

Building Marketing Automation into your Sales Process

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Investing in marketing automation for sales isn't just an excellent way to save your reps time, it can also lead to new revenue opportunities and growth. Marketing automation software is one of the most powerful tool in a company's communication arsenal.

It helps organizations not only capture the attention of new prospects, but also follow up on leads and nurture opportunities. That's one of the reasons why the market for this software is expected to grow to a [value of \\$13.48 billion by 2028](#).

While marketing automation tools and sales automation systems are often seen as two different solutions, they have more overlapping areas than you'd think. After all, a lot of sales and marketing revolves around the same thing ' connecting with prospects.

Here's how you can start building marketing automation into your sales process.

What is Marketing Automation for Sales?

Let's start with the basics. Marketing automation software is the technology companies use to streamline and augment their marketing strategies.

It 'automates' various repetitive tasks, like sending emails to prospects at the right times in their buyer journey, or publishing posts on social media. The right tools can help with all aspects of the customer journey, from initial contact with a prospect, to activating loyal advocates.

Sales automation software, on the other hand, tends to focus on automating specific sales processes. For instance, there are tools that can automatically qualify leads for the sales team, rapidly generate lists of names and contact details for cold calls, or send invoices to clients.

Marketing and sales automation tools working together, can mitigate various manual tasks in both the marketing and sales process at the same time. They can help companies track a customer's position in the sales cycle, pinpoint opportunities to follow up with prospects, and [communicate with leads](#). They can also handle various administrative tasks, like transcribing calls and adding data to a CRM.

How Do Sales and Marketing Automation Work Together?

Although there are many different types of automation tools in the modern market, they all generally focus on the same thing ' eliminating time consuming tasks. Automated sales and marketing tools might not be

able to manage all of the processes involved in the buyer journey, but they can help you to move through the sales cycle faster, and more efficiently.

Using marketing automation for sales gives companies the opportunity to reduce some of the work burden on their sales reps. For instance, rather than having to manually send follow-up messages to each lead at a specific time, sales professionals can use their automated sales tools to send personalized messages on their behalf.

Using marketing automation and sales tools together also delivers additional benefits. For instance, many businesses use automation software to help the marketing team nurture leads with personalized content at different stages of the sales funnel.

These automated systems become a lot more effective when they have access to sales tools that store customer information, automatically predict future behavior, and determine lead quality. Essentially, building marketing automation into your sales process allows you to empower your teams, while simultaneously ensuring you can take advantage of valuable insights.

Building Marketing Automation into your Sales Process

There are various ways small businesses and large companies alike can build marketing automation into the sales process. The strategy you use will generally depend on the kind of sales processes and strategies you use. However, marketing automation can help with various parts of the sales cycle.

For instance:

Capturing prospects

Prospecting is one of the most important parts of any sales process, but it's also one of the most time-consuming parts of a salesperson's job. Marketing automation tools can help professionals save time on sourcing and even qualifying various prospects.

For instance, with email marketing automation tools and landing pages, companies can collect information about potential customers instantly, which can be transferred directly to the sales team. Some marketing automation tools even help you to track engagement levels over time, so sales teams know when it might be a good time to reach out to a lead.

Automation tools can also help with data entry, rapidly gathering information about potential leads and adding them to profiles for salespeople to use at a later stage.

Nurturing Leads

Marketing automation tools are excellent for nurturing leads. With tools for automating social media posts, email campaigns, SMS messages and more, companies can ensure they're constantly communicating with prospects, without placing extra strain on their sales team.

With email marketing automation tools, companies can create entire 'series' of emails designed to move customers through the sales funnel. With social media campaigns, companies can build hype for an upcoming sale or offer, driving more prospects towards sales professionals.

Many marketing automation tools are exceptionally good at automating sales communication, and building rapport with customers. They can even prompt sales professionals to follow up with specific leads when they're at risk of churning, or their engagement levels drop.

Closing deals and increasing sales

Marketing automation tools aren't just excellent for capturing the attention of your target audience and building your sales pipeline. They can also be extremely useful for collecting valuable data. Most marketing automation tools come with analytical features built in.

They can help you to segment your audience into different groups based on the content they're interested in, or their engagement level. This helps sales teams to determine which leads are cold, warm, or hot, in the sales pipeline. Plus, it ensures sales reps have information to guide them when they're creating personalized pitches for leads.

Automation tools can even consistently capture data throughout the customer journey, providing insights into the best times to consider sending an 'upsell' offer to your prospects. They can give sales professionals an opportunity to increase the overall lifetime value of each customer.

The Overlap of Sales and Marketing Automation

Increasingly, sales and marketing teams are beginning to work more closely together. After all, the customer journey consists of various crucial points, which require interactions with members of the marketing team, sales team, and even your customer service reps.

Building marketing automation into your sales process can deliver a host of benefits to both your marketing team, and your sales professionals. Businesses can target possible customers with unique, engaging messages at the ideal moment. This boosts your chances of converting leads into customers.

Automated tools can help with segmenting leads into different categories based on demographics or interests, helping sales teams target prospects with relevant offers and information. Plus, with email, SMS, and social media automation, you can start automating sales communication on a broader level.

Companies can follow up with prospects more consistently, send messages to keep customers updated about new products, services, and promotions, and craft deeper relationships with consumers.

Similarly, sales automation solutions can benefit marketing teams too. Automation tools in the sales landscape can collect data on orders and payments, showing companies how their marketing campaigns are performing, and what the ROI is for each campaign.

For both groups, sales and marketing automation tools save time on everything from lead generation to customer relationship management, and even processing payments and transactions.

Getting Started with Sales and Marketing Automation

One of the most important steps in successfully building marketing automation into your sales process is figuring out what kinds of tools and technologies you're going to use. There are platforms out there, from vendors like HubSpot and Zendesk, which align sales and marketing automation features into a single toolkit for business leaders.

Alternatively, companies have the option to build their own 'automation stack' from scratch, using integrations, APIs, and other tools to bring all of the unique components of their system together.

The most important things to consider when choosing the right tools include:

- **Functionality:** Decide what kind of key features you're going to need from your tools. Do you need something that can score leads, automate email marketing campaigns, and help you segment your audience? Are you looking for a solution that can automatically notify your team members when they need to follow up on leads, or when an existing customer is at risk of churning? The more advanced your feature requirements, the more you're likely to spend.
- **Ease of use:** Automation tools should make it easier for everyone in your team to get involved in the sales journey. The right solutions will make it simple to create custom workflows, based on your sales and marketing processes, without the need for any complex technical or coding knowledge. They'll also ensure your employees can collect insights with visual reports and easy-to-follow analytics.
- **Consolidation:** The best sales and marketing automation tools ensure you can consolidate all of your customer data, financial reports, and marketing insights into a single environment. Bringing all of this information together makes it easier to create customer profiles, personalized marketing and sales campaigns, and strategies that work for your business.

Even if you choose an all-in-one solution, keep in mind that it might be helpful to look for something that still supports integrations with other platforms, like your content management system, or your CRM database. This can help employees save time on jumping between apps.

Automating Sales Communication and Marketing

Building marketing automation into your sales process is an excellent way to create more efficient, productive, and aligned teams. By integrating all of your customer touchpoints, and finding new ways to automate outreach, lead validation, and nurturing processes, you give your professionals more time to focus on the tasks that drive value for your business.

Automation tools can ensure sales reps have more opportunities to focus on closing deals, with personalized sales pitches and meaningful solutions.

Want to learn more about how you can use sales and marketing automation tools in tandem? Sign up for the Hard Skill Exchange today, for insights from the world's leading sales and marketing experts.

HSE Team