

# MARKETING AUTOMATION CHALLENGES REPORT

2019



<b>TABLE OF CONTENTS</b>	<b>1</b>
<b>EXECUTIVE SUMMARY</b>	<b>2</b>
<b>SURVEY QUESTIONS</b>	<b>3</b>
<b>REPORT OVERVIEW</b>	<b>6</b>
<b>GLOSSARY</b>	<b>10</b>
<b>RESPONDENTS WHO DON'T AUTOMATE</b>	<b>15</b>
<b>RESPONDENTS WHO AUTOMATE</b>	<b>19</b>
<b>CHARACTERISTIC CHALLENGES</b>	<b>40</b>
<b>MARKETING AUTOMATION ADVICE</b>	<b>48</b>
<b>METHODOLOGY</b>	<b>53</b>
<b>ACKNOWLEDGMENTS</b>	<b>55</b>

## EXECUTIVE SUMMARY

---

This report was created by the team at Automizy, which is an email marketing automation platform.

The marketing automation world is growing at a large scale. More and more people use some type of automation for repetitive marketing activities to increase productivity and consequently revenue.

However, even as technology changes and evolves, people working with marketing automation have almost the same challenges as they did 5 years ago. We wanted to find out exactly what challenges marketing automation users have and share our findings with the world in the form of this report.

## ABOUT THE REPORT

---

In this report, we assess what the most common challenges people have with marketing automation in different industries, positions and company sizes.

We also talk about why certain companies don't use marketing automation, what would be the reason for them to start using it, and what people starting out with marketing automation should pay attention based on the advice of over a 100 experts.

It's important to note that for this report we didn't ask any Automizy users, because we wanted to access the marketing automation scene while staying as unbiased as possible.

# SURVEY QUESTIONS

”

---

*Think about the customer's experience. You want the conversation to feel as human and genuine as possible. No one wants to be sold to or read a long, wordy sales email. Keep it short and to the point as if you're talking to a friend.*

*- Hailey Friedman*  
Growth Marketing Pro

## SURVEY QUESTIONS

---

The first question in the survey was: "Do you use some kind of marketing automation software?". The purpose of this question is to segment the respondents so that we could follow it up with relevant questions about marketing automation.

### YES BRANCH

On the "Yes" branch the next question was: "What is your number 1 challenge when you use marketing automation?". The goal of the survey is to determine the things people struggle with when using marketing automation. So this question is the essence of this survey.

The following question of the "Yes" branch was: "What would you say to a person who just got started with marketing automation? What should she/he pay attention to?". This question gave us valuable insight into what experienced marketing automation users think are the most important factors when starting out.

## SURVEY QUESTIONS

---

### NO BRANCH

On the "No" branch the next question was: "Why don't you use some kind of automation software?". Of course, the first thing we had to ask the people who don't use marketing automation is: WHY? There are specific industries, business models, and sizes where marketing automation isn't necessary at all. We wanted to hear these cases first hand.

The following question of the "No" branch was: "If you would use a marketing automation tool, what would be the number one reason?". Companies decide to start using marketing automation because of very different reasons. We wanted to hear some of these from the people who haven't used marketing automation before.

### BUSINESS DATA

The next section was about the respondents and their companies' information. We asked about the name and industry of the respondent's company, how many employees the company has and what's the position of the respondent in the company.

This data helps us put the answers to the long form questions into context. Also, it lets us divide and examine the responses in different industries, company sizes, and positions.

# REPORT OVERVIEW



*I think one has to start with the basics and prioritize the use of marketing automation accordingly. In this regard, it won't make sense to learn a software which helps with increasing retention if you are a new business and are in the acquisition stage. There are also tons of case studies and books available which can be of help. More than that, irrespective of what the industry standard is for a particular strategy, or tactic, it is important that you test your own data. For instance, to use a simple example, many new business owners are wondering what the best time to tweet would be. Now this is something which the business owner should analyze based on their own audience's activity level. Constant experimentation, data analysis is the key. In this regard, as Sean Ellis says in his recently released book Hacking Growth, one has to adopt the philosophy of MVT (Minimum Viable Testing) to make the best use of one's resources and build on that experience and the lessons it provides.*

*- Syed Irfan Ajmal*  
Digital Marketing ROI

# REPORT OVERVIEW

## INDUSTRIES

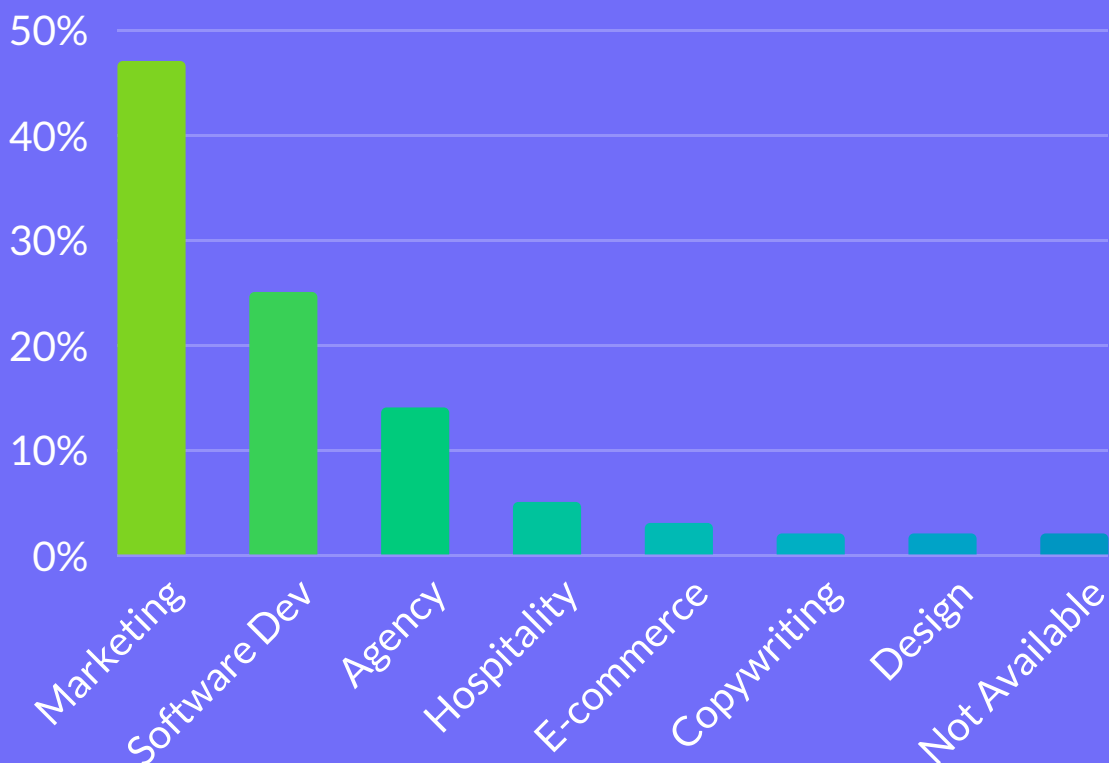
---

The distribution of industries among the respondents is leaning towards the Marketing, with 47%. This was intentional as we collected the data so that about half of the respondents would be from marketing.

The Software Development industry came in second in the survey, with 25% of the submissions coming from this industry.

The other industry type who had a decent amount of submissions are non-marketing agencies, with 14%.

5% of the respondents work in Hospitality, 3% in E-commerce, and 2% in Copywriting or Design. Also, 2% of the submissions didn't have industry filled out.





# REPORT OVERVIEW

## COMPANY SIZES

---

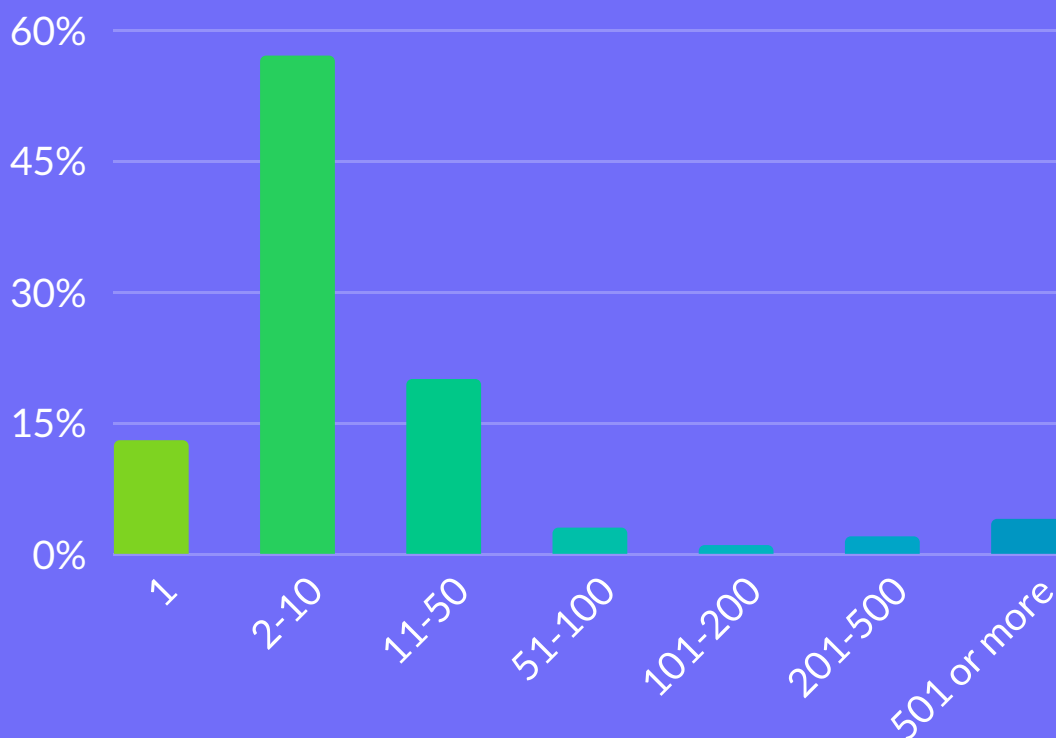
More than half of the respondents (57%) work at companies with 2-10 employees.

Fifth of the answers came from companies with 11-50 employees.

17 submissions (13%) came from solopreneurs.

This means that 90% of the respondents are from companies with 50 employees or less. This means that small and micro businesses are significantly over-represented in this report.

The remaining 10% is made up of companies with 51-100 (3%), 101-200 (1%), 201-500 (2%) and 501 or more (4%) employees.



# REPORT OVERVIEW

## POSITIONS OF RESPONDENTS

---

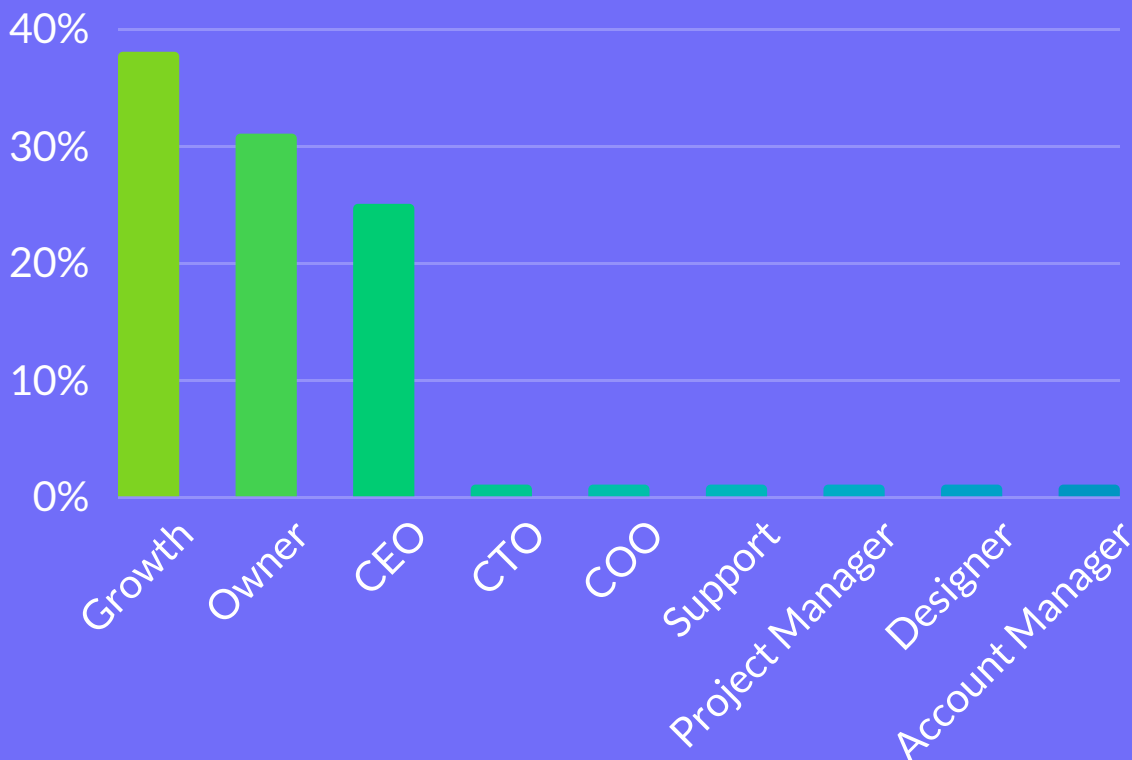
The most submissions (38%) came from professionals working in Growth positions like Marketing and Sales.

31% of the respondents in this survey are business owners.

A quarter of the participants (25%) are CEOs.

These three groups take up 94% of the submissions.

The other 6% is distributed evenly among CTOs, COOs, Project Managers, Designers, Account Managers and people working in Support, with each group at 1%.



# GLOSSARY



---

*The biggest challenge I've faced when I've deployed automation platforms in multiple businesses is bringing existing company data into the marketing automation platform, and connecting that to other company systems so it stays relevant.*

*- Jim Smalley*

2019

# GLOSSARY

---

In this section, we're going to clear up some definitions we're using in this report. This is crucial to avoid misinterpretations and provide a sharp picture of the challenges, issues, pieces of advice, and reasons we're talking about.

**Not at the level:** The company doesn't need the ability to automate marketing at scale and doesn't have people to manage it, yet.

**Complexity:** Marketing automation requires too much time and knowledge to set up.

**Bad software:** The respondent couldn't find a software that fits their business model, gives a "human touch", or finds it overwhelming.

**Not reliable:** The respondent isn't confident in it and doesn't want to lose prospects because of "untidy automation".

**Not a fit for BM:** The companies business model "isn't ideal" for marketing automation.

**Saving resources:** The respondent would use marketing automation to save time and money, and scale up activities.

**Reliability:** The respondent feels that marketing automation is more reliable than manual work.

**Attraction:** Marketing automation would bring new opportunities to attract prospects and clients for the company of the respondent.

# GLOSSARY

---

**Follow-up:** The respondent would use marketing automation to follow up and connect with prospects and clients.

**Only emergency:** The respondent would use marketing automation only in case of emergency.

**Creating automations:** The respondent finds creating quality automations difficult.

**Creating content:** The respondent thinks it's challenging to generate content for automations.

**Integrations:** It's hard to set up and manage integrations with marketing automation software for the respondent.

**Engagement:** It's challenging to drive engagement on automated content for the respondent.

**Segmentation:** The respondent finds segmenting marketing database challenging.

**Data management:** It's hard for the respondent to manage data inside the marketing automation platform.

**Optimization:** The respondent finds fine-tuning and optimizing his automation a challenging task.

**Finding tools:** It's difficult for the respondent to find a software that truly fits the needs of the company.

# GLOSSARY

---

**Personalization:** The respondent finds it difficult to personalize the content in automations.

**Lead scoring:** It's hard to do lead scoring in the marketing automation platform the respondent uses.

**Analytics:** The respondent has a challenge related to the analytics inside the marketing automation in use at the company.

**Reporting:** It's hard to create easily digestible reports in the marketing automation platform the respondent uses.

**Deliverability:** The respondent has a challenge landing his marketing emails in the inbox of his subscribers.

**Plan ahead:** The respondent advises beginners to plan ahead before jumping into creating automations.

**Set goals:** The respondent says it's better to have clear goals when people get started with marketing automation.

**Keep track of data:** The respondent says it's important to keep track of data in marketing automation tools and make decisions based on it.

**Know your audience:** The respondent advises beginners to get to know their audience before starting to automate processes.

**Pricing:** The respondent says beginners should pay attention to the pricing of marketing automation software.

# GLOSSARY

---

**Testing:** The respondent advises people getting started to conduct tests to see what works better.

**Provide value:** The respondent advises beginners to provide value to their audience with marketing automation.

**Contact quality:** The respondent says beginners should pay attention the contact quality of their database.

**Lead nurturing:** The respondent advises that people getting started should pay attention to lead nurturing with marketing automation.

**Consistency:** The respondent says beginners should focus on staying consistent when doing marketing automation.

**Quality of support:** The respondent advises that people getting started should consider the quality of support when they select a marketing automation platform.

