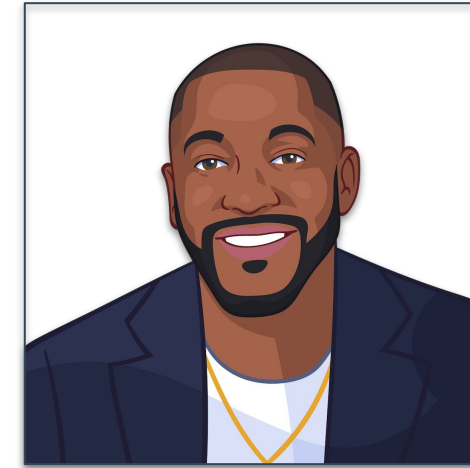


# Driving Business Growth & Promoting DEI through Marketing Automation and RevOps

# Introductions



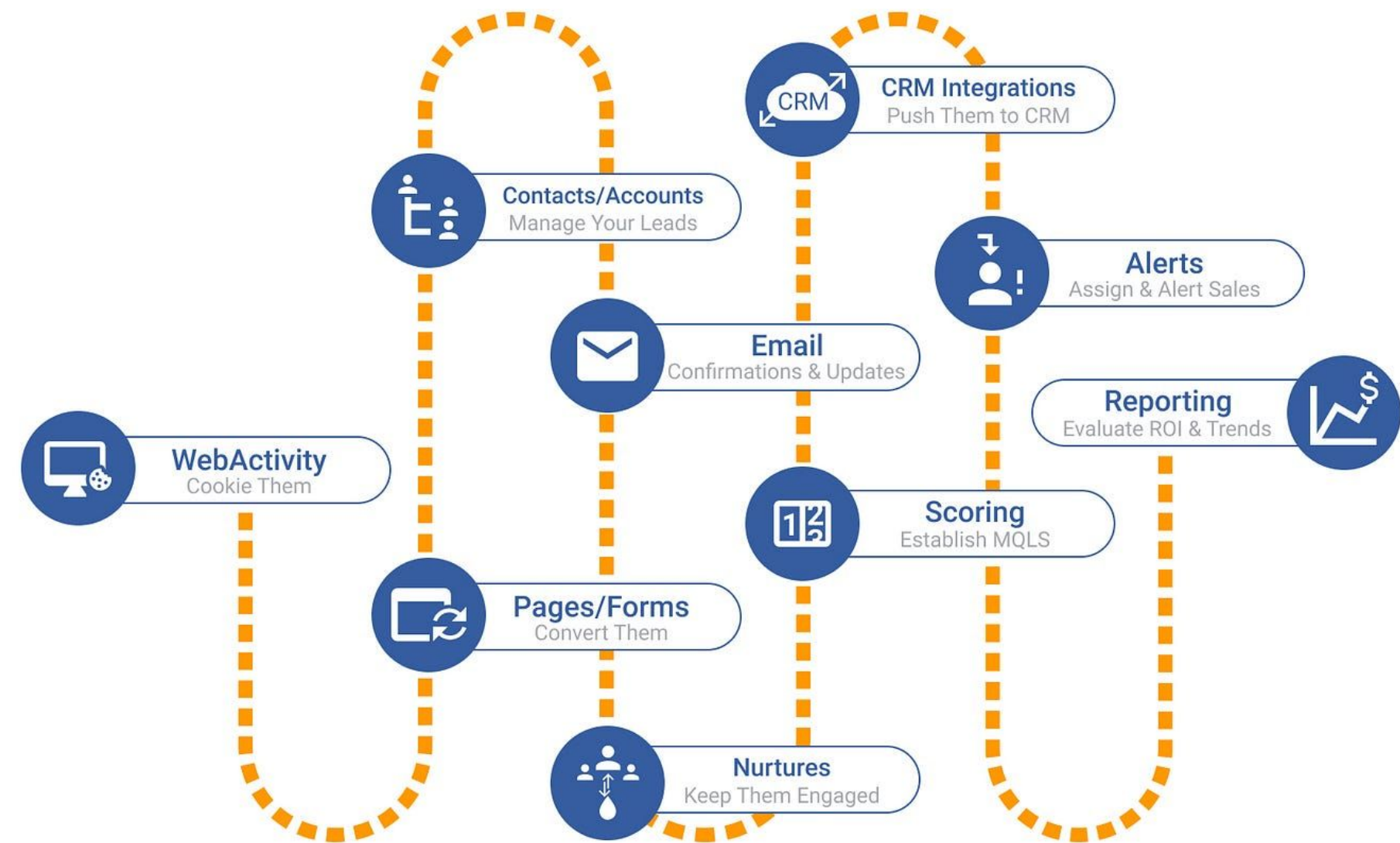
I'm Justin Crawford, CEO at The Automation Company. I spend my days strategizing business growth, and my nights wishing for an extra hour for sleep.



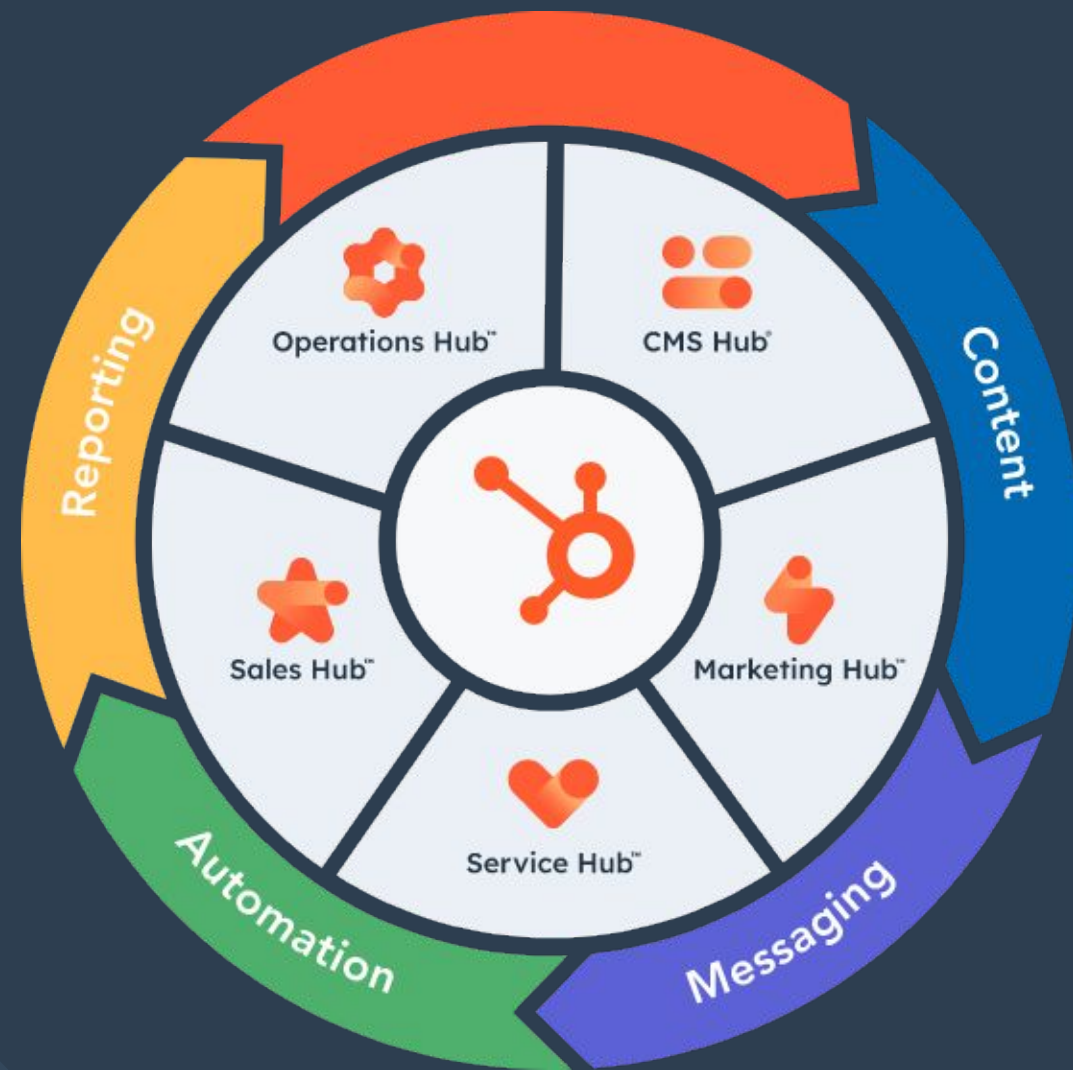
The Automation Company is a growth-focused agency, turning complex marketing automation and RevOps processes into measurable business results. The team's expertise lies in transforming businesses into scalable, high-performance machines.

# What is Marketing Automation?

- Streamlines and automates marketing tasks to increase efficiency and allow businesses to focus on what they do best.
- Enhances customer relationships through personalized communication, nurturing leads effectively and boosting conversion rates.



