The Agency Marketer's Perspective on

The State of Marketing Automation

Research Series Conducted in Partnership with Ascend2

SharpSpring
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Methodology

Ascend2 benchmarks the performance of marketing strategies, tactics and the technology that drives them with a standardized online questionnaire and a proprietary 3-Minute Survey format.

This survey was fielded to a panel of marketing professionals and marketing research subscribers.

Survey Respondents

Number of Employees

More than 500	14%
50 to 500	27%
Fewer than 50	59%

Primary Role in Company

Owner / Partner / C-Level	58%
Vice President / Director / Manager	25%
Non-Management Professional	17%

Primary Marketing/Sales Channel

B2B	43%
B2C	31%
B2B and B2C equally	26%

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The Agency Marketer's Perspective on
The State of Marketing Automation

Agencies can use marketing automation not only to drive new business, but to provide their clients with an integrated and efficient end-to-end experience.

But what is the current state of marketing automation from the agency marketer's perspective? To answer this question, Ascend2 and SharpSpring fielded The State of Marketing Automation Survey.

This report, titled *The Agency Marketer's Perspective on The State of Marketing Automation*, represents the opinions of the 95 marketing professionals who provide agency services.

This research has been produced for your use. Put it to work in your own marketing strategy. Clip the charts and write about them in your blog or post them on social media. Please share this research credited as published.

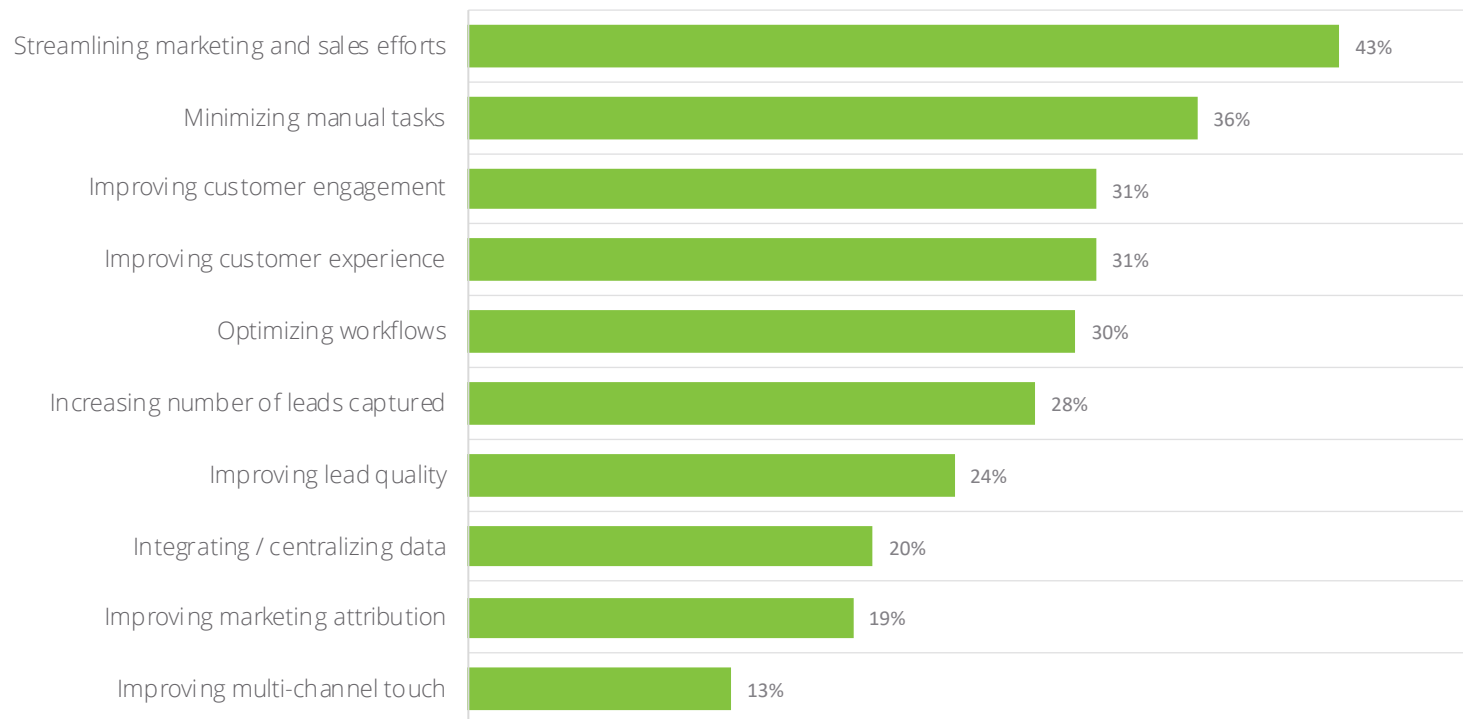**SharpSpring**
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Why Marketers Use Automation

Why are agency marketers seeking out marketing automation tools to implement into their technology stack? 43% of those surveyed list **streamlining marketing and sales efforts** as a top reason for automation implementation. Organizing marketing and sales to be more strategically aligned can lead to creating a more personalized experience for the end customer and executing efforts more efficiently.

What are the top reasons for implementing marketing automation?

Reason	%
Streamlining marketing and sales efforts	43%
Minimizing manual tasks	36%
Improving customer engagement	31%
Improving customer experience	31%
Optimizing workflows	30%
Increasing number of leads captured	28%
Improving lead quality	24%
Integrating / centralizing data	20%
Improving marketing attribution	19%
Improving multi-channel touch	13%

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Is Strategic Success Being Reached?

Over one-quarter (27%) of agency marketers describe their success at using marketing automation to achieve their strategic goals as **best-in-class** compared to the competition. A mere 2% say their use of automation has been **unsuccessful**. Automation is working **somewhat successfully** for nearly three-quarters (71%) of agency marketing professionals responding to the survey.

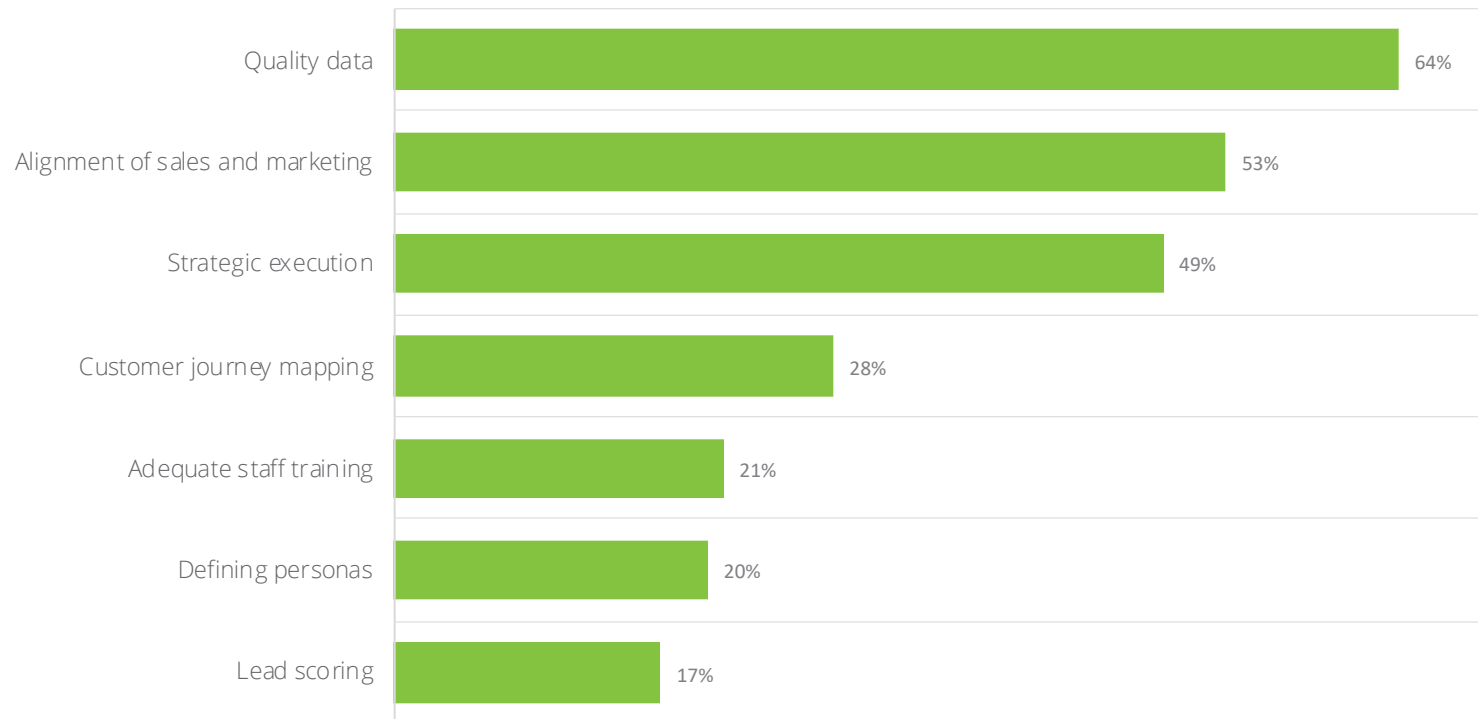**Which best describes your (or your typical client's) SUCCESS at using marketing automation to achieve your top priorities?**