# RESPONDENTS WHO DON'T AUTOMATE



---

*I am new to digital marketing field so first I want to learn skills my self and then manually I want to implement and get experience so that it will polish my skills as well as help me. So at starting phase I don't want to depend on something which automates my tasks but when I will explore other things and don't find time to spend on manual taks then I may think for automation tools (but not fully).*

*- Jai Acharya*



# RESPONDENTS WHO DON'T AUTOMATE

---

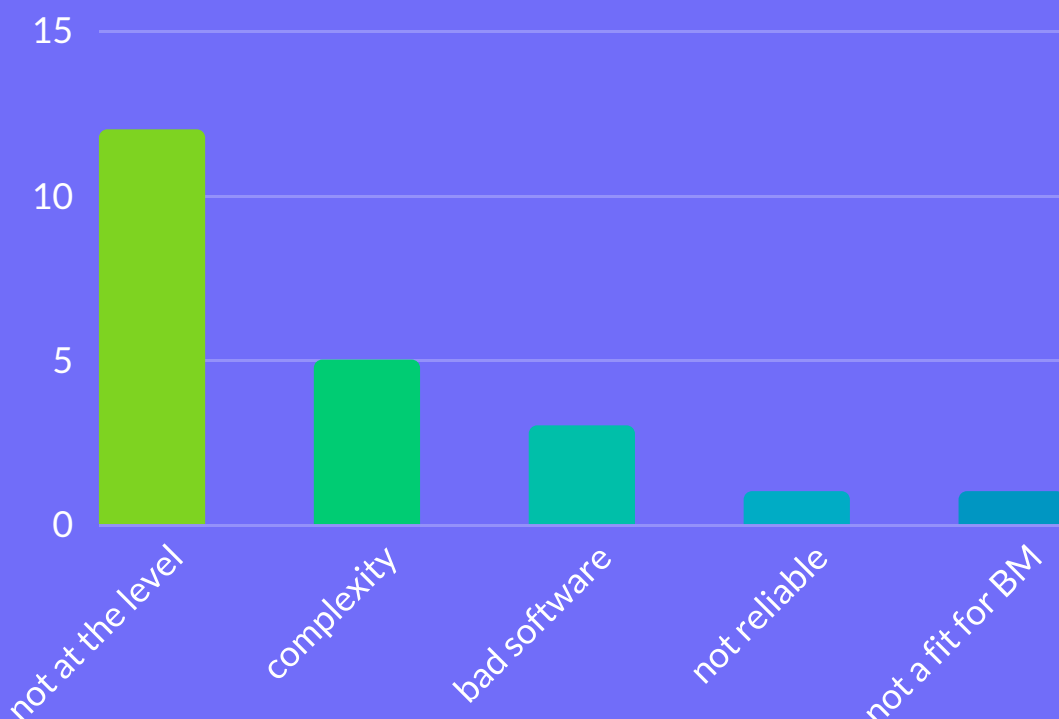
In our survey, 15% of respondents don't automate their marketing yet at all. Coming up you can read about the reasons why companies don't use marketing automation.

## REASONS WHY COMPANIES DON'T USE AUTOMATION

---

The number one reason why companies don't use marketing automation is that they aren't at that level, yet. Most of these participants are either solopreneurs or work at micro companies and have just started operating.

The complexity of the tools available is a major reason for people to avoid using marketing automation. Which is fair, considering how complicated most of solutions are.



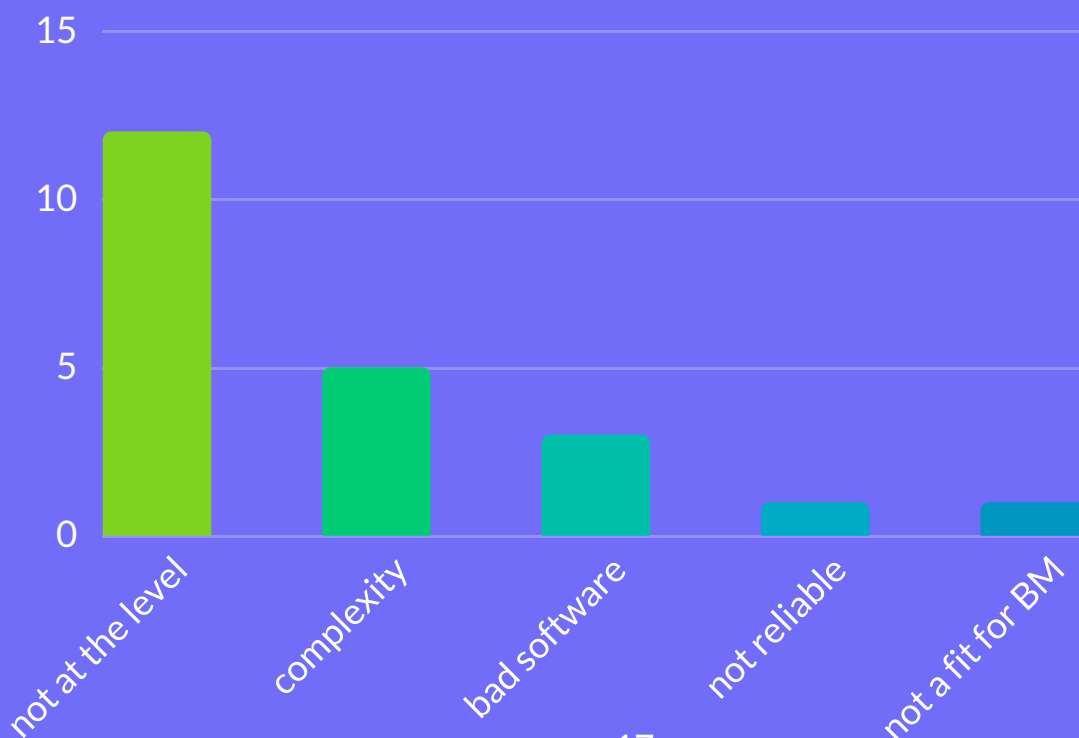
# RESPONDENTS WHO DON'T AUTOMATE

## REASONS WHY COMPANIES DON'T USE AUTOMATION

The third most frequently mentioned reason is bad software. Even with the abundance of tools available, some companies have a hard time finding one that truly fits their needs. This issue is in strong correlation with complexity. Based on our data people who don't automate their marketing can't find software on the market that would be easy to implement and use.

Some respondents think that the marketing technology today isn't reliable enough.

In some cases, marketing automation just doesn't fit the business model of the company. These companies usually deal with a handful of precious clients, who require personal, one-to-one communication.



# RESPONDENTS WHO DON'T AUTOMATE

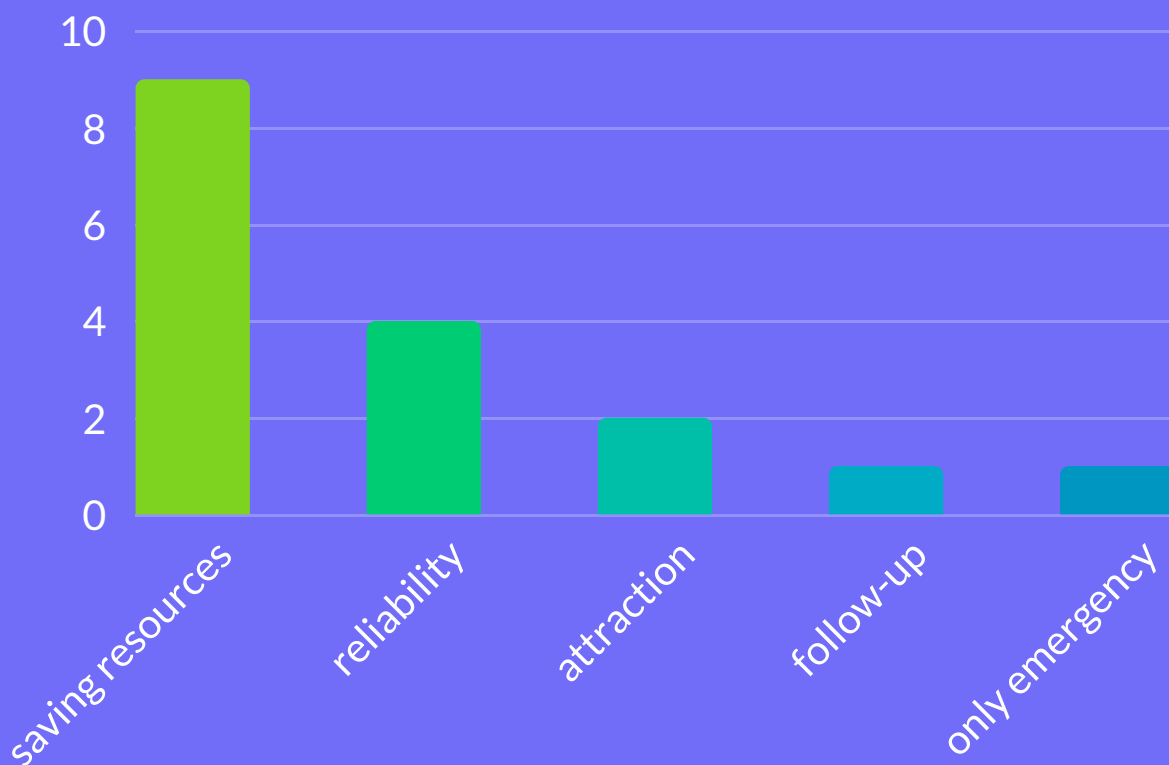
## REASONS WHY COMPANIES WANT TO USE MARKETING AUTOMATION

---

The number one reason why companies would start to implement marketing automation is saving resources, mainly time.

Reliability came in second place, which is particularly interesting considering that the lack of reliability was one of the reasons for not using automation. The respondents who don't automate can be broken down into two sides: people who don't trust marketing automation at all and those who trust it but their business isn't at a stage where it's needed.

Attraction (presence, reaching customers) is the third reason companies would start using marketing automation.



# RESPONDENTS WHO AUTOMATE



---

*My number one challenge is making sure that my subscribers list interacts positively with the content of the emails they will receive. I have to make that both the content is just as high quality as the list of people I will be sending it out to.*

*- Youness Bermime*

WritersDo

2019

# RESPONDENTS WHO AUTOMATE

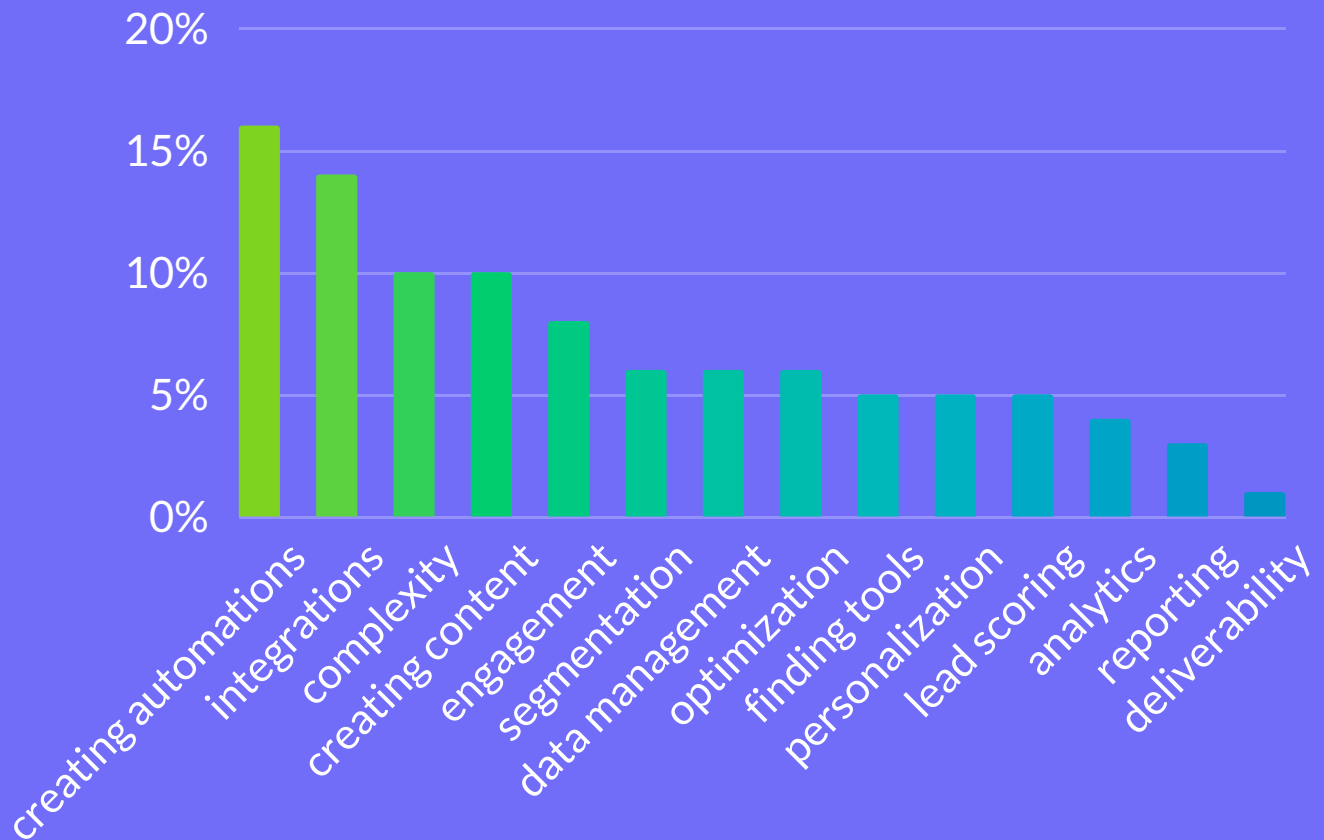
## CHALLENGES OF MARKETING AUTOMATION

---

In our survey, 85% of respondents use some kind of marketing automation.

The most common challenge people face with marketing automation is creating quality automations, with 16% of respondent mentioning it.

Based on our data, integrations (14%) are another critical challenge users face with marketing automation technology.



# RESPONDENTS WHO AUTOMATE

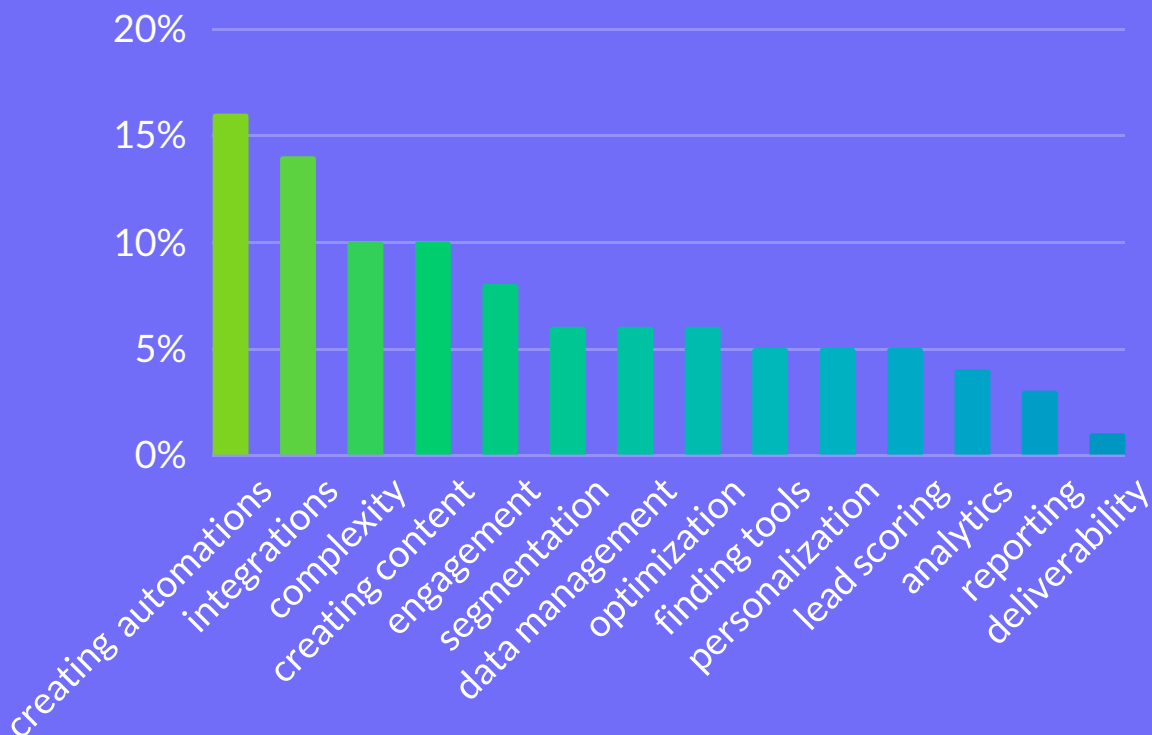
## CHALLENGES OF MARKETING AUTOMATION

Marketing automation requires lots of content. No wonder, that creating content came in third place, with 10%.

Engagement (8%) is another major challenge and is closely related to content. Automation requires top-notch quality content to drive engagement.

Segmentation, data management, and optimization are mentioned by 6% of the participants as a marketing automation challenge.

Finding tools (5%), personalization (5%), lead scoring (5%), analytics (4%), reporting (3%), and deliverability (1%) were all mentioned as a challenge by some of the surveyed professionals.



# RESPONDENTS WHO AUTOMATE

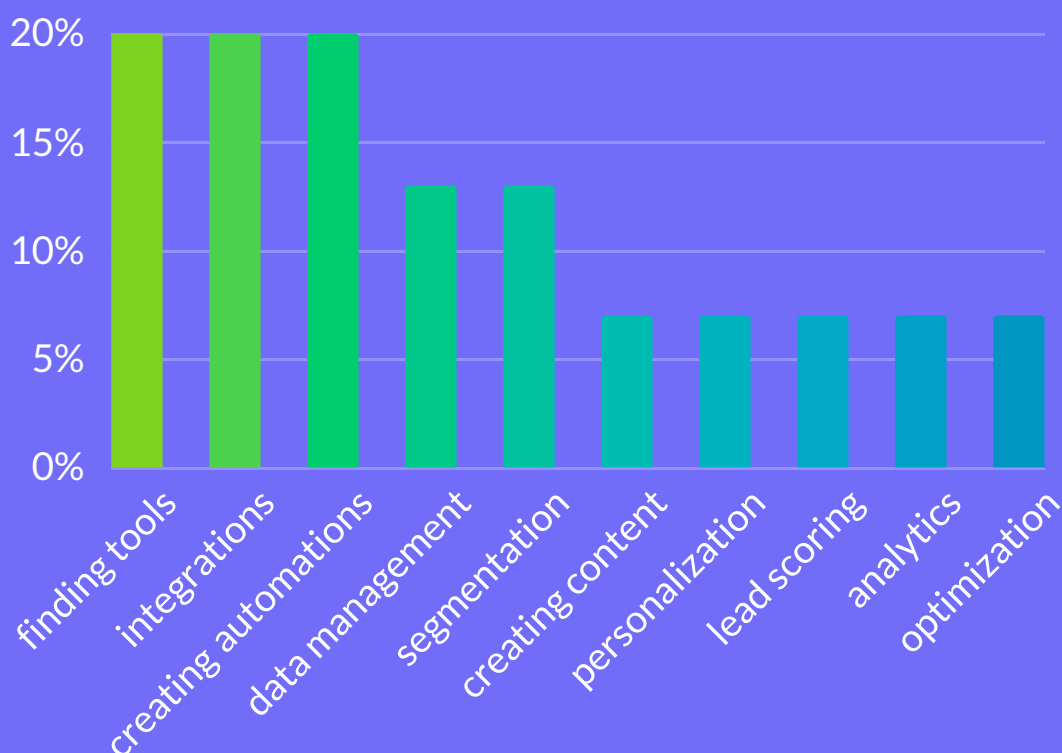
## CHALLENGES OF MARKETING AUTOMATION PER THREE INDUSTRIES

Coming up, we're going to take a look at how these challenges differ between three industries: Agencies, Marketing & Advertising, and Software Development.

### AGENCIES

Among agencies finding tools, integrations, and creating automations are the most common challenges.

In the case of agencies finding tools comes with a new dimension, agency partnership, and affiliate programs. Agencies have to think about the needs of their clientele and the aforementioned reselling opportunities.



# RESPONDENTS WHO AUTOMATE

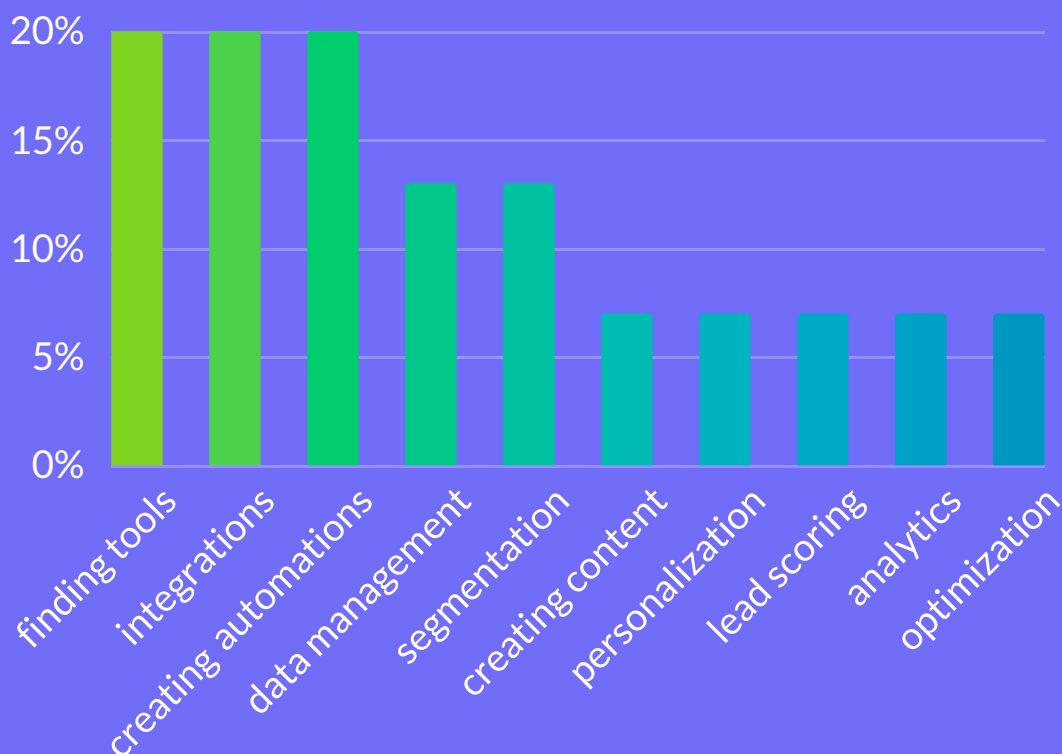
## CHALLENGES OF MARKETING AUTOMATION PER THREE INDUSTRIES

### AGENCIES

Data management and migration (13%) are another key challenge agencies have with marketing automation.

Segmentation is a challenge in relation to data management. The easier it is to manage your data the easier it is to segment and filter your database.

Creating content, personalization, optimization, lead scoring, and analytics are some additional marketing automation challenges for agencies, with 7% of respondents mentioning it.





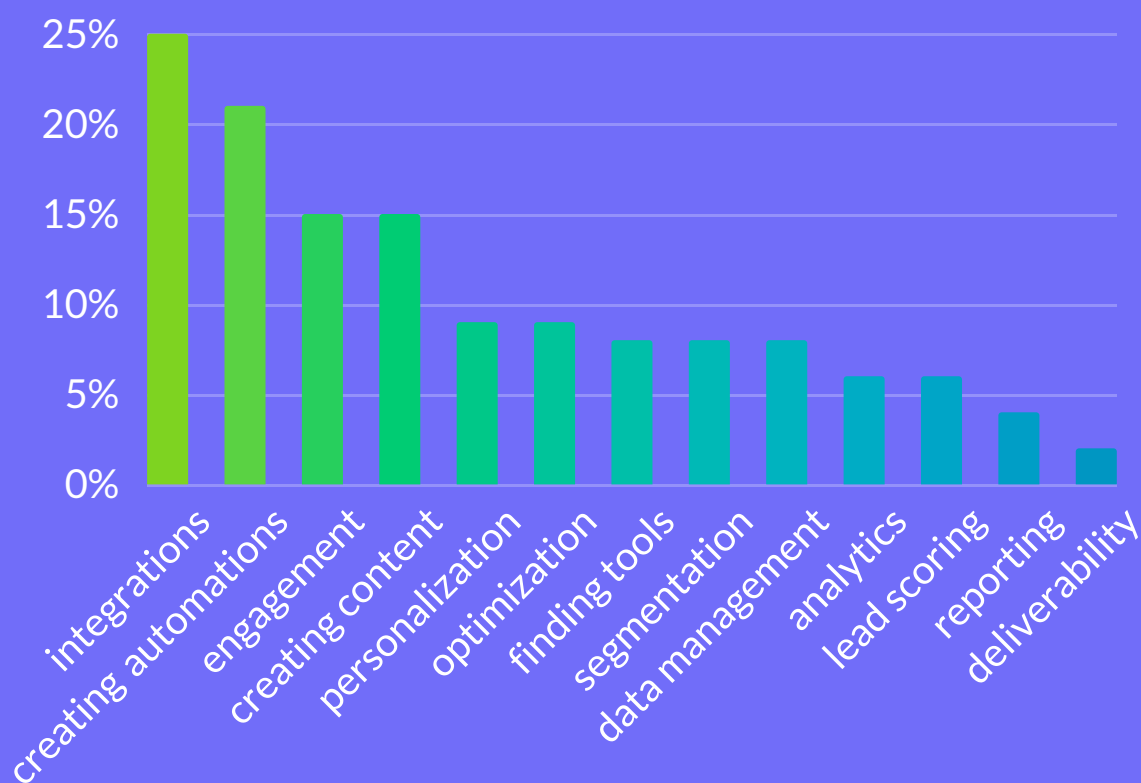
# RESPONDENTS WHO AUTOMATE

## CHALLENGES OF MARKETING AUTOMATION PER THREE INDUSTRIES

### MARKETING & ADVERTISING

The main challenge of the marketing & advertising industry are integrations, with a quarter of the participants mentioning it. Even with all the integrations provided by marketing automation vendors and solutions like Zapier, it's still challenging to set up integrations between different platforms and tools.

Creating automations (21%) came in second place, which depending on the platform can be a real challenge for lots of marketers.



# RESPONDENTS WHO AUTOMATE

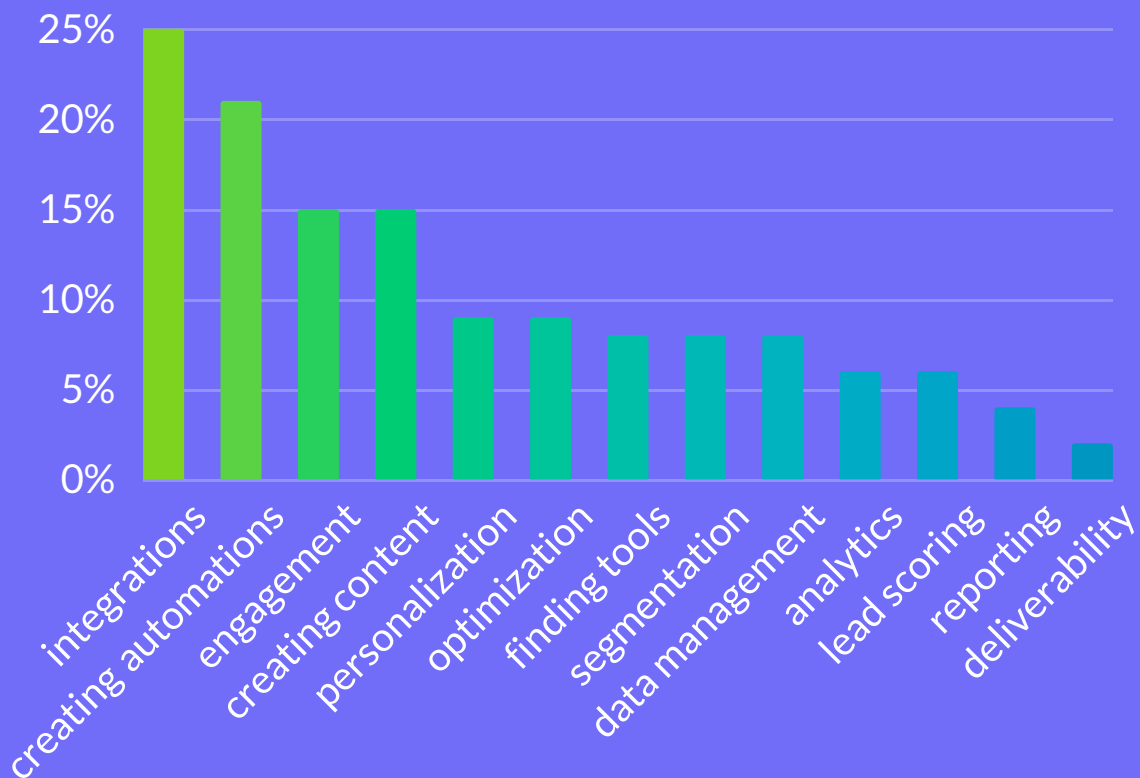
## CHALLENGES OF MARKETING AUTOMATION PER THREE INDUSTRIES

### MARKETING & ADVERTISING

Engagement and creating content (15%) are tied as the third most significant challenges companies in the marketing & advertising industry face with marketing automation.

Personalization and optimization (9%) are also neck and neck for the fourth place in the marketing & advertising industry challenges.

Finding tools (8%) is mentioned significantly less by companies in the marketing & advertising than in the case of agencies (20%).



# RESPONDENTS WHO AUTOMATE

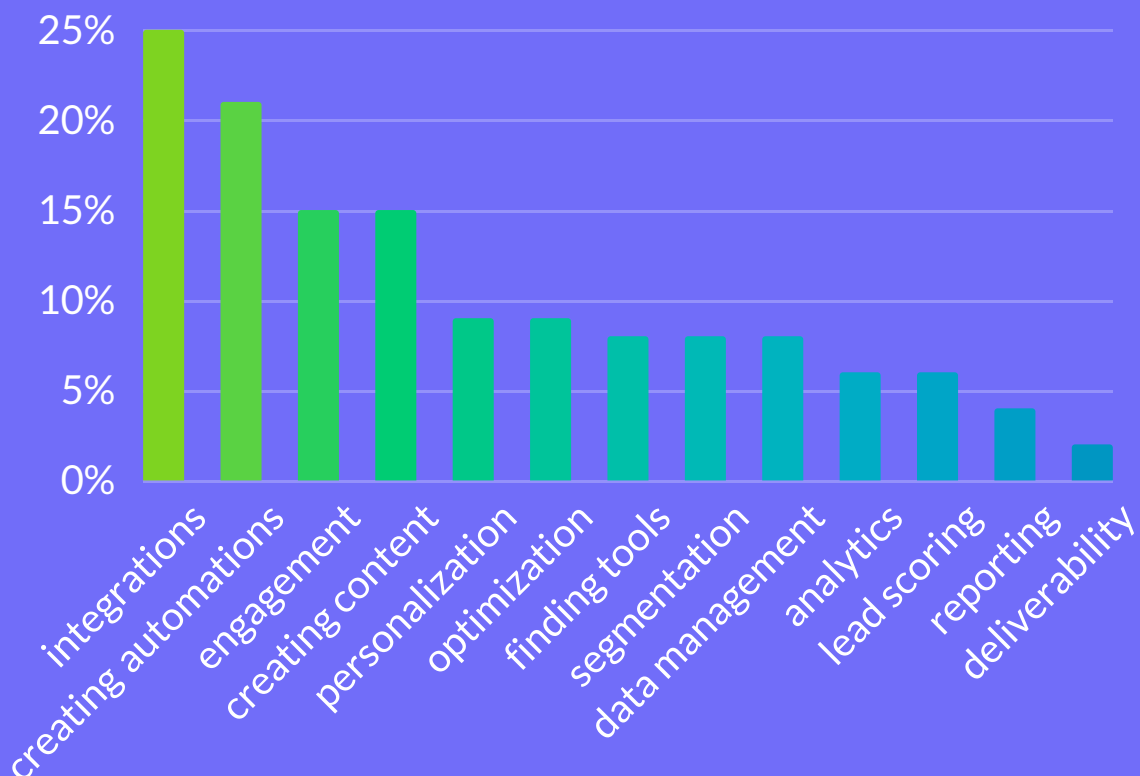
## CHALLENGES OF MARKETING AUTOMATION PER THREE INDUSTRIES

### MARKETING & ADVERTISING

Segmentation and data management are similar in this regard. Both of them are mentioned in 8% of answers by professionals in the marketing & advertising industries. On the other hand, agencies cite them in 13% of their submissions.

Analytics and lead scoring (6%) seems to be a challenge for some companies in this industry.

Reporting (4%) and deliverability (2%) was mentioned by only a handful of companies in the industry as a challenge.



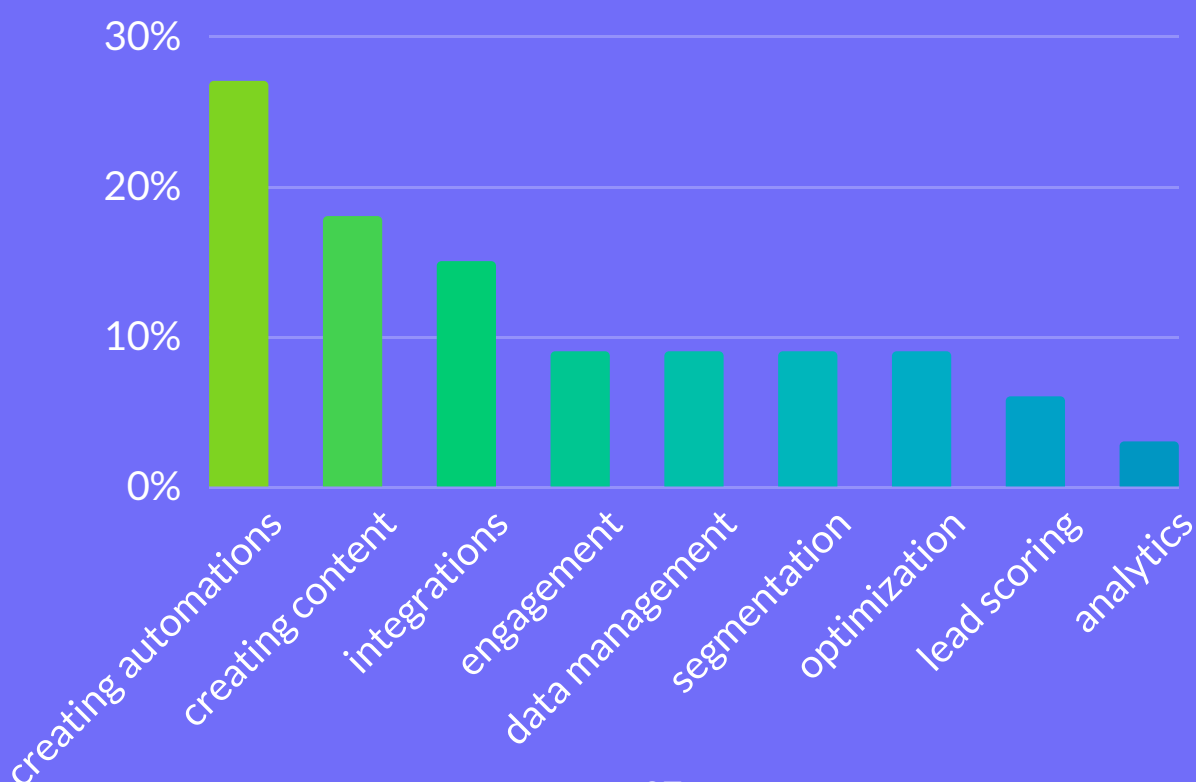
# RESPONDENTS WHO AUTOMATE

## CHALLENGES OF MARKETING AUTOMATION PER THREE INDUSTRIES

### SOFTWARE DEV

For Software Development companies the most significant challenge, by far is creating automations, with 27% of respondents mentioning it. Generally, these companies require more sophisticated automation for client acquisition, user onboarding, and retention.

