GETTING STARTED WITH MARKETING AUTOMATION AND CRM

POWER OBJECTS

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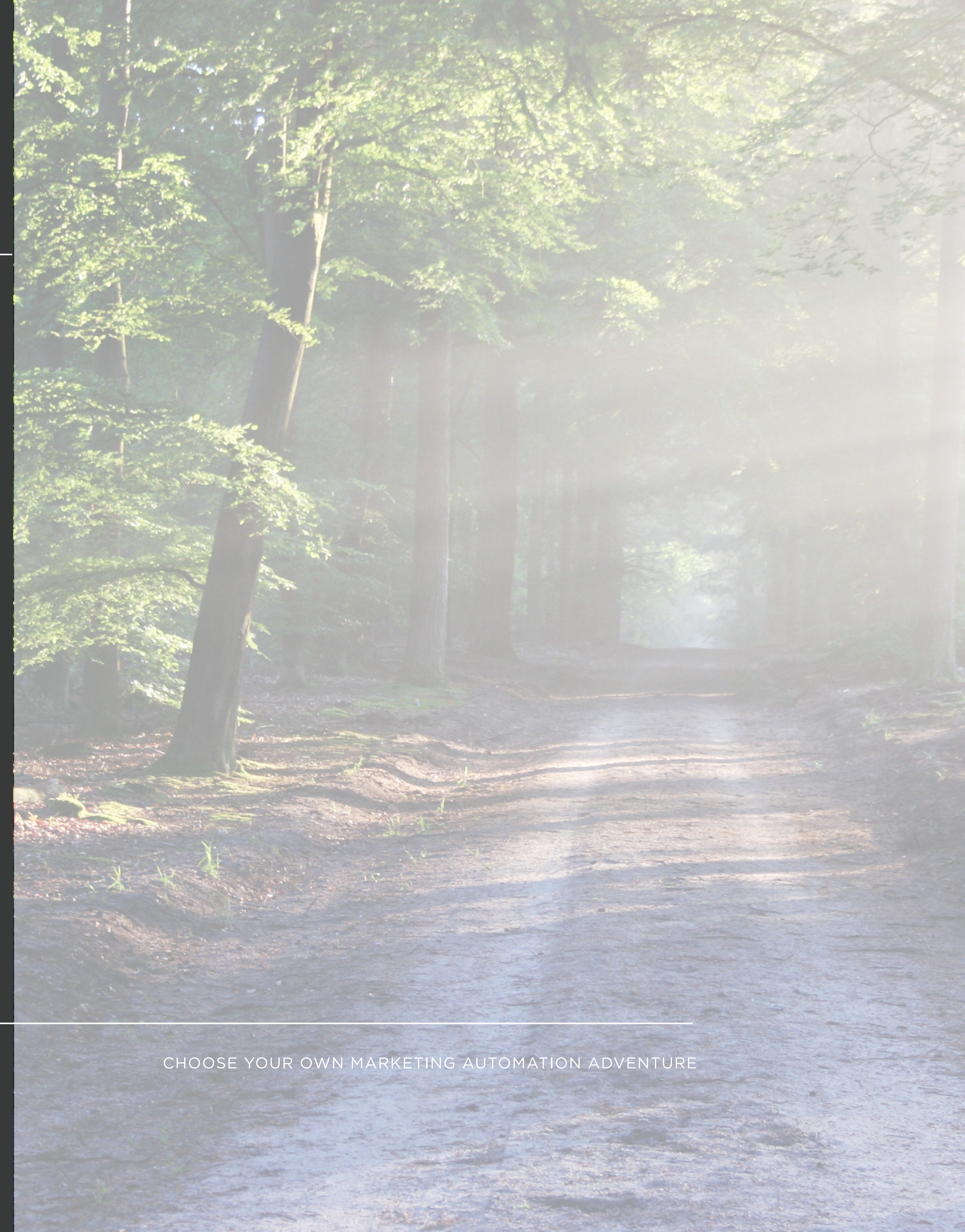

CHOOSE YOUR OWN MARKETING AUTOMATION ADVENTURE

INTRODUCTION

Marketing automation is a term heard a lot in the business world these days, but what do people mean when they say marketing automation?

That's a good question. The issue is that marketing automation means a lot of different things to different people. In this eBook, we'll be giving you our take on the topic. We'll define marketing automation, show you how to implement it in the CRM workload for Microsoft Dynamics 365, and address how marketing automation should fit into your overall digital marketing strategy.

Understanding what marketing automation is, however, is only part of the battle. You need to know how to use it effectively. We believe you should be considering three main points when thinking about marketing automation:

1. You need to be using CRM to drive all of your marketing efforts
2. Never stop marketing to your current customers
3. Just try something!

Marketing automation doesn't start with a bulk email or an automatically generated thank you message, it starts with an action. The whole goal behind marketing is to inspire someone to act on their interest, aka "raise a hand." This means that the conversion, the process of turning someone like a website visitor into a paying customer, should be defined in advance. That way, the correct conversation gets triggered by an event that starts the conversation for each prospect or customer at any point in time. You accomplish this by using automation tools and CRM.

If you take away one thing from this eBook, it should be that you need to be using a relationship database like CRM to drive all of your marketing efforts. A Customer Relationship Management system, CRM, should be the heart of your marketing efforts. The lifecycle of your marketing campaigns should live in CRM, from start to finish and for everything in between. Don't think of sales and marketing as separate components, think of them as members of the same team, brought together by CRM to work together as one. CRM gives you the ability to track each entity's history with your company or product without information being lost in translation as it moves from one department to another. With all of your contacts in one place, you can draw relationships correctly, sending the right message at the right time to the right person.

Marketing automation is just one piece of the pie that we know as digital marketing. Organizations can and should focus on the tactical aspects of digital marketing, however, they shouldn't be looking for a silver bullet to solve all of their lead and sales problems. There is no marketing solution you can buy that will magically create leads and sales for your organization. So what can you do? Start out simply, focus on your business, and use CRM.

Remember, it's all a big experiment. If something works, it works, if not, get rid of it and move on to the next thing. Don't be afraid to give something a try. The key is to be able to MEASEURE the success or failure of the marketing effort, which is what CRM allows you to do seamlessly. Each marketing strategy is different, but this eBook will give insight into how a solid marketing automation plan and CRM can impact your overall marketing efforts in a positive way.

GETTING STARTED WITH MARKETING AUTOMATION

MARKETING AUTOMATION 101

The American Marketing Association defines marketing as the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large. So, what is marketing automation then, and how does it fit in with your overall marketing efforts? Think of marketing automation as a one-on-one conversation. While it may be unrealistic to have a one-on-one conversation with all of your customers and prospects, you can, however, make it appear as though you are.

Marketing automation does not start with a bulk message, although indirectly it can. It starts with an action. For example, say a customer fills out a web form asking for information about your training offerings. This action can trigger a pre-defined marketing conversation about "education offerings." Maybe someone attends a webinar about a new product. This could trigger a marketing conversation about a "new product." What if a person fills their online shopping cart but never submits the order? This could trigger a marketing conversation about "completing the order." The point we are trying to make here is that the conversion should be defined in advance so that the correct conversation can be triggered by an event that starts the conversation for each prospect or customer at any point in time.

When considering getting started with marketing automation, it's important to ask yourