

# Transform your business with Marketing Automation



# Contents

---

<b>1 &gt; Introduction</b>	<b>03.</b>
<b>2 &gt; Discover the pillars of automation</b>	<b>04.</b>
<b>3 &gt; Explore the benefits of Marketing Automation</b>	<b>05.</b>
<b>4 &gt; Step-by-step to implement a Marketing Automation strategy</b>	<b>08.</b>
<b>5 &gt; Key tools and platforms</b>	<b>12.</b>
<b>6 &gt; From inspiration to implementation: Success stories</b>	<b>18.</b>
<b>7 &gt; Conclusions</b>	<b>19.</b>
<b>8 &gt; References</b>	<b>20.</b>

## 1. Introduction

---

Today, we live in an increasingly **automated** world. Production processes, administrative tasks and even interpersonal relationships are increasingly affected by technology. In this context, Marketing Automation was born as a response to the need of companies to **optimize their marketing and communication processes**, while **personalizing** their customer experience.

Marketing Automation is a strategy that **uses technology and specialized software to automate repetitive tasks and personalize communication with customers**. It is a fundamental tool for SMEs and freelancers, as it allows them to optimize their time and resources, personalize communication with customers and increase conversions. In this context, **the number of potential opportunities increases by 80% for those who employ this strategy [REF-01]**.

Among the most common marketing automation workflows are **email marketing, behavioral targeting, lead prioritization and personalized advertising**.

In short, this variant of marketing allows SMEs and freelancers to **automate these tasks, freeing up time and resources** to focus on other, more strategic activities.



## 2. Discover the pillars of automation

In the business context, automation translates into the implementation of systems and processes that enable **the execution of tasks without direct human intervention**. Automation frees teams from manual tasks, allowing them to focus on more strategic and creative activities. In this way, **automated processes** ensure faster and more accurate execution, boosting operational efficiency [REF-02].

In marketing, this discipline is materialized through Marketing Automation, a set of technologies designed to **simplify and optimize interactions with customers throughout the lifecycle**.

Within a company's own means of communication, which include channels such as email, social networks and websites, Marketing Automation plays a **major role, coordinating and optimizing each interaction**. From **intelligent audience segmentation** to **personalized content delivery**, this discipline transcends task automation, focusing on cultivating meaningful relationships with customers.



## 3. Explore the benefits of Marketing Automation

Marketing Automation is a strategy that uses technology to automate marketing tasks such as emailing, social media management and lead generation.

This strategy offers a number of benefits for SMEs and freelancers, including:



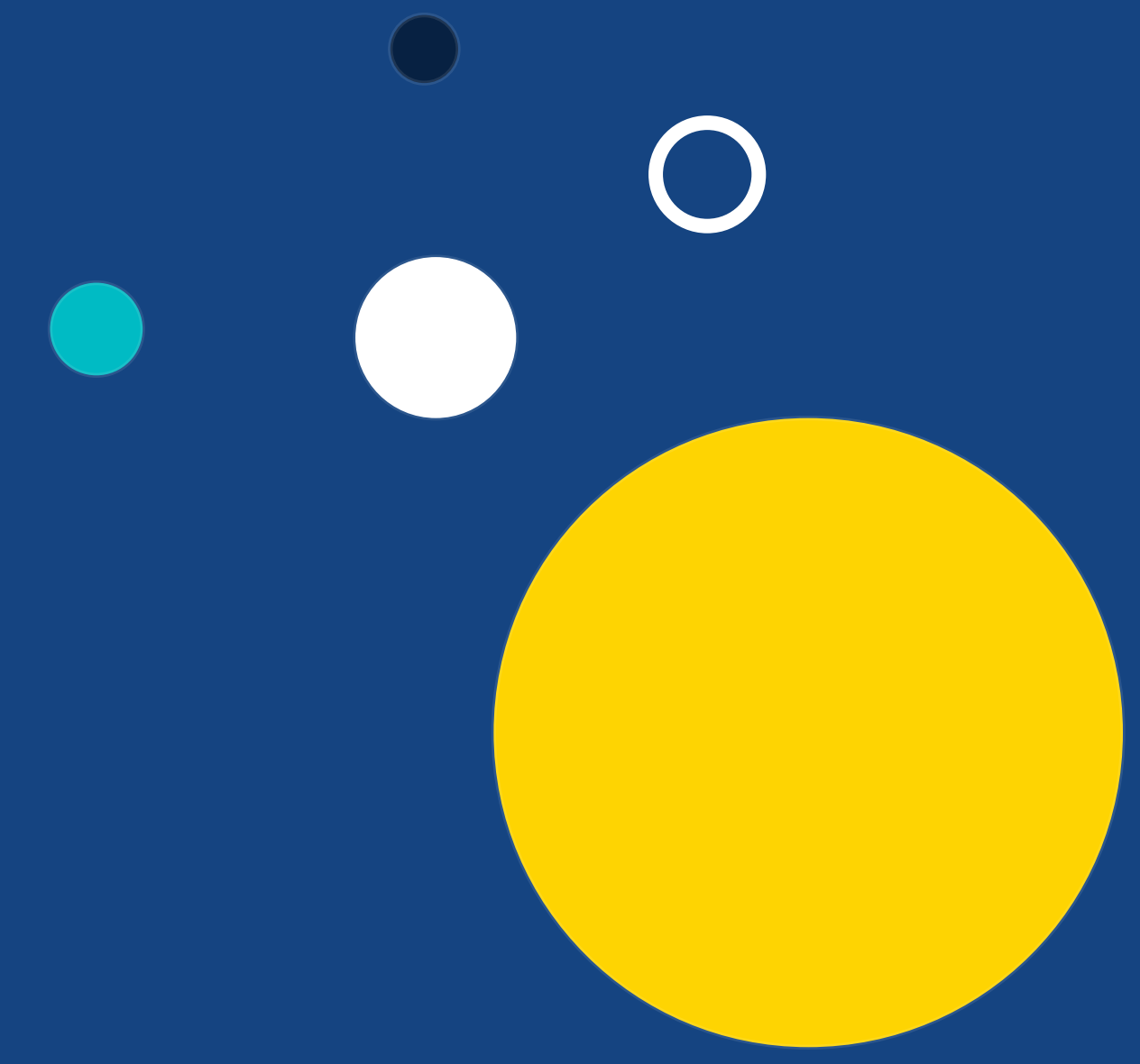
### Optimization of time and resources

One of the main benefits of Marketing Automation is the **optimization of time and resources**. According to an Oracle study, companies using Marketing Automation experience a 12.2% reduction in marketing overhead [REF-01].

Thanks to this reduction, SMEs and freelancers can focus on more **strategic activities**. Creating quality content, **designing more impactful campaigns** and **detailed data analysis** become achievable priorities thanks to automation. Instead of wasting time on repetitive tasks, they can focus on developing more **robust strategies** and **making informed decisions**.

In addition, Marketing Automation also helps companies become more **efficient in managing** their marketing campaigns. Marketing Automation tools enable the creation of automated workflows that guide customers through the sales cycle. This helps companies increase the efficiency of their campaigns and improve their results.





## Monitoring

This technology allows **tracking and analyzing** every interaction, from the opening of an email to the conversion into a sale. By providing a detailed view of user interaction with campaigns, it **provides insight** into which strategies are effective and which need modification and/or improvement.

The ability to access real-time metrics allows for more **agile data-driven decision making**, continually optimizing campaigns for better results.



## Impact effectiveness

Automation enables **precise and automatic control** of the sales process. From lead generation to nurturing and conversion, Marketing Automation facilitates personalized workflows that guide users through the sales cycle in a consistent manner.

This not only accelerates the sales cycle, but **also ensures that customers receive relevant messages at every stage of their journey**. The ability to send timely, personalized messages in response to specific user behaviors **significantly increases the effectiveness** of marketing strategies.





## First party data:

By focusing on obtaining "First Party Data" (data provided directly by users), this technology offers **differential, relevant and high-quality information**. Effective personalization is based on **understanding the preferences and behaviors of the target audience**, and Marketing Automation enables the construction of detailed profiles through direct interaction with users.

This not only improves the accuracy of marketing strategies, but also **reinforces customer trust** by ensuring relevance and consistency in communications.

In summary, Marketing Automation is a strategic tool that **drives operational efficiency, optimizes the use of resources, increases the effectiveness of marketing strategies, and provides high quality data** directly from the user.



## 4. Step-by-step to implement a Marketing Automation strategy

Implementing a successful Marketing Automation strategy requires the effective synchronization of two components: the execution of a **well-designed strategy** and the implementation of the right technology. These two pillars work together to transform not only **operational efficiency**, but also the **overall effectiveness and impact** of marketing initiatives [REF-03].

Below, we will break down the process into six key steps.

### 1. Setting objectives

This first step involves a thorough analysis of the **current situation and available resources** in the company. Identifying **business and marketing objectives** is essential, outlining specific short- and long-term goals for the implementation of Marketing Automation.

Accurate goal setting not only guides strategy, but also provides a framework for **continuous evaluation and improvement** [REF-3].

For example, if you have a restaurant you could aim to increase bookings by 15% in the next three months by implementing a Marketing Automation strategy.



## 2. Audience segmentation

Effective personalization is impossible without **proper audience segmentation**. This second step involves understanding that not all customers are the same.

Segmentation, based on criteria such as **age, gender, location, interests and behaviors**, allows the delivery of personalized and relevant messages to each group. Each segment should be unique, with distinctive characteristics that facilitate the creation of targeted and effective messages [REF-3].

For example, if you are in the financial consulting business, you could segment your audience based on needs, creating segments such as "growing small businesses seeking tax advice" and "self-employed individuals interested in long-term financial planning".

## 3. Identifying available channels

Selecting the **right channels** for the Marketing Automation strategy is crucial to **achieve maximum impact**. This step involves a careful **evaluation of the available channels**, focusing on those that offer the best return on investment (ROI).

Whether it's email, social media, SMS messaging or push notifications, the choice of channels **must align with the audience and the company's goals** [REF-3].

If you have an online apparel store, you may identify channels such as social media and email marketing as the most effective for reaching your audience.



## 4. Customer journey design

Efficient automation is achieved by designing a *customer journey* that automatically responds to **user behaviors**. This fourth step involves designing sequences of actions that are triggered when a customer performs a specific action.

From welcome messages for new subscribers to abandoned cart recovery strategies, these flows **optimize interaction with customers** at key moments in their lifecycle [REF-3].

If you're in the health and wellness industry, your target audience's customer journey might start with a newsletter subscription, followed by educational content on healthy habits, and finally, an exclusive offer for wellness products.



## 5. Message Creation

The essence of any Marketing Automation strategy lies in the messages that are sent. This fifth step involves **creating clear, concise and visually appealing messages** that impact each segment of the audience.

Using **simple language and avoiding technicalities** is essential to enhance this impact. In addition, the aesthetics and relevance of the content play a crucial role in the effectiveness of the messages [REF-3].

For example, if you have a natural products store, you could tailor your messages according to the segmentation of "health-conscious customers". Your messages could highlight quality ingredients, sustainability and promote special offers on featured products, conveying a healthy lifestyle approach.





## 6. Monitoring and optimization of results:

The implementation cycle culminates with the **monitoring and optimization of results**. This last step involves the use of analytics tools to evaluate campaign performance.

Key metrics, such as open rates, clicks and conversions, provide valuable data to identify areas for improvement. This iterative approach, based on **performance analysis**, ensures adaptability of strategy and continuous optimization of results [REF-3].

Imagine you are a travel agency that has implemented a Marketing Automation strategy. You could analyze click-through rates on promotional emails, lead conversion to bookings, and adjust the strategy based on customer feedback, such as destination preferences or comments on past experiences.

In summary, implementing a successful Marketing Automation strategy requires **careful planning and constant attention to results**. From setting clear objectives to creating effective messages, each step will contribute to the overall success of your strategy.



## 5. Key tools and platforms

The diversity of Marketing Automation tools and platforms available on the market offers companies a broad spectrum of solutions. This panorama offers companies the ability to select the **platform that best suits their specific needs**, thus optimizing their automation approach.

Among the current platforms on the market, we differentiate between **free and paid platforms**.

### Free platforms



**MailerLite** is a simple and intuitive email marketing tool that offers a wide range of features to create and send effective email campaigns. Its free plan allows you to manage up to 1,000 contacts, making it an ideal choice for small businesses and freelancers [REF-04].



**SendPulse** is an email marketing and SMS marketing tool that offers a wide range of features to create and send effective email and SMS campaigns. Thanks to its free plan, you can manage up to 500 contacts [REF-05].



**Mailchimp** is a leading email marketing tool that offers a wide range of features to create and send effective email campaigns. The free plan provides the ability to manage up to 2,000 contacts [REF-06].



**ConvertKit** is an email marketing tool focused on content creators that offers a wide range of features to create and send email campaigns. With the free plan, you will have the ability to manage up to 1,000 subscribers [REF-07].



