kod szkolenia: DM-B2B / marketing_automation_en

Marketing Automation in B2B Companies

The **“Marketing Automation in B2B Companies”** training is a closed, dedicated training and workshop program designed to help organizations develop a well-thought-out and scalable marketing automation strategy tailored to their stage of growth, sales process, and the real needs of their customers.

The training focuses on strategy and processes rather than on specific tools. Participants will learn when marketing automation truly delivers business value and when its implementation can lead to unnecessary complexity and reduced effectiveness. The program covers the design of lifecycle scenarios, the fundamentals of lead scoring, principles of maintaining high-quality data in CRM systems, and an analysis of the most common mistakes made by growing B2B companies when implementing automation.

Training recipients

The training is intended for marketing teams and marketing–sales teams in B2B companies, particularly for Marketing Managers, Heads of Marketing, and professionals responsible for CRM, marketing automation, and marketing–sales integration.
The program is designed for companies that are planning to implement marketing automation or that want to organize, improve, and optimize their existing automation processes.

Benefits

- Understanding when marketing automation delivers real business value
- Ability to design lifecycle scenarios aligned with customer needs and the sales process
- Fundamental knowledge of lead scoring and its role in B2B

- Improved CRM data quality and greater process transparency
- Identification of the most common mistakes in automation implementation
- Practical implementation recommendations tailored to the company

Training program

1. Marketing Automation in a Business Context
- What marketing automation is (and what it is not)
- When automation makes sense and when it does not
- Marketing automation and the company’s stage of growth

2. Designing Lifecycle Scenarios
- The lifecycle of a lead and customer in B2B
- Key automation touchpoints
- Onboarding, nurturing, and post-sales scenarios

3. Lead Scoring – Fundamentals
- The role of lead scoring in B2B
- Behavioral and demographic criteria
- Marketing–sales collaboration in lead scoring

4. CRM Hygiene and Data Quality
- Why data is the foundation of automation
- The most common data quality issues
- Best practices for maintaining CRM systems

5. The Most Common Mistakes in Automation Implementation
- Automating chaos
- Overly complex scenarios
- Lack of alignment between marketing and sales
- How to eliminate errors and simplify processes

6. Implementation Recommendations
- Priorities and “quick wins”
- Next steps after the training
- A model for the further development of automation

Expected preparation of the participant

Participants should be familiar with the current marketing and sales processes within the company, as well as the CRM system in use (if one has already been implemented).

Czas trwania

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Language

Training: english
Materials: english