



The Hidden ROI of Marketing Automation

Email List Management, Applicant
Screening, Sales Lead Scoring, and More





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Introduction

3 Things You Didn't Know Marketing Automation Could Do

You probably already know about the benefits of automation -- it allows you to delegate time-consuming tasks to the cold, calculating touch of a robot. Employing the talents of a robot also ensures consistency and lets employees focus on what they do best.

But what most people don't know is that marketing automation software is good for so much more than just marketing -- be it administrative processes, sales prospecting, or human resources communications. And all of that is in addition to the obvious improvements your marketing team enjoys.

In this eBook, we'll cover 3 non-marketing processes that marketing automation software could help with:

- Simplifying Email List Management
- Screening Employee Applications
- Qualifying Sales Leads

Automation might not mean autopilot, but it does mean more leads, better communication, and happier customers. And who doesn't like that?



Email List Management

How to Send Smarter, More Personalized Campaigns with Marketing Automation

Let's be honest, email list management isn't fun. Contact lists are large and constantly in flux, so any updates you want to make add even more complexity to delivering your campaigns to the right inboxes. Inaccurate contact data and improperly managed user lists add up to big deliverability problems (and even bigger relevancy problems for email marketing).

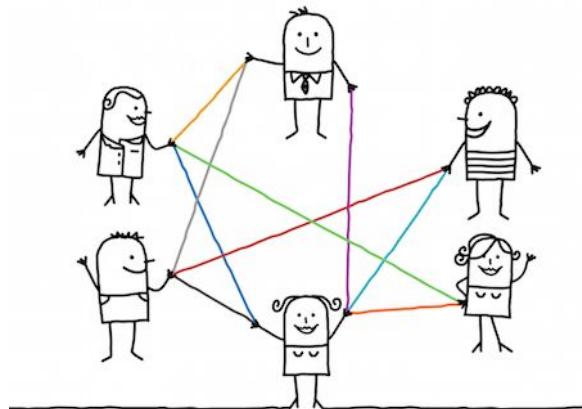
If you want to simplify your email marketing list management process, these tips will help you. And if you have questions, you can always get in touch with our team by [filling out our contact form](#).

Email Is for Much More Than Internal Messaging

I don't need to tell you why email is important. You already know that it's an essential way to communicate within a business and you probably know how powerful it is for marketing and other external communications.

Just in case you need a quick refresher, here is a non-comprehensive list for how email is used:

- Prospective customer marketing
- Existing customer marketing
- Customer support
- Employee recruiting
- Office administration
- Sales notifications
- Partner announcements



The versatility and usefulness of email cannot be understated. And if you still need to convince your boss that investing resources into email list management is critical, consider these facts:

- Right now, there are over 3.3 Billion email accounts worldwide. (Source: [Mashable](#))
- After polling online Americans aged 12 and over, 94% of them cite email as one of their daily activities. (Source: [Pew Internet and American Life Project's Generations 2010 report](#))



- Email reigns supreme. More than 77% of consumers prefer marketing efforts through email. (Source: [Waldow Social](#))
- Email generates revenue. For every dollar spent on email marketing in 2011, there was \$40.56 return. A dollar spent in search engine marketing would return you almost half at \$22.44. (Source: [Marketing Sherpa 2013 Benchmark Report](#))

What Good Email Marketing List Management Looks Like

Keeping your contact records updated and properly segmented is critical, whether you're managing email lists for marketing, sales, human resources, or anything else. So what do properly segmented email lists look like?

Here are some basic categorizations that you should have in your email system.

- **Contact Type:**
Is your contact a customer prospect? A current employee? A former customer? You need to be able to segment your email list by type of contact. Otherwise, your emails either end up being irrelevant to large portions of your list or they become an information dump that's trying to cater to every type of contact.
- **Demographic Data:**
Where does the contact live? Will he or she be reading your message from a different time zone? Can you send your emails by gender or age? Using demographic data to personalize your emails can drive up engagement
- **Last Interaction:**
What was your contact's most recent experience with your company? Did you meet them at an event? Were they searching for something on your website? What are they expecting from you?

There are countless other lists you could and should create for effective email sends, but these are the most important and most obvious. So if you're struggling to manage email lists like these with your current email platform, you may want to investigate alternative platforms.

