# UTILIZING MARKETING AUTOMATION AND ARTIFICIAL INTELLIGENCE

## Video – Why Use Marketing Automation and Artificial Intelligence in Inbound Marketing?

Marketing automation and artificial intelligence (or AI) are becoming increasingly important to business, and this will only continue to heighten as technology evolves and progresses. So what are marketing automation and artificial intelligence?

Marketing automation is a software platform designed to help marketers automate repetitive tasks.

Artificial intelligence, as defined by Gartner, is technology that "applies advanced analysis and logic based techniques, including machine learning to interpret events, support and automate decisions, and take actions."

To put it another way, marketing automation is technology that executes tasks based on if-then statements. For example, *if* a customer clicks the CTA in your email *then* they are enrolled in a lead nurturing campaign. Artificial intelligence, however, is technology that can interpret if-then statements to determine if specific actions in turn are beneficial or not. For example, your software might use an algorithm that assesses all the interactions each customer has with your email and then optimizes the best times to send the emails so more people click the CTA. Automation and AI often work in tandem.

As an inbound marketer, you want to more than attract and engage your customers, you want to delight them – marketing automation and AI are essential for this. Automation can allow your interactions to be more efficient and AI can empower each interaction to be more relevant. Used correctly, you can magnify the level of personalization you provide for your customers. Gartner defines personalization as "a

process that creates a relevant, individualized interaction between two parties designed to enhance the experience of the recipient." Personalization is about putting the customer first, which is what inbound marketing is all about. In a world inundated with messaging, you want to make sure the product or service you have to offer your customers reaches them.

Marketing automation and AI help increase the level of customer experience and satisfaction, streamline productivity and efficiency, empower scalability, and give you more insight into your customers and your efficacy.

It's kind of like comparing a regular bicycle with an electric bicycle. A regular bicycle takes less investment up front, but more time to get you to where you want. An electric bicycle takes more investment up front, but will get you to your destination faster. Both will get you to your destination, but one does so faster despite the initial investment.

It's the same with marketing automation and AI. You can probably accomplish a lot of your tasks manually, but strategically employing automation and AI will allow you to complete tasks faster and with more accuracy, even if it takes more time and money at the beginning.

When it comes to customer experience and satisfaction, marketing automation and AI allow for hyper-personalization and more targeted segmentation of your customers. According to Forbes, 70% of millennials feel frustrated when companies send irrelevant emails and 74% feel frustrated when the content of a website is not personalized to them. AI can be used to help you generate hyper-personalized digital ads by interpreting user behavior, customer segmentation, and profiling. Automation allows for more fluid touchpoints. A customer can receive a follow up email immediately when they request information rather than waiting for someone to manually reply.

Marketing automation and AI also help you streamline your productivity and efficiency. Automation can be leveraged in accomplishing repetitive tasks. For

example, you can build a workflow so when someone gives you their email to download that e-book on your website they're entered in a month-long campaign that includes other similar blog posts or relevant promotions. Imagine if you had to spend time manually sending out every email of your campaign to every person who signed up for an e-book download. When it comes to productivity and efficiency, AI can help with mitigating human error. Think about spell check, something most of us take for granted daily. Imagine if you had to manually locate and correct every typo – I know my emails would be a lot more embarrassing than they already are! The power of AI can be seen in not only catching your typos, but in how it can interpret your sentence structure and provide feedback on tone and fluency.

Another significant benefit of marketing automation and AI is how they can be used to empower scalability. In your small startup, you might be doing a great job following up with every contact seeking more information, but as your business grows, no matter how enthusiastic you might be, you won't be able to keep up. This is where automation can come in handy. When it comes to how AI can assist with scalability, think about all the data your website gathers daily. Gathering and interpreting data in order to determine the best next steps is vital when scaling. AI can be utilized to instantaneously process and interpret vast amounts of data and form reports that otherwise might take you weeks, if not months, to complete. Incorporating automation and AI into your foundation from the beginning means you won't have to waste time trying to implement new systems in the hustle and bustle of growth.

