



ANTENNA GROUP PRESENTS

# The Cleantech Guide to Marketing Automation



# Introduction

As the leading PR and Marketing agency for smart energy, mobility, sustainability, life sciences and emerging tech, we have the privilege of working with clients who provide some of the most sophisticated (and coolest) technology out there. When our clients are looking to apply the same level of sophistication to their marketing and sales efforts, we recommend marketing automation.

This e-Book will provide a high-level overview of marketing automation, defining the tools, tactics and methodology, and equipping you with the knowledge to begin streamlining your marketing efforts.

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## SECTION

# 01

# Defining Marketing Automation

**M**arketing automation software is designed to improve operational efficiency, reduce redundancy, convert leads, and make new processes possible. It executes marketing actions without manual effort, allowing you to complete repetitive and/or tedious tasks in a more efficient way. The marketing automation uses data to trigger actions and send customized messages tailored to a contact's interaction with your website. It tracks each touchpoint and adapts each step and pieces of content accordingly.

Marketing automation also uses tracking codes to monitor contacts' behavior and analyze how they are engaging with your website and content. After you place a tracking code on your website, you will be able to follow visitors as they browse it. When a contact opens or clicks an email or submits a form, a cookie will be installed on their browser, and you will be able to identify them and track each interaction they perform. This data can be used to segment contacts, enroll or un-enroll them into a workflow, or send multiple targeted emails to drive engagement.

Marketers using automation software generate two times more leads than those using blast email software and are perceived by their peers to be twice as effective at communicating.

Source: Autopilot

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# 02

# What Marketing Automation Isn't

**T**hough email marketing is a key component of marketing automation, it is only one element. Marketing automation is not just another name for email marketing, though email marketing is a key component of marketing automation. Email marketing is built on static information about a contact. This means that you are only using information that you have already provided to the email database, which is often just standard contact information. With email marketing, there is only a single path, which typically consists of one-off e-blasts to imported lists. Conversely, marketing automation utilizes dynamic information, continuously leveraging behavioral data points based on how the contact is interacting with your content. Contacts will receive a series of messages that adapt based on their actions. These targeted emails will automatically go out to people as they join your list.

Marketing automation encompasses efforts and analytics across your marketing channels. It combines marketing tools in your digital campaigns, including:

- **Email marketing**
- **Landing pages**
- **List Segmentation**
- **Calls-to-action**

- CRM
- Web analytics
- Lead scoring
- Content marketing
- Blogging
- Social media
- .... And more

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# 03

# Who Can Benefit From Marketing Automation

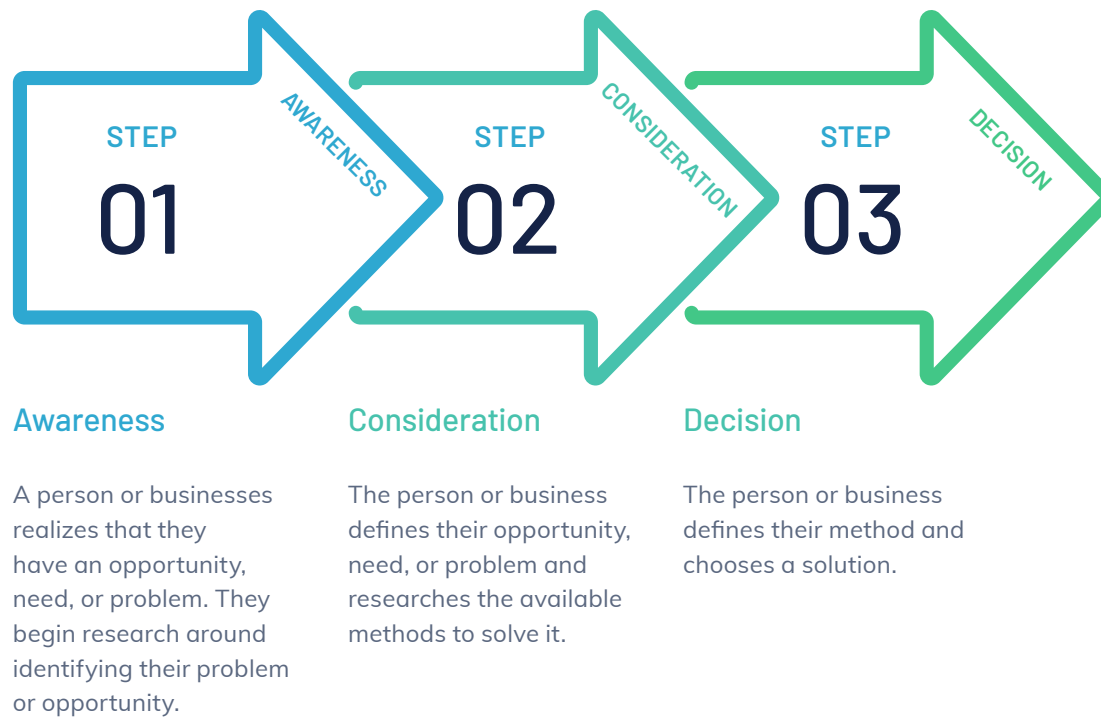
While marketing automation is often associated with larger organizations, the technology is not just for big businesses. It's also a great streamlining tool for Startups and Small and Midsize businesses (SMBs). In fact, SMBs are currently the largest growing segment for marketing automation. From life sciences to mobility to clean energy, companies across various industries and sectors are using marketing automation to optimize their campaigns.

