

Are You Ready for Marketing Automation?



This worksheet is designed to help you gauge if your business is in a good place to benefit from marketing automation.

To use the worksheet, read the statements in the box below and answer whether they are true or false in your business. You can interpret your results in the next section. To find out why each of the factors is important, check the second page.

Are you ready for Marketing Automation?

TRUE FALSE

Our buyers spend a lot of time researching our products before buying.

Our sales team would benefit from better-qualified leads from marketing.

We have useful resources—such as blog posts, eBooks, whitepapers—that we use throughout the sales process.

TRUE FALSE

We want to build better processes to encourage customer interaction.

We use an inbound marketing strategy and understand how it works.

We are highly motivated to implement marketing automation. We have all the resources to put processes in place.

Interpret Your Results

TRUE to every question

Congratulations! You're definitely ready for marketing automation.

TRUE to 3-6 questions

You're probably ready for marketing automation. Take a look at the chart on the next page to find out more.

TRUE to 1-3 questions

Your business might not be quite ready for marketing automation. Depending on your circumstances, it may not be hard to get yourself ready. Look at the section on the next page to see what steps you can take.

FALSE to every question

Perhaps marketing automation isn't for you at the moment. Now could be an excellent time to find out more about what marketing automation is and how to prepare your business.

Why the Answers Matter

- 1.** Marketing automation helps **simplify and automate complex sales funnels**. If your sales process is shorter, automation can still help. But, to ensure you are ready, try to identify steps in your process that you would automate.
- 2.** Marketing automation helps **provide sales teams with valuable leads** by automating product education and lead scoring. If your sales team would benefit from better leads, marketing automation software can help.
- 3.** Marketing automation makes use of marketing collateral to **educate buyers and collect information** through landing pages related to these resources. If you don't have many resources, creating some will help prepare you for marketing automation.
- 4.** Marketing automation can both **increase and improve the quality of customer interactions** by automating messaging based on actions they take. Even if you're happy with your current customer interactions, there may be ways you can improve the process by automating them.
- 5.** Marketing automation is **typically part of an inbound sales strategy**; this is where it often provides the most value. Although there are still ways you can implement marketing automation within an outbound strategy.
- 6.** Marketing automation **saves time and energy** in the long run by automating marketing processes. However, it does require some energy up-front to discover and set-up optimal processes. If you don't have the time or resources available to make the most of marketing automation now, consider implementing it at a later time.

About Act!

Act! is the leading provider of all-in-one CRM and marketing solutions that empower small and mid-sized businesses to market better, sell more, and create customers for life. With Act!, you can choose which works best for you - email marketing or marketing automation, and easily turn leads and website visitors into customers. For more information about how Act! email marketing or marketing automation can benefit your organization, visit our [website](#).

*This worksheet is based on information from Gleanster Research: <https://www.slideshare.net/GleansterResearch/marketing-automation-gleanster-research-cheatsheet>

Prepare for Marketing Automation With These Free Resources:

- [What is Marketing Automation?](#)
- [Your Definitive Guide to Marketing Automation](#)
- [Your Definitive Guide to Lead Generation](#)
- [Your Complete Guide to Lead Management](#)
- [Your Step-by-Step Guide to Creating the Perfect Customer Journey](#)
- [A Beginner's Guide to Customer Acquisition](#)



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