

# MARKETING AUTOMATION STRATEGY

## Benchmarks for Small & Medium Business

How small and medium businesses will overcome the most challenging obstacles to marketing automation success in the year ahead.





## Marketing Automation Strategy Benchmarks for Small & Medium Business MarketCrest Presents Ascend2 Research Conducted in Partnership with SharpSpring

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# TABLE OF CONTENTS

How SMBs use marketing automation to drive sales revenue .....	4
Extent of marketing automation usage .....	5
Overall importance of marketing automation .....	6
Most important strategic objectives .....	7
Rating marketing automation success .....	8
Most challenging obstacles to success .....	9
Most effective strategy planning resources .....	10
Most valuable system features .....	11
Most useful performance metrics .....	12
How marketing automation budgets are changing .....	13
Research methodology and demographics .....	15
About the Research Partners .....	16

# Companies are adopting marketing automation more aggressively than ever

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Half of all companies surveyed expect top-line results from their marketing automation strategy, naming “increased sales revenue” as their most important objective. But how will they overcome the most challenging obstacles to achieving marketing automation success?

To find out, SharpSpring and Ascend2 fielded the Marketing Automation Strategy Survey and completed interviews with 317 business and marketing professionals. We thank these busy professionals for sharing their valuable insights with you.

The charts in this edition of the study, titled Marketing Automation Strategy Benchmarks for Small & Medium Business, represent the 197 respondents identifying their company as a small to medium-sized business with fewer than 500 employees.

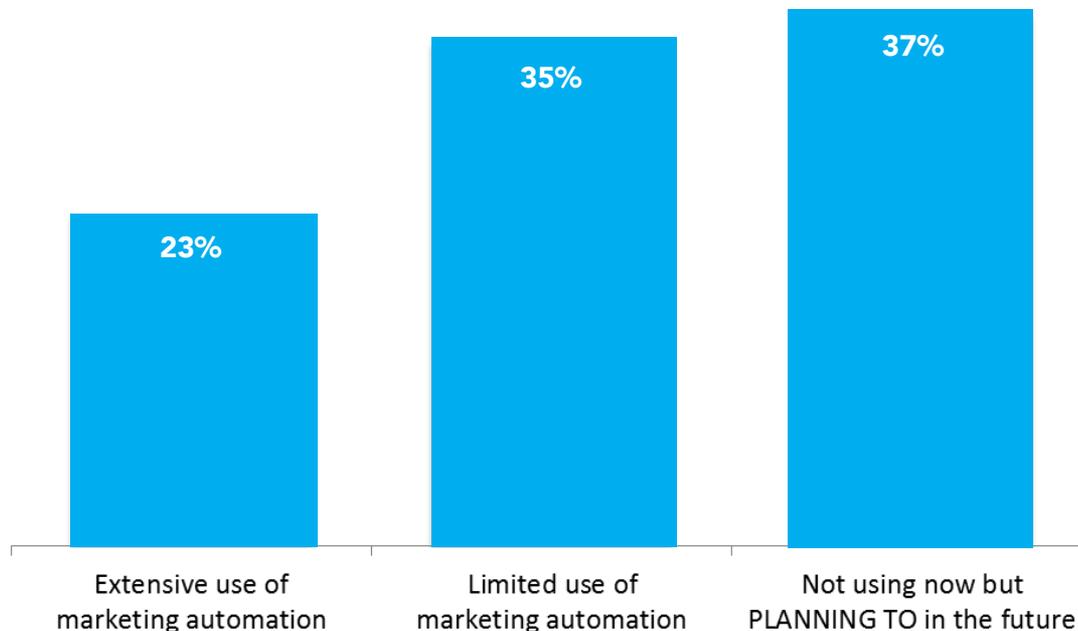


All the best,  
Scott Berry, Managing Director



95% of companies use or plan to use marketing automation.

To what extent does your company currently USE MARKETING AUTOMATION?