# The Power of RevOps



- RevOps: The secret to unified business operations. It's about aligning sales, marketing, and customer service, for a frictionless, consistent customer journey.
- Data-driven decisions: RevOps gives financial services and real estate businesses the edge by leveraging data for predicting customer needs and driving more sales.
- Enhancing customer experience: RevOps doesn't just boost profits, it elevates the customer journey, fostering stronger relationships in industries where trust is paramount. It's the game-changer your business needs.



# Marketing Automation & RevOps in Financial Services & Real Estate

- 1) **Optimizing Processes:** In the world of financial services and real estate, countless repetitive tasks can slow down the workflow. Marketing Automation and RevOps streamline these processes, enabling teams to focus on strategy and customer relationships.
- 2) **Maximizing Lead Conversions:** By using advanced analytics and personalized campaigns, these solutions improve lead quality, guiding potential clients through the sales funnel more efficiently, ultimately maximizing conversions.
- 3) **Customer Retention and Lifetime Value:** Through improved tracking and customer interaction data, Marketing Automation and RevOps provide invaluable insights to help businesses understand, retain, and upsell their clients, maximizing customer lifetime value.



# Digital Impact on the Financial Services Sector in 2022

18x

More revenue generated by personalized, automated emails than manual emails.

30%

Companies in the financial services sector use marketing automation to increase productivity.

14.5%

Increase in sales productivity for companies utilizing marketing automation and a 12.2% decrease in marketing costs.

# The Intersection of Marketing Automation, RevOps, and DEI

- 1 Enables diverse audience engagement with personalized strategies.
- 2 Streamlines multi-channel communication for diverse audiences.
- 3 Provides audience-centric data for improved decision-making.
- 4 Facilitates inclusivity through tailored content and marketing practices.



# Marketing Automation & RevOps in Action



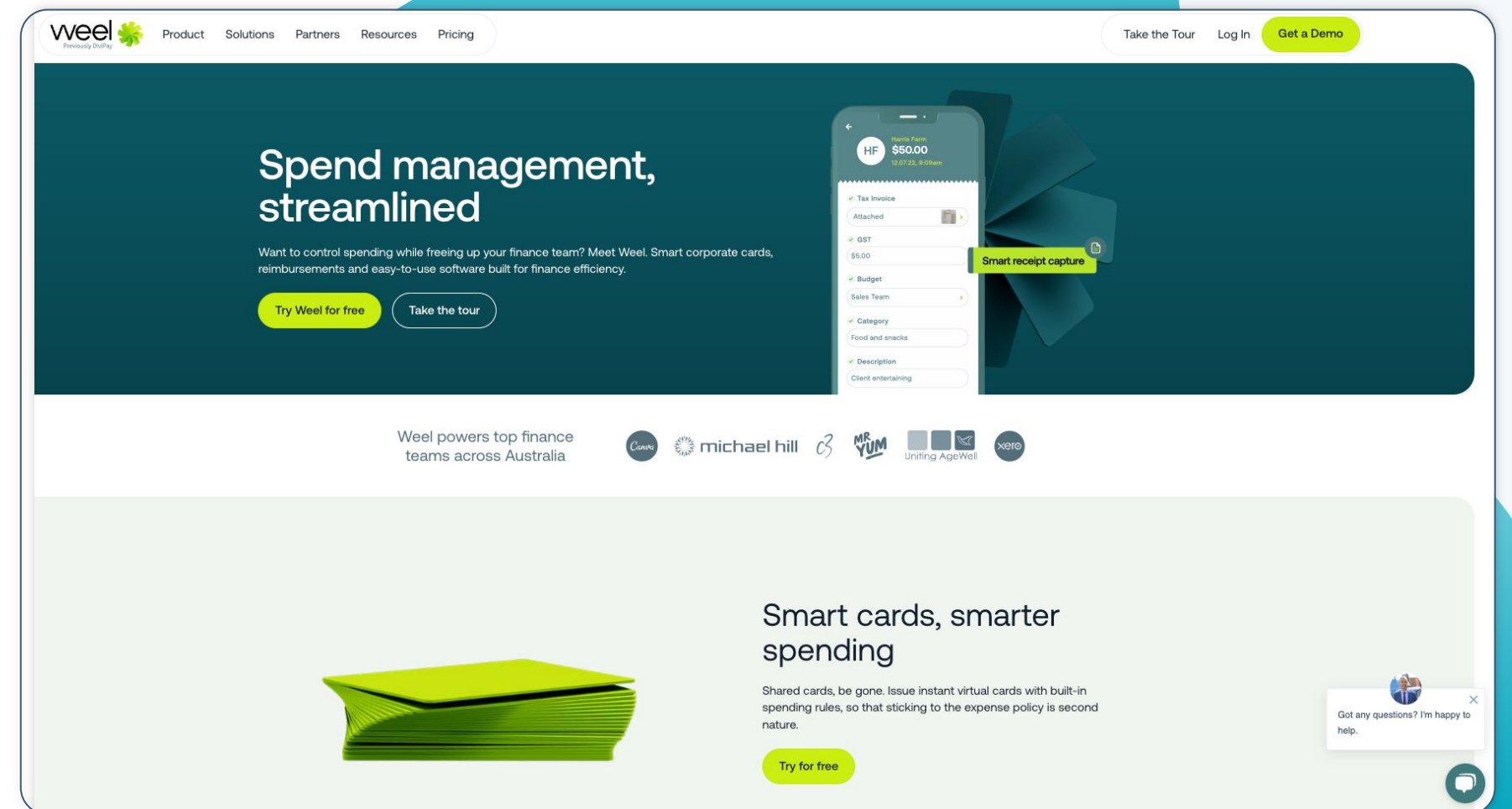


## Driving 12X More Leads with Marketing Automation

Weel offers virtual corporate cards and a spend-management system to help businesses gain visibility and control their spending.

25-200  
Employees

Australia  
Location



# Customer Impact



Weel had initiated DEI-centric marketing automation campaigns, but needed to elevate its strategies to effectively stand out amidst a rapidly diversifying competitive landscape.

## Challenge

Weel needed to:

- Address diversity and inclusion gaps in marketing automation
- Navigate limited resources for DEI-focused campaign development
- Reverse downturn in engagement with diverse customer segments

## Solution

Embracing an automation based content strategy allowed them to:

- Personalize marketing automation for diverse customer segments
- Foster inclusivity through tailored content strategies
- Boost internal alignment with automated communication tools