However, for SMEs and freelancers looking for more complete and advanced options, there are several payment platforms.

## Plataformas de pago



HubSpot is an all-in-one Marketing Automation suite that offers a wide range of functions, from sending emails to creating landing pages. The cost ranges from €20 (starter pack) to €3,300 (Enterprise). It is a popular choice for SMBs and freelancers as it offers good value for money [REF-08].



Brevo is an email marketing and SMS marketing tool that offers basic Marketing Automation features. It has a free basic option and also has plans starting at 19€ (starter). It is a popular choice for companies looking for an affordable email marketing and SMS marketing tool [REF-09].



Marigold Engage is an enterprise Marketing Automation platform that offers a wide range of features, from sending emails to creating social media campaigns. Selligent's plans start at \$1,500 per month for a contact base of up to 10,000 contacts. It is a popular choice for SMBs that need a platform that supports a large volume of data and users [REF-10].





salesforce

Salesforce Marketing Cloud is a module that contains multiple tools to improve the interaction of brands with their customers and prospects through all types of channels. As with other platforms, the simplest plan is €1,000 per month for 50,000 contacts. It is a popular choice for companies looking for a Marketing Automation platform integrated with other Salesforce solutions [REF-11].

Fondo Europeo de Desarrollo Regional

*"Una manera de hacer Europa"*



VICEPRESIDENCIA  
PRIMERA DEL GOBIERNO  
MINISTERIO  
DE ASUNTOS ECONÓMICOS  
Y TRANSFORMACIÓN DIGITAL

SECRETARÍA DE ESTADO  
DE DIGITALIZACIÓN  
E INTELIGENCIA ARTIFICIAL

red.es



UNIÓN EUROPEA



## 6. From inspiration to implementation: Success stories

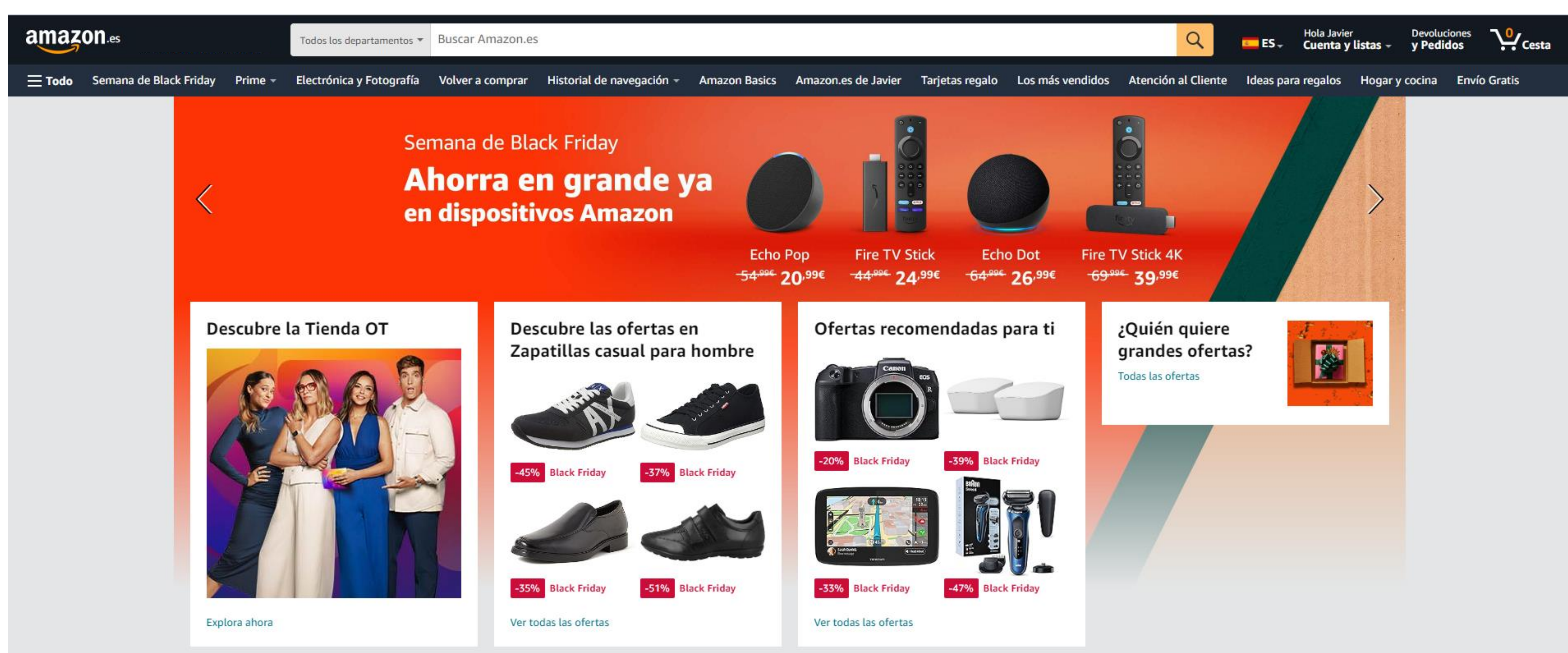
As discussed above, Marketing Automation can help companies achieve a number of objectives, such as increasing sales, generating leads, improving customer satisfaction and reducing marketing costs.