Lastly, marketing automation and AI can give you valuable insights to your customers and to your efficacy. Automated reports can help you quickly see your growth rate and team performance. AI can analyze a collection of behaviors of your website visitors, and make recommendations based on those behaviors.

A great example of this is Tik Tok. In December 2020, Tik Tok surpassed Facebook as the most globally downloaded app, with over a billion active users monthly. Much of Tik Tok's success can be attributed to the way the company has leveraged AI by directly presenting videos to users based on their recommendation algorithm. This is a great example of not only gathering information from AI but letting the data drive

innovative action. Other platforms were using recommendation algorithms, but only Tik Tok designed the interface to apply the recommendation immediately instead of just making a suggestion. Tik Tok's algorithm is extremely effective because of the way the technology is designed to interpret user behaviors as specific as the rate at which a person swipes away from a video.

Tik Tok's scope of AI and automation usage may feel unattainable, but consider small business, Paper Style, a company that provides wedding stationery and favors, who automated segmented campaigns based on buying behaviors. They built a campaign that would quickly determine whether someone who had given their email was a bride-to-be or a friend of the couple. They segmented accordingly. For example, their automated campaign would send friends wedding gift ideas after they had purchased bachelorette party favors, while brides who had purchased stationery for invitations would be sent options for "thank you" notes. By using automation, Paper Style saw their revenue increase by 330% per mailing.

Now you may think, "I can't design an algorithm at all, much less one that fits my company's specific needs." In fact, according to the Marketing AI Institute 50% of marketers classify themselves as AI beginners and 77% say that less than one quarter of all their marketing tasks are automated.

Further research also revealed that though relatively few marketers feel proficient and efficient at marketing automation and AI in their work, 52% say that AI is very or critically important in marketing. And 43% say they think more than half of their work will be automated in the next 5 years, while 80% say at least one quarter of it will be.

Technology is progressing at an exponential rate, and is ever shifting and evolving. If you don't feel entirely comfortable in this arena, industry trends say you're in good company, but the important thing is to get engaged. Consider getting started by building a workflow to accompany your campaign for the people that sign up for your newsletter. Install a writing assistant software to enhance the copy of your content. Or try automating your follow up process for when you miss a call to mitigate the friction of phone tag.

Implementing marketing automation and AI into your strategies and processes now will reap long term benefits as the industry engages with these tools more and more. Prepare for the future by getting started in the present, and you will delight your customers in a way that's helpful and human.

### Video – Internal Processes: What to Prioritize When Implementing Marketing Automation and Artificial Intelligence

Have you ever invited guests to your home and instead of doing a thorough job to prepare, you pushed some clutter into a spare closet or under your bed only to have to sort through all of it later? Sometimes it's tempting to approach marketing automation and artificial intelligence this way – prioritizing the customer-facing aspects but leaving the internal processes in disarray – resulting in more organization and clean up later.

When implementing automation and AI into your business, you must ensure your internal processes are built to sustain your customer-facing processes. There are three aspects of your internal processes to address in order to successfully use marketing automation and AI: data hygiene, tech stack organization, and cadence and content.

Automation and AI rely on data, so one of the main priorities to using them effectively is having good data hygiene. The International Data Sanitization Consortium defines data hygiene as "the process of ensuring all incorrect, duplicate, or unused data is properly classified and migrated into the appropriate lifecycle stage for storage, archival, or destruction on an ongoing basis through automated policy enforcement." In other words, it's the means by which you ensure and maintain your data accuracy. This includes de-duplication, addressing missing values, and standardizing your data systematically like what abbreviations you use or don't use. However, there are aspects of data hygiene you have to proactively work on in order to use automation and AI well.

Before you even begin organizing and cleaning up your data, you have to address how and where you're attaining your data. Inherently, gathering and using data isn't wrong. In fact, you can't effectively do much without it. Imagine trying to form a genuine connection with someone without having or gaining any knowledge about them. That would be impossible. Inbound marketing is centered on building genuine connections with your customers, and doing so requires data. The important thing is to be transparent with your customers on how you're attaining and using their information.

So let's talk about data privacy. Considering how you approach data privacy is a critical part of setting up your internal processes to succeed with marketing automation and AI. With the emergence of GDPR, CCPA, and iOS15, the nature of data privacy within the industry is evolving and it's important to be aware of and adhere to these regulations. As an inbound marketer, navigating data privacy ethically is essential. Intrinsic to a "customer first" mindset is ethical behavior.

People are protective of their privacy while also wanting their experiences to be highly personalized. Your job as an inbound marketer is to live in that liminal space. To start, research what regulations may pertain to the market you operate in, audit your processes for regulation compliance, and develop a system of transparency that involves disclosures and consent.

VP analyst at Gartner, Penny Gillespie, shares, "Organizations are losing their best chances to create great customer experiences due to needlessly risk-averse privacy ideas that limit the use of personal data. The key is to bring value to customers and bring data use in context."

Put your customers first by being clear in your data privacy procedures and using the information you have to enhance their experience. Having good practices in place regarding data privacy allows you to address your data hygiene more comprehensively. Think of data as something organic – capable of deteriorating in quality over time. This is why it's important to prioritize having clean data, or accurate

data. Dirty data, otherwise known as inaccurate or incomplete data, can render ineffective even the most streamlined customer-facing automation processes.

According to Forbes, each year as many as 18% of all telephone numbers change, and 60% of individuals move roles within their companies. Think about the implications of 18% of your contact record's phone numbers being inaccurate or 60% of the associated titles of your contacts rendered obsolete. Your ability to connect decreases drastically. Forbes' research also shows that about 70% of B2B data deteriorates each year. In an article from Greenbird, one study revealed that 60% of businesses believed their overall data health was not trustworthy. You will have an extremely difficult time getting the right message to the right person if your data is compromised. With statistics like this having consistent, thorough upkeep, no matter how much data you have, is necessary for maintaining useful data.

Think about how easy it feels to turn on your faucet and get running water. Though you may not call it to mind often, the experience you have in this daily luxury is due to a vast network of pipes, pumps, and lines all working together. In the same regard, for you and your customers to experience the benefits of automation and AI, you need all the internal processes to be connected and integrated. Being intentional about maintaining your data hygiene is like clearing out the lines in your plumbing system. You don't want a trickling faucet due to clogged pipes! For example, you could utilize AI to optimize the best times to send your emails, but if you don't have accurate data on open rates, even if you have the functionality of the algorithm the results will not be helpful.

Data hygiene is about keeping your knowledge updated. From customer interactions to contact records and even your knowledge base, clean data is essential to effective marketing automation and AI. Prioritizing data hygiene takes time, but you don't have to do it alone! You can use automation and AI as a part of your process to get there. Software from InCycle, ZoomInfo, ClearBit, Gong, and HubSpot provide tools that automatically catch and remove duplicates, auto-generate relevant company information into your contacts, and automatically process conversational data. Using AI and automation to keep your data clean whether it's de-duplicating records or

auto-generating missing values saves you time and gives you the foundation you need to build your customer-facing processes.

Streamlining your internal processes for marketing automation and AI also includes organizing your technology stack or tech stack. Optimizely defines a tech stack as "a grouping of technologies that marketers leverage to conduct and improve their marketing activities". Your tech stack is the full scope of all the different software and tools you use as an inbound marketer. When it comes to organizing your tech stack, ask yourself: Does your technology speak to each other? Are all the tools you're using pulling information from the same database? Does all your software integrate with one another or are you having to create workarounds in order to use the tools together?

HubSpot Chief Technology Officer, Dharmesh Shah, has coined the idea of the "Frankensystem" which he defines as a "CRM monstrosity cobbled together with software parts." If the applications and software systems you use require multiple databases and can't integrate with one another, how can you leverage marketing automation and AI effectively? The data each system pulls from would be incomplete. Think about the extra work you would be creating for yourself. In a Frankensystem, you'll not only be maintaining clean data for one database, which is work enough, but multiple databases. Ensuring that the technology you employ can access all the same data consistently and integrate with one another is key to your internal success.

Cobbling together software parts might get the job done, but over time you're creating more manual work for yourself and the margin for error increases. When your software systems are not integrated with each other, you have to deliver the messages back and forth, and just like in a game of "Telephone," where a message is being passed down through multiple players, the chances of the messaging being misconstrued increases every time you remove a direct connection. When your technology speaks to one another, accuracy increases and time is saved – both key components for scalability.

Finally, to succeed in utilizing marketing automation and AI, in your internal processes, you must consider your cadence and content. As technology for automation and AI develops, the key for you as an inbound marketer is to identify

opportunities to be helpful. This means getting the right message to the right people at the right time. Doing so requires discerning the balance between not too much or too little when it comes to your content and cadence. This is where you can leverage data from behavioral marketing to assess and automate your touchpoints and campaigns with your customers.

In addition, it's important to set your automation to a strategy and calendar. Automating tasks or employing AI without a clear vision or goal is just more tasks. Utilizing these tools with your motivation in mind creates connection. One way to get clarity on your cadence and content internally is to employ journey mapping. Create a clear story visually of your customer's journey and interactions with you. This helps you experience your business from a customer perspective, enabling greater empathy and empowering you to delineate appropriate touchpoints and campaigns.

Senior product manager at HubSpot, Mike Jaramillo, gives this advice: "One thing I'd recommend more marketers do is: think like your customer.     I see far too many marketers not putting themselves in the shoes of the audience they serve, when doing any sort of journey mapping. This sometimes can cause you to lose sight of that human and emotional connection, which truly builds trust and loyalty with your customers.     This not only gives you a better perspective (from the customer's lens), but it ultimately forces you to create the best customer experience you possibly can."

When journey mapping, consider taking time to set up your CRM scheme and integrations. What applications are you utilizing at each point of your customer's journey? This part of the process often works in congruence with organizing your tech stack. Utilizing journey mapping by visualizing your customer experience is one way to better align your calendar and goals. How do your goals relate to your customers' behaviors? Streamlining your cadence and content internally is about coming up with a plan to reach your customers at the right time with the right message, which involves understanding where your customers are and what they want.

Similar to maintaining good data hygiene, you can use marketing automation and AI to help establish your internal processes for cadence and content. An example of this is automating workflows that remind team members to complete specific tasks each quarter that contribute to your overarching strategy.

Marketing automation and AI can be leveraged in creating exceptional experiences for your customers, but to use them efficiently and effectively requires your internal processes to be integrated well into your customer-facing processes. If you prioritize your data hygiene, engage with data privacy responsibly, organize your tech stack, and develop an internal strategy for your cadence and content, you'll be on your way to delighting your customers.

### Video – Customer-Facing Processes: What to Prioritize When Implementing Marketing Automation and Artificial Intelligence

If streamlining your internal processes for marketing automation and artificial intelligence is like tidying your home in preparation for an event, your customer-facing processes are like the party favors that delight all your guests.

When it comes to customer-facing processes, there are two areas it will be important to focus on – strategizing and humanizing.

Strategizing customer-facing processes for marketing automation and AI parallels your internal processes. In your internal processes, cadence and content are evaluated via behavioral marketing and journey mapping. When it comes to strategizing how cadence and content can delight your customers directly through automation and AI, think about things like the accuracy of your content, the level of personalization to the individual, and the timing of your messaging in conjunction to lead nurturing.

