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AHPR Resource Bank

Marketing Automation Starter Guide



A beginner-friendly guide packed with step-by-step tips to help you automate your marketing campaigns, nurture leads, and save time. Learn how to use AI-powered tools to schedule content, streamline email marketing, and measure success — all while staying authentic to your brand voice.

1. Introduction

- What is marketing automation?
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- Why is automation critical for efficiency and growth?

2. Benefits of Marketing Automation

- Save time on repetitive tasks
- Nurture leads more effectively
- Track and measure results automatically
- Maintain consistent messaging across platforms

3. Choosing the Right Tools

- Popular platforms: Marketo, HubSpot, Mailchimp, ActiveCampaign
- Key considerations: ease of use, integrations, scalability

- Free vs. paid options for small businesses

Platform	Best For	Key Features	Ease of Use	Pricing Range	AI/Automation Strength	Recommended Use Case
Marketo	Large enterprises & B2B companies	Advanced lead scoring, CRM integration, detailed analytics	Moderate (requires setup)	\$\$\$\$	Strong — robust automation workflows and data-driven targeting	Ideal for enterprise-level teams managing complex, multi-step campaigns
HubSpot	Growing businesses & marketers	All-in-one CRM, integration, detailed analytics	Easy	\$\$\$	Excellent — intuitive AI tools and marketing suggestions	Perfect for small to mid-sized teams looking for an all-in-one growth platform
Mailchimp	Small businesses & beginners	Email campaigns, landing pages, basic automations	Very Easy	\$-\$	Moderate — AI-assisted design and send-time optimization	Great for solopreneurs or small teams starting with email marketing
ActiveCampaign	E-commerce & customer engagement	Email automation, CRM, SMS marketing	Easy-Moderate	\$\$-\$	Strong — predictive actions and advanced segmentation	Best for online stores and service-based businesses focused on retention

Notes:

4. Setting Up Your First Automated Campaign

- Step 1: Define your goal (lead generation, engagement, or sales)
- Step 2: Map your customer journey
- Step 3: Choose triggers and actions (email sequences, follow-ups, notifications)
- Step 4: Test your workflow before launching

Notes:

5. Email Automation Basics

- Welcome series for new subscribers
- Drip campaigns for nurturing leads
- Personalized emails based on user behavior
- Using segmentation to target the right audience.

Notes:

6. Social Media Automation Basics

- Scheduling posts with tools like Hootsuite, Buffer, or Later
- Automating cross-platform posting
- Monitoring engagement through dashboards
- Best practices to avoid looking “robotic”

Notes:

7. Analytics & Reporting

- Metrics to track: open rates, click-through rates, conversions

- How to use data to optimize workflows
- Automating reporting to save time

Notes:

8. Tips & Best Practices

- Start simple and scale gradually
- Keep human touch in automated messages
- Regularly review and update workflows
- Combine automation with AI tools for smarter results

Notes:

