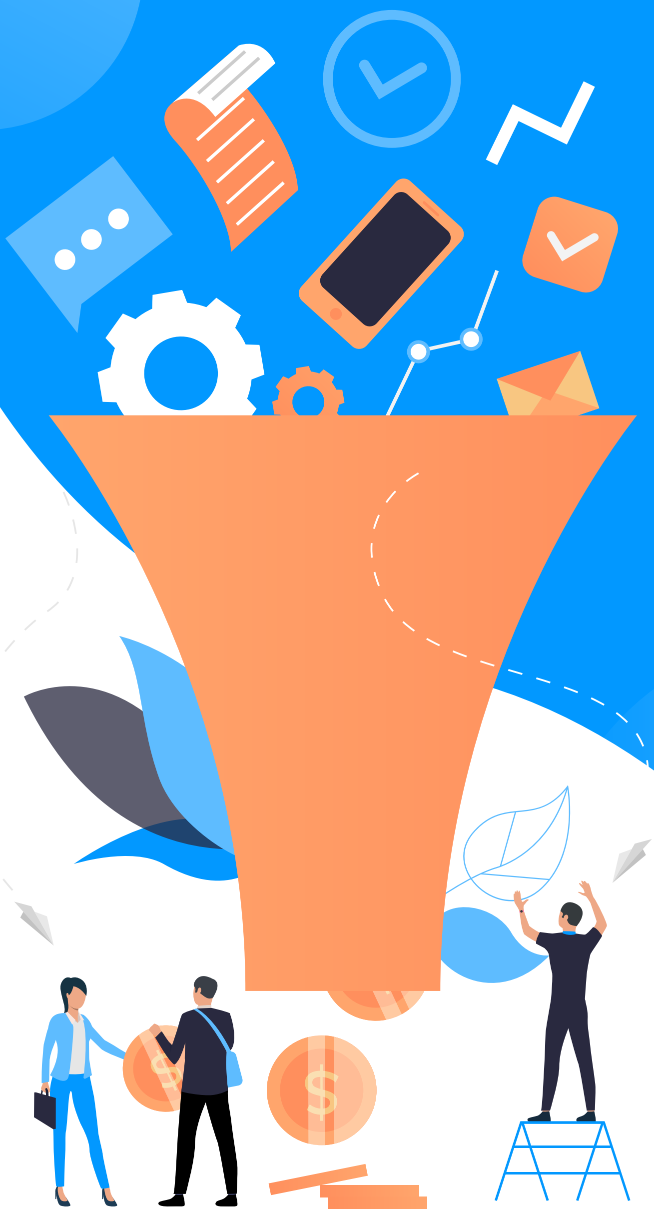
NET-RESULTS
marketing automation

HOW TO IDENTIFY PROSPECTS WHOSE TIMING IS CHANGING TO YOUR ADVANTAGE

Locate and act upon opportunities in your database with marketing automation



This PDF is part of our video series "2 Reasons to Use Marketing Automation" which you can find right here [link] on the Net-Results website.

DESPITE WHAT YOU MAY HAVE BEEN TOLD OR BEEN LED TO BELIEVE, THERE ARE REALLY ONLY TWO REASONS TO USE MARKETING AUTOMATION SOFTWARE:

1. **To identify prospects whose timing is changing to your advantage.** Meaning that they're becoming ready to buy - and you'll know when that happens.
2. **To build a relationship with prospects whose timing is yet to change.** To add actual value to your prospects' lives, so they'll remember you when it's time to purchase.

Everything else in your platform (like a drag-n-drop email builder) is a "nice-to-have." Useful, absolutely. But secondary to the things that really move the needle for your company.

HOW DOES IDENTIFYING PROSPECTS REALLY WORK?

In this PDF worksheet, we'll show you how to use marketing automation software to identify prospects in YOUR database whose timing is changing.

The payoff? **You'll help your sales team identify and close more deals.** You'll actively help your company bring in more revenue.

Sound good? Let's go!

MARKETING AUTOMATION FEATURES WE'LL USE

Which features of your marketing automation software will you need to identify prospects whose timing is changing to your advantage?

1. Segments and/or lists
2. Triggers and alerts
3. Lead scoring
4. CRM integration
5. Task scheduling (optional)

THE GOAL: ALERT THE RIGHT PEOPLE TO MOVE IN

How do you monetize prospects whose timing for purchasing is changing? You need to spring the right people into action, at the right time. In most cases, this means alerting a sales rep.

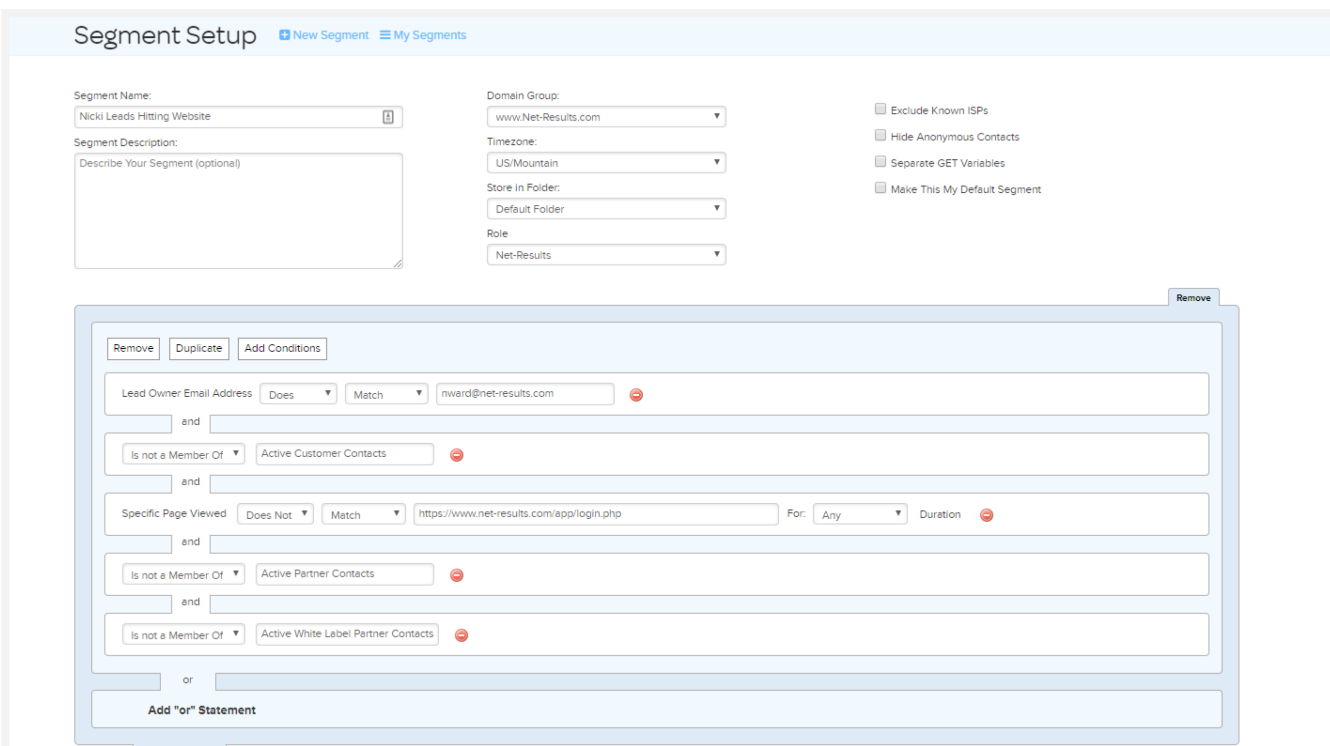
It's even possible to leave human interaction out of this entirely. Should a prospect show buying intent signs, you can approach them with targeted, automated communications, too.

Note: this is marketing automation, but it's not a "set it and forget it" kind of thing. You'll have to experiment with the segments and conditions you use. Only dialing them in, over time, will make your targeting truly effective.

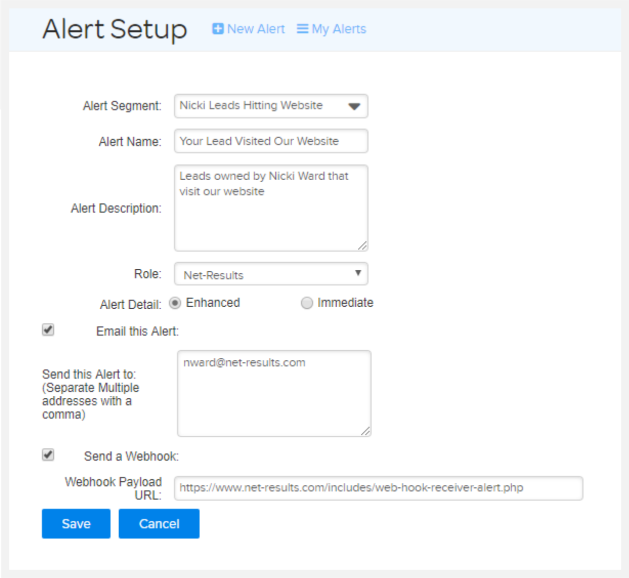
THE RUNDOWN

Here's how you'd normally go about setting up your "prospect identification workflow". Note, we'll show you how this works in Net-Results - but you should be able to replicate the steps in any other system.

1. First, you need to tell your marketing automation platform what to look for. In Net-Results, this means loading up a segment with conditions. Like this:



2. Then, you need to your platform what to do with that information. In our case, we want to alert a salesperson. In Net-Results, we can set it up so our lovely Senior Account Executive, Nicki Ward, gets an email alert every time the conditions in the segment are met:



3. You can also leverage lead scoring to help you identify prospects. All you would do is add your lead score to the determining segment

4. As you can tell, in this case, we can send alerts from Net-Results. Should you be using a CRM system (like Salesforce, Dynamics or Sugar) you'd likely do this:
   a. Build a segment.
   b. Create a campaign.
   c. Add a campaign step where your marketing automation platform creates an alert or a task in your CRM.

5. Obviously, the actual execution of this is highly dependent on your CRM and marketing automation platform, but this is the gist of it!

HOW TO CHOOSE THE RIGHT CONDITIONS

So much for the practical part. However, how do you determine what the buyer intent signals for YOUR prospects are? The answer to that is really specific to your case (Net-Results customers: you know your customer success team would be glad to help you with this!).

However, here are some suggestions:

1. **Activity.** What kind of activity would a prospect looking to buy display? Which pages on your website would they visit? How long would they visit those pages for? One way to find out to look into Google Analytics and look for session times for certain pages. Write them down here:

ACTIVITY SCORE

Behavior	Score

2. **Contact traits.** Look for specific things you want to see in a prospect. Then, set up your segments and alerts to respond to those things. For example, if a prospect has given you their title and it fits with your ideal customer, then that's a good segment condition right there. Write them down here:

CONTACT SCORE

Attribute	Score

3. **Engagement.** Are there specific things a prospect ready to buy would do? Would they download certain things? Watch certain videos? Make sure you alerts your salespeople (or send out relevant communications to prospects) when these things happen. Write them down here:

ENGAGEMENT SCORE

Behavior	Score

As mentioned, you should experiment with your conditions - and take note of the accuracy with which you can identify prospects.

Ask your sales team: "those leads you're getting from us. Are they actually ready to buy, or do we need to adjust?"

HAPPY HUNTING!

NEXT STEP? BUILD RELATIONSHIPS WITH PROSPECTS

Identifying prospects that are ready to buy from you is a potentially business-altering thing to do. It can give you an edge over your competition.

However, it's only one reason to use marketing automation software. The other reason is: build relationships with prospects whose timing is yet to change.

How do you do that? Well, we've got another useful guide for you to get your hands on.

Download the building relationships guide here.

GET THE GUIDE

NEED HELP?

If you've gotten inspired, there are two things you can do:

1. **If you're a Net-Results customer, just get in touch with our Customer Success team through the regular channels.** We'd be happy to think with you about proper conditions. And we can show you step by step how to start identifying prospects in the Net-Results platform.
2. **If you're not a Net-Results customer, but you've gotten curious: click the button below to schedule a demo with our product team.** We can show you exactly how to start identifying prospects in Net-Results. Note: all demo participants also get 14 days of free access to a fully working Net-Results instance, including free platform onboarding by our top-rated Customer Success team. What are you waiting for?

BOOK A DEMO