



How to Have a Conversation with Customers Using Marketing Automation

This transcript was lightly edited for clarity.

Chris: Welcome back to the second part of our two-part mini-series on marketing automation. Again, I'm honored to have Guy Page as a guest on the podcast. Guy has a PhD in genetics from the University of Washington and extensive experience both as a scientist at the bench and as a marketer in the business of life sciences. He's currently the principal at Pacific Biomarketing where he helps life science companies achieve their sales and marketing tools through practical, actionable solutions. Guy, welcome back.

Guy: Thank you.

Chris: In the last episode we introduced marketing automation and talked a little bit about how to select a platform that's right for your company, what seems to be working, and some mistakes companies might make and how to avoid those. Today we're going to go right into the meat of making this stuff happen, which is campaigns and content. What can we learn from your analytics? And what is the ultimate outcome for companies that are doing all this well with their marketing automation?

Let's start, let's talk about planning campaigns Guy. Please lay out for us how you go about setting up an automated campaign beginning with goals and then all the steps all the way through to completion.

Guy: Sure. Normally when I do this I have a visual presentation I can step through somebody and show them step by step, but this is a podcast, I can't do this. I'm going to talk about a relatively simple campaign today and anybody who would like to see it visually can

go to the website: pacificbiomarketing.com and I have a video up there which is essentially the same thing I'm going to be talking about now so you can see it visually.

In the beginning, the most important things are to think about the customers that you want to go after. What are their concerns and what is the message that you want to deliver? We're going to take those as givens right now. That's usually a huge barrier to get over- the careful definition of the customer. What do they really care about and what do you want to say to them that reflects their concerns or their hopes or stuff they need to get done?

But let's begin at that point. We're going to start off and say, okay, to initialize this campaign, we're going to produce a white paper. That's pretty common. That's going to be titled something which addresses your target customer segments' concerns. You make the white paper. You can bring it to their attention in a wide variety of ways: you can send out emails, you can run an AdWords campaign, you can do social media and lots of other things, banner ads on your website. It goes on and on. All of these vehicles will funnel down to the central element of your campaign and that's your landing page. And that's where you're going to do the transaction which exchanges your content for the customer's contact information and informs you that they are actually interested in what you have to offer.

So we build a white paper, we put together the e-mails, the AdWords, ads, the social postings, whatever. All of those point to a landing page which has a form people fill out in order to get the white paper. And that happens. Question number one is, first of all, do these vehicles work? Are people interested? That's your most important question. Did you actually get your message right? Then they get to your landing page and the question is did they download it? Did they fill out the form and receive the white paper? In the backbone of our automation program, the answer is yes. And then we have to ask, okay, do we want to hand them off to our sales organization right now or do we want to give them phone call? Typically my recommendation would be "no", because there are lots of people who will download something just because they like the title, they're tech gurus, they want to add it to their document list, they feel that they need to be informed, whatever. You don't really need to spend any time on them because they're not going to buy.

What we'll do next is we'll create another piece of content and in this particular case, one of the things I might use would be a comparison chart. That would be a chart that compares the benefits that your product or service offers versus the competitors' and give people the opportunity to download that with a whole different form in a different landing page. If they download it, then you learn two important things: first of all, their level of interest is a lot higher so they get a higher qualification score. And secondly, you can feel fairly confident that they are in the stage where they're actually thinking about buying something and they want to compare the alternatives. And that's a really important stage because the next thing you want to do is to take them on to the close. They've expressed interest. Now

they've indicated to you that they are possibly considering alternatives and it's time to get a little...to start pressing them.

Now you can do a couple of things at this point: one is you can transfer them right straight to sales. Automation systems will send an email to your sales organization that says, "Hey, we've got a hot one here so give this person a call, get in touch. They're interested." Or depending on your product or service you may want to add one more stage, which would be, for example, a demo or a trial offer that would indicate that people really are pretty close to buying. You can program in either of those options. Let's suppose they go with the trial offer, you can say here, get 50% off this trial kit. They order the trial kit and as soon as they order the trial kit their name is transferred automatically to your sales organization.

That is the backbone of an automated system, where they go from the initial email all the way through to an email that goes to the sales person without you having to do anything.

But let's back up just a second because along the way there are also branches. Let's suppose when they get to the initial landing page, they don't download it. Well, if you do have the email address, either you came from an email list of your own or an external one, you can send them a follow up email because there are a lot of reasons why people don't open an email or they don't download. Because they didn't have the time, it just didn't ring with them at the moment. Send him another one that has a different subject line, slightly different spin. Do they download that? Yes. Send them right straight to the comparison chart. If they don't, maybe you want to send a third email. Maybe you don't. It's a personal call. If you don't, you can send him to your nurture list which you can keep as a...because you already got a sense that they're interested, you can keep working them until their budget comes through, they encounter a new problem they didn't have before, for some reason they become interested in what you have to offer.

All along the way there are branches which allow you to measure their response: they open, don't open, download, don't download. And then respond with a...follow on of your own. It begins to look a lot like a conversation, a lot like an interaction between a sales person and a customer. But you're doing it all pre-programmed and you're doing it all in an automated fashion. One thing I want to emphasize about this, well a couple of things, is that once you build this kind of a campaign in your automation system, it stays active all the time. So next month, if someone comes from your website, comes from an emailing that you do, comes from a referral from somebody else or an organic search and hits your landing page, that automation process is still going to be there and will still process them and still hand them off to your sales. It's a constant lead generation engine.

The second thing is that once you've build it, you've got your target. It's based on a target market and it's based on a target message. You can build another one. You can build ten more. And you have them all operating at the same time casting a really huge net out over

your markets to bring in leads. To me that is absolutely the most wonderful thing about marketing automation.

Chris: That is the magic. It's my perception that many people...you'd think they do, but maybe they don't, appreciate that active-all-the-time thing.

Guy: Oh, absolutely right. That is one of the "aha's" and the people I talk to they realize that this thing, once they build it it's going to...they flip the switch and it just goes.

Chris: I think that what automation does for you is let you think a little bit more long term about the kinds of things you're going to build which should, theoretically, lower your level of effort over time. Obviously you're always going to be busy doing something but I think you're going to be more productive.

Let's talk about, you've talked about building a campaign. There's a first stage, what do people care about? We could talk a little bit...let's start with that. Talk about personas for a minute. This isn't necessarily the main topic of today but let's throw that in there since that's where you're really starting.

Guy: Well, there's a huge amount of discussion around personas. Everybody knows the term. Everybody uses the term. I would say very few people actually use the concept in their work. It is the cornerstone, the bedrock, the foundation, the most important part of digital marketing because basically where you want to begin anything is to start with the question: what do people care about? Why do they care about this in relationship to your product or your service? If you know that, the more you know about your customers, the better you're going to be able to answer that question. And if you don't know your customers very well, you will come up with an answer and you'll produce something and you go through all the work that's subsequent to your plan and in many cases it's a waste because you didn't start off with a clear understanding of the customer. I know everybody says this. It just happens to be really true. And changing your mindset to not ask what can we do but what do customers care about is a bigger challenge than most people realize but it's fundamental to success of any kind of marketing these days.

Chris: Exactly, and I have to ask, if people aren't thinking about what their customers care about, of course I'm guessing what marketers are producing is more product related, but if you're not thinking about what the customer cares about, what is your target? How do you even know what to build and what to talk about?

Guy: Well, we can take a really simple example. Let's say you're doing multiplex assays and you're a company that has a way to reduce the reagent consumption in multiplex assays. And you think, 'This is awesome. People should really love this because it saves them money and they'll get more out of their dollar. So what we're going to do is we are going to

tell them how they can save money using multiplex assays.' And that's what you're talking about. You have made an assumption that that is an important issue for them. It's important enough for them to cough up how many dollars to acquire new equipment and change their procedures to get what you have to offer. That may not be the case. You're talking about your product. You're talking about the benefits that you see as valuable to someone, not what they see is valuable. You may be surprised about the market response. There are many other examples where people have made perfectly legitimate, logical, clear and unassailable assumptions that turned out not to be workable in the market.

