** [REDACTED]  
**Website:** [REDACTED]  
**Title:** Marketing Manager  
**Industry:** COMPUTER\_SOFTWARE  
**Number of Employees:** 50  
**Revenue:** 50000000  
**Inferred Location:** [REDACTED], california  
**Visited Service/Contact Page:**  
**First Conversion:** The Definitive Guide to Crafting Effective Display Ads That Win the Click: Agency - E-Book Download - Main Website  
**Original Source Type:** PAID\_SOCIAL  
**Original Source Data 1:** LinkedIn  
**HubSpot Record:**  
[https://app.hubspot.com/contacts/\[REDACTED\]](https://app.hubspot.com/contacts/[REDACTED])

3 replies

**Arsham Mirshah** 15 days ago  
mmm, SaaS!

**Chris Mechanic** 11 days ago  
Yea this one looks good — @jfleagle -- you on it?

**Jarrett Fleagle** 11 days ago  
Called & booked a call for 4/16 at 4 PM (1 PM PST)

+ Reply...

☐ Also send to #wmx-mqls

Send





# WebMechanix

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