For example, to increase the accuracy of your content, consider writing-assistant software, Grammarly. This tool uses automation and AI to assist in better copy, which results in greater precision in your messaging. Utilizing an application like Grammarly to check your content for grammatical and spelling errors can greatly affect your content quality. We all know what it's like to receive an email riddled with errors. Delighting your customers includes removing even small barriers of disengagement, and marketing automation and AI can help. It doesn't always have to be a complex system!

When it comes to increasing the level of personalization in your cadence and content consider utilizing tools that allow you to experiment with smart content and recommendations. Tools such as BrightInfo, Everage, Sitespect, or HubSpot analyze and use your customers' behaviors on your site to generate smart content, or content customized based on their behaviors. This tailors your website's content to each user.

Remember, customers want their experiences to be personalized. When the content of your website feels built just for them, they are more likely to engage.

Another way to increase the level of personalization in your cadence and content is by using a recommendation engine such as Adobe Target, Optimizely, Dynamic Yield, or Qubit Pro. Recommendation engines employ AI to provide your users with a set of options based on their past behaviors on your site. Automation and AI can also help with send-time optimization. Seventh Sense is a tool that gathers the data of your contacts' interactions with your email campaigns – open rates, click rates, times that they engage – and uses this data to predict the times that your contacts are most likely to read what you send. This tool uses AI to test and analyze engagement, so that over time your campaigns become more effective, and you can automate your campaigns so you don't have to manually send out each email.

Whether it's text completion, grammatical accuracy, smart content, recommendations, or send-time optimization you can use AI and automation to make your content and the cadence of it more engaging to your customers.

Another strategic way to utilize marketing automation and AI in your customer-facing processes is in your availability. All humans need to sleep at some point, but chatbots never do! Whether it's chatbots that recommend relevant knowledge base articles or automated workflows for specific customer actions, you can use marketing automation and AI to delight your customers by ensuring you are ready to respond whenever they seek any level of engagement.

A 2019 study by Comm100 showed that chatbots were able to resolve customer issues from start to finish 68.9% of the time. Research by Kinsta showed using

automation in a timely manner such as with abandoned cart emails, welcome emails, and customer reactivation emails, can increase sales revenue up to 7%.

Using marketing automation and AI to strategize your customer-facing processes can make you exponentially more helpful as an inbound marketer, but we can't forget that helpfulness is only one portion of effective inbound marketing. A holistic approach requires human touch. Humanizing your customer-facing processes can still be assisted by marketing automation and AI though. One example is the application WordTune, which uses AI and automation to audit your copy for tone consistency and clarity, and can even adjust your content to specific levels of formality.

Chatbots are helpful but they can't replace the emotional intelligence and empathy you, as an inbound marketer, provide. One Forbes article suggests that emotional intelligence allows for significantly improved social listening, clarity in branding, credibility with customers, and acknowledgement and growth when mistakes happen.

As an inbound marketer, you don't just want your touchpoints to be efficient, you want them to be empathetic. Every time your customers interact with you, you want them to feel keenly understood and seen.

If your customers are not responding to how you're trying to engage with them – whether they aren't opening your emails or interacting with your chatbot – consider how you might use a human touch to generate solutions. Perhaps you develop a targeted feedback survey or use A/B testing concentrated on areas such as language or tone. Think on whether your language and branding sound natural or if they are full of industry jargon that's difficult to understand. Consider using humor in your earlier touchpoints with your customers to create engagement. Technology glitches and humans are fallible, so when mistakes are made, commit to transparency.

Identifying a comprehensive marketing automation and AI strategy for your customer-facing processes partnered with humanizing your touchpoints, provides your customers with a personalized, frictionless experience. Inbound marketing is

about putting our customers first and surpassing their expectations. Whether it's a conversation intelligence tool, email parser, or recommendation engine, use marketing automation and AI intentionally so that your customers are delighted by each interaction with you.