How to Simplify Email List Management with Software

"Emails are send and forget, right?" Wrong. Just because they are out of sight doesn't mean they should be out of mind. An effective email marketing campaign continues past the send and into the engagement data. After all, how else are you supposed to know if your campaign was delivered to the right recipients?



So how can you use email data to simplify list management and improve your campaigns? Software. Whether you like it or not, you're going to need good email list management software to keep your contacts in order. Just about any email software will do for basic segmentation -- like contact type and engagement data. But if you want to almost entirely eliminate the guesswork in your list management process, marketing automation software is what you need.

A [marketing automation solution](#) can pull contact information from a huge number of data points -- previous email sends, website activity, CRM records, and much more. With all of this information automatically populated in your contact records, it's remarkably easy to create accurate, up-to-date lists. In fact, with most marketing automation platforms, it's even automatic.

So what choices do you have for email marketing list management?

Available Email Marketing List Management Solutions

In the world of email marketing list management, these are our top picks. Take a look at what each company offers and how their software differs:

HubSpot

Hubspot is the leader in the world of marketing automation software. Based in Cambridge, MA, HubSpot brings cutting edge software that helps companies attract visitors, convert leads and close customers. Here are some of the benefits their software suite provides for dealing with email list management issues:

- Smart email lists that automatically update based on email, website, and CRM data
- Integrated email and website analytics for all-in-one testing and evaluation
- Simple email design and editing

You can view HubSpot's website [here](#).

Marketo

Marketo is a marketing powerhouse. In 2012, Inc. 500 ranked them #1 among all marketing software companies. Since then Marketo has gone on to develop industry leading software. Marketo's email marketing software includes:

- Easy email list segmentation based on email and website data
- Integrated email and website analytics for fast evaluation
- Simple email design and editing

You can view Marketo's website [here](#).



Pardot

Pardot is a B2B marketing automation company run by Salesforce. They offer marketing automation solutions that allow marketing and sales departments to create effective campaigns. Pardot Lists is their database tool:

- Easy email list segmentation based on email and CRM data
- Spam analysis and multiple email preview options
- Simple email design and editing

You can view Pardot's website [here](#).

Our favorite of the bunch is [HubSpot](#). We feel like it's the easiest to use and sports the best functionality of the bunch. But regardless of which marketing platform you feel is right for your company, getting some kind of automated email list management help is better than none. All of these platforms offer most of the same functionality to one extent or another.

Email List Management: DIY or Hire an Agency?

List management is a crucial part of your business's success. So how should you determine how to handle email lists and sends? The easy answer is "it depends on your business" (and the complex answer starts with "talk to your legal team").

But let's pretend all things are equal and take a look at the thought process behind a typical business's decision on who to use for email marketing list management.

Managing Email Lists In-House

Nobody knows your business better than you do. You simply can't share all of your team's institutional knowledge outside of your organization -- sometimes because you can't and sometimes because nobody knows how; you simply had to be there.

But while your team's knowledge of internal affairs can help, it can also be a hindrance. Opinions and approval can be too hard (or too easy) to come by. Team members can also be stuck in your institution's way of thinking, overlooking alternative approaches that would be obvious to somebody else.

Hiring an Agency

Hiring an agency for email list management provides you with professional expertise and more calculated decision-making. Agencies do this kind of stuff for a living so they do it a lot and are good at it. They're not scared of killing some of your sacred cows because they're sitting outside your company's walls while making their suggestions.



But agencies aren't the perfect solution. As mentioned before, they're not privy to unshared institutional knowledge and they're not as emotionally invested in the [outcome of your email campaigns](#). This cuts both ways though. And, admittedly, as an agency we are a little biased.

Conclusion: Email List Management Should Be a No-Brainer

At the end of the day, email list management needs to be done by somebody with the time and knowledge to do it. Whether you have somebody in-house who meets that criteria or you're willing to pay for a professional to take things to the next level, you need to invest in your email campaigns. If not for your company's sake, for your prospects'.



Applications Screening

How to Attract High-Quality Employees with Marketing Automation



Time is money. And the time you spend sifting through stacks of resumes is costing your company a lot of money. Even worse, you may also end up with lower quality candidates because of the inherent limitations in a manual screening process for hiring.