In this section, we will present illustrative examples of large companies that have successfully implemented marketing automation strategies.

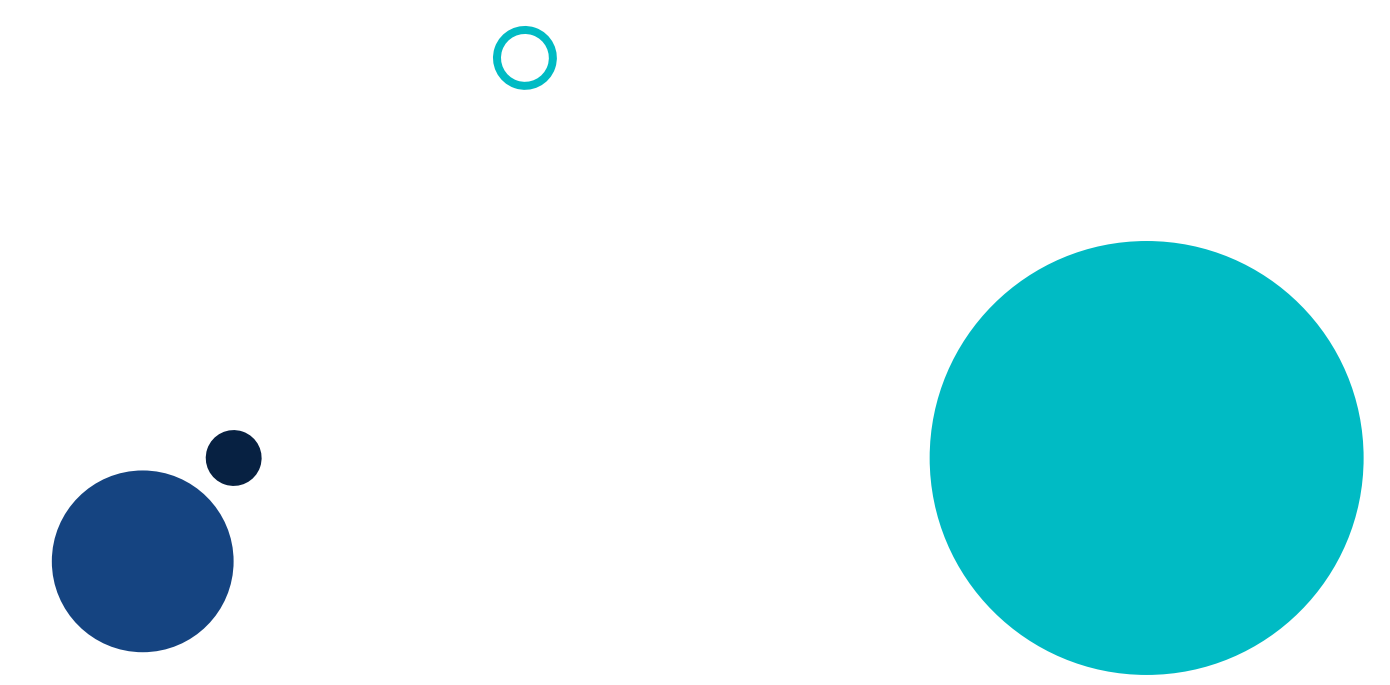


**Amazon** is a multinational e-commerce, cloud computing and digital streaming company. Founded in 1994 by Jeff Bezos, Amazon is one of the world's largest online retailers, offering a range of products from books and music to furniture and clothing.