Chris: Yeah. We're testing a hypothesis of creating content at that first stage. So let's assume, we have defined a persona, which is our best guess, and I know there are tools out there to actually help refine that. But you make your best guess about who this person is and then, I think, the more you define it, I believe, the easier it is to figure out what they care about. You might still be wrong but you've narrowed the margin of error. You're going to create a piece of content, you put it out there and as you said, they either download it or they went to the landing page and decided not to. Then that triggers an alternative.

Guy: The beauty of digital marketing is that you get this answer very fast. If you do treat it, and one of the things that I counsel people on is not to put all your chips in the first basket, or eggs in the first basket I guess, not put all your chips on the first bet, because you can, for example, instead of like a full on white paper you can come up with something which is like a light white paper that addresses the issues but doesn't cost you a whole lot of time and effort to make. But it's a feeler. You send it out, and it's legitimate, totally technically, scientifically, legitimate. But it's not going to cost you six months to produce. You can get a feel for whether people are interested or not. You're testing the messaging is what I'm saying. You can do that very fast and if the thing doesn't work, throw it away. Come up with a new one.

Chris: Okay. Are we ready to talk about the importance of content, structure of content?

Guy: Oh, yeah, absolutely.

Chris: I just want to make sure you hadn't thought we'd covered that.

Guy: No. I think that if it hasn't obvious already that the whole idea of content, and I guess marketing if we use a larger word, they're closely integrated because content is your way of carrying on a conversation with people. It's what you bring to the party. It's your ability to talk with customers in a meaningful way. That's what we do these days, is content. It really works because that's what people expect and they regarded it as a legitimate conversation. Many of the suppliers don't understand their role in the conversation and how they can make it happen and help customers and help the conversation go forward. I'm kind of going on here but if people get overwhelmed by content and they don't think they have to be

because you can take your idea and you can build it out in a variety of ways. You can take a meaningful statement and, as the term is, repurpose it in ways that give you a lot of mileage for, I won't say a relatively little amount of input, but definitely amplify your input. But Chris, this is really your area so I'm going to like defer to you on...because I know you have some really good examples of how this can actually be done.

Chris: Well, thank you. The way I think about content, and I try to get my clients to think about it as well and I've gotten good response on this, is to think about making your content in smaller pieces. Guy, you talked about getting someone's attention with something they care about and then, for example, a comparison chart. The way I think about it, which I think aligns pretty well with what you were saying, is what are those high level topics that someone who is in your target market, that customer we just defined, cares about, even if it's not related to your product but now we're finding out who they are?

Then I would always have a call to action to move them to another piece of content so they download the white paper as you say, and the next thing is a comparison chart. I think very much along the same lines that in the second stage I'm trying to either give them literally a comparison chart or a white paper or some piece of content that says here are many alternative technologies for answering the same question. Then specifically with respect to our technology maybe here are the other people, other companies who make something and how our product compares to them in different categories, for example.

But that would be a hugely valuable piece to someone who's seriously looking for a new product. Then it goes down to the content that continues to educate and then moves them towards a close. I try to get my clients to think about the buyers' journey. Everything a buyer does in the process of going to a website, doing a little research, downloading a paper, going to a webinar, whatever it is, there's a question that they have in their head that they're trying to answer and every answer to one of those questions is a piece of content. That's micro content but it can be assembled, if you think about it, into larger things. I help people figure out what are all the questions they might ask and then how can we assemble those in an appropriate way, in different ways? Then there are multiple options but when you pick to do something, for example let's say I might do a webinar to create awareness for people in my target market about anything that they care about. Then the call to action might be, "Hey. If you want more detail go look at this."