Creating content (18%) came in second place, which is considerably higher than the other two industries mentioned before. The reason behind this is that smaller companies in this field first focus on hiring developers rather than marketers or copywriters. This causes some resource issues for the marketing department.



# RESPONDENTS WHO AUTOMATE

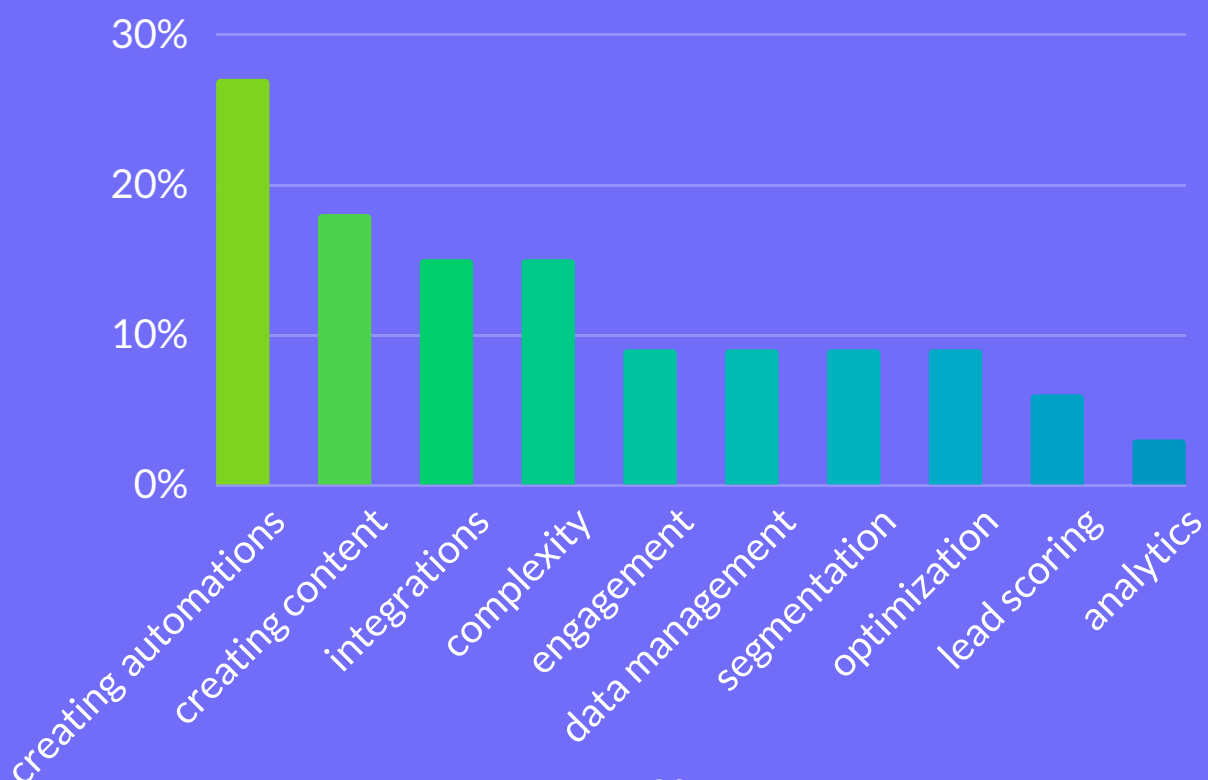
## CHALLENGES OF MARKETING AUTOMATION PER THREE INDUSTRIES

### SOFTWARE DEV

Integrations and complexity are both major challenges that companies in the software development industry face, with 15% of respondents mentioning them.

Engagement, data management, segmentation, and optimization were all mentioned by 9% of respondents working at software development companies.

Lead scoring (6%) and analytics (3%) were only mentioned by a couple of companies in the industry.



# RESPONDENTS WHO AUTOMATE

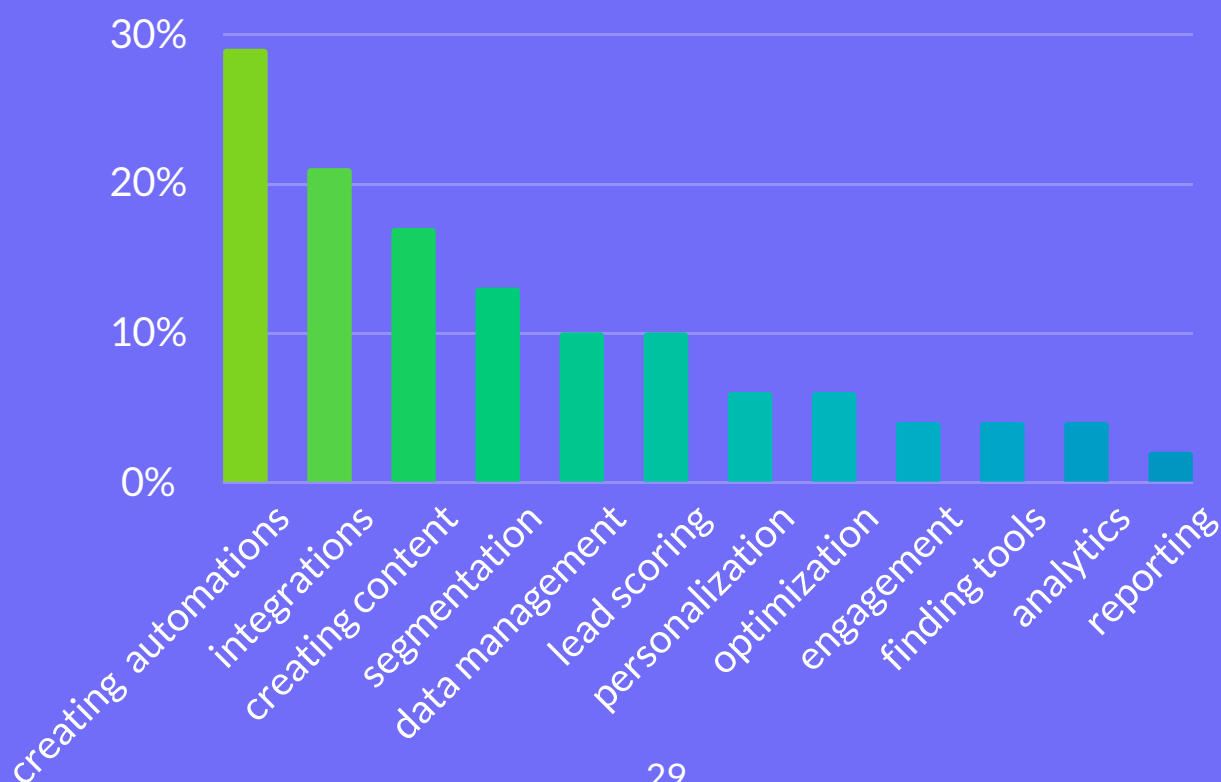
## CHALLENGES OF MARKETING AUTOMATION PER THREE POSITIONS

In this chapter, we're going to take a look at the marketing automation challenges of three different positions and compare some essential elements.

### GROWTH (MARKETING & SALES)

The most frequently mentioned challenge between participants in growth positions is creating automation (29%), by a high margin.

Integrations are another major challenge professionals in growth positions face with marketing automation, with 21% of respondents pointing it out.



# RESPONDENTS WHO AUTOMATE

## CHALLENGES OF MARKETING AUTOMATION PER THREE POSITIONS

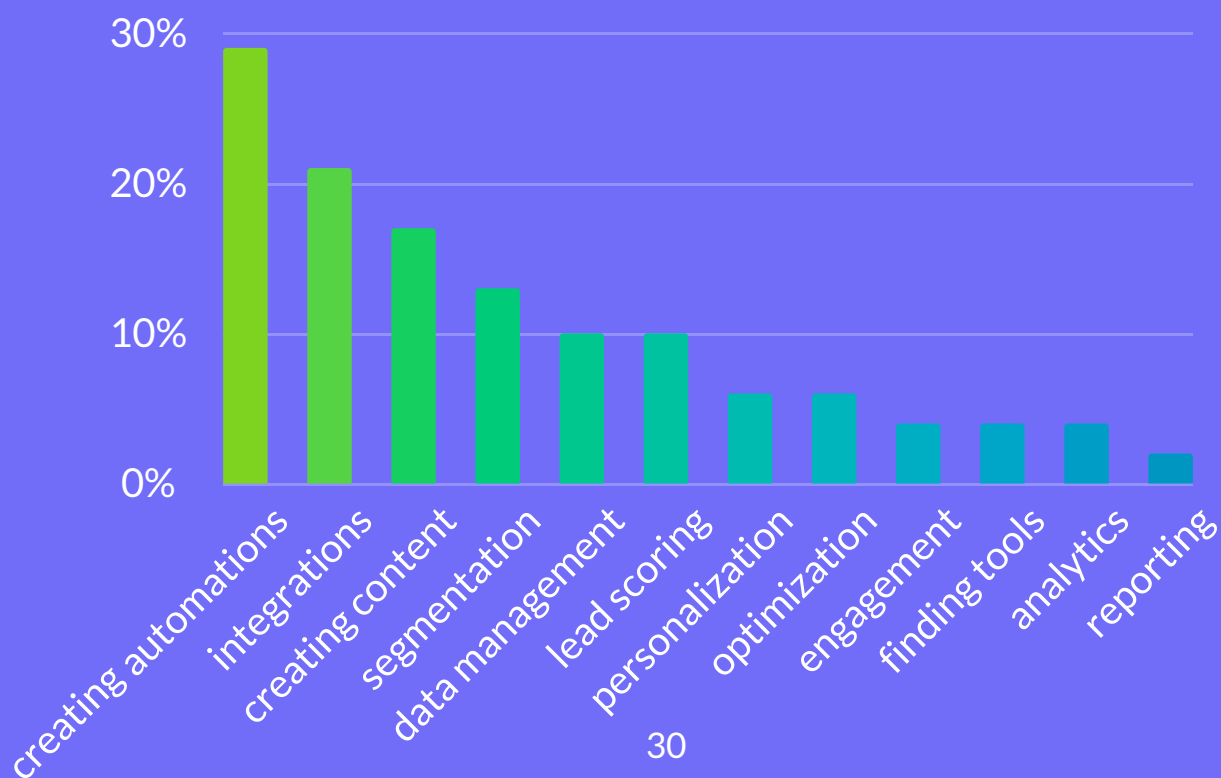
### GROWTH (MARKETING & SALES)

Creating content came in third place with 17% of growth professionals mentioning it.

Segmentation was brought up by 13% of respondents from growth positions.

Data management and lead scoring were pointed out as challenges by 10% of participants.

Other less frequently mentioned challenges include: personalization (6%), optimization (6%), engagement (4%), finding tools (4%), analytics (4%), and reporting (2%).



# RESPONDENTS WHO AUTOMATE

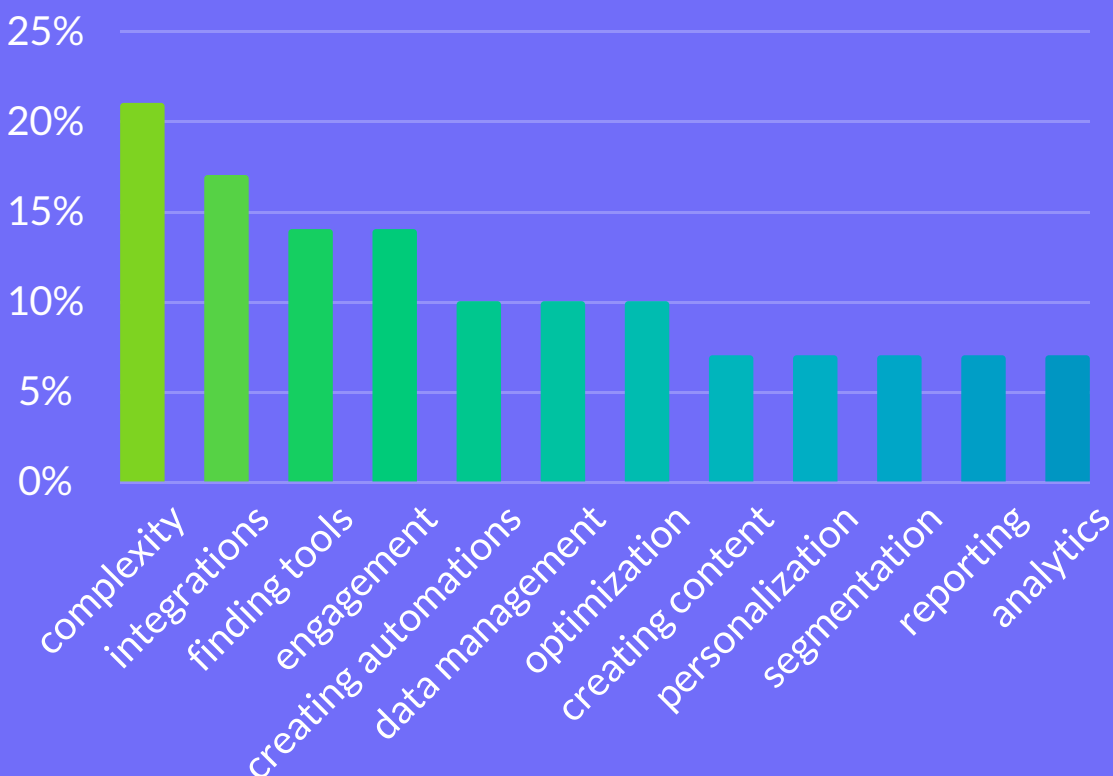
## CHALLENGES OF MARKETING AUTOMATION PER THREE POSITIONS

### CEO

The complexity of marketing automation is the number one challenge for CEOs, with 21% of participants in this positions bringing it up.

In micro and small companies, it's often the CEO who decides what combination of software the company uses. So, it's no wonder that integrations (17%) and finding tools (14%) are significant challenges for them.

Driving engagement on automated marketing messages was pointed out as a challenge by 14% of CEOs.





# RESPONDENTS WHO AUTOMATE

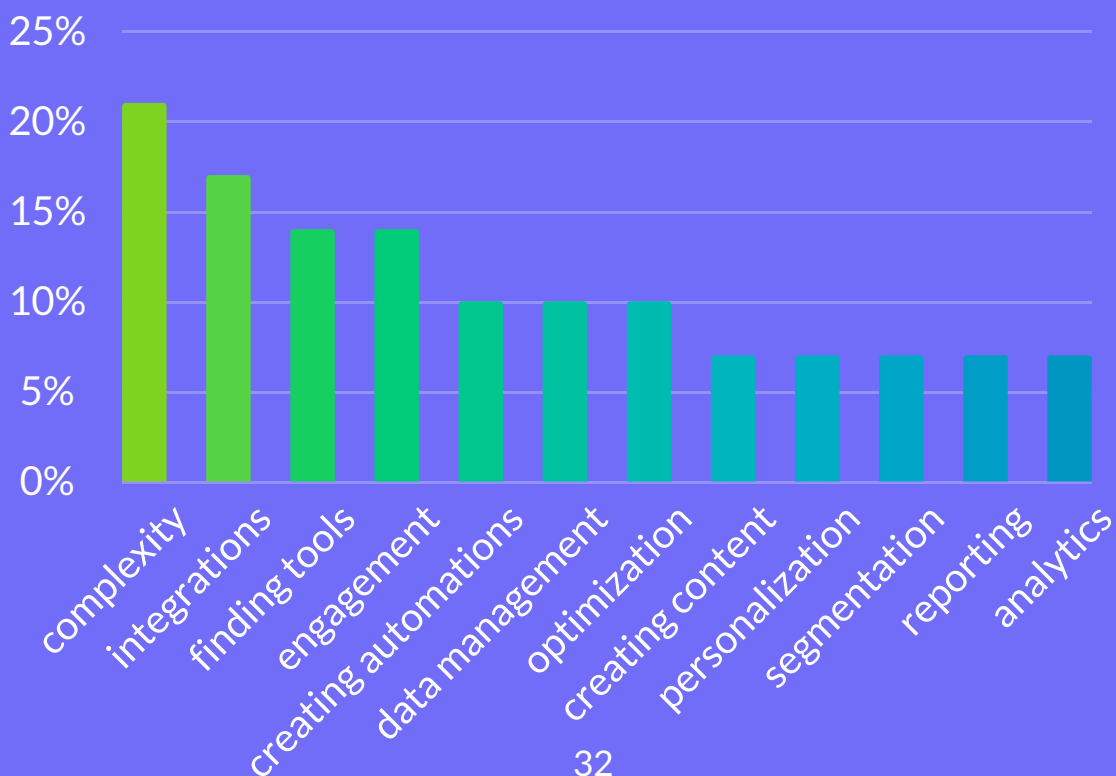
## CHALLENGES OF MARKETING AUTOMATION PER THREE POSITIONS

### CEO

Creating automations (10%) was mentioned significantly less by CEOs than growth professionals and business owners. The reason for this is that most CEOs don't deal with creating automations.

Data management and optimization were both brought up by 10% of respondents in CEO roles.

Some of the less frequently mentioned challenges of CEOs are creating content, personalization, segmentation, reporting, and analytics, each of these appeared in 7% of answers.