If your company wants an edge when hiring high quality employees, then you want to look into upgrading your methods for screening candidates. Notably, multi-tasking automation software can make the process better for the would-be employees and easier for your hiring managers.

Keep reading for resume screening tips that will teach you how to screen resumes to improve the quality of the employees you hire. We'll demonstrate how this can be done using HubSpot, [marketing automation software](#) that's good for much more than just marketing.

If you have questions about what we're discussing, you can always get in touch with our team by [filling out our contact form](#).

Why Methods For Screening Job Candidates Is A Must

Employee recruitment is a never-ending campaign; your company needs to constantly be attracting high-quality candidates to your business if you want to grow. So whether recruiting



strategies fall into the domain of human resources, marketing, or a mix, you want to carry out these activities as consistently and effectively as possible. That's where automation comes in.

But how exactly does an automated screening process for hiring help recruit and hire top-quality employees?

Here are some of the benefits that your company can expect from setting up a system that automatically screens resumes and applications:

- **Provide a better application experience**

Remove human error from the process and you'll find yourself with more highly engaged and better informed applicants. Prospects won't need to wait for HR when follow-up emails are automated.

- **Attract more application submissions**

An automated process allows applicants to move things forward on their own time, rather at a time that's convenient for internal staff. This leads to a higher rate of application completion.

- **Prioritize high-quality candidates**

Setting up a scoring system lets you automatically rank candidates before even talking to them. This way, your staff can more quickly respond to high-quality candidates and secure them for your company.

- **Gather a better pool of talent**

Just because your company doesn't have a glaring need now doesn't mean there won't be in a few weeks or months. Continuously collecting applications from high-quality candidates (without misrepresenting active openings) saves you time when your company when somebody unexpectedly leaves or new business comes in.

A mistake many companies make is initiating the recruiting process when they have an obvious need for a new employee. The problem with this is that it restricts you to a shallower pool of talent, where you're limited in your ability to identify and select high-quality candidates. By automating the process, your talent pool is considerably deeper because you're constantly attracting candidates to choose from.

How To Set Up An Automated Resume & Application Screening Process

Setting up an application screening process can be as simple or complex as you want it to be. Companies dealing with very high volume of applicants (e.g. recruiting agency) would want a more complex solution that segments prospects with a high level of granularity.



Most companies, however, would be fine with a simpler screening system that prioritizes based on a few criteria. After all, if you can restrict the need for human input in the earlier, more formalized part of the hiring process, you can save huge amounts of your employee's time.



Tips for Getting Started with Resume & Application Screening

Let's look at a few things your company can do to structure their application screening process.

Tip 1: Always Be Accepting

Improving your team's talent is more than developing your current employees, you need to be accounting for tomorrow, next week, next year, and beyond. By always accepting applications, you have a much deeper pool of talent to draw from as your company grows. But you don't have to be deceitful about always accepting applications -- simply list all the positions at your company, indicate which ones are currently open, but accept applications for every position.

Tip 2: Respond Promptly and Accurately

Don't keep applicants waiting; neglecting an applicant the easiest way to get off on the wrong foot with a new hire. Instead, you should plan out your organization's communications (e.g. thank you emails, qualified applicant emails, disqualified applicant emails, etc.). Then, you can ensure that prospects are all receiving the right response. And if you're using an automated system, the communications can be sent without any human involvement.

Tip 3: Make it Multi-Step

Multi-step applications might not intuitively seem like a good way to encourage submissions, but they're actually incredibly useful for helping applicants to complete the submission process. Condensing the process into a single, gigantic page can be discouraging. Additionally, segmenting the process into several steps allows you to eliminate human review by automating the easy parts.



Questions to Use In Your Screening Process

As we mentioned previously, segmenting your application process allows you to ask easily scorable questions (i.e. multiple choice) that will help you prioritize and disqualify applicants. Here are some examples you can use.

Question Set 1: Experience Matching

Sometimes you want to hire an employee with a lot of life experience. Sometimes you don't want an experienced employee, you want a blank slate that can grow with the position. Either way, evaluating an applicant's experience is a good way to start determining who's a good fit for your company.