It uses a Marketing Automation strategy to **send follow-up emails to customers** who have abandoned their shopping cart. These emails include offers and discounts to encourage customers to complete their purchase [REF-12].



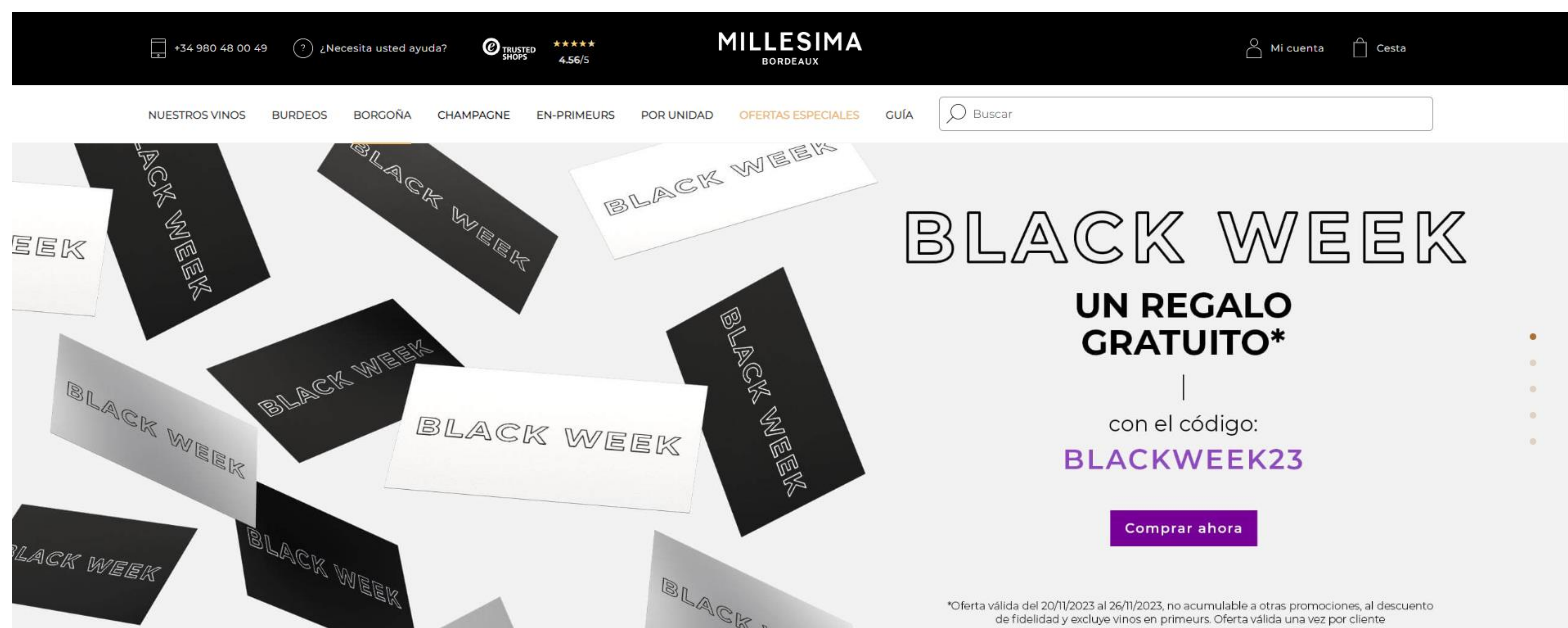




**MILLESIMA**  
BORDEAUX

Millésima, a leading player in the international trade of French wines and champagne, is also a benchmark in the strategic application of Marketing Automation. Despite having extensive experience in dealing directly with customers and standing out as a company skilled in B2C communications, it faced the challenge of generating sales with a high average order value, but with a remarkably low recurrence.

Through the email channel, Millésima implemented personalized recommendations and exclusive offers, introducing the concept of "Personal Sommelier". This unique approach made it possible to offer each customer exactly the product that best matched his or her preferences, thus generating a desire to buy [REF-13].







The NUBICO Group faced a considerable challenge: its application, pre-installed on Movistar mobile devices, had a sizeable base of "dormant" users. These customers, inactive on both the app and email communications, represented an untapped opportunity.