UNSUCCESSFUL
2%

VERY SUCCESSFUL
(BEST-IN-CLASS)
27%

SOMEWHAT
SUCCESSFUL
71%

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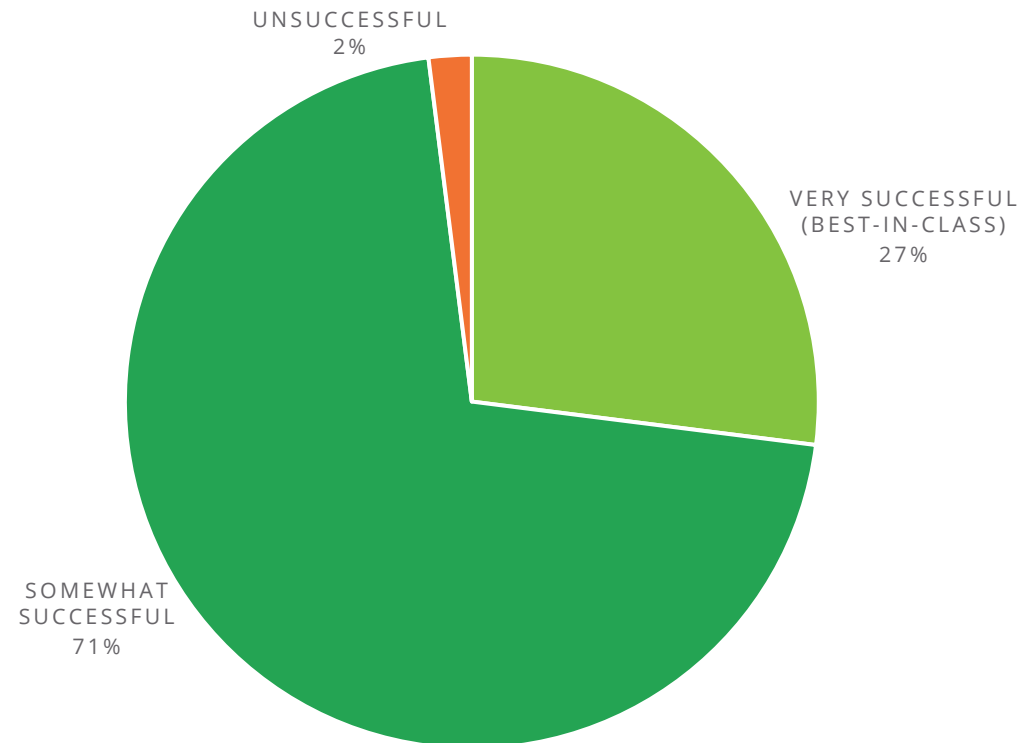
Amplifying the Success of Automation Tools

Obtaining **quality data** can move the needle when it comes to achieving success with automation solutions according to 64% of agency marketers. About half of agencies also agree that **alignment of sales and marketing** (53%) along with a well-thought-out **strategy to execute** the use of marketing automation (49%) are also elements that can most amplify success.

Which of the following efforts or tactics most AMPLIFIES THE SUCCESS of your marketing automation tool?

