Make Marketing Automation and AI Work For You
Agenda

• Introduce the Level Agency team
• Define marketing automation and AI and provide some examples
• Who needs this technology most today?
• Review and prioritize specific use cases
• Establish a sample implementation roadmap
• Look to the future
Who Are These Guys?

Patrick Van Gorder, Senior Vice President

Brad Stephenson, Sr. Director of Client Services and Special Projects
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Level Agency

We are experts in digital customer generation.

We are a full-service agency custom-built for B2B and high-value B2C partners. We invest in people, technology, partnerships, and strategies that deliver measurable ROI for our partners.

We plan and build vertically-integrated conversion funnels that reach, engage, activate, and nurture highly targeted audiences with messages that resonate.
We Offer Full-Funnel Marketing & Sales Support Service
Our Partners

We plan and execute effective digital marketing strategies for more than 40 clients across a range of industries.

Industries
- B2B Services & SaaS
- Education
- Insurance
- Healthcare
- Mortgage
- Finance
- Legal
- Technology
- Automotive
- Manufacturing
- Telecommunications
- Travel & Hospitality
Defining Marketing Automation and AI
Marketing Automation

Marketing Automation is using software to more effectively communicate with audiences on multiple online channels (like social, email, search) and automate repetitive marketing tasks.

Marketing Automation Platforms are either multi-use contact management solutions, OR single-point solutions that address specific opportunities.
Artificial Intelligence

**Artificial Intelligence** is intelligence demonstrated by machines.

**Marketing Artificial Intelligence** refers to advertising technology systems that utilize data and machine learning to automate or optimize key marketing processes.
# Marketing Automation

- Multi-use tools like Marketo, Hubspot, and Pardot
- Single-point solutions
  - EMAIL: Mailchimp
  - SEARCH: Kenshoo or Marin
  - DISPLAY / VIDEO: DV 360
  - SOCIAL: HootSuite or MeetEdgar

# Artificial Intelligence

- Platform-integrated AI
  - Search and recommendation engines
  - Lead scoring
  - Algorithmic optimization engines
  - Smart assistants
- Analysis and insight tools like IBM Watson
Marking Automation: 1998

“Press 1 for Sales, Press 2 for Service”
Marketing Automation and AI: 2012

“Target thinks my daughter is pregnant”
Marketing Automation and AI: 2018

Predictive channel, message, or offer customization
Will it Help Me Reach My Goals?

The impact of message personalization or other baseline marketing automation functions is well documented.

The value proposition for higher function automation and AI tools isn’t always as clear. Each year, Level Agency implements a man vs. machine test to establish the efficacy and ROI of automated optimization tools.

Though some of the technology has existed for more than a decade, it didn’t win until 2018.

3X increase in management efficiency, 58% improvement in conversion performance
It’s Only a Matter of Time Before the Machine Wins...
Who Needs this Technology Most Today?

- Companies who sell their products online
- Companies with long, complex sales cycles and higher-value products or services
- Companies with a customer service focus
- Companies willing to make upfront capital investments to streamline and improve their future marketing
- Companies with a data-first mentality
Why Does My Data Approach Matter?

• Machine learning doesn’t “think” like you or I do
• It requires specific human inputs and objectives
• It then either analyzes a back-log of data (i.e. predictive analytics)
• Or runs water through the pipes to develop a new data set (i.e. automated bid optimization)

If the data is inaccurate, inconsistent, or otherwise bad, the tools won’t work.
Making Automation / AI Work for You
Email Marketing Automation

Nurture leads by sending emails related to the problem the audience is facing, and the solution you present for that user.

**Digital entry into flow**: Social media prospecting ad

**Lead gen**: User drops off after step 1 of a 4-step form but email is captured

**Day 1, Email 1**: Complete your registration to get these great benefits of becoming a widget customer.

**Day 4, Email 2**: Learn how one customer found success with our widgets.

**Day 7, Email 3**: Download our free infographic highlighting the lifetime potential value for a widget customer.

**If conversion action**, user is added into the current customer email nurturing campaign

**If no action**, add into “Long-term nurturing email campaign” or content/newsletter

**Day 10, Email 4**: Frequently Asked Questions about our widgets.

**Day 13, Email 5**: Call to action. We noticed you didn’t download our widget success guide. What stopped you?

**Day 15, Email 6**: Video testimonial with another successful widget customer.

Social and display remarketing campaigns used as subtle reminders throughout.
Predictive Advertising (AI)

Source: WYLEI.com
Predictive Analytics

Use cases:
• Customer buying behaviors
• Customer value
• Product development
• Lead scoring

Example resources:
• MS Azure
• Google Cloud
• TensorFlow

The Predictive Analytics Process

Pull  Prepare  Pick  Predict  Plan

Extract the data from where it lives.
Clean, refine, and prepare it.
Identify what to predict.
Create the prediction.
Develop a plan of action.

Source: christopherspenn.com
AI-Powered Call Tracking

Tools like Invoca are doing more than just tracking calls. Now we can understand the source of the calls, the duration, the type of phone, and what was said.

Most importantly, based on the conversation, the lead can be assigned a score.

The days of human call monitoring are nearing an end.
Google RankBrain

- As many as 90% of B2B buyers use Google search to begin their buying journey (Marketo)
- 90% of searchers haven’t made their mind up about a brand before starting their search. (Status Labs, 2018)

Optimizing for RankBrain

1. Run a depersonalized search for a set of keywords
2. Create a list of ranking factors based on top results
3. Develop great natural-language content using ranking factors
Implementation Roadmap

1. Identify opportunities for Automation/AI
2. Validate the opportunity
3. Evaluate solutions and features
4. Establish budget
5. Identify a champion or gain buy-in
6. Establish KPIs or success metrics
7. Launch process or system
8. Measure and report
9. Rinse and repeat
Looking to the Future
The Future

1. Consumer expectations of relevant ads will increase

2. Marketing Automation and Marketing AI will become more and more ubiquitous, and will be an expected feature in every major digital platform

3. The effectiveness of Marketing Automation and AI tools will continue to increase, while the cost simultaneously decreases – making the ROI case for businesses more and more compelling

4. Internal teams and marketing agencies will increasingly focus on systems integration and data analysis in addition to traditional strategy, messaging, creative, and media buying roles

5. The emergence of voice search, virtual assistants, and augmented reality represent massive opportunities – and new challenges – for businesses and technology providers

6. Privacy questions and “the creep factor” will grow and importance – and increasingly be evaluated on a consumer value basis