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MARKETING AUTOMATION MIGRATIONS, PT. 1

Getting started with a marketing automation system

September 8, 2016

(https://www.godaddy.com/garage/webpro/clients/getting-started-with-a-marketing-automation-system/#disqus_thread)

Similar to migrating a domain to a new server, moving from one marketing software to another can be cumbersome (even for the pros). Do it well, and you'll have better, cleaner and more actionable data driving your marketing strategy. Do it poorly, and you may lose valuable contacts, measurable revenue and long-cultivated subscriber lists.

If you're thinking about or have been tasked with moving your marketing efforts to the most advanced setups – marketing automation systems – this post details one way to do it.

The value in marketing automation systems

Before we dive into the steps, let's talk for a minute about the extensive value in switching to a full-blown marketing automation system. To write this series, I used my personal website as a guinea pig of sorts. Here's why:

The vendor I've used for almost 10 years – Blue Sky Factory, acquired by in 2011 by WhatCounts – is end-of-lifeing its email marketing product Publicaster. Although Publicaster will be sold to a third-party company, I think it's a good indicator that it's time to move on from just a pure email marketing system. It's time to get modern.

The benefits of a strong marketing automation system are difficult to overstate, as they offer email marketing
(<https://www.godaddy.com/online-marketing/email-marketing/>)

isc=cardigan) But also landing pages, lead scöring and many möre options.

Businesses large and small can benefit from this robust solution.

Setting priorities for marketing automation

The first thing we need to do in evaluating marketing automation systems is to look at the market and see what's out there. What am I looking for? What benefits do I want?

Personally, I know I want two things: **email marketing** and **lead scoring**.

Lead scoring is important, especially for small business owners. They need to focus on both quality *and* quantity. They need audiences to help ensure enough people are paying attention to what they're sending out, and then engaging with their content (<https://www.godaddy.com/garage/smallbusiness/market/download-free-email-marketing-guide>). They also need to know who the best customers are.

For my site, I culled that data anecdotally from my eCommerce system, but having it all in one spot would be much more convenient. Additionally, if you're building out things like influencer lists, a marketing automation system can help you do that at a personally identifiable level.

Now that we know what we want in our system, it's time to think about cost.

Most marketing automation software costs \$1,000 per month or more. With my small business account, I send between 15,000 and 16,000 emails each week, about 60,000 each month. This small business account does not represent my full-time job – it's a side job/project/hustle/beer money, which brings in about \$5,000 every month in revenue. If that side hustle means spending \$1,000 plus per month on marketing automation, it's out of the question.

Almost as important as cost is understanding what your own personal capabilities truly are.

If your forte is design and development but you dabble in marketing, some steps in the process will be challenging. At the same time, keep in mind your capabilities. There are a few things that set me apart and will influence my decision-making process compared to the average small business owner:

1. I can write code (<https://www.godaddy.com/garage/webpro/development/10-tips-for-writing-clean-code/>). I'm not that great at it, but I'm good enough to get things working and customized, if need be.
2. I can manage and maintain IT infrastructure very well, which results in a considerable cost savings as I don't have to hire anyone to maintain my system.
3. Because of my daily work at SHIFT Communications (<http://www.shiftcomm.com/>), I can operate just about any kind of marketing automation software relatively quickly.

Your client's technological know-how will dictate some of the decision process in choosing the right marketing automation system.

The options vary from those ready to go out of the box to fully-customizable solutions.

Finding the right marketing automation syst

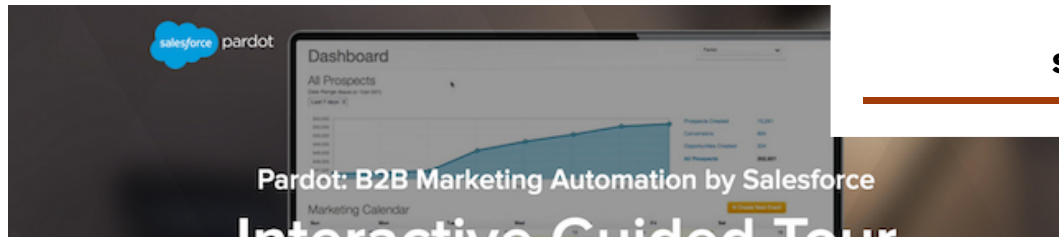
A good place to start your online search is with small-business marketing automation, restricting your results to B2B marketing automation, Pardot (<http://www.pardot.com/>) is often considered the gold standard.

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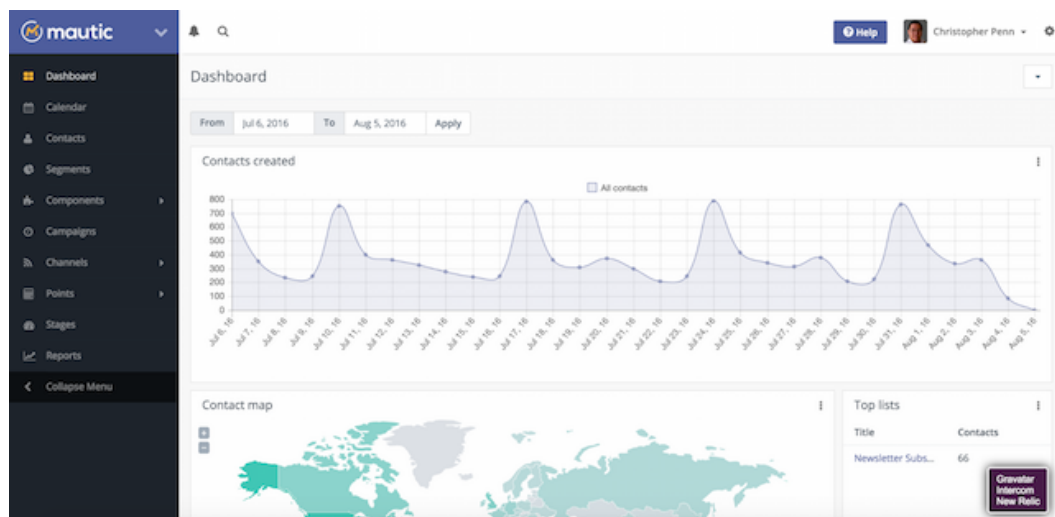
Also among the top three is Marketo (https://www.marketo.com/) which is very robust and offers many unique features. Another solution you'll often hear about is Oracle Marketing Cloud (https://www.oracle.com/marketingcloud/index.html), formerly known as Eloqua. With any of these options, you're most likely looking at \$2,000 to \$5,000 every month.

But don't worry. There are also more budget-minded options.

On the lower end of the spectrum is Mailchimp (http://mailchimp.com/). A quick calculation tells me it would cost about \$150 per month to manage and automate emails to my approximately 15,000 subscribers. That's still a decent amount of money, and if you add options you might need another \$199 for basic marketing automation. While the software is of quality, it's still quite expensive for my side-hustling self.

Finally, there is Infusionsoft (https://www.infusionsoft.com/), another major player in small-business marketing. Running the numbers tells me it would cost about \$600 every month to service my entire contact list; again, not really an option for me.

It wasn't until recently I became aware of a piece of software called Mautic (https://www.mautic.org/). Mautic is open-source marketing automation.



(https://www.godaddy.com/garage/wp-content/uploads/2016/08/mautic-marketing-automation.png)

You have to download the software yourself and install it on a server, or you can use a self-hosted version for about \$12. I decided to go with the latter because even though I can run a server, it's not the best use of my time. If you're already a GoDaddy customer — or want to be — GoDaddy offers Mautic with Bitnami application hosting (https://bitnami.com/godaddy) that provides great scalability and efficiency.

In order to make it work best, you also need to use a third-party email backend. It can send from your server, with Amazon Web Services' tool called Amazon Simple Email Service (https://aws.amazon.com/ses/), which o

Outside of these five systems I mentioned, there are dozens more to choose from. Before you get things up system.

Taking stock of your marketing efforts

After picking a marketing automation solution, it's important to identify all the pieces of your existing email ma create a new email backup folder on your desktop.

Using Apple's built-in UNIX system, you can quickly tie things up rather than muck around with individual fold

```
Desktop — -bash — 120x37
Dalaran:~ cpenn$ cd desktop
Dalaran:desktop cpenn$ mkdir email lists
Dalaran:desktop cpenn$ mkdir lists
mkdir: lists: File exists
Dalaran:desktop cpenn$ mkdir templates
Dalaran:desktop cpenn$ mkdir landingpages
Dalaran:desktop cpenn$ mkdir logos
Dalaran:desktop cpenn$ mkdir tracking
Dalaran:desktop cpenn$
```

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(<https://www.godaddy.com/garage/wp-content/uploads/2016/08/marketing-automation-backup.png>)

Here's a sample set of commands:

- Mkdir lists
- Mkdir templates
- Mkdir landingpages
- Mkdir logos
- Mkdir tracking

Remember, my existing setup was purely an email marketing system; there weren't many major landing pages, except the opt-in forms, which I'll want to capture. I'll also want to capture the conversion codes in case I need to replicate them later.

Next, you'll want to grab your public pages, which are typically landing pages that include HTML. For example, my subscriber preferences page contains quite a bit of code, which I'll want to capture in its entirety. You'll also need to verify if there any other pages with customizations.

After that, categorize your pages, starting to extract your email lists one by one from your current system. Some lists may not necessarily be the mailing lists you want to use for messaging, so we'll eventually separate those.

After you've moved all lists into your email backup folder, turn your attention to logos (if you have them) and newsletters. I personally save my newsletters separately from HTML email because I create them in a program called Scrivener (<https://www.literatureandlatte.com/scrivener.php>). It's a book-writing program that automatically compiles my newsletters so I don't need to save them individually.

Finally, you'll check to ensure you've moved over all of your email templates and tracking codes using Google Tag Manager (<https://www.google.com/analytics/tag-manager/>). The easiest way to do this is to compress and put these items in a container.

Before you migrate the major pieces to carefully about the cleanline

Get our newsletters

My newsletter subscribers list, for example, is a very large (and not necessarily the cleanest) list. To make the

List cleaning for marketing automation

The easiest way to clean an email list is sorting by bounced status, which clearly shows active users. These "bounce territory," do your due diligence and remove those users (<https://www.godaddy.com/garage/smallbus-efforts/>).

**There is no point in emailing people who c
you're sending.**

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You'll also likely have soft bounces and unsubscribes you'll want to remove. I recommend saving these users in a second tab or document, which you can eventually use for advertising and other outreach efforts.

One way to recycle these users is setting up an ad campaign (on the social media network of your choice) to advertise to these email addresses. Although they may have updated their email addresses (hence the soft bounce), there's a good chance they haven't updated their social media profiles. As a result, you might be able to advertise to those people later on down the road.

"Hey, you used to be part of my mailing list, why don't you come back and learn what's new?"

In my next post, we'll dive into the actual setup of your new marketing automation system.

Also published on Medium (<https://medium.com/@cspenn/5e4773b3122d>).

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VP of Marketing Technology at SHIFT Communications (<http://www.shiftcomm.com/>), Christopher S. Penn is an authority on digital marketing and marketing technology. A recognized thought leader, author and speaker, he has shaped three key fields in the marketing industry: Google Analytics adoption, data-driven marketing and PR, and email marketing. Known for his high-octane, here's how to get it done approach, his expertise benefits companies such as Citrix Systems, McDonald's, GoDaddy, McKesson and many others. His latest work, Leading Innovation (<http://www.leadinginnovationbook.com/>), teaches organizations how to implement and scale innovative practices to direct change. You can find him on Facebook (<https://www.facebook.com/christopherspenn>), Twitter (<https://twitter.com/cspenn>), LinkedIn (<https://www.linkedin.com/in/cspenn>) and Instagram (<https://www.instagram.com/cspenn/>).

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