And then I might write a blog post that answers a single question that was presented in the webinar and the call to action would be, "Hey, we talked about this in much more breadth and depth. Go listen to this webinar," and just try to keep people moving. But think about creating content in smaller pieces that you can repurpose because, in my experience, taking an existing piece of content, a full length long form piece of content and repurposing it is actually not as easy as many people make it sound. But if you build it from small pieces and

you have that mindset, building multiple things from the Lego bricks, as I like to call them, much easier.

Guy: Great. Well, I think getting into a content-oriented mindset is really difficult because like other things, like personas and like value propositions and many of the terms that we bandy about, we get them but making them real takes a bit more work and understanding and I think your recommendation here is terrific because it's very actionable, you can really get to work with it right away. It will help you think from a content point of view as opposed to, I don't know what we call the alternative thing, like the big white paper that we've always used in the past.

Chris: Right. I think we could do well. We could all do well to examine our own buying process. We don't have to be buying scientific kits or instruments. If you go buy a digital camera you're doing the same thing. You're going to go to consumer reports, you will look up comparative stuff, you'll read blogs from photographers, what do they use? There's a number of pieces of content, it's so transparent that you don't even think about what you're consuming. Yet you're doing the same thing. So it shouldn't look so foreign to create it for your customers. But maybe it's so transparent to us that we're just not making a connection.

Guy: Well, we aren't. Just one little, quick comment. I think it's very worthwhile once you become aware of this process, since everybody uses it- pay attention to how people market to you. They're doing the same thing. They're doing the same kind of content structure, Chris that you just talked about and once you begin to see how they're doing it to you, you can learn a few lessons, regardless of the product.

Chris: Yeah. When people talk about that the first thing that pops in my head is the Lego movie, which is really an hour and a half of content marketing. They never ask you to buy Legos but they're showing you Legos in action in so many different ways. I don't know, it's just one of my favorite examples. It may seem silly but...

Guy: Let's see like a chromatography movie. What do you think?

Chris: Yeah, I'm looking forward to that. It could happen. All right, we've talked about that. Let's talk about the workload around creating content because I think that's the next thing that comes up. People say all, "All right. I recognize I need to do content marketing. I need to fill my marketing automation platform with content because there are all these decision points that I need to be ready for." What do you see as people's challenges around the workload and getting around that? We just talked about it a little bit but...

Guy: Yeah. Well, you will find out as soon as you start trying to put a process like this into place that it becomes overwhelming. It's not just overwhelming because you have to make

stuff, which you do and your approach to it I think is very efficient, but it's because in any conversation you're having...you imagine yourself you are having conversations with hundreds or thousands of people at the same time, all of whom have different responses to what you're saying and you have to respond to each one with a personalized response. That's where the automation comes in. The thing I mapped out earlier on is a fairly simple marketing automation campaign. They get really, really complicated. The great thing about automation is you set it up as if you're in a big room of a hundred people and you get to go ahead of time and talk to each one and figure out what your conversation is going to be. Then you get to build in your response to each one of them so they all feel like they're getting a personal conversation even though you're carrying on a hundred conversations at the same time. So you take your content and through the automation process you can leverage it easily to take care of all of your customers and they all feel like they're getting what they want.

Chris: I like that. I'm curious about your approach with that. Would you have, at each of the stages you pointed out... of course the ideal is to have multiple pieces ready for whatever response they have. But do you start with let's make the minimal set and then find out where we might need to make more? Because you might have some steps that are killing it and then some steps that aren't. But how much time do you invest upfront for the alternative possibilities rather than build the core and then expand?

Guy: Well, as much as you can up front because that'll save you a lot of time down the road. It's very worthwhile for two reasons to take your campaign step wise. Let's use our earlier example. You make a white paper, a high level one. You put it out there and you see if people are going to respond to it. That's the bait you throw in the water. Do we get bites, yes or no? You could wait and see and then respond or in the beginning you could say, 'What are the five reasons why someone might not want this?' And give yourself some thought. If you can't answer that question, that's a good time to go out and talk to customers and see if you can figure it out.

