Getting Started with Zoho Marketing Automation

Introduction

Zoho Marketing Automation (ZMA) is a multi-channel marketing automation software that can help you in achieving all your business goals. Using ZMA, you can efficiently contribute to your marketing initiatives through lead generation, nurturing and engagement, personalized marketing strategies, sales and marketing alignment, boosting conversion rates, report analysis, data management, and more. If you run a business, however big or small, it's crucial to focus on marketing activities to help your target audience reach your products or services. This document will help you get up and running with your Zoho Marketing Automation account.

What you'll learn

- Gather insights about tracking website visits to collect visitor data using tracking code snippets.
- Build and manage an extensive contact base in Zoho Marketing Automation.
- Segregate leads into various stages of their life cycle based on various criteria, and engage with them using multiple channels.
- User management options available on Zoho Marketing Automation to set roles and privileges to all account users based on the tasks they need to undertake.

Track anonymous website visits

Zoho Marketing Automation lets you track your website and landing pages by installing a snippet code. As a marketer, you likely run many campaigns and promotions, online and offline, including on Facebook, Google, television, radio, newspapers, and so on. All these ads generally feature a website link you'd like to direct all your leads to. This makes it important to track your webpages to analyze how your ads are performing and how many leads they generate. [Learn more about different kinds of tracking codes and how to install them](#)

Build your audience by importing contacts

Marketers often have many contacts in their database that are scattered across multiple platforms. These include details of customers, suppliers, subscribers, partners, potential customers, and so on. You can use the Contacts module in ZMA to view the contacts dashboard, organize leads as lists and segments, assign topics to share the right campaigns with them, get lead qualification and attribution reports, and so on.
Let's take a look at the options you can use to bring in existing contacts to Zoho Marketing Automation:

- **Import** - Information regarding some leads is often spread between a marketer's computer cloud storage. You can import them to ZMA using the Import from Cloud and Import from Computer options available in the Contacts module.
- **API** - You can use ZMA's API to bring in contacts that you've stored in various applications, especially an in-house CRM tool. [Learn more about using ZMA's API](#)
- **CRM integration** - Integrating your ZMA account with [Zoho CRM](#) and other CRM platforms will help you sync and import all the contacts you have there to the ZMA account. [Learn more about CRM integration and its benefits](#)
- **Other Integrations** - If you've stored some of your contacts in third-party applications, you can use ZMA's Integrations feature to bring them to ZMA by initiating a sync. This will also help you obtain leads on ZMA whenever lead information is updated in the integrated platform. [Learn more about integrations](#)

> 📄 Note:
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> - Before importing contacts to ZMA, ensure that the email and/or mobile number fields are mapped.
> - Create proper fields in settings if a user is trying to import custom fields.
> - Ensure that you have the required permission to send out any form of communications to your contacts.

[Related help documents](#)

Other ways to build your audience

Your main objective as a marketer will be to increase the number of leads in your mailing list to reach a wider range of audience. This is because it's these leads whom you can engage with, nurture, and finally convert into potential and loyal customers.

- **Embed a signup form for your website/landing page** - Signup forms are quite useful to collect user details including name, phone number, email address, and other valid details. You can use signup forms to gather leads, categorize them into various lists and segments, and target the right marketing strategies towards them.
- **Engage with your web visitors using predesigned signup popup templates** - Another method to generate leads is by embedding signup pop-ups on your website. They boost user interaction on your website with call-to-action buttons. ZMA offers four pop-ups types: pop-ups, slide-ins, banners, and full screen. You can use any of these pop-up types based on your business requirement.

[Learn more about lead generation using ZMA by reading our help documents](#)

Lead qualification and engagement

In Zoho Marketing Automation, you can classify your contacts into various stages based on how they qualify certain predetermined criteria. You can assign certain scores for contacts that fulfil specific criteria. For example, based on the scores, you can view hot contacts that have the highest potential to convert as customers and cold contacts, who are at a stage where they are less likely to make a purchase.

[Learn more about lead qualification and scoring on Zoho Marketing Automation](#)

After deriving the lead scores, you can use our multichannel marketing to engage with them, understand their behavior, and craft marketing plans to convert them to active customers. You can send email and SMS campaigns, create social campaigns to share posts online, or design engagement pop-ups to stay relevant to your customers and tap in to their attention. Let's take a look at how you can use each of them to benefit your business.

- **Email campaigns** - A customized email campaign with personalized messages is a great way to engage with your leads. ZMA's drag-and-drop template editor helps to design attractive email campaigns, which can be sent out at the right time using the schedule option.
  [Related help documents](#)
  Note: We recommend authenticating your email domain for better email deliverability. If your sender address is patriciajones@zylker.com, 'zylker.com' is your sender domain. [Learn more about how and why you must authenticate your sender domain](#)

- **SMS campaign**s - Another way to stay connected with your leads is by sending them SMS campaigns. You can use merge tags to send personalized wishes to your leads on their birthdays, holidays, or other special occasions. Along with a number of third-party SMS gateways, ZMA offers its own SMS gateway to send out SMS campaigns.
  [Related help documents](#)

- **Social campaigns** - You can set up your brand on ZMA and link all social media pages, including, Facebook, X, LinkedIn, and Instagram with it. You can schedule to share posts on these social channels via ZMA to boost brand awareness.
  [Related help documents](#)

- **WhatsApp campaigns** - Zoho Marketing Automation lets you promote your business by engaging with your contacts and sending them customised promotional messages on WhatsApp.
  [Related help documents](#)

- **Engagement pop-ups** - You can use engagement pop-ups to announce exciting deals you're offering on your website. For example, the slide-in pop-ups can be used to display the details of a flash sale, the banner pop-up can be used to share sale information on multiple pages of your website, and so on. These pop-ups will help you interact with your website visitors and encourage them to take the required action.
  [Related help documents](#)

- **Journeys** - The Journeys feature in Zoho Marketing Automation is a go-to solution when it comes to automating repetitive tasks, such as sending monthly newsletters, purchase follow-ups, updates on abandoned cart, and so on. Even though these activities are time consuming when done manually, they are ideal to engage with leads and build a rapport with them. [Learn more about creating and using journeys to boost lead engagement](#)

Manage user preferences in your account

Your Zoho Marketing Automation account will have a large amount of crucial and confidential data about your business and leads that needs to be protected. You need to assign proper roles and privileges to your account users to restrict data accessibility and ensure data is not compromised. The various user roles available on Zoho Marketing Automation are admin, manager, editor, and viewer. [Read more about user roles and the permissions associated with them](#)

[Related help documents](#)

Grow your business with us

Let's take a quick look at how you can use Zoho Marketing Automation to grow your business:

- Generate leads through various mediums, including signup forms, signup pop-ups, landing pages, and more.
- Engage with leads using email campaigns, SMS campaigns, social campaigns, WhatsApp campaigns and engagement popups to understand their behaviour
- Create journeys to nurture leads based on their behavior
- Analyze reports to see qualified leads and push them to sales
- Follow up with the sales qualified leads that haven't responded
- Convert leads into customersEngage further with leads through the lead engagement strategies to cross sell or up sell your products.
- Retain existing customers
- Build loyalty with your customers