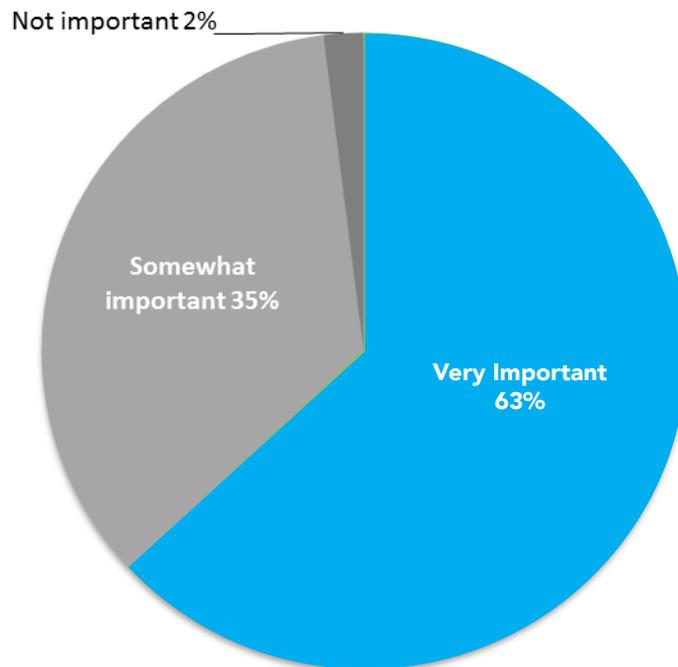


#### MarketNote

Once thought of as just a "buzzword," marketing automation is no longer a niche software only available to a select few. Now, almost all companies are exploring the benefits of marketing automation to drive more leads, close more sales, and optimize their marketing ROI.

# Virtually all companies believe marketing automation is important to the success of their marketing programs.

*How important is MARKETING AUTOMATION to the overall success of a marketing program?*



## MarketNote

Case study after case study show the tremendous results from using marketing automation. More leads, more won deals, higher revenue per deal, and shorter sales cycles are among the reasons companies consider marketing automation a key piece of the marketing puzzle.

# Raising sales revenue is the top goal companies are targeting and achieving with marketing automation.

What are the MOST IMPORTANT OBJECTIVES of a marketing automation strategy?

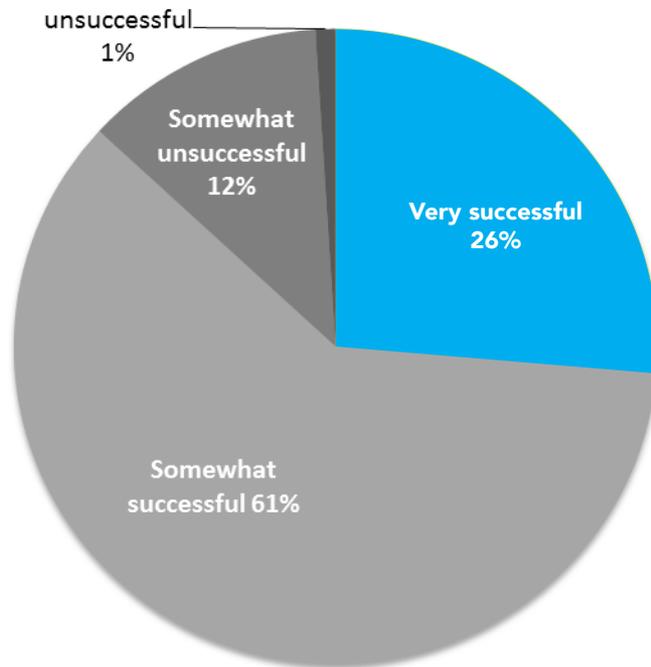


## MarketNote

The measure of any strategy, tactic, or tool is whether it produces a positive return on investment. By supercharging the two biggest components of revenue, leads and close rate, marketing automation pays for itself and then a whole lot more.

# Marketing automation helps companies achieve their important goals.

How do you RATE THE SUCCESS of marketing automation to achieve important objectives?