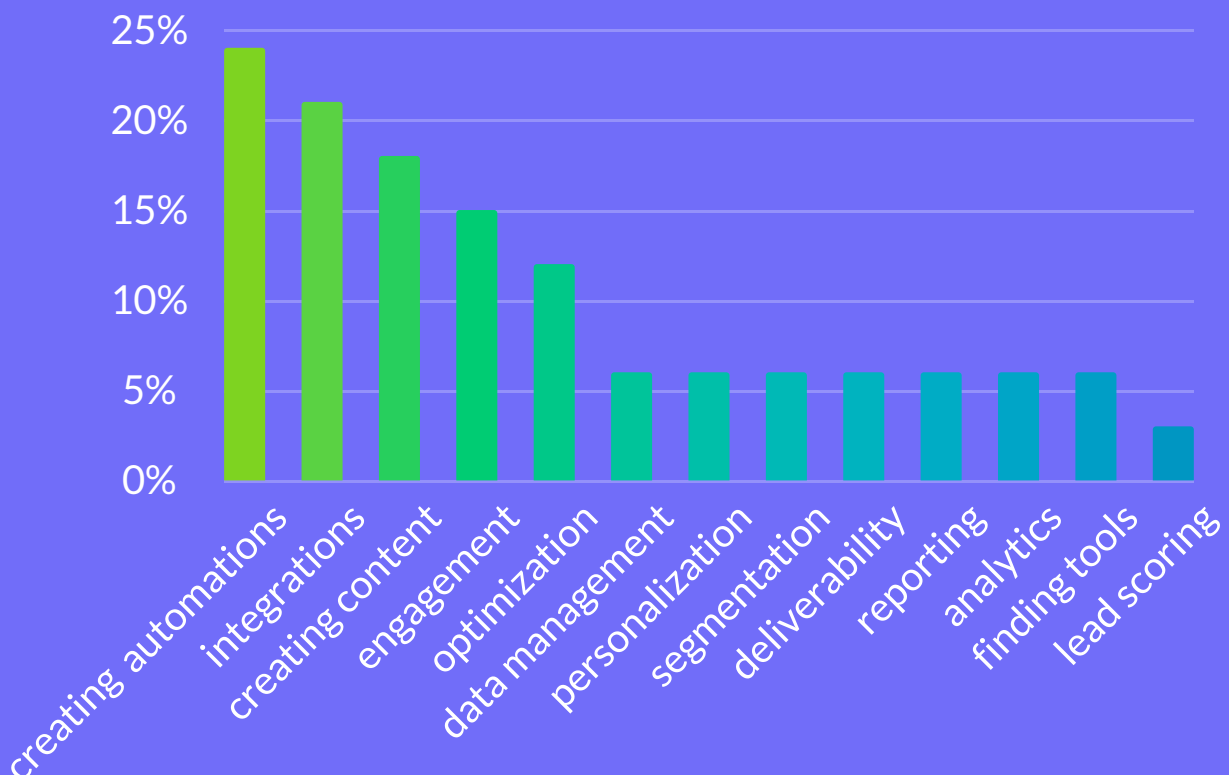
# RESPONDENTS WHO AUTOMATE

## CHALLENGES OF MARKETING AUTOMATION PER THREE POSITIONS

### BUSINESS OWNER

Just like in the case of growth positions, the most common challenge of business owners is creating automations (24%). These business owners are the founders of micro companies and they usually still handle operative tasks related to growth. That's the reason why creating automations is pointed out at a higher percent by them, than CEOs.

21% of business owners mentioned integrations. So, it's a key challenge for them, just like it is for CEOs.



# RESPONDENTS WHO AUTOMATE

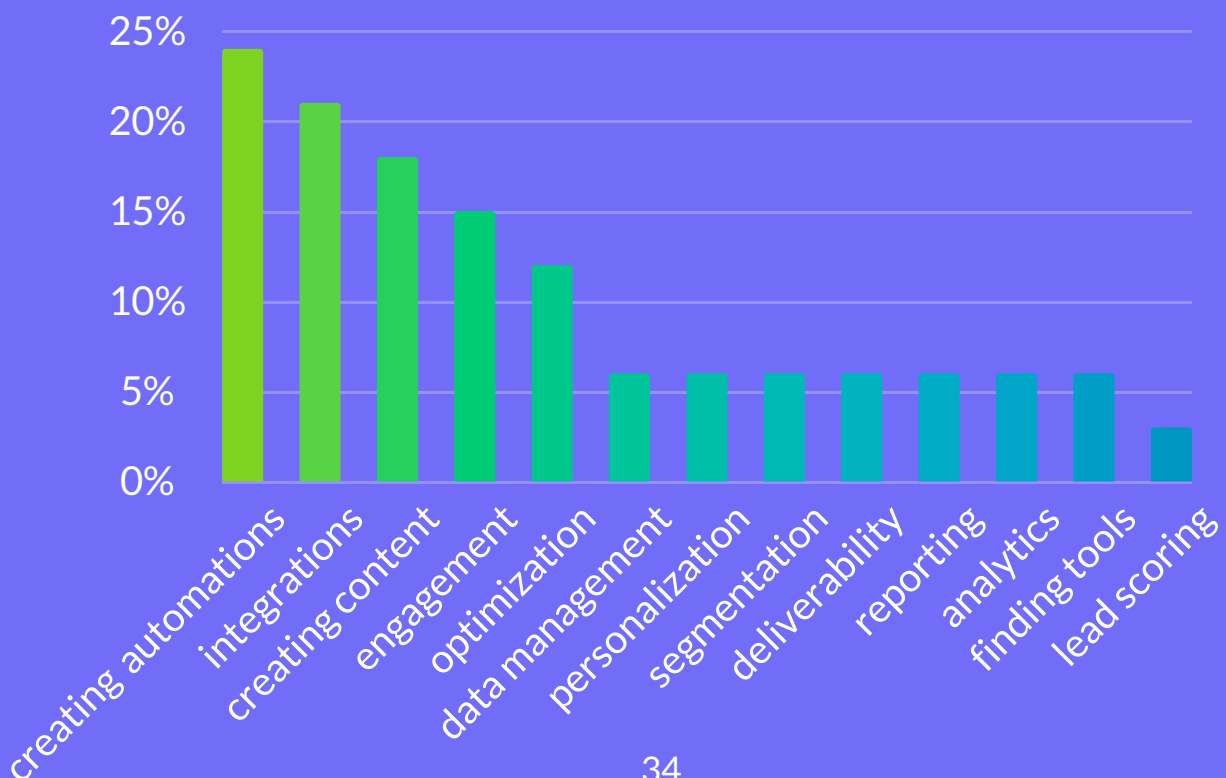
## CHALLENGES OF MARKETING AUTOMATION PER THREE POSITIONS

### BUSINESS OWNER

Creating content finished third, with 18% of respondents in this role mentioning it.

Engagement (15%) and optimization (12%) both received a significant ratio of mentions by business owners.

However, issues like data management, personalization, segmentation, deliverability, reporting, analytics, and finding tools were only brought up by a couple of business owners (6%). That's because these challenges are things bigger companies face with marketing automation.



# RESPONDENTS WHO AUTOMATE

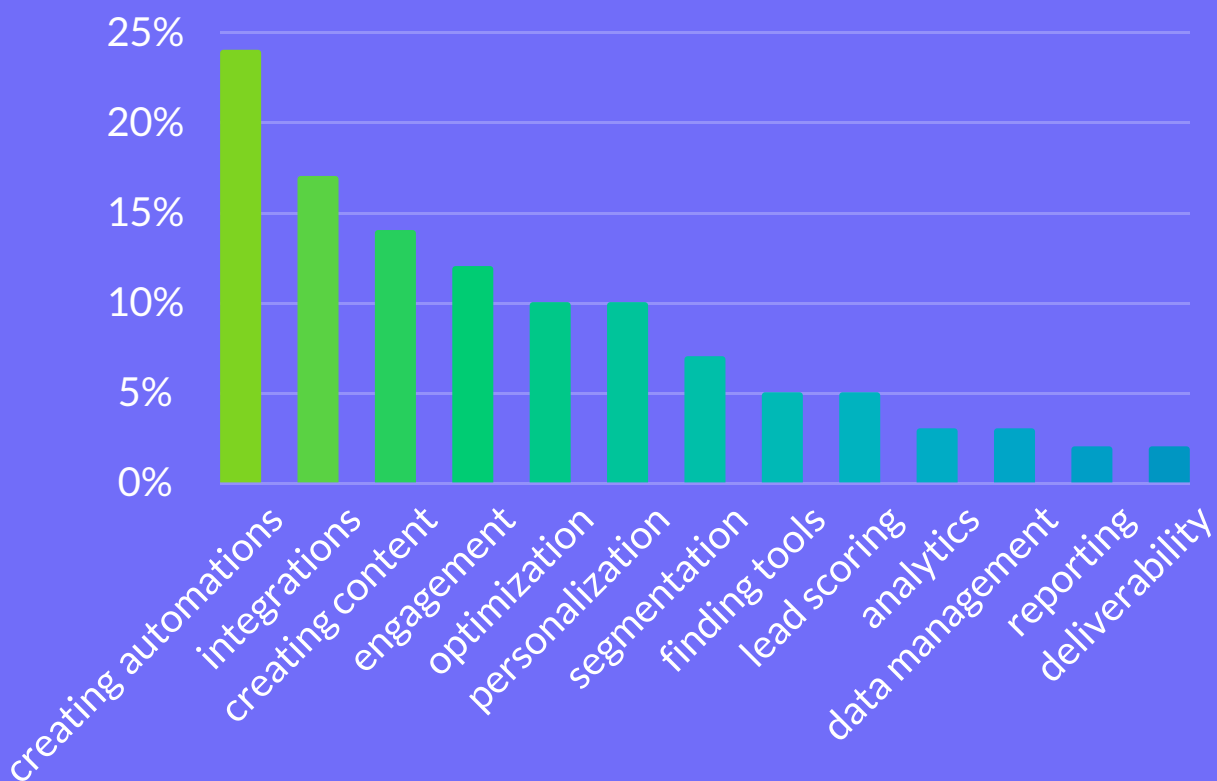
## CHALLENGES OF MARKETING AUTOMATION PER COMPANY SIZE

This chapter breaks down the marketing automation challenges between different company sizes. Companies with 2-10 and 11-50 employees are significantly overrepresented in the survey, so we'll focus on them.

### 2-10 EMPLOYEES

The most frequently mentioned challenge in this group is creating automations (24%) by a large margin.

The only other challenge that was mentioned by more than 15% of respondents in this category are integrations, with 17%.



# RESPONDENTS WHO AUTOMATE

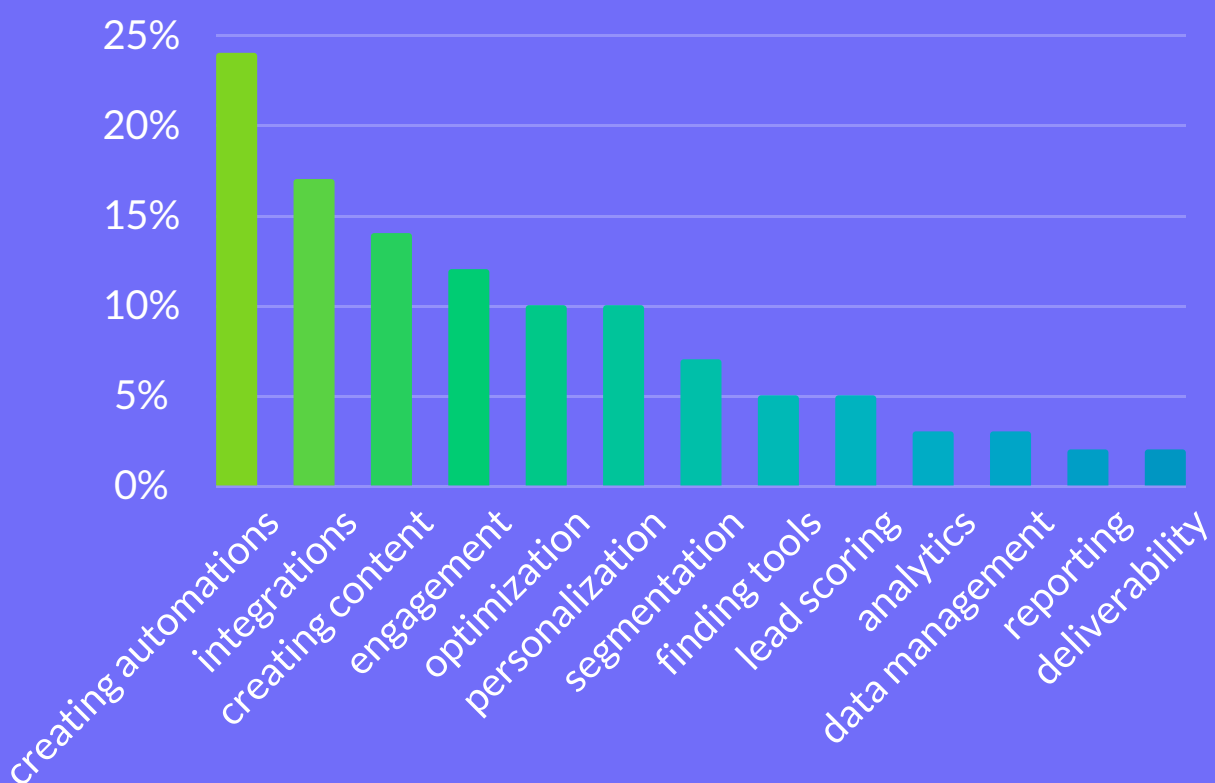
## CHALLENGES OF MARKETING AUTOMATION PER COMPANY SIZE

### 2-10 EMPLOYEES

Creating content is third most common challenge companies in this group face with marketing automation, with 14% of respondents mentioning it.

Driving engagement (12%) is also challenging for companies in this group. It's something lots of micro companies face before finding their audience and brand tone.

Optimization and personalization were pointed out by 10% of the participants in this category.



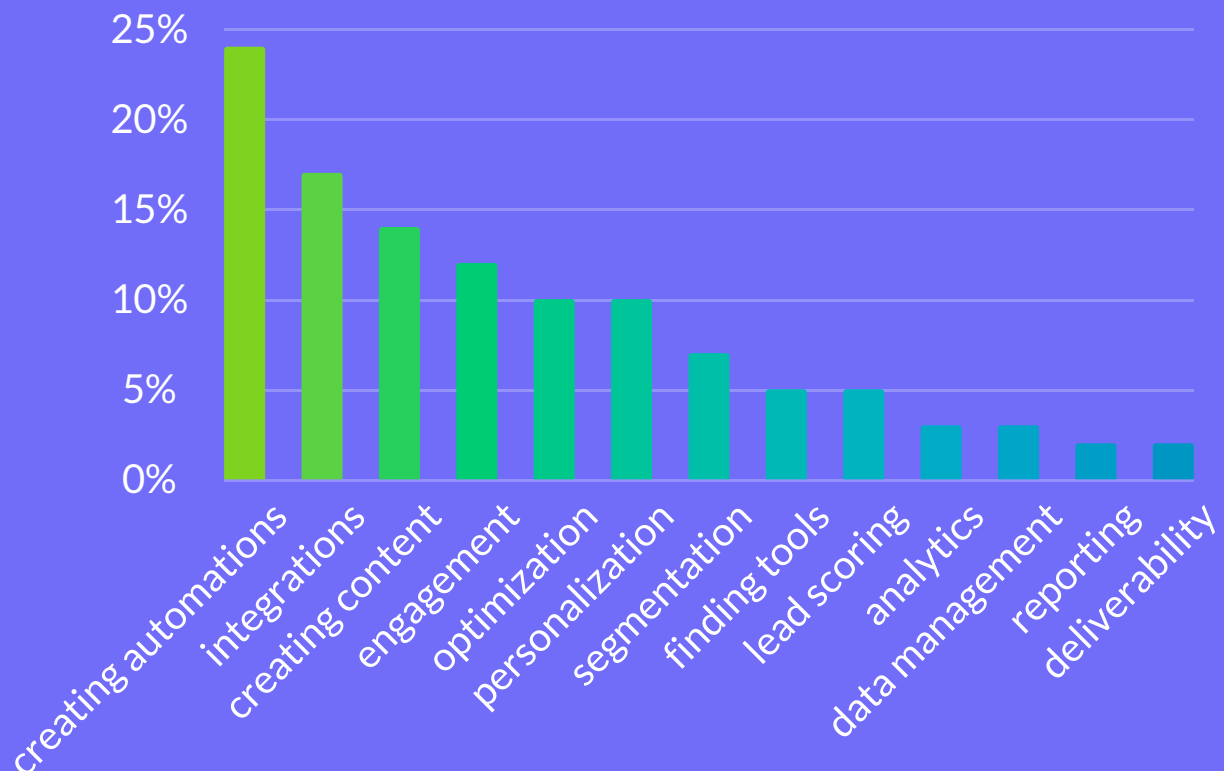
# RESPONDENTS WHO AUTOMATE

## CHALLENGES OF MARKETING AUTOMATION PER COMPANY SIZE

### 2-10 EMPLOYEES

Some less frequently brought up challenges for this category are:

- segmentation with 7%,
- finding tools and lead scoring with 5%,
- analytics and data management with 3%,
- and reporting and deliverability with 2%.



# RESPONDENTS WHO AUTOMATE

## CHALLENGES OF MARKETING AUTOMATION PER COMPANY SIZE

### 11-50 EMPLOYEES

The top three challenges of both company sizes are the same and in the same order. So based on the data we collected, we can say that micro and small companies experience the same most crucial challenges when it comes to marketing automation.

In this category, creating automations was mentioned by 36% of respondents, integrations by 24%, and creating content by 20%.

After the top three, we can see some differentiation, between the two groups.