Examples:

- How many years have you been professionally employed?
- How many years have you been employed in our company's industry?
- How many years of experience do you have in a customer-facing role?

Question Set 2: Skill Sets

Having applicants self-evaluate their skills can tell you a lot about them. For starters, it can tell you whether they're adept at using important products or services for your company; if they aren't, then you can disqualify them then and there.

Examples:

- On a scale of 1-10, how would you rank your proficiency with Excel?
- On a scale of 1-10, how would you rate your ability to work with other colleagues?
- Which of the following skills would you consider yourself an expert?

Question Set 3: Culture Fits

How an applicant fits with your team is almost more important than the skills they add to your team. By asking questions that help you understand what type of person is applying, you're better able to choose an applicant that will work well with your team.

Examples:

- Which of the following services does our company NOT offer?
- Which of the following is a core value of our company?
- List the name of one employee that works for us.

Question Set 4: Subjective Insights

While subjective insights won't aid an automated screening process, it will help you better understand what makes a candidate tick. And if you're in the fortunate position where you have



too many highly-qualified candidates coming through, these insights can help you choose the best for your company.

Examples:

- Why should we hire you?
- What interests you most about our industry?
- Who is your hero?

Criteria for Prioritizing Applications From Your Screening Process

If you're using a multi-step application with easily scorable questions, like the ones above, then you simply need to determine the minimum threshold to move onto the next step. You need to decide internally what answers are most important and prioritize applicants whose answers match that criteria. Then your tracking system can conditionally send instructions based on criteria fit.

So now that you understand how to prioritize applications in your screening process, let's take a look at the software options you have.

Automated Resume & Application Screening Software Options

If you're convinced that an automated employee recruitment process is right for your business, then the next step is figuring out what type of screening software is right for you. In our opinion, you can use marketing automation software like HubSpot to get most of the functionality that dedicated [applicant tracking systems](#) (ATS) offer. But before we discuss how you can do that, let's take a look at why you might want an out-of-the-box dedicated ATS.

Using An Applicant Tracking System

A dedicated applicant tracking system (ATS) is ideal for organizations that process very high volumes of resumes. They're specifically designed for collecting, screening, and tracking applications so they'll offer the most functionality.

The biggest advantage of a dedicated ATS is that they typically offer out-of-the-box integrations with popular recruiting sites. This is a big help for teams that always have positions to fill -- think recruiting agencies and very large organizations.

For most businesses, however, a dedicated ATS is going to be overkill. Adding another unitasking system will simply end up costing you time for training, integrating, and managing while delivering no other benefits for other company communications.

If you believe an ATS is right for your company and want to compare different applicant tracking systems, Capterra has a great [chart comparing the most popular applicant tracking systems](#).



Building Your Own Applicant Screening System

If your organization is not hiring 10+ new employees a month, then you may be able to just-as-effectively screen resumes and applications with your own systems. Our team uses [HubSpot's marketing automation software](#) because a) we consider recruitment to be an extension of marketing and b) we like to use one multi-tasker tool (e.g. marketing automation software) rather than several uni-tasker tools (e.g. ATS + CRM + email marketing).

As an example, I'll simplify our recruitment process below, which is powered by HubSpot. The core of the process are versatile website forms by HubSpot that collect submissions and send emails based on what was input; it's the same methodology used in virtually all marketing automation activities.

Step 1: Post job description and application to your website and promote.

Applicants need a way to find and submit their application. Posting your opening on your website makes that easy and avoids the frustrations associated with sending applicants off-site. Then, you can use 3rd party websites (e.g. Indeed, LinkedIn, Symplicity, etc.) to promote the opportunity and direct applicants to the application.

Apply Online Now

Use the form below to apply for this position. Please provide accurate information. Applications with inaccurate or incomplete information will be ignored.

First Name *	Last Name *
Brian	Thackston

Step 2: Split application process into 3 different steps.

1. Basic information, resume, and cover letter
2. Skill and personality assessment
3. Work sample

Step 3: Disqualify unfit applicants after skill and personality assessment.