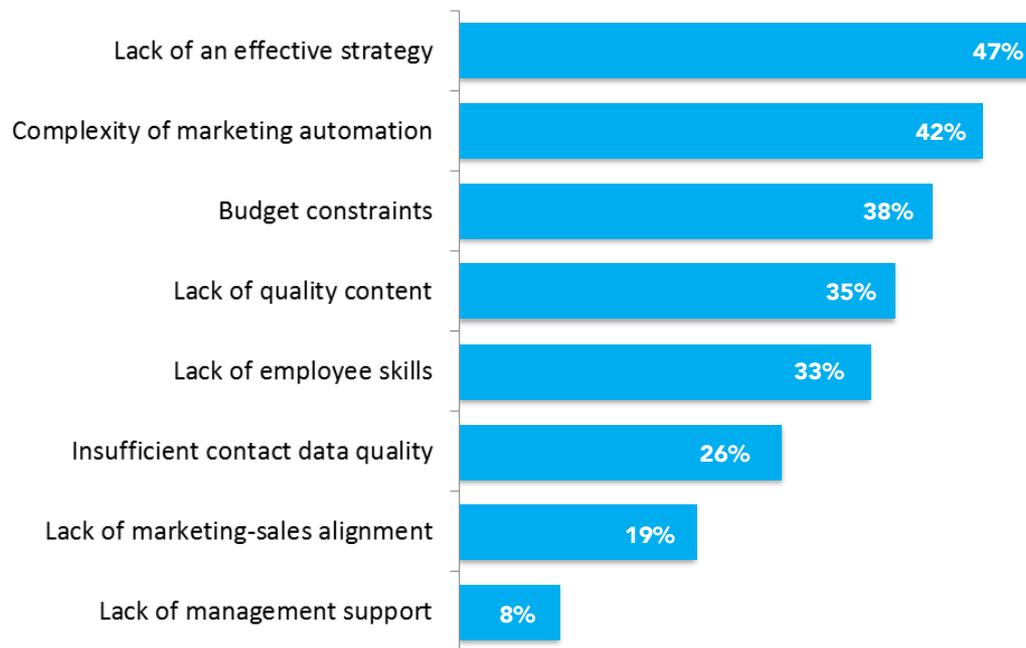


## MarketNote

Traditionally reaching targets like more leads, improved close rate, and higher engagement has involved a handful of different platforms and a lot of trying to marry data from all those different platforms to measure results. Marketing automation overcomes these hurdles by delivering that information on a consolidated, comprehensive platform, giving you instant visibility into exactly where you're tracking compared to your goals.

# Companies implementing marketing automation look to agencies to provide an effective marketing strategy and marketing automation expertise.

*What are the MOST CHALLENGING OBSTACLES to marketing automation success?*

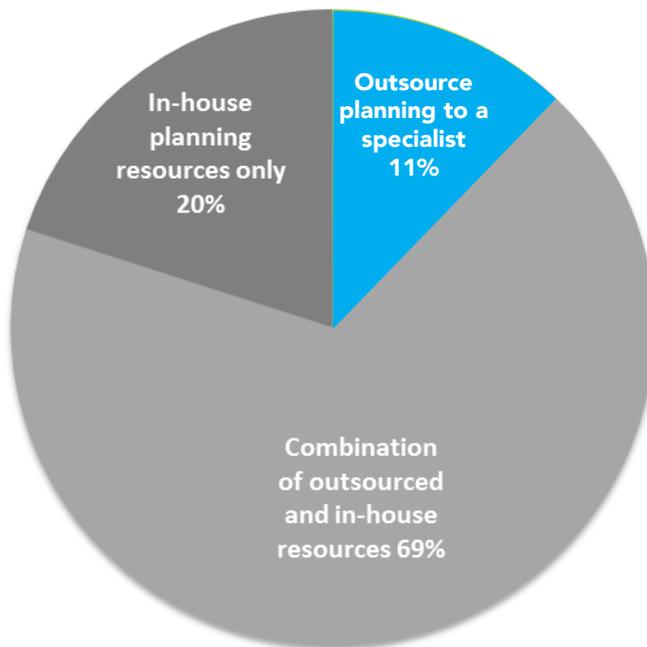


## MarketNote

The largest obstacles to successfully starting a marketing automation program boil down to HOW and WHEN. The first step is simply how to use the platform, from setting up your first workflow, to building your first email, to hooking it up to your CRM and CMS. The second piece is about when to use the platform: the key is relevant personalized contact, not constant contact. Digital marketing agencies can help companies jump start their programs by providing guidance with the how and the when.