**55%**

Increase in website traffic from emails

**12X**

Increase in annual lead generation

**600**

More leads generated from web forms

## Hubs

 HubSpot Marketing Hub Enterprise

 HubSpot Sales Hub Pro

 HubSpot CRM

# A RevOps Success Story

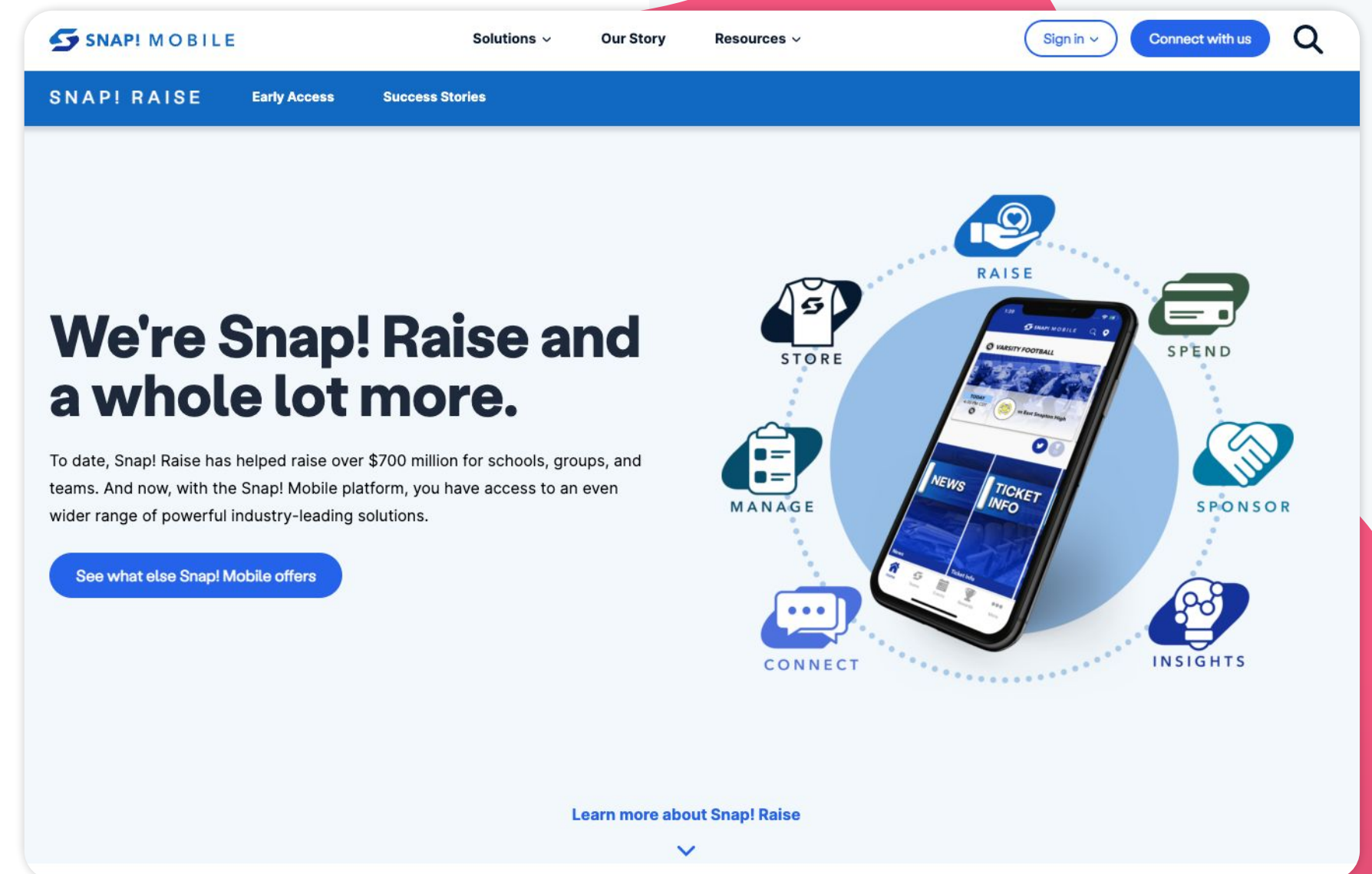


## How Snap! Raise Improved Conversions & Increased Productivity

Snap! Raise transitioned to the HubSpot CRM platform for its versatility and customization capabilities. Within 6 months, the marketing team had all necessary tools to shift from generic to DEI-focused automated campaigns.

200+  
Employees

Seattle, WA  
Location



# Customer Impact

As a rapidly growing startup, Snap Raise! was struggling to penetrate new audiences and keep up as they scaled even though they had a solid, proven sales process in place.

## Challenge

Snap! Raise was struggling to grow its footprint in new segments and needed to find a way to:

- Promote DEI across marketing automation channels
- Integrate DEI metrics into lead generation analysis

## Solution

Embracing DEI-centric marketing automation initiatives allowed them to:

- Implement a targeted marketing automation strategy
- Optimize the sales process with automation for scalability

## Hubs

 HubSpot Marketing Hub Enterprise

 HubSpot Sales Hub Pro

 HubSpot CRM

**18%**

Increase in monthly lead conversions from the website

**23%**

Increase in deals per month from email marketing

**78**

Deals closed since their 1st targeted campaign



# In Summary: The Importance of DEI in Marketing & RevOps



## Enriched Workforce

DEI invites a wealth of diverse perspectives and experiences, fueling innovation and fostering a strong company culture.



## Enhanced Productivity

Marketing automation removes the burden of repetitive tasks, allowing teams to devote their energy to creative, strategic pursuits.



## Improved Profitability

RevOps employs data-driven strategies to optimize the sales funnel, converting higher-quality leads into loyal customers, driving revenue growth.



## Sustained Expansion

By embracing DEI, implementing marketing automation, and leveraging RevOps, businesses create a dynamic, efficient environment that fosters sustainable growth and competitiveness.



# Steps to Implement Marketing Automation & RevOps in Your Business

- 1 Choose the Right Tool**  
Select platform suited to business needs.
- 2 Define Processes**  
Establish clear, measurable workflows.
- 3 Train and Adapt**  
Continually learn and refine approach.

# The Immediate Impact of Inclusive Marketing & Revenue Operations

## Targeted Outreach

- Personalized, diverse messaging increases engagement.

## Improved Efficiency

- Streamlined operations save time and resources.

## Increased ROI

- Inclusive strategies boost market reach and profitability.

## Customer Satisfaction

- Culturally sensitive approaches enhance client relations.





What to take away

# A Quick Recap

Embracing Inclusive Marketing and RevOps propels growth, drives efficiency, and fosters a culturally sensitive approach, thereby enriching client relations and boosting overall business performance.



## Why automate?

**Efficiency:** Automation cuts down repetitive tasks, freeing time for strategic initiatives.

**Accuracy:** It eliminates human errors in data management, enhancing overall accuracy.

**Consistency:** Automation ensures consistency in marketing communications, strengthening brand reputation.

**Insights:** It provides valuable data insights for informed business decisions.

**Growth:** It provides valuable data insights for informed business decisions.



// Innovation needs to be part of your culture. Consumers are transforming faster than we are, and if we don't catch up, we're in trouble.

Ian Schafer  
Founder and former CEO of Deep Focus





# Thank You