# RESPONDENTS WHO AUTOMATE

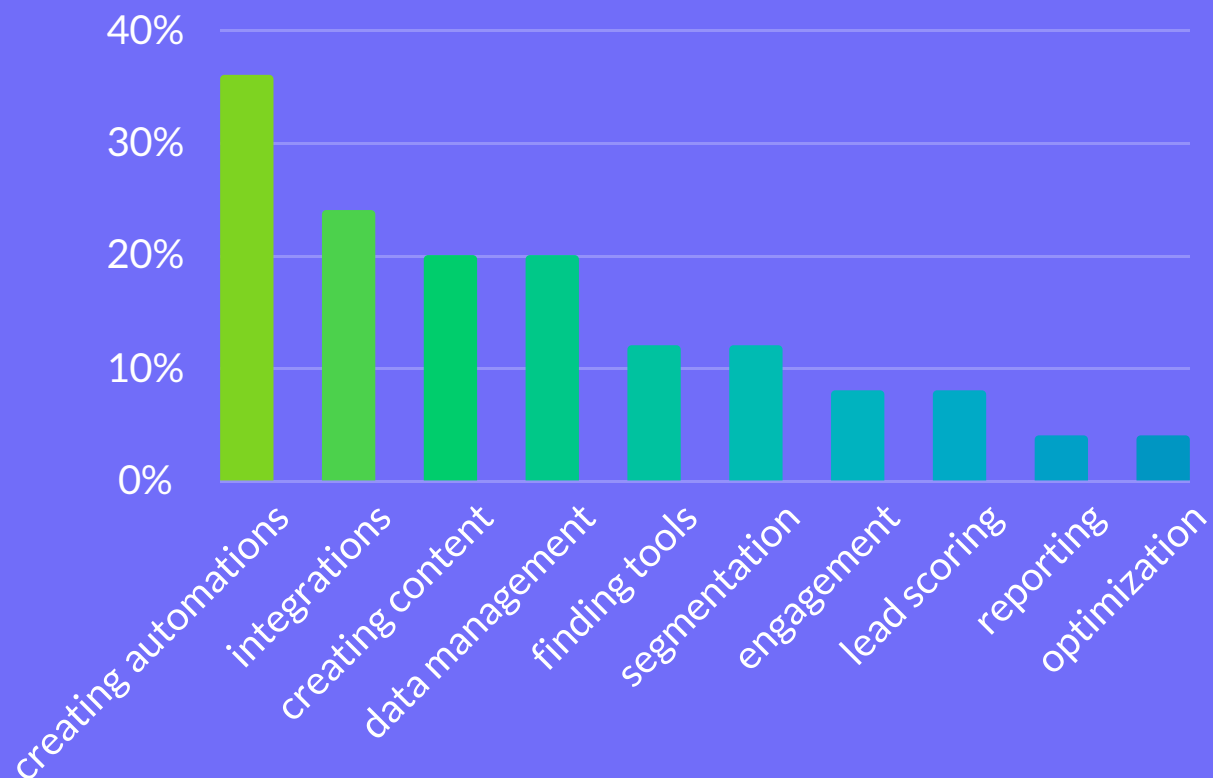
## CHALLENGES OF MARKETING AUTOMATION PER COMPANY SIZE

### 11-50 EMPLOYEES

20% of respondents pointed data management out as a marketing automation challenge, while only 3% of participants mentioned it from micro companies.

Finding tools and segmentation were brought up by 12% of respondents.

The remaining challenges were all mentioned in less than 10 percent of answers: engagement (8%), lead scoring (8%), reporting (4%), and optimization (4%).





# RESPONDENTS WHO AUTOMATE CHARACTERISTIC CHALLENGES



---

*Complexity and as a result of that, a lack of focus on what actually matters. Marketing automation tools today can do so much and enable marketing professionals to work across channels with less friction than ever before.*

*But if you have no strategy before you begin and just try a bit of everything, you end up with a dozen irrelevant personas, hundreds of mail flows with only a few leads in each, way too many reports, and a ton of different landing pages. Managing all of this ends up taking more time, when the marketing automation tool was actually supposed to give you more time by cutting administration. So make sure you go systematically into the implementation of your tool.*

*- Sebastian Hammer*

TimeLog

# RESPONDENTS WHO AUTOMATE

## CHARACTERISTIC CHALLENGES

---

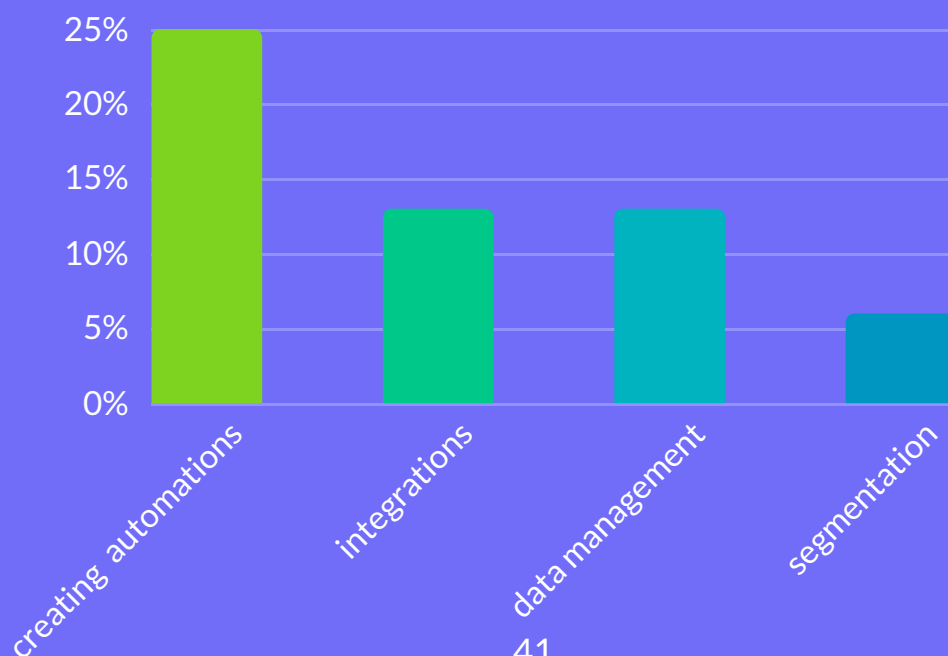
Next up, we're going to have a look at some correlations that appeared between the different marketing automation challenges our respondents mentioned.

### RESPONDENTS WHO SAID "COMPLEXITY" IS CHALLENGE

Participants who mentioned complexity as a challenge have also mentioned having issues creating automations in 25% of answers. This is, by far, the strongest correlation in this category.

Complexity also correlates with integrations and data management, with 13% of respondents mentioning the three challenges in their answers.

Segmentation has the weakest correlation with complexity that's worth a mention. 6% of people brought up both challenges in their answers.



# RESPONDENTS WHO AUTOMATE CHARACTERISTIC CHALLENGES

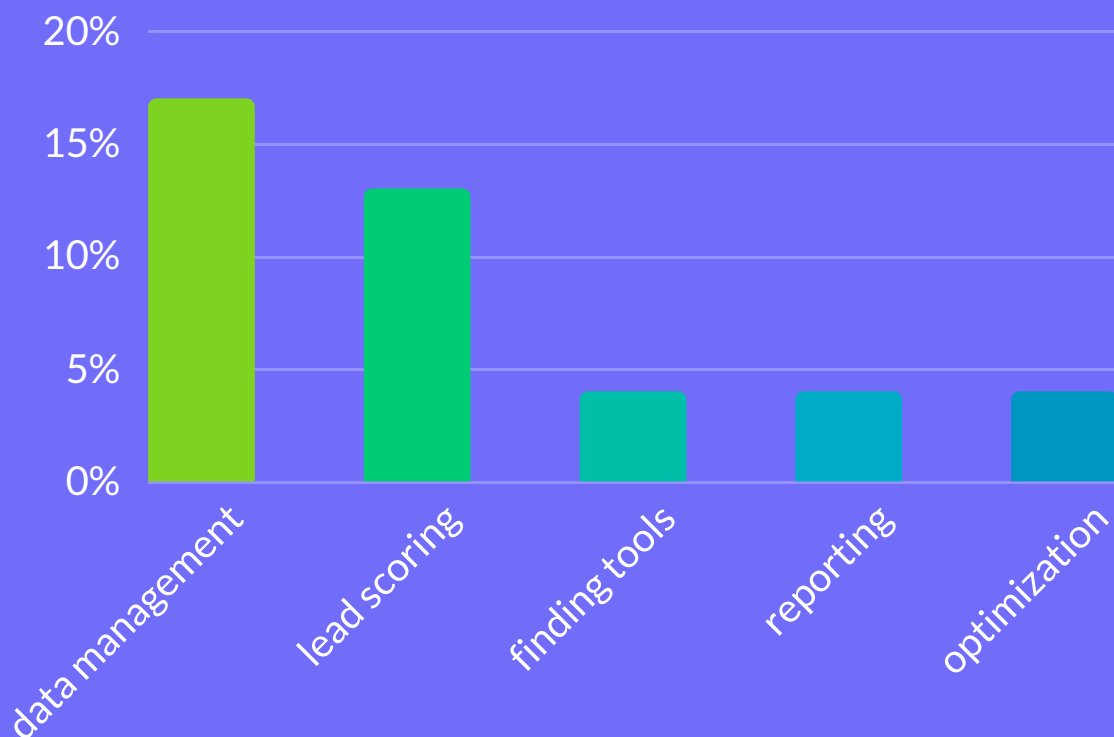
---

## RESPONDENTS WHO SAID "INTEGRATIONS" ARE CHALLENGE

Data management has the strongest correlation with integrations. 17% of respondents mentioned the two challenges together in their answers.

Lead scoring shows significant correlation with integrations, with 13% of pointing them out together in their answers.

Finding tools, reporting, and optimization also show correlation with integrations. Each of them appeared in 4% of answers where integrations were mentioned.



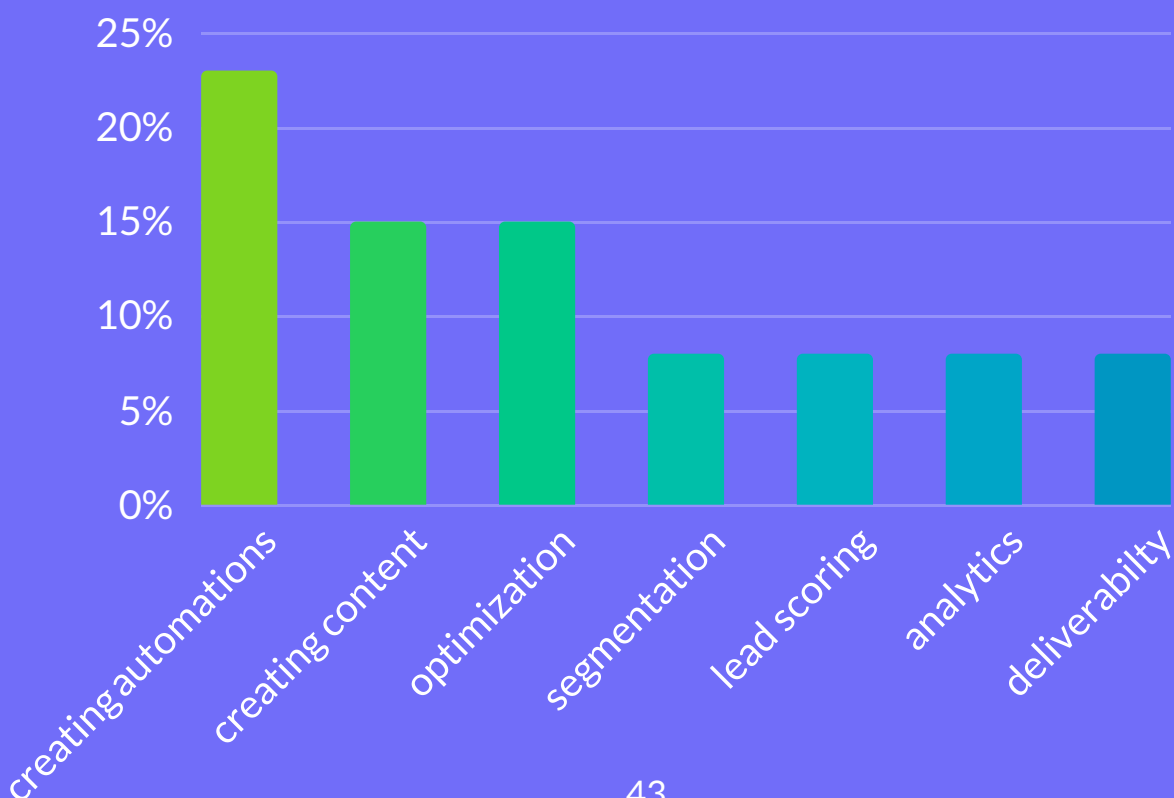
# RESPONDENTS WHO AUTOMATE CHARACTERISTIC CHALLENGES

## RESPONDENTS WHO SAID "ENGAGEMENT" IS CHALLENGE

Creating automations is the strongest challenge for people who have a hard time driving engagement. 23% percent of people mentioning engagement also mentioned creating automations as a marketing automation challenge.

Creating content and optimization are the second and third most frequently brought up challenges with engagement, both with 15%.

Segmentation, lead scoring, analytics and deliverability all have an 8% correlation with engagement, which means that 8% of people who mentioned engagement also pointed these out as a marketing automation challenge.



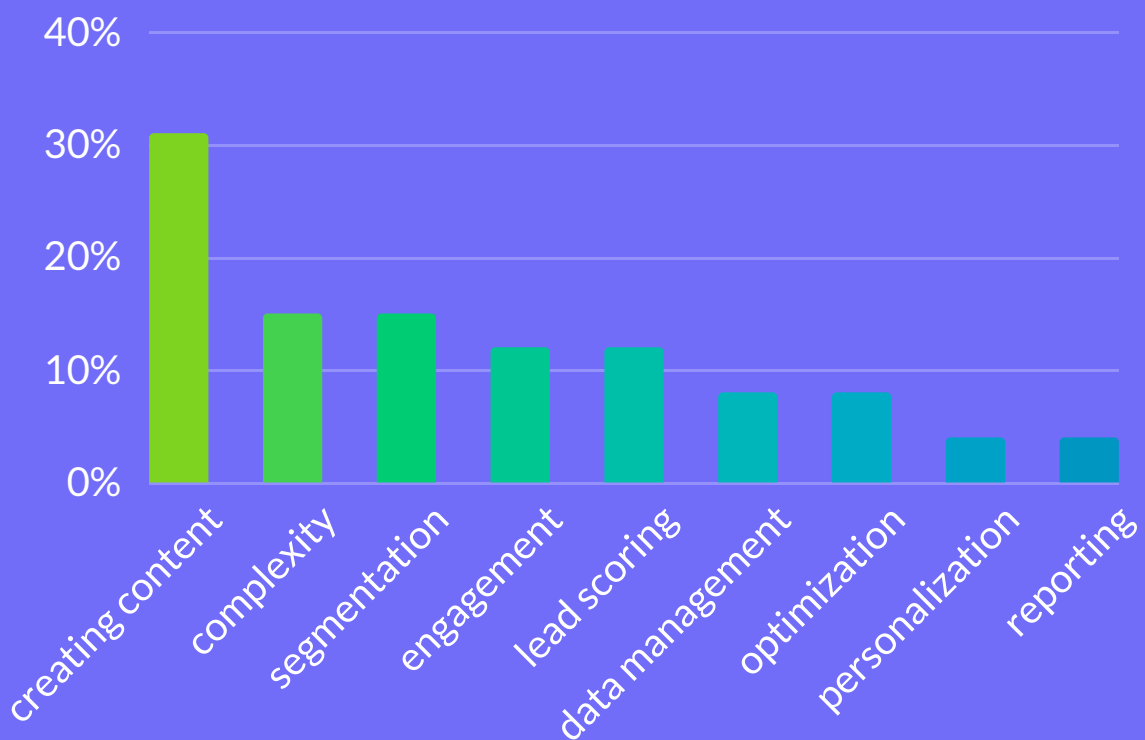
# RESPONDENTS WHO AUTOMATE CHARACTERISTIC CHALLENGES

## RESPONDENTS WHO SAID "CREATING AUTOMATIONS" IS CHALLENGE

Respondents who brought up creating automations as a challenge, also mentioned creating content as a challenge 31% of the time. This is by the strongest correlation any challenge has with creating content.

Complexity and segmentation were mentioned in 15% of answers pointing out creating automations as a challenge.

Engagement and lead scoring also have a significant correlation with creating automations. Both challenges are mentioned in 12% of answers with creating automations also listed.