# More companies than ever are relying on agencies and other outsourced resources for their marketing needs.

*What are the MOST EFFECTIVE RESOURCES for planning a marketing automation strategy?*

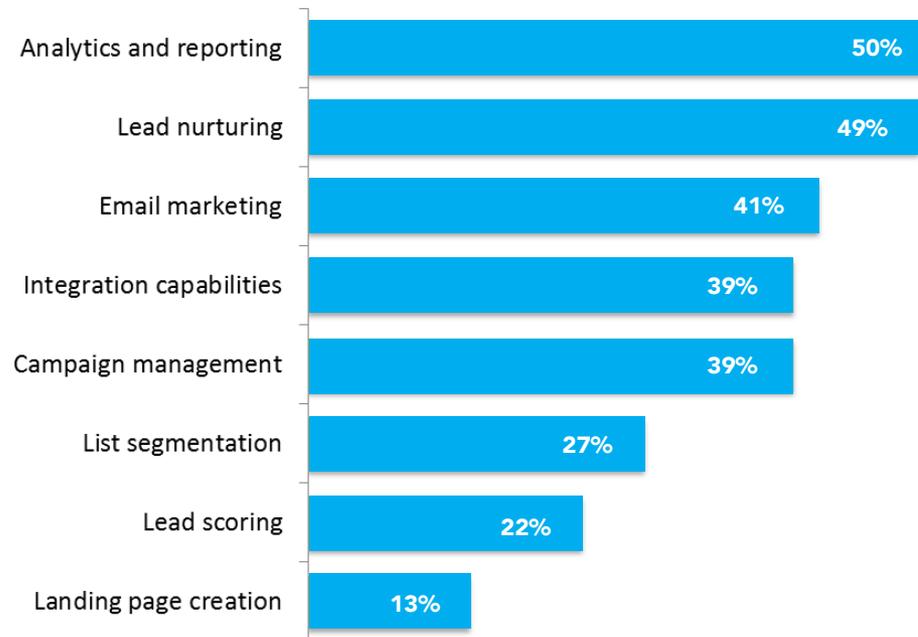


## MarketNote

Odds are you didn't start a (non-agency) business because you wanted to focus on marketing. With how quickly the marketing landscape is evolving, it makes more and more sense to leave some or all of marketing to an outside resource, so you can focus on providing value and growing your business.

# The number one need that drives companies' search for marketing automation: analytics and reporting.

What are the MOST VALUABLE FEATURES of a marketing automation system?