The idea in splitting up the process is to have a line drawn where applicant screening can occur. Applicant doesn't know how to use Excel? Sorry, your skills don't match the qualifications for this position. Applicant doesn't know what industry we're in? Sorry, our team is looking for others who more strongly align with our interests and passions.

Step 4: Hiring managers respond to qualified candidates

As with any automated process, there still needs to be human involvement to some extent. For recruitment, an automated screening process can cut down on the number of unqualified



applicants who reach your hiring managers; they don't have to send the "Sorry..." emails and they can focus on hiring the best person for your company's open position.

Automating Beyond Applicants with Marketing Automation

How your company screens resumes will largely depend on your company's size, the positions open, and the industry you work in. But for most small to medium businesses, we believe that you can utilize existing multitasker systems, like a marketing automation platform, to build a competent screening process for hiring new employees. Then you can double down on the platform for your marketing and sales efforts as well.

If you want a more in-depth explanation for how we use HubSpot to screen applicants, then [contact our team today](#). Our broad view of marketing includes recruitment and we love sharing what we know to help make the web a better place.



Sales Lead Qualification

How to Generate and Prioritize Sales-Ready Leads

You can generate sales leads for your business in a variety of ways -- word of mouth referrals, paid advertisements, search engine listings, etc. The list goes on and on. But if you want to improve the quality and volume of sales-ready leads, then this is for you.

Keep reading if you want to learn how to generate quality sales-ready leads.

- Marketing Qualified Leads vs. Sales Qualified Leads
- Lead Generation Campaign Ideas for Your Business
- Using Lead Generation Services, Software, And Companies

If you have questions for us, feel free to [reach out to our team with any of your questions](#).

Marketing Qualified Leads vs. Sales Qualified Leads

We will discuss how to generate sales leads, but we're first going to cover some marketing concepts as well. Our approach to handling sales-ready leads borrows many principles from [HubSpot's "Smarketing" hybrid](#), where responsibilities between sales and marketing departments blur a bit.

For the purpose of this piece, we're going to consider "marketing-qualified" and "sales-qualified" as two parts of the same lead generation process. It's a simplification (e.g. some sales leads may not come from marketing efforts) but it's true most of the time.

The first part of quality lead generation is making sure it's "marketing qualified". A marketing qualified lead (MQL) is a prospect that has provided enough information that your sales team can contact to the prospect. What qualifies as enough information is up to you and your sales team; it may be as little as "Name" and "Phone Number" or as much as 10 different fields in the contact record. MQLs are then shared with your sales team for next phase of the process.

After receiving MQLs from your marketing team, a lead becomes "sales qualified" (SQL) if the contact provides your sales team enough information to consider him or her willing and able to purchase your products or services. After this, the lead hopefully turns into a customer or client where they're [delighted by your company and customer service](#) to the point where they start the process over again and buy more from you.

As we mentioned before, we're blurring the line between MQLs and SQLs. Marketing and sales lead generation responsibilities contain significant overlap so, in our opinion, it makes sense to talk about them together. The bottom line is that qualifying your leads helps save your salespeople's time and your marketing team's budget.



Now, let's get into important part -- how to generate quality leads your sales team can immediately use.

Lead Generation Campaign Ideas for Your Business

Generating quality sales leads starts with your marketing campaigns. Whether it's advertising, email, or networking, these efforts are what generates most of your business's leads. So what can you do during this part of the process to get more qualified leads to sales?

Diversify Channels for Lead Generation Campaigns

Do not silo your lead generation campaigns by channel. While you will be making minor changes based on the channels you're using, the heart of the campaign remains the same.

So if you're trying to sell more yellow widgets, the blog post about yellow widgets for your search engine marketing campaign can easily be repurposed for an email campaign. It often helps to develop a system for diversifying the channels you're using to generate sales leads. Something like this would work for most companies:

New Blog Post → Social Media Updates → Paid Ads → Dedicated Email Blast

With this diversification, your yellow widget campaign is now targeting four different audiences through four marketing channels:

- Search marketing
- Social media marketing
- Paid advertisements
- Email marketing

Identify Lead Generation Sources That Work Best

Targeting multiple audiences across marketing channels is a good way to generate quality sales leads. However, not all marketing channels are created equal so it's important to spend your time and money where they matter the most.