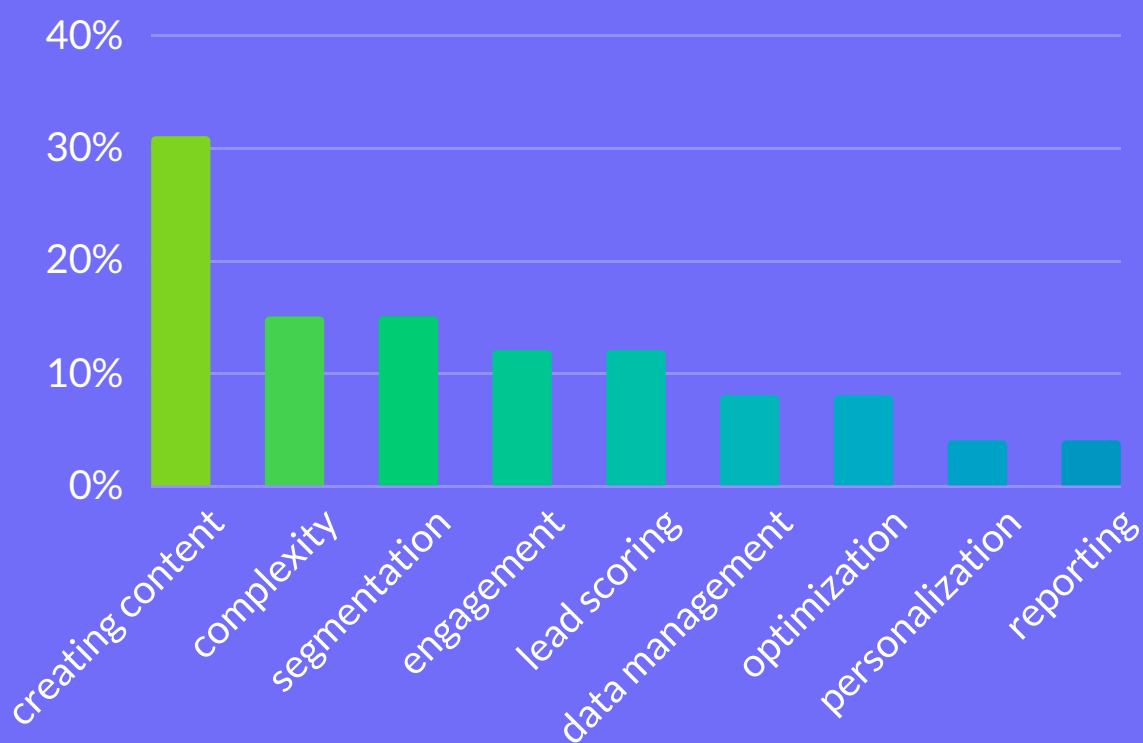


# RESPONDENTS WHO AUTOMATE CHARACTERISTIC CHALLENGES

## RESPONDENTS WHO SAID "CREATING AUTOMATIONS" IS CHALLENGE

Respondents who have a hard time creating automations brought up data management and optimization as a challenge, too. 8% of answers mentioning creating automations have either of these pointed out.

There's a minor correlation between personalization, reporting and creating automations, 4% of respondents mentioned creating automations together with either personalization or reporting.



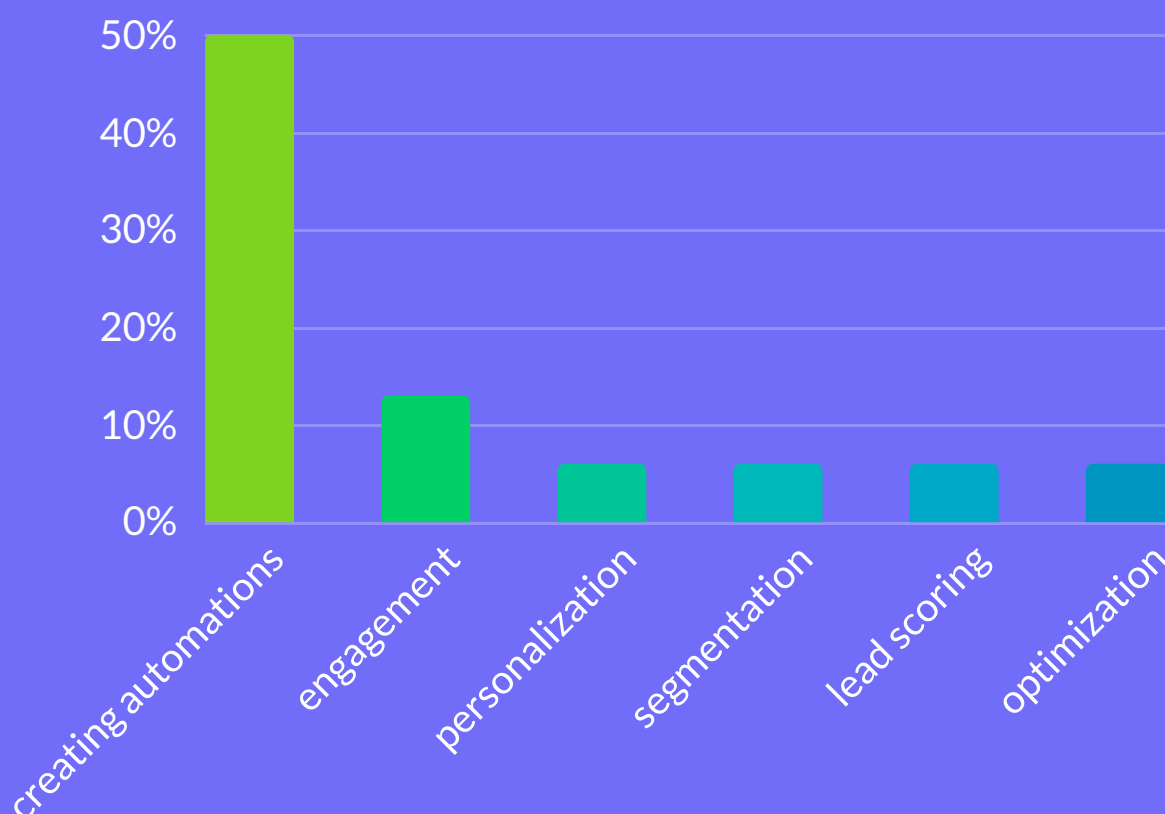
# RESPONDENTS WHO AUTOMATE CHARACTERISTIC CHALLENGES

## RESPONDENTS WHO SAID "CREATING CONTENT" IS CHALLENGE

Half of the participants who said creating content is a challenge for them, also have a hard time with creating automations. The reason for this is that automating more marketing activities requires more content.

Engagement is mentioned in 13% of answers, where creating content appears.

Personalization, segmentation, lead scoring and optimization show some correlation with creating content. 6% of answers with creating content also mention one of these challenges.



# RESPONDENTS WHO AUTOMATE CHARACTERISTIC CHALLENGES

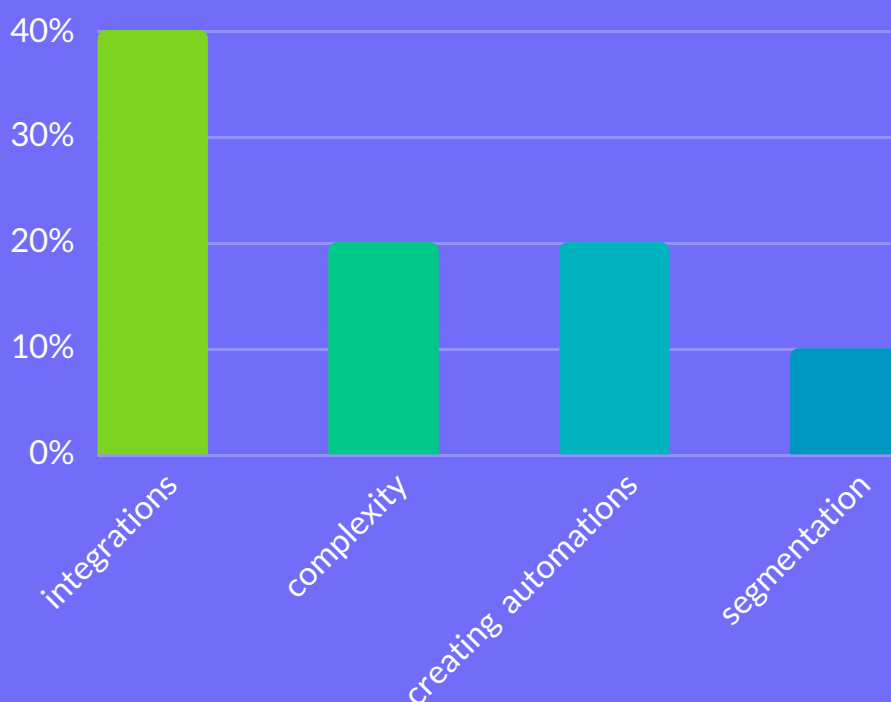
---

## RESPONDENTS WHO SAID "DATA MANAGEMENT" IS CHALLENGE

Integrations were the most frequently mentioned challenge together with data management. 40% of people who said data management was a challenge, brought integrations up. Integrations let different software exchange data with each other, so naturally, people struggling with data management also have a hard time setting up integrations and finding software that integrates.

Complexity and creating automation were both mentioned in 20% of answers that had data management pointed out as a marketing automation challenge.

Segmentation appeared in 10% of answers that had data management mentioned.





# RESPONDENTS WHO AUTOMATE

## MARKETING AUTOMATION ADVICE FOR BEGINNERS FROM EXPERTS



100% understand the journey that you want your customers to take in the flow. We can set any type of funnel or marketing automation flow but one thing that can be forgotten when starting out is not to think about the whole flow and mindset of the customer going into the flow and also what they will do and how they will be when they exit. What will be your trigger points be? How will you guide your reader to do what you want. That is right you are the guide, you are not the strict teacher telling them what to do, that doesn't work in this day and age. You have to use words, imagery, a bit of humour and knowledge of your customer to get them to trust you and do things. Be consistent in everything that you do, know your brand, know your brand voice and look at every campaign as a whole to make sure your language and flow makes sense.

- Aniel Bhaga

Ungapped

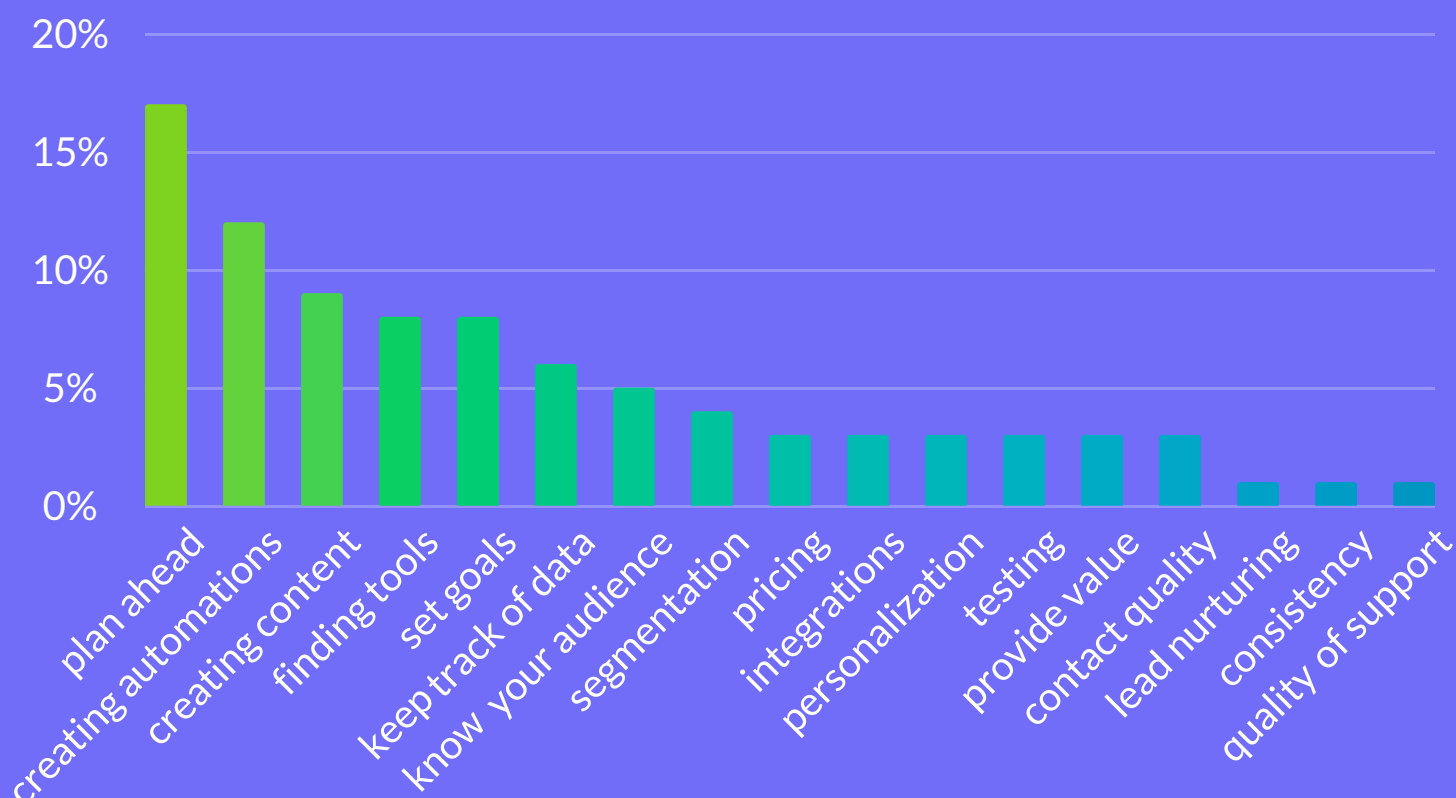
# RESPONDENTS WHO AUTOMATE

## MARKETING AUTOMATION ADVICE FOR BEGINNERS FROM EXPERTS

In this section, we're going to take a look at what people who want to start using or have just got started with marketing automation should pay attention to.

Just like in the case of challenges, this was an open question we asked people who use marketing automation.

We consolidated this data so that we can recognize the patterns appearing in the answers. You can read more about the processes in the methodology section.

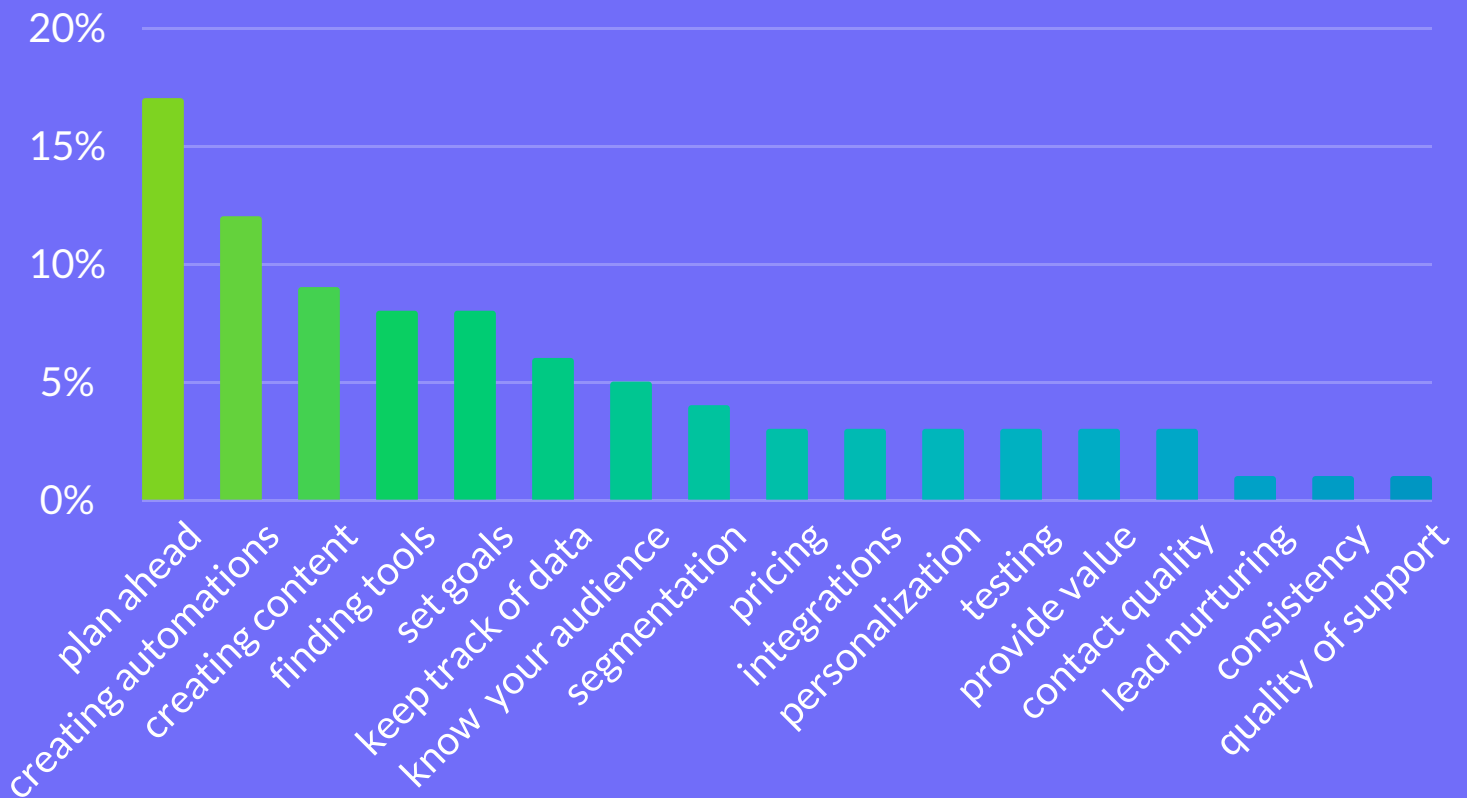


# RESPONDENTS WHO AUTOMATE

## MARKETING AUTOMATION ADVICE FOR BEGINNERS FROM EXPERTS

Planning ahead (17%) appeared most frequently as advice for starters. Marketing automation requires a clear strategy to be effective. Without that there's nothing to be automated.

Creating automations (12%) came in second place as something people starting out should pay attention to. It's no wonder, as automated processes are the whole essence of marketing automation. Creating quality automations when you're starting out will save you a ton of resources and headache.