Then if you've got reasons one, two, three, four, five, come up with a counter-argument for each one. Now you can see that we've just added a fair number of branches to our automation system. But it's fine. All you have to do is plug them in. You can have a very short response. It can be simply an email with a short discussion. It can be a blog post with a short discussion of a topic that you think might have prevented them from downloading your white paper. The reason I said there is a couple of benefits of this is, first of all, it gives you, in advance, a way of recapturing people who may not have downloaded the first white paper. But it also forces you to think through your customer perception, which as I said earlier is the most important thing you can do as a marketer.

Chris: I love that. Yeah, it makes you rethink. And then I also like your answer in that the alternative branches don't have to be huge, long form pieces of content. They can be as simple as an email or a little more in depth, like a blog post but maybe something that doesn't require as much effort to create as, for example, your initial white paper.

Guy: Right and they don't have to fill out a form. It just moves them back to your landing page.

Chris: Right, exactly. I love it. Let's move on because we have so much to talk about. I'm interested in analytics so let's talk about customer insights. I think when people are thinking about marketing automation they might not be considering the value of the information they get back based on customer behaviors.

Guy: Oh, well. This has got so many dimensions. One of the things that's happening and has been for several years now is that because of the Internet and because of our access to digital information, marketing tools have just been exploding. There's so much out there. You can get so much information and it can tell you, and it does tell you, a great deal. One of the issues we have now that I've seen is the gap between getting the data and responding to the data. We used the conversation analogy before, it's kind of like if you're in a conversation with someone and they say something, they like say, "Hey, you're pretty cute." And now you go like, "Oh, I got a really important piece of information. I'm going to need to get back with my team and do a presentation, prepare a plan and come back and then you come back and say, 'Hey, you are too.'" If you're back two months later, well guess what? The party's over. This is the world we live in. People will tell you you're cute and you need to be able to respond. You can get massive amounts of data. You can follow your customers behavior every step of the way quantitatively. You can see what works, what doesn't work, how well it works, where it works. But the difficult part is to try to change the way that you respond to them. Automation gives you a way to start that process. But it really is a question of how you as a marketer and your organization are prepared to respond to the information that you get. Because if you do it like I said before, where you're going to take the "Hey, you're pretty cute" and you turn it into a series of meetings and proposals and presentations and approvals, you're not connected with your market anymore.

Chris: She left the party.

Guy: Exactly.

Chris: With someone else.

Guy: Totally, who was actually able to respond to the comment.

Chris: Yeah, exactly. That's a beautiful analogy. I think that's fantastic. I've used a little bit of marketing automation and to me what I really like is being to see where people came from,

what campaigns are worth putting more effort into, and besides the immediate interaction, but also the bigger picture of the analytics, like this channel is working, that channel doesn't. We have lots of leads over here but none of them turned into real customers. Those are, who knows why they're here?

Guy: Yeah. Well, for budget management, it's solid gold. No question about it. You want to get ROI out of marketing dollar. You're not automating like you're wasting money. I would almost guarantee it.

Chris: Let's talk about, I'm interested to hear about profiling. You and I talked about this a little bit before the call and we agreed this is maybe second level content marketing about progressive profiling where you ask a visitor to your website a different set of questions on every subsequent visit to your site. You're accumulating a larger set of data about them over time. Tell us a little bit about the adoption you see of that or other ways you can profile your customers without executing that variable form.