Quality data	64%
Alignment of sales and marketing	53%
Strategic execution	49%
Customer journey mapping	28%
Adequate staff training	21%
Defining personas	20%
Lead scoring	17%

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Where is Automation Being Used?

Marketing automation solutions can be used to optimize the entire marketing and sales funnels, but technology stacks are often cobbled together with automation only utilized in particular areas. Nearly eight in ten agencies (78%) are using automation tools to execute **email marketing** and over half (53%) have implemented automation into the **management of their social media**. Interestingly, less than one-quarter of agency marketers report that automation is used in more sales-driven efforts such as **sales funnel communications** (24%) and **account-based marketing** (21%) campaigns.
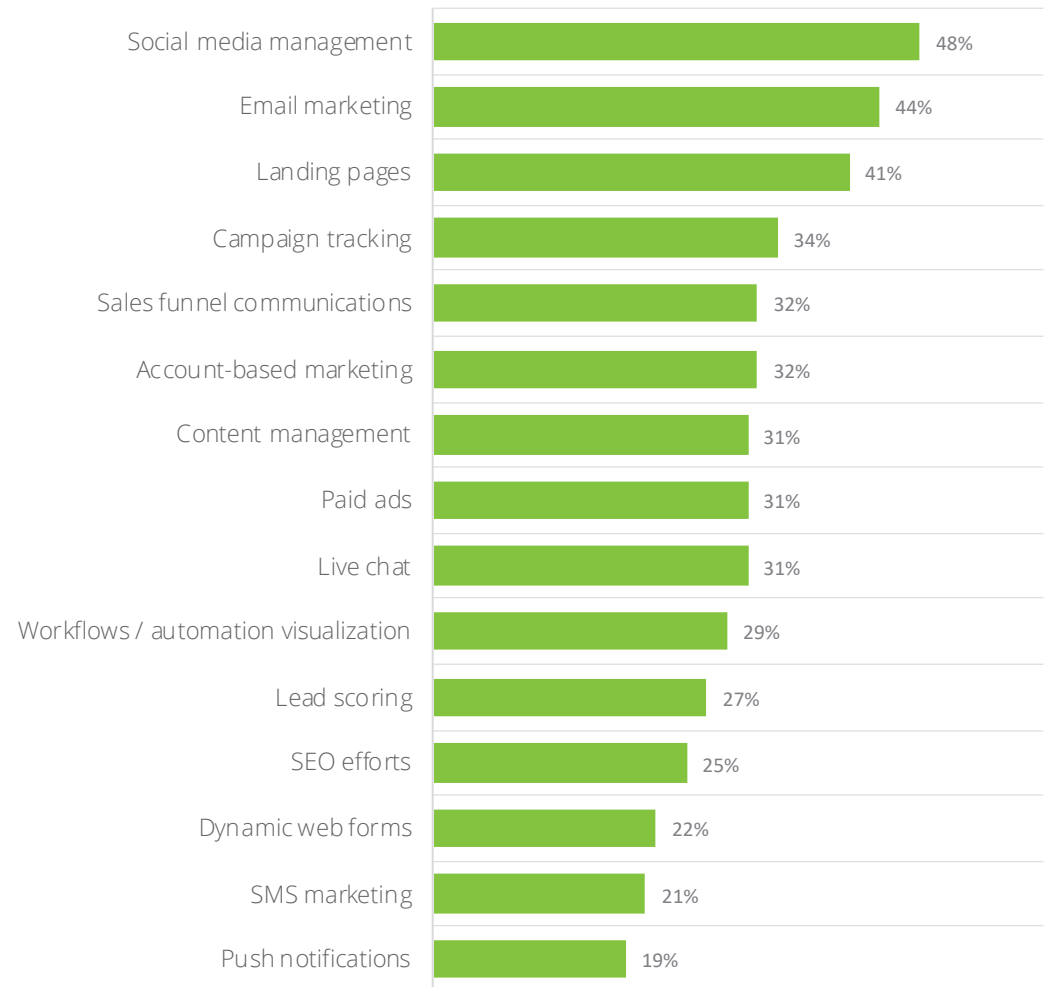
In which of the following areas do you CURRENTLY UTILIZE marketing automation?