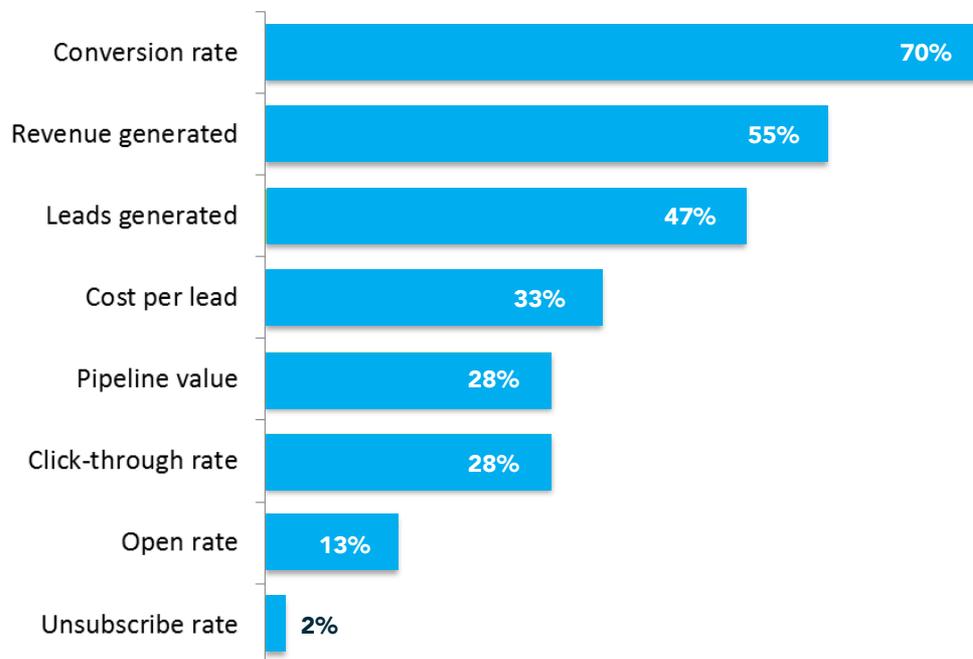


## MarketNote

Marketing is notorious for being difficult to report on, from what's working and what isn't, to the ROI of a particular campaign. By capturing every lead that comes in, whether by phone or by form, you'll have 100% attribution across the board.

# The metric companies find the most useful is conversion rate: a main driver of sales revenue.

What are the MOST USEFUL METRICS for measuring marketing automation performance?

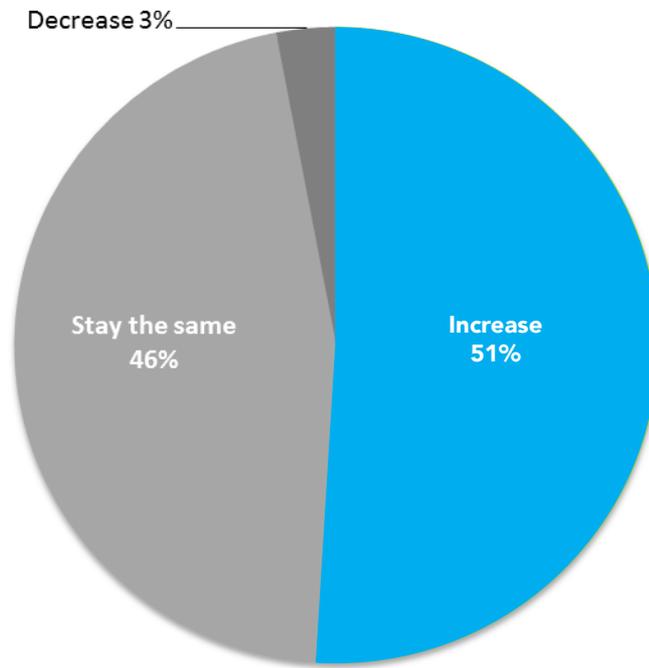


## MarketNote

Generating a bunch of leads for the sales funnel is great, but quantity isn't enough; quality has to be considered. Budget and labor are limited resources, so it's important to focus on the leads that are worth the money and time. Crystal-clear conversion rates by campaign means you can double down on what works and drop what doesn't.

# Most companies plan to increase their investment in marketing automation in the coming year.

*How will your marketing automation BUDGET CHANGE in the year ahead?*



## MarketNote

The question is closed: marketing automation isn't a fad or a buzzword. It is driving staggering revenue results across nearly every vertical, and the business community has taken notice. Marketing automation is quickly becoming a core component of the marketing toolkit and a requirement to reach leads in ways that resonate and convert.

# Research Methodology And Survey Demographics

Researchers utilized a standard questionnaire, research methodology and 3-Minute Survey format. Findings are examined in a quantitative context by experienced analysts and reported objectively.

This survey was conducted online from a panel of more than 50,000 US and international marketing, sales and business professionals. The following is a breakout of the demographics represented in this report:

## Primary Marketing/Sales Channel

- B2B (Business-to-Business) 77%
- B2C (Business-to-Consumer) 23%

## Number of Employees

- More than 500 0%
- 50 to 500 34%
- Fewer than 50 66%

## Role in the Agency

- CEO / COO / CMO / CSO etc 44%
- Marketing VP / Director / Manager 30%
- Sales VP / Director / Manager 3%
- Marketing or Sales Staff 13%
- Other 10%

## About The Research Partners



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