Guy: Well this goes to one of the central issues that I see a lot and that is not progressive profiling but profiling at all. I've talked to a lot of people about this and one of the first questions is like, "So tell me about your customer and what do we know about them." The information tends to be kind of superficial. "Well, they're immunologists and they work in universities and they work on T cells and okay, that's what we know." That's not going to take you very far. The idea of developing a profile and what a profile is and how you use it has yet to become significantly embedded. Progressive profiling is great once you get into that mindset and you've got yourself a big blank spreadsheet with lots of open spaces that you need to fill in because then you can make your progressive profiles. You can design them in a way to start filling information in and attaching them, linking the different pieces of information so that you do get an actual customer profile using this vehicle.

But often, I would say the first step is to look at some of the tools that are available. There's a lot out on persona development, on customer profiling and set the challenge of really creating a robust, deep and useful, actionable customer profile. You'll see benefits right away. Anybody doing this is going to get payback almost immediately when they start to do it. Then the progressive part will reveal itself automatically and one of the great things about the automation systems is they help you do that automatically so you don't have to do it yourself. The complex management of this goes away.

Chris, in our earlier conversation you mentioned the institutional issues that are related to this. One of the benefits of a self-contained automation system, which most of them are because they'll have CRM integrations and they'll have marketing parts that you can keep all the information within the marketing part. If you have a little bit of a disconnect with your IT group or with your CRM manager, you can still gather that information for yourself, for your marketing team within the automation tool. And if even so you run up against issues,

organizational issues with the collection and storage and use of data, which is not uncommon, then I would have to say that there are some among you who are warrior marketers. We are in a new age of marketing and you may want to take it upon yourself to bring your organization into the 21st century and the practices that are required to have effective integration and conversations with your customers and go forth. Go forth and do it.

Chris: I love that. I would like to think that everybody who listens to this podcast is a warrior marketer.

Guy: Let's hope so.

Chris: That's why they're listening, to get these ideas and then say "let's make something happen in a new way." All right. Finally, I'm curious about the outcome of all of this. Someone goes through your funnel, they've downloaded a number of things. You did mention earlier, at some point they've requested a demo, of course anybody who does that is going to be immediately referred to your sales team but maybe there's a ratio you can tell me about or just tell me what happens? At the end of the thing someone picks up a phone call and says hey, I have to have this thing or you're building up your profiles and your data around a customer and then deciding based on their behaviors the time it needs to be sent to the sales team?

Guy: Well, this is actually a really interesting question because, I'll give you a recent example. I was working with a company that had a traditional model where the transfer to sales was the natural part. Marketing would get a lead, marketing would hand the lead off to sales, sales would go out and close the deal. As we looked at it and we looked at the costs associated with these different steps, we realized that for many of the products that they were selling that wasn't required and that if we put the effort into a little more, let's just say content development, at the end we could close a lot of sales without having to hand them off to sales people.

So the sales people could spend their time on the products that actually did require a demo or a more detailed exploration of the customer's applications and the people who would look at it and go, "Okay, in comparing the three alternatives I have available to me, I want this one," and place an order. Obviously many of us buy that way in our own lives so we said, "Well, okay. Let's just take marketing and make it a lot more like sales. We have to think a little further down the pipeline and think about how are we going to get people to close and what if they don't buy it, all the kind of stuff that consumer companies do naturally and do it for a scientific company." As you mentioned earlier, Chris, if you're going to demo a piece of equipment, yeah, you have to hand it off to sales. But I think I would encourage marketing people to push to see how far they can get down the sales process

without having to give it over to a sales person because I think you can get a lot farther than you might believe at this point.

Chris: Yeah, and avoid perhaps wasting sales people's time on leads that aren't quite ready or were never going to buy or people that were going to buy but they didn't need to talk to you.

Guy: Exactly.

Chris: Nice. Well, this has been a fantastic two-part conversation. Again, if you didn't listen to the first part, go back and listen to that one. I really enjoyed this one. I thought it was hugely valuable. I learned some things that I hadn't thought about with respect to content and automation. I just really want to thank you for all your time and insights Guy Page.

Guy: Thanks so much Chris. It's been a total pleasure.

Chris: Bye-bye.

Guy: Bye.

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