Area	%
Email marketing	78%
Social media management	53%
Landing pages	39%
Campaign tracking	36%
Paid ads	33%
Workflows / automation visualization	29%
Lead scoring	28%
Content management	26%
Live chat	25%
Sales funnel communications	24%
SMS marketing	22%
Account-based marketing	21%
Push notifications	21%
Dynamic web forms	20%
SEO efforts	19%
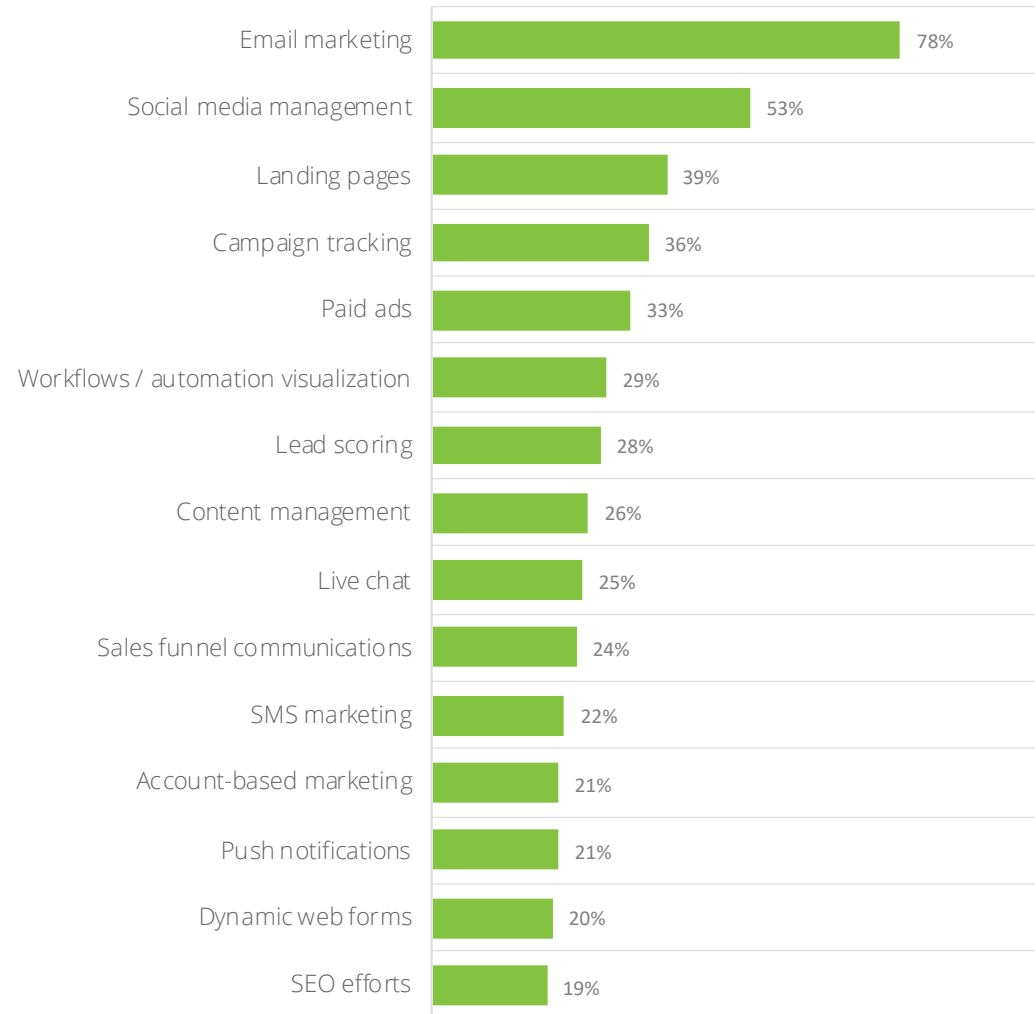
Where Do Marketers Plan to Use Automation?

