



MARKETING AUTOMATION VS SALES AUTOMATION

Marketing automation & sales automation offer many benefits to a construction organization. Just like a marketing department works closely with the business development one, marketing and sales automation systems go hand in hand. But oftentimes, these two automation systems are confused one for the other.

This article analyzes the differences between marketing and sales automation. Armed with this information, organizations can decide which system they need. Both automation systems have similar features but apply differently. Stakeholders within an organization should understand how to best leverage both tools.

DEFINITION

Each automation system is important and has its own advantages. So let's first define each one.

Marketing automation executes, measures, and analyzes marketing activities. This type of automation expedites communication with prospects, i.e. contacts and customers. An organization relies on marketing automation to qualify leads for Sales.

Sales automation standardizes and streamlines the sales process. It covers business development interactions, from bidding to closing deals and nurturing customers. Sales automation builds on marketing automation and leads. It accelerates your sales process by ensuring that qualified leads and opportunities don't fall through the cracks.

COMMUNICATION

Communication plays an essential role within and outside of organizations. With the help of marketing automation and sales automation, you can ace outside communications. Both Marketing and Sales are key players in an organization's sales funnel.

Marketing automation systems develop and prime the client base. They attract prospects via email, video channels,

websites, and social media. Marketing automation systems can develop content for different target audiences. This type of automation focuses on lead qualification by creating valuable content and experiences tailored to prospects and customers. While outbound marketing interrupts your audience with content they don't necessarily need, inbound marketing solves problems they already have!

Sales automation nurtures the communication between the prospect/customer and an opportunity. It requires a qualified lead or an opportunity. At this stage in the sales funnel, sales reps will communicate to the specific needs of a customer. It drives the conversion from qualified leads to deals. Sales automation systems accelerate the journey to closing deals.

LEADS

Leads have different meanings when it comes to sales and marketing automation.

Marketing automation systems define leads as prospects. They foster the leads and identify viable opportunities with them. They focus on tracking contact activity and interaction with the prospect. When it comes to contacts and opportunities, the relationship is linear, meaning that an opportunity has to be marketed to every contact separately.

Sales automation systems define leads as opportunities. They concentrate on automating the activities around winning a project. Construction sales automation systems organize opportunities into the different stages of the sales pipeline. Some, like iDeal CRM, also allow you to attach multiple clients to and track them for an opportunity – very handy if your company’s sales process involves sending proposals to different clients for the same project.

This differentiation is important when it comes to the sales process in construction. If it’s a commercial project, construction companies will more than likely bid multiple clients, e.g. general contractors, for the opportunity. A sales automation system will be able to track that opportunity with multiple clients (one opportunity to many clients). A marketing automation system will likely not.

TEMPLATES

Marketing automation systems create templates; sample documents that already have branding and an outline or some content in place. The email and collateral templates focus on communicating a value proposition.

Sales automation systems use templates to save the sales team time on administrative tasks so they can spend more time selling and closing bids. Sales can use the templates for managing estimates, proposals, and follow-up.

FOLLOW-UP

Marketing automation systems help you nurture and ultimately qualify leads. For example, you can schedule emails to send based on triggers (prospect email responses). Or you can set up automated emails to go out to your potential customers after they fill out a form on your website.

Sales automation systems allow contractors to win bids by scheduling follow-up communications and recording follow-up activities directly related to opportunities. Some systems, for example iDeal CRM, automate this process such that you can follow up on many opportunities at the same time. It’s been proven time and time again that timely and consistent follow-up can significantly increase the closing ratio.

DATA

Marketing automation tools can analyze data from marketing campaigns. The data helps you to tailor content for further marketing purposes. For example, if you want to open a new office in a different location, you can analyze the marketing data to see if it’s a viable opportunity. Or, if you detect an interest in a certain topic, you can tailor your content to provide more value in that area.

Sales automation tools analyze the return on investment (ROI) in leads. They provide construction companies with the ability to focus on clients that bring the most revenue to the business. With analytics, you can keep track of the deals you win and lose. For example, you can identify which customer

to reach out to based on previous data. If you bid multiple clients for projects, it is helpful to pull a report that shows which of your clients won most projects of that type in the past. This way, you can focus your follow-up efforts on the client most likely to win the project.

PROCESSES

Process automation systems automate internal processes to make them more cost effective and efficient. Typically, a process automation system links to your prospect/customer or CRM database.

Marketing automation system software and applications execute, manage, and automate marketing tasks and processes to improve the outcome of a marketing campaign. For example, if a prospect shows interest in a particular topic, marketing automation triggers more information on that topic, and pushes it out across the different marketing channels to ensure the product or service stays top of mind.

Sales automation allows your sales team to focus more on connecting with and selling to your clients and less on administrative tasks. Sales automation facilitates internal workflow and streamlines your sales pipeline. It sets up, executes, and records sales follow-up. For example, if a client opens your construction proposal, an email goes out to them a day later as a touch point or reminder.

EMAIL INTEGRATION

Most **marketing automation** systems include email integration with the sales management or CRM tool. Email integration records relevant information about the prospect in the CRM, e.g. did the prospect open the email the system generated, did the prospect follow any links in the email, or did the prospect unsubscribe from email communications.

Sales automation systems include email integration that automates (schedules, sets up, and records) follow-up, from sending proposals to closing the bids. Most systems provide email integration at a contact level. Only a construction sales management system like iDeal provides email integration that records the journey through the sales funnel at the opportunity level and the contact or client level.

Bid & Follow-up Software. CRM for Construction.

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