Given the obvious ineffectiveness of email, NUBICO made the decision to employ personalized push notifications as an alternative and novel approach. This tactic not only sought to pique the interest of inactive users, but also to gauge the receptivity of this particular format. Surprisingly, this strategy not only proved successful with users "dormant" in the application, but also proved effective with those who had not yet registered, thanks to the pre-installation of the application on mobile devices [REF-14].





## 7. Conclusions

In this monograph, the transformative potential of Marketing Automation has been highlighted. From goal setting to channel selection, the essential steps for efficient strategies have been outlined.

Audience segmentation stands as the art of personalizing messages, recognizing that each customer is unique. Workflows, personalized messages and success stories, such as Millésima and NUBICO, demonstrate how the effective implementation of these strategies can generate not only engagement but also significant conversions.

In terms of tools and platforms, diversity offers companies the ability to adapt, highlighting the importance of choosing solutions aligned with established objectives and target audiences. By using automation tools, SMEs can personalize their messages and campaigns more effectively, tailoring them to the individual needs of each customer. This not only improves the customer experience, but also strengthens loyalty and retention.

Ultimately, Marketing Automation is not just an operational tool, but a catalyst that drives business success through increased sales, an enhanced customer experience, and the possibility of stronger and more effective business expansion. By embracing this paradigm, organizations position themselves to consistently and efficiently meet and exceed their business objectives.



## 8. References

[REF-01] – ORACLE. Principales estadísticas de automatización del marketing en 2022. <https://www.oracle.com/es/cx/marketing/automation/what-is-marketing-automation/statistics/>

[REF-02] – HubSpot. . What is Marketing Automation? <https://www.hubspot.com/products/marketing/marketing-automation-information>

[REF-03] – Omibu. Qué es el marketing automation y cómo implementarlo. [Qué es el marketing automation y cómo implementarlo.](#)

[REF-04] – Mailer Lite . Crea campañas de email marketing automatizaciones landing pages formularios de suscripción páginas web que atrapen la atención de tu audiencia. <https://www.mailerlite.com/es>

[REF-05] – Send Pulse. Acelera tus ventas y crece tu negocio en una sola plataforma. <https://sendpulse.com/latam>

[REF-06] - MailChimp. Crece con Mailchimp. [https://mailchimp.com/es/landers/email-marketing-platform/?ds\\_c=DEPT\\_AOC\\_Bing\\_Search\\_ROW-SP\\_ESP\\_Brand\\_Acquire\\_Omega\\_NE\\_T3&ds\\_kids=p78385656706&ds\\_a\\_lid=kwd-77859596017295:loc-170&ds\\_cid=71700000115527486&ds\\_agid=58700008586667414&msclkid=c5ab9b444c4b10556322fe1cb812e223&currency=EUR](https://mailchimp.com/es/landers/email-marketing-platform/?ds_c=DEPT_AOC_Bing_Search_ROW-SP_ESP_Brand_Acquire_Omega_NE_T3&ds_kids=p78385656706&ds_a_lid=kwd-77859596017295:loc-170&ds_cid=71700000115527486&ds_agid=58700008586667414&msclkid=c5ab9b444c4b10556322fe1cb812e223&currency=EUR)

[REF-07] – Convert Kit. The creator marketing platform for your newsletter podcast/book/album/collection . <https://convertkit.com/>

[REF-08] – HubSpot\_Crece mejor con HubSpot. <https://www.hubspot.es/>

[REF-09] – Brevo. Conexiones que impulsan tu crecimiento. <https://www.brevo.com/es/>



---

[REF-10] – Marigold Engage. La solución completa de marketing relacional.  
<https://www.selligent.com/es>

[REF-11] - Salesforce. Haga que cada momento cuente con Marketing Cloud.  
<https://www.salesforce.com/es/products/marketing-cloud/overview/>

[REF-12] – Redacción. Claves de la estrategia de marketing de Amazon: del marketing digital a las 4p. <https://marketinginsiderreview.com/estrategia-de-marketing-de-amazon/>

[REF-13] – Millésima Bordeaux. Millésima, el retailer especializado en vinos descorcha el engagement personalizado para impulsar la repetición de pedidos.  
<https://www.selligent.com/es/resources/casos-de-exito/millesima/>

[REF-14] – Fernando Carrillo. Nubico de Movistar: el servicio de lectura que ofrece Movistar. 21 de noviembre de 2023. <https://roams.es/companias-telefonicas/movistar/guias/clientes/nubico/>



# Acelera *pyme*



red.es