Nearly one-third (32%) of agency marketers who aim to better align their marketing and sales efforts through the use of automation say they plan to implement marketing automation into their **sales funnel communications** and **account-based marketing** efforts. Agencies also plan to utilize automation in their **social media management** (48%), **email marketing** (44%), and **landing pages** (41%) in the coming year. **Push notifications** and **SMS marketing** might be considered areas of opportunity where automation isn't yet being utilized and with minimal plans for utilization (only about one in five marketers are currently using or planning to use automation in these areas).
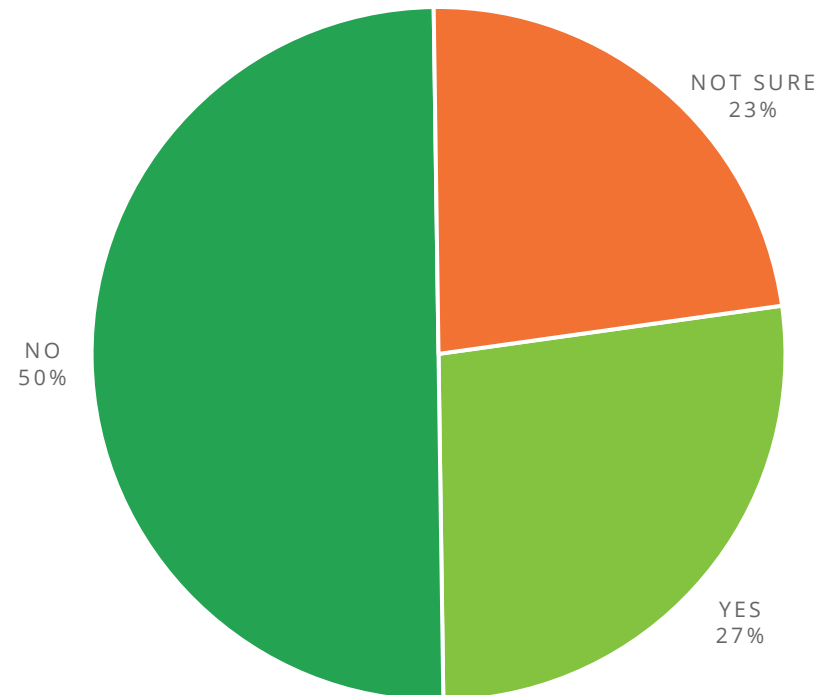
In which of the following areas do you PLAN TO IMPLEMENT marketing automation in the year ahead?

Area	%
Social media management	48%
Email marketing	44%
Landing pages	41%
Campaign tracking	34%
Sales funnel communications	32%
Account-based marketing	32%
Content management	31%
Paid ads	31%
Live chat	31%
Workflows / automation visualization	29%
Lead scoring	27%
SEO efforts	25%
Dynamic web forms	22%
SMS marketing	21%
Push notifications	19%

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Using Automation Tools to their Fullest Potential

While many automation tools have capabilities that can cover a wide range of tasks and campaigns throughout the marketing and sales funnels, only 27% of agency marketing professionals report that they feel **they are using their automation tools to the fullest potential**. Half (50%) of those agency marketers surveyed say **they are not using their automation tools to the full extent of what they could be**.
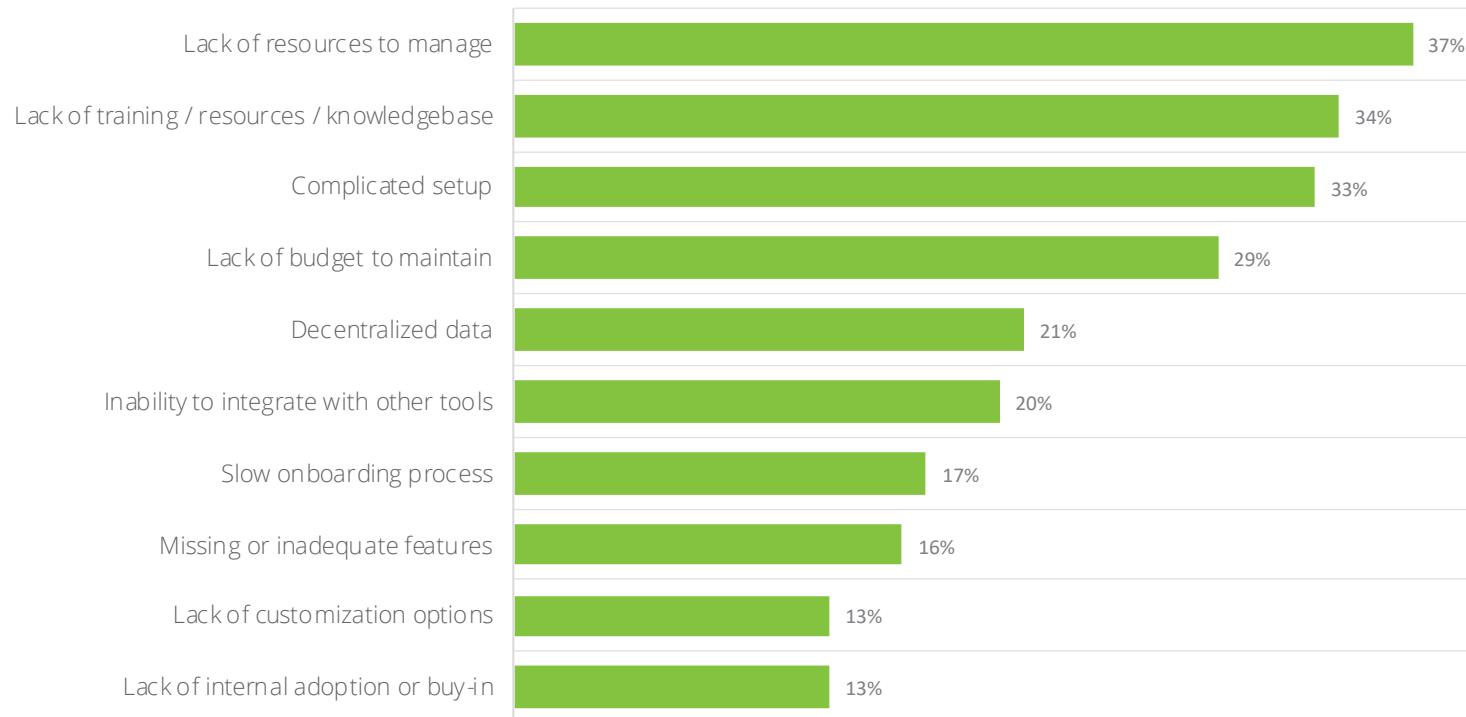
Do you feel that you are utilizing your marketing automation tools to their FULLEST POTENTIAL?

NOT SURE
23%

NO
50%

YES
27%

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Significant Barriers to Use

What is preventing agency marketers from using their marketing automation solutions to the fullest potential? The most commonly reported barrier is a **lack of resources to manage the solution(s)**. Over one-third (34%) of agencies feel that they are **not provided adequate tools such as training, resources, or a knowledgebase**, to utilize the solutions to their fullest extent.

What are the most SIGNIFICANT BARRIERS to utilizing your marketing automation tool(s) to the fullest potential?

Barrier	Percentage
Lack of resources to manage	37%
Lack of training / resources / knowledgebase	34%
Complicated setup	33%
Lack of budget to maintain	29%
Decentralized data	21%
Inability to integrate with other tools	20%
Slow onboarding process	17%
Missing or inadequate features	16%
Lack of customization options	13%
Lack of internal adoption or buy-in	13%

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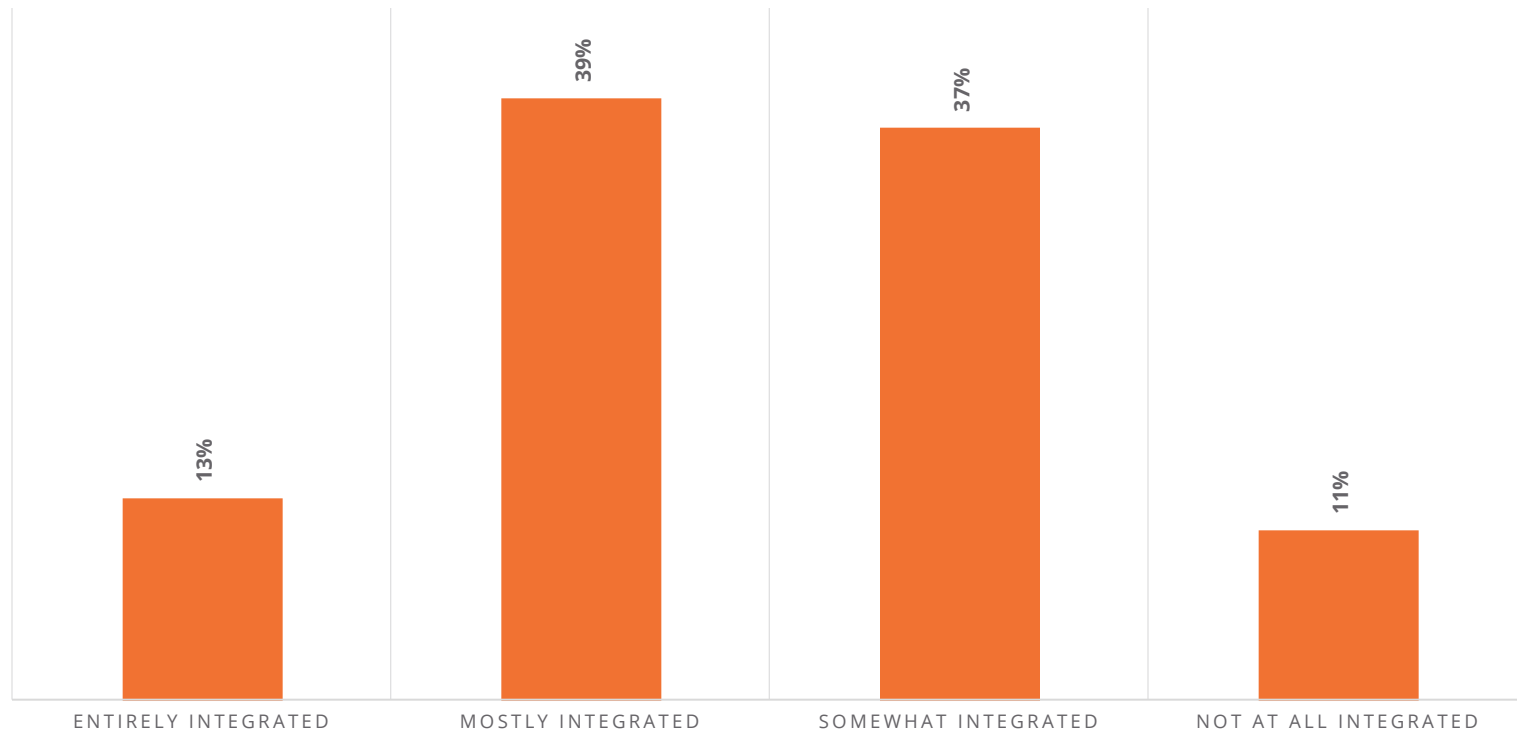Published August 2021

Extent of Technology Integration

When marketing automation is deeply integrated into an existing technology stack, marketers are better able to centralize data and utilize it throughout campaigns more efficiently. Over half (52%) of agencies are operating with automation either **entirely or mostly integrated** into their existing marketing and sales technology stacks. Another 37% of agency marketers report that automation is just **somewhat integrated**.

Which best describes the INTEGRATION of your marketing automation solution(s) with the rest of your technology stack?

ENTIRELY INTEGRATED	MOSTLY INTEGRATED	SOMEWHAT INTEGRATED	NOT AT ALL INTEGRATED
13%	39%	37%	11%

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About the Research Partners

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Agency marketers are feeling confident in their abilities to use marketing automation to drive new business and provide their clients with an integrated and efficient end-to-end experience. It's clear, though, that opportunity still exists for agencies looking to set themselves apart by offering automation services for sales-driven efforts. SharpSpring helps agencies fuel growth for themselves and their clients with end-to-end sales and marketing automation + CRM at a fraction of the cost of other providers.

Learn more about SharpSpring.

Ascend2 RESEARCH-BASED MARKETING

Marketing technology companies and digital marketing agencies trust Ascend2 to create credible, engaging research. Ascend2 provides media-trusted original research backed by a custom strategy to build brand awareness, generate media coverage, and drive demand through the middle of the funnel.

Receive research in as little as two weeks!

Learn more about Ascend2.