[Multi-channel conversion reports](#) are a great way to tell which marketing channel is making you the most money. This allows you to attribute percentages of a lead to different marketing channel. For example, a qualified lead may go through a process like this:

- Clicked on a social media update
- Read one of your blog posts
- Clicked on a remarketing ad 3 days later



In the instance above, attributing the lead's source can be difficult. Many companies simply use "last touch" attribution, which attributes 100% of the lead to the remarketing ad, but then you'd be overlooking the power of social media and on-site content marketing. But with multi-channel conversion reporting, that's not a problem.

Use Call Tracking to Qualify Sales Leads

Marketing and sales are two parts of the customer experience continuum. By sharing information between these two parts of the process, you're better able to understand what's working and what's not working.

Specifically, analyzing phone calls allows you to quickly and easily identify your most profitable marketing campaigns. You can think of this as a multi-channel attribution "hack" that ties sales qualified leads back to the marketing channel that generated the phone call.

There are dozens of call tracking tools that help you to qualify phone leads. The one that we prefer to use is [CallRail](#); they provide an intuitive way to use trackable phone numbers for your different marketing channels. And their call monitoring solutions make it easy to generate reports on call volume alongside custom tags for categorizing the quality of the lead.

Other Lead Generation Strategies

This piece is meant to provide an overview for how to generate sales leads. If you want to read specific lead generation tactics and examples, we suggest checking out some of the content linked below:

- [HubSpot's 4 L's of a Successful Lead Generation Strategy](#)
- [CIO's 8 Lead Generation Strategies That Will Boost Your Sales](#)
- [Unbounce's 32 Clever Lead Generation Ideas For Your Next Marketing Campaign](#)

Using Lead Generation Services, Software, And Companies

Now that we discussed why lead qualification is important and what you can do to generate new leads, let's talk about how you can set up a lead generation system.

Your business has a variety of options if it wants to upgrade the lead generation process. You can get help from an agency or you can pay for lead lists from aggregator services. If you want to keep it in-house, you can setup automated software that assists with lead generation and qualification. Let's take a quick look at the two approaches.

Outsourcing Lead Generation

One way to outsource lead generation is to purchase lists from lead aggregator services. An example of this types of service include home refinancing websites that collect contact information from would-be refinancers and sell it to banks. If you've ever seen an ad promoting something like a "too good to be true refinancing offer from Obama", that's most likely the work



of an underhanded lead aggregator. As you can imagine, the quality of their leads can be quite questionable.

A safer approach would be to engage an agency that specializes in lead generation strategies. They'll work alongside your company's marketing team to bring your campaign ideas to life and ensure everything is performing optimally. At least that's what your agency should be doing.

Keeping Lead Generation In-House

If you want to keep things in-house and supercharge your marketing team's lead generation efforts, there's plenty of lead generation software that can help. In our opinion, the software that best supports sustainable growth and holistic marketing goals would be marketing automation software.

Marketing automation software allows you to easily create sophisticated marketing and sales lead qualification processes. And by automating many of the processes, you're able to extend the impact of your marketing campaigns.

The best example of an automated lead generation system made possible by marketing automation are nurture email campaigns. By setting up these automated email sends, you're able to deliver the right content at the right time for all your prospects -- regardless of the size and availability of your sales staff.

Additionally, marketing automation suites commonly offer sales prospecting and lead scoring features. The prospecting features can help your team target individuals or companies that fit your ideal customer profile. Lead scoring follows up with this by automatically prioritizing new leads by their willingness and ability to buy from your company. Together, these two features can save your sales team significant time.

If you want our recommendation for marketing automation software, we suggest using HubSpot. It's what we provide many of our clients and it's lead to huge successes. You can [learn more about our marketing automation services here](#).

Lead Qualification and Marketing ROI Go Hand in Hand

How your company generates quality sales leads is unique to your company. But the process for figuring out where the best leads are coming from and how to get more of them is the same.

By diversifying your marketing channels and identifying the ones that work the best, you can easily fine tune your lead generation strategy and increase your company's demand.

If you need help with any of these concepts, [let us know](#). Our marketing strategists specialize in marketing automation implementation and management and we'd be happy to help your company.



Questions?

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