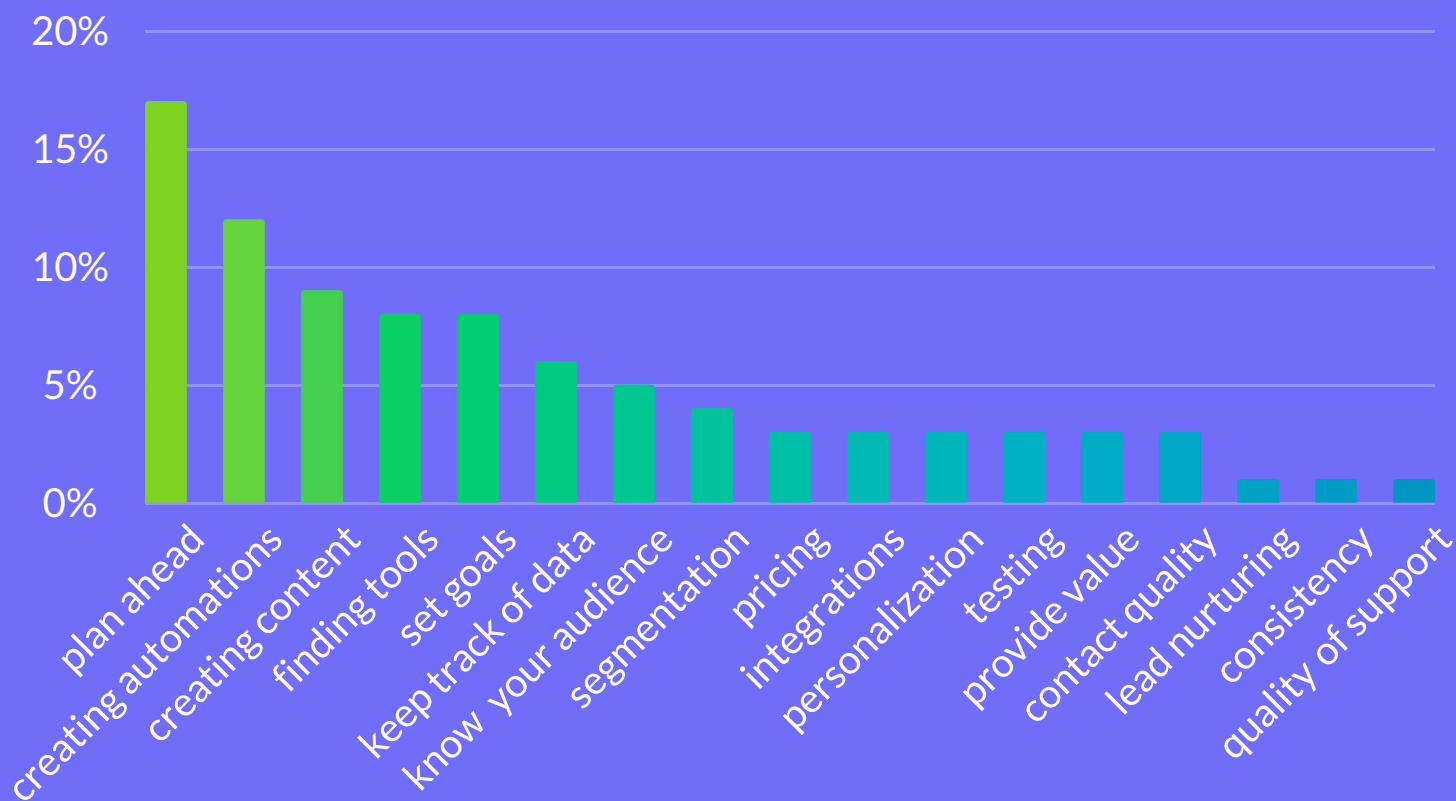


# RESPONDENTS WHO AUTOMATE

## MARKETING AUTOMATION ADVICE FOR BEGINNERS FROM EXPERTS

Creating content is another frequently mentioned advice from marketing automation users. Even the most sophisticated automation is worth nothing without quality content.

8% of marketing automation users in our survey say that starters should pay attention to finding the right software that suits your needs. Doing some research and finding a tool that does exactly what you need it to do, will make it easier for you to get started and get the results you desire.

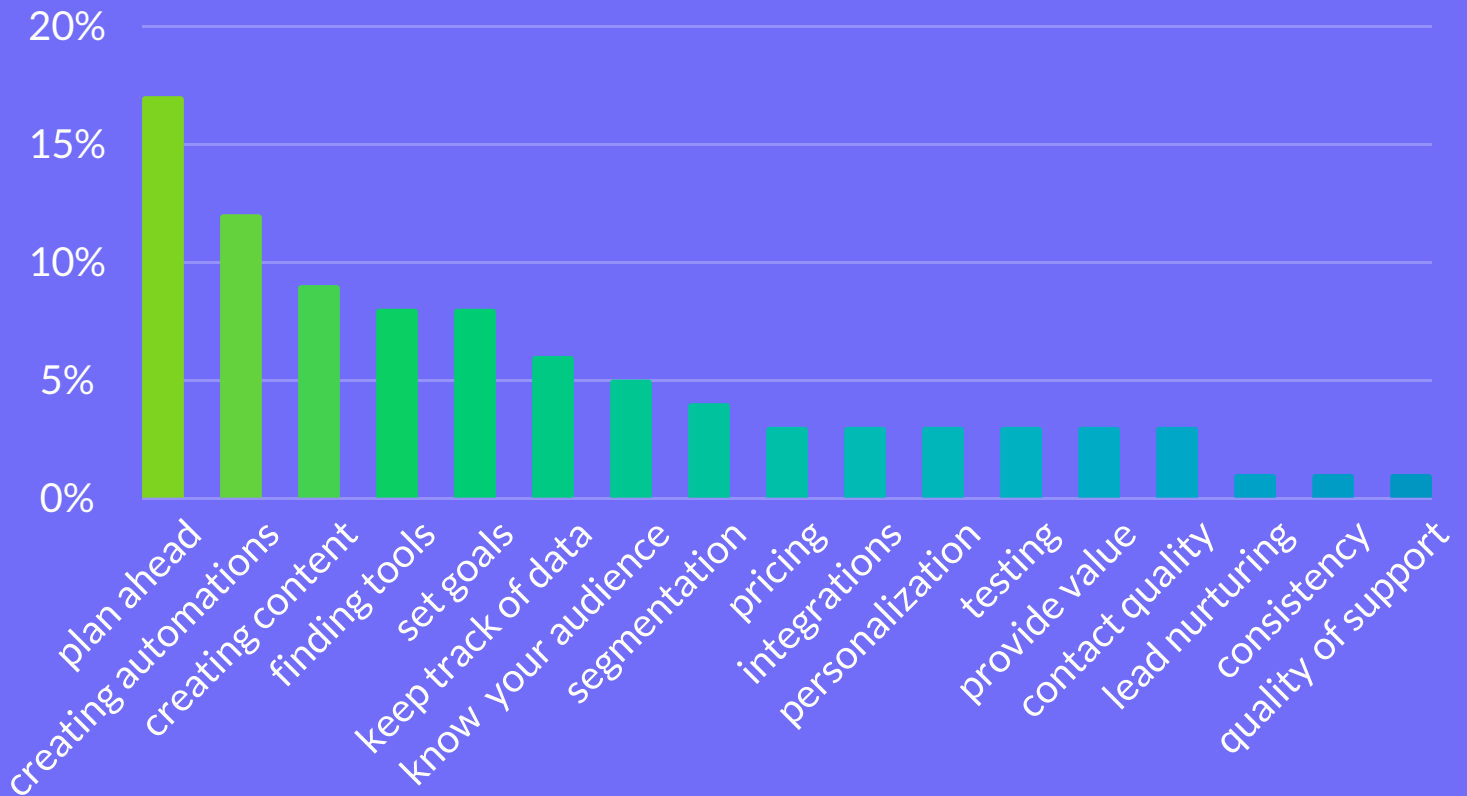


# RESPONDENTS WHO AUTOMATE

## MARKETING AUTOMATION ADVICE FOR BEGINNERS FROM EXPERTS

While setting goals seems similar to planning ahead, setting goals is way more specific. It's about choosing measurable goals and metrics to evaluate the performance of your campaigns and automations.

Closely related to setting goals, keeping track of data (6%) is another advice marketing automation users mentioned as something people new to marketing automation should pay attention to.



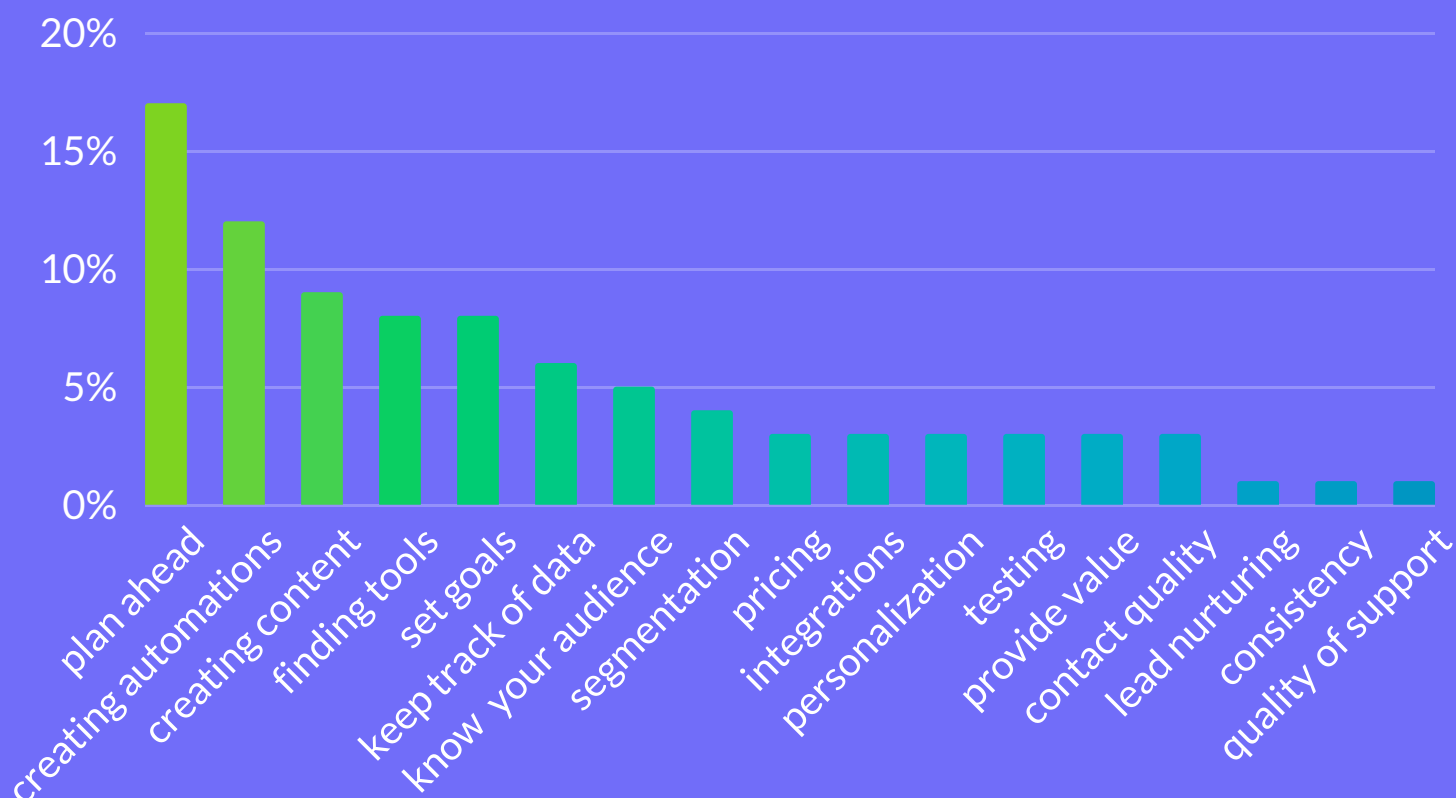
# RESPONDENTS WHO AUTOMATE

## MARKETING AUTOMATION ADVICE FOR BEGINNERS FROM EXPERTS

It's wise to start segmenting your audience when you're starting out with marketing automation. However, only 4% of marketing automation users mention it.

Pricing, integrations, personalization, testing, providing value and contact quality were brought up in only 3% of responses. Still, they are some key things that need attention after you get started.

A couple of participants only mentioned lead nurturing, consistency and the quality of support (1%). These might not be your priority when you're in the beginning but keep them in mind.



# METHODOLOGY



---

*Keeping automation as human as possible. With multiple and more complex multi-part workflows making sure they stay organized, easily understood and there is not any overlap.*

*- Trevor Hatfield*

Inturact

2019

# METHODOLOGY

---

The data used in this report was collected in July and August 2017. We surveyed 133 people who work in marketing or other relevant positions. Most of the data were obtained by reaching out to suitable participants through LinkedIn, one by one, with a link to the survey.

Once we had enough submissions, we started consolidating and processing the data. In the survey, all questions were open, except the first one, which was a yes-no question and the question where we asked for the number of employees in the respondents' company. We did this because we didn't want to force people into inadequate categories. Instead, we required text answers, which we would later code and categorize.

The first step of data consolidation was to get rid of duplications.

Then, we had to create categories for the positions and divide the database into two groups: respondents who automate and respondents who don't automate.

Once we had these two distinct databases, we started consolidating the long form text answers. We had to identify patterns and keywords that appeared in the answers. After this was done and we had the keywords, we just went through all the answers and checked whether the respondent mentioned that particular keyword or not. If he or she didn't mention it, we put a 0 to the assigned field in the spreadsheet, and he or she did we put a 1. With this process, we were able to create numerical data from text.

The next step was to process the whole database, to be able to demonstrate the distribution of industries, positions and company sizes.

We continued by doing this process for the segmented databases, so we could examine and highlight the differences, similarities, and tendencies.



# ACKNOWLEDGMENTS & THE RESPONDENTS



---

*Focus on the results you want and find a way to measure it while you are planning. Don't wait for the execution phase. And never do things in phases.*

*- Scott Valentine*

Default Inc

2019

# ACKNOWLEDGMENTS

---

As you could see the main concerns and challenges marketers have with marketing automation are creating automations, integrations, and complexity.

That's the reason why we at Automizy focus on providing a seamless experience for our users with an easy-to-use interface and visually recognizable patterns.

I'd like to thank everyone who contributed to creating this report in any way shape or form.

Special thanks to the whole Automizy team for being awesome. The initial idea for creating this report came from my colleague and good friend Viktor Egri. Without him, this report could've never happened. In the recent months, there's been so much going on that I couldn't start writing the report, he pushed me to buckle down and begin. Appreciate it, mate!

I'm sending my highest level of appreciation to everyone who took the time to fill out the survey. Without the contribution of all you amazing people, this report couldn't have turned out this great. Thank you so much!

On the next page, you can find the name of every person who filled out the survey. I hope we can work together in the future creating more awesome stuff and tons of value for the good people out there.

Let's grow,

Mor Mester  
Head of Marketing  
Automizy



# THE RESPONDENTS

Ed Fry	Rohith Darisa	Marcus Lindblad	
Youness Bermime	Guillaume Moubeche	Alexis Martial	
Aaron Krall aka A-Aron	Alex Rangevik	Steven Picanza	
Rick Kuwahara	Deanna Aaron	Renate Ceipiniece	
David Attard	Andrea Kilin	Daniel Daines-Hutt	
Djahill Zouaoui	Miklós Emődy	Nicole Frisbee	
Pat Ahern	Krisz Fazekas	Rupert Morris	
Udit Goenka	Ferenc Hamori	Craig Hewitt	
Luka Zuparic	Haim Pekel	Tim Smalley	
Naveen Dhanapal	Nebojsa Damjanovich	Nuno Sancha	
Apolline Adiju	Kata Györke Szász	Melanie Brouste	
Tarun Chhanda	Ling Koay	Kieran George	
Alastair Smith	Jesse Bastide	Bruno Etchepare	
Shaun Lee Wei Rong	Dr. Peter Kadas	Jayden Maharaj	
Jubayer Hossain	Stefan Gaasbeek	Nenad Papic	
Abhik Shome	Judit Sandor	Dave Collins	
Sampath S	Konstantine Gegeshidze	Georgia Kokkini	
Jeff Lambert	Matouš Roskovec	Gaurav Singh	
Peter Afoke Oniovosa	Stephen Clarke	James Steadman	
Jon Buchan	Juan Quintero	David Craig White	Yoel Israel
Neeraj Joshi	Jim Sterne	Bruno Pešec	Bret van Putten
Chris Von Wilpert	Jørgen Riiser	Sharon Mascarenhas	Emmanuel Aremu
Gilles De Clerck	Sebastian Matoso	Matt Davison	Boglarka Dobi
Luke Fitzpatrick	Cyndi Lemke	Shathyan Raja	Fahad Mohammed
Nix Eniego	Vas Musca	Jerome Syed	Sam Hurley
Attila Peringer	Thomas Qvist Krüger	Will Laurenson	Monnel Espiritu
Shubham Vyas	Janja Jovanovic	Eleanor Goold	Ben Bradbury
Timi Garai	Sebastian Hammer	Christina Holthuis	Ana Grasic
Jai Acharya	Kenneth Swedlund	Lukas Rogwall	Louis Grenier
Bendegúz Nagy	Jimmy Hagelfors	Viktor Zöld	Csaba Zajdo
Trevor Hatfield	Tomek Duda	Jason Quach	Yonatan Snir
Emil Lamprecht	Trip Sirna	Adam Gould	Emily Chisholm
Justin Wu	Martin Junker	Jonathan Aufray	Karl Kanugr
Aniel Bhaga	Hugo Svärd	Eddy Bautista	Erik Bullen
Syed Irfan Ajmal	Matt Campbell	Denisse Schnabel Soker	Eric Holtzclaw
Robin Singh	Scott Valentine	Per Sjöfors	David Connors
Andrei Zinkevich	Hailey Friedman	Yam Regev	Kristen Berman
Kalle Saunamäki	Bryan McAnulty	Fab Ghys	Ovi Negrean