Marketing automation is a powerful tool for both B2B and B2C companies. While the channels, segmentation, experiences, content, and processes may differ between B2B and B2C companies, both seek to build relationships, personalize messaging, and track data, which marketing automation enables.

In cleantech, B2B, B2B, and B2B2C companies sell through channels and also target organizations upstream and downstream in their industries. One example is community solar developers, who need to sell to both residential and commercial end customers, while simultaneously marketing to financiers, project development partners, manufacturers and other strategic partners.

## The Buyer's Journey

The buyer's journey is the process decision makers go through when they are considering purchasing a product or signing up for a service. Before contacts becomes customers, they go through a three-step process to make a decision:



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## 04 Lead Nurturing

Lead generation is typically a top priority of marketing. Often, however, companies overlook the process of what happens once a lead is generated. Sometimes, the lead is sent directly to a sales representative. Sometimes, the contact is just pushed to a database, where they sit until the next e-blast goes out. Because this type of outreach does not consider the buyer's journey, the lead often drops off before it can be turned into a customer.



On the other hand, nurturing leads by providing targeted information at each stage generates value by moving them down the sales funnel. This is particularly relevant to cleantech companies that often struggle with long sales cycles. For example, energy companies that are selling to utilities, or mobility companies selling to tier-1 auto OEMs, might go through multi-year sales cycles, which requires ongoing engagement with a variety of stakeholders. Lead nurturing ensures that your communications keep you top of mind for those target stakeholders.

An effective lead nurturing strategy utilizes both marketing and sales tactics to build a relationship, maintain top-of-mind awareness, and engage with contacts until they are ready to make a purchasing decision. Marketing automation enables you to nurture your leads, providing them with highly-targeted, personalized touchpoints that address their specific barriers to becoming a customer.

Marketing automation is a powerful channel for lead nurturing because it provides long-lasting one-on-one interactions with each contact. In fact, 57% of marketers say lead nurturing is the most valuable feature of automation software (Source: Ascend2).

**Effective lead nurturing generates 50% more sales-ready leads at a 33% lower cost**

Source: DemandGen



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# 05 Segmentation

Whether your database has 1,000 contacts or 100,000, segmentation can ensure that you are sending the right people the right message. There are countless ways to segment contacts --, by job title, buyer persona, product interest, location, or lifecycle stage, which refers to where a contact is at in your sales cycle: subscriber, lead, marketing qualified lead, sales qualified lead or customer. For example, we segment the database of one of our life sciences clients by patients, hospital administrators, marketing directors, and healthcare providers. We then drill down further and segment by location of the healthcare provider. With one of our clean energy clients, we segment by different types of property owners, equipment dealers, installers, end customers and investors.

With marketing automation, you don't have to worry about manually update lists constantly or slaving away in spreadsheets. Instead, when a new contact matches certain criteria, they will be automatically added to the list and enrolled in an automated campaign. Marketing automation can also be used to automatically remove contacts from lists once they complete an action. For example, a contact enters your database by filling out your "Subscribe for updates" form. You start sending out emails to nurture them into filling



out your “Request a Demo” form. After a few emails, they are ready for a demo and convert on the form! To ensure that they don’t continue to receive communications targeted at contacts who have not yet requested a demo, an automated workflow will automatically remove the contact from the general subscription list.

51% of email marketers say segmentation is the most effective way to personalize lead nurturing.

Source: Ascend2

Not sure how to segment your database?  
Here are some potential ideas for a few sectors we work with:



**Energy Startup**

Utilities, Developers, Installers, Distributors, Energy managers, Facility managers, Financiers, Investors



**Mobility**

Auto OEMs, Tech Startups, Transit agencies, Fleet managers, City planners, Facility Managers, End Users



**Life Sciences**

Investors, Strategic Partners, Hospital admins & C-suite, Doctors, Patients, Healthcare providers ,Marketing Directors



**Real Estate**

Developers/property owners, Brokers, Tenants, Municipal officials, Academia, Construction Companies



**Utilities**

C-level decision maker, Finance department, Engineering team, Marketing, Field operations & maintenance crew

# Content

Content is king” has become a maxim of modern marketing campaigns. Marketing automation is no exception: content is essential for nurturing leads and keeps automation from going stale.

By offering content, you are providing value to your leads, educating them and addressing their specific needs, while proving your status as a thought leader and selling your company as the solution to their needs. Furthermore, a piece of content provides an additional opportunity for the contact to convert and interact with your website, enabling you to track their behavior and adapt the communication strategy accordingly. Instead of sending a “Just wanted to check in...” follow-up email, marketing automation can deliver a call-to-action centered around content, such as a blog post, e-Book, white paper, or case study

For example, after a contact downloads a white paper, you can send them an initial thank you email, followed by a relevant case study a few days later. If they click to read the case study, an automated follow-up can be sent to see if they are interested in discussing how they can have the same success as the person/company discussed in the case study. If the contact does not click to read the case study, they likely aren’t as sales ready, so an automated follow-up can send them an additional piece of content.

**Targeting users with content relevant to their position along the buying process yields 72% higher conversion rates.**

Source: Aberdeen



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# Sales Enablement

Sales enablement bring together technology, processes, and content that empower sales teams to sell efficiently at a higher velocity (Source: HubSpot). The days of sales and marketing as separate efforts are long gone. Today, sales and marketing teams work closely together to implement effective lead generation. Aligned sales and marketing efforts generate qualified leads, providing the sales team with the relevant insight and data points needed to close them. Did you know that sales teams spend less than a third of their time actually selling? (Source: Salesforce). The rest of their time is spent on manual administrative tasks like creating CRM records and logging activity. With automated processes, salespeople can spend less time on those repetitive tasks and more on what really matters – efficient selling.

Marketing automation can trigger email sequences if a prospect has not responded to the salesperson in a set amount of time, freeing the sales force from hours of sending out identical follow-up emails. If the prospect replies, they will be automatically unenrolled from the workflow and will not receive additional automated follow-up emails. Using personalization tokens, such as the first name, last name, company name and other pieces of information about the contact will tailor the message to the specific prospect.

With marketing automation, you can automatically assign leads to sales people, reducing the time it takes to follow up after an inquiry. For example, if a lead fills out a form indicating they are in a certain state, you can automatically assign that lead to the sales rep in charge of that territory. You can also rotate leads, so that they are assigned “round-robin style,” ensuring that they are assigned evenly to your sales reps.

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# 08

# Marketing Automation Tools

There are a lot of marketing automation tools out there, and choosing one can be an overwhelming task. When deciding on a marketing automation platform, you should select the provider that fits best with your company and your goals. Rather than focusing solely on specific features, concentrate on what a long-term relationship with the vendor would look like. Consider how the platform would fit in with your current digital landscape and IT environment. Are you looking for a tool that will integrate with external platforms or one that will serve as your all-in-one solution? Are you looking for an easy-to-use, yet robust platform or a more complex solution? Answering these questions will help you get closer to a decision.

Before we recommend a platform to our clients, we set up a discovery call to understand their needs. Once we have a better idea of their goals, we identify the best strategies and the tools to execute them. We use the best marketing automation tools for cleantech and can help you select the one that’s right for you. For our clients in the smart energy, mobility, sustainability, life sciences and emerging tech sectors, we often find that HubSpot is the best fit for their goals.

As a HubSpot Certified Partner, we’re skilled in using it as a marketing and sales automation platform. In addition to marketing automation, we leverage HubSpot as your full-service marketing software to turn your website and other digital campaigns into lead-generation machines.



## Conclusion

Unlike other industries where automation may be replacing jobs, marketing automation does not make marketers' jobs irrelevant; rather, it enhances and streamlines your marketing strategy. In fact, having a **strong marketing team**, whether internal or an outsourced **partner agency**, may be more important than ever. Clearly, marketing requires a human connection to get the job done.

It is important to recognize that while marketing automation is a key part of lead generation, it does not do lead generation for you. To generate leads, you need to attract visitors through your site through tactics such as public relations, SEO, social media, pay-per-click marketing, and blogging. Marketing automation enhances that by helping you nurture your leads and close them as customers. Contact **Antenna Group** to discuss how to attract visitors to your site, convert them into leads, and close them as customers through marketing automation.

Start using marketing automation  
for your company



# About the Authors

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### Marketing Automation & Operations Specialist



As Antenna's Marketing Automation & Operations Specialist, Lee develops full-funnel marketing strategies and lead-generation initiatives for the agency's smart energy, mobility, sustainability, life sciences and emerging tech divisions. He assists clients in launching customer-focused digital marketing and integrated marketing communications campaigns. Lee brings his expertise in leveraging marketing automation software to implement inbound marketing and to capture & nurture leads.

Lee holds a master's degree in Marketing Communication Management from Manhattanville College and a BBA in Marketing from Pace University.

## Jake Rozmaryn

### Vice President of Strategy and Business Development



Jake Rozmaryn brings a decade of experience advancing cleantech industries through marketing innovation. He has helped launch dozens of cleantech startups and was recently recognized as a 2018 Forbes 30 Under 30 in Energy. As Antenna's Vice President of Strategy and Business Development, Jake leads strategic growth, service expansion and client success initiatives for the agency's clean energy, sustainability, mobility and emerging tech divisions.

Jake previously founded Eco Branding, an integrated public relations, marketing and creative agency that specialized in technology for clean energy, smart cities and advanced mobility. He participates on numerous Advisory Boards, Education Committees, and Mentor Committees for a variety of clean energy non-profits, associations, conferences and accelerator programs.

Jake studied Government and Politics with a focus in Environmental Policy at the University of Maryland and resides in New York City.



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