

Starting and building prospect relationships with marketing automation

You can start and build relationships with prospective clients by helping them learn (as we began to consider last month in a first edition about [content marketing](#)). By regularly delivering valuable information, you demonstrate your capabilities and provide value to prospects. In addition, your information can help them decide to act (rather than do nothing) and perhaps to use outside help (rather than "do it themselves"). When they are ready to move forward, they will be aware of you and more inclined to consider you.

Well-designed and well-targeted email campaigns offer a reliable, testable and trackable way to get prospects to read your valuable information on a regular basis. If they provide their email address, you can keep sending them relevant information.

Understand the people at your target clients, and the information they could use

To attract target clients, you need to know what is most relevant to their needs, and then provide it. One way for you to find out might be to ask them.

Focus on what prospects need, and not only on what you offer. In a wonderful and successful [case example](#), CroweHorwath (the accounting firm) offered information about the Dodd-Frank financial regulation law, even though the firm didn't offer services related to that law. CroweHorwath thought its prospective clients would value the information, so they provided it. In addition, the firm also offered in the emails the opportunity to ask for information on other issues more closely tied to CroweHorwath services. The information about Dodd-Frank kept the prospective clients aware of and feeling positive about CroweHorwath, and the offers on the sidebars of the emails about other services were noticed and clicked on sometimes too.

Most B2B firms doing "marketing automation" try to provide what potential customers need at each stage in their buying process (e.g., basic information about the problem, ways of addressing, potential providers, case studies, ROI justification). Like these firms, you can focus on the buying process; however, that focus is wise only if buying information relevant to buying truly addresses a critical need for your prospects.

Identify your buyers and their "personas"

Traditional business development and sales emphasize on the role a person plays in the buying process, e.g., decider, influencer, technical adviser. In developing emails for marketing automation, it is often better to focus more on the concerns and needs of a particular buyer -- what kinds of information does he/she need to move forward in considering taking action? You might have 3-4 different flavors of executives, or general counsels, or CFO's in mind. You probably won't have a separate campaign for each "persona" but will rather be sure to touch on some key concerns of each persona in each (or most) of your pieces.

Identify your existing content, and how you could use or repurpose it

In a typical campaign, each email you send offers a chance to click through to or download some content. You likely have a great deal of material already, but probably not enough. As you lay out perhaps 5-10 items that you hope a prospect will read in a campaign, you'll see holes. You can fill some by adjusting what you have, and others with new material. Existing items can be tailored to address the needs of the different personas. You can contract out development of some material once you've established the themes and the desired tone.

Get introduced to potential clients

To get started with potential clients you can contact them directly via email or lure them to your material online. To lure them to your material online, you need a social strategy to get to know the people online who are influential about your topic, so they'll notice your material and share it with their followers. (You'll also need some way of putting material out in public online, e.g., via blog posts). You can start to get to know these "influentials" by commenting on their work and reposting it so your social followers can see it.

Prioritize your actions to fit with the resources, e.g., time, money that you plan to invest

Marketing automation is a big undertaking. While the software is accessible and affordable, devising a strategy and preparing many communications takes time. It is important then, to focus on attracting and communicating with the people most important to you.

What to do this week

1. Think about whether marketing automation is relevant for you.
 - Identify the prospective clients you'd like to be aware of you and to regard you well. Pick a narrow group if you can.
 - Identify problems they face where you could provide useful information. How much relevant information do you have?
2. If marketing automation seems possibly relevant for you, take a look at the websites for [Hubspot](#) and [Infusionsoft](#), two providers of software for smaller b2b firms to get a look at

what is possible and what it costs (for the software, etc.).

What are these tips?

These monthly tips help professionals create more business and enjoy their work more. We focus on how to start relationships, how to build relationships, and how to convert those relationships into sales. Visit our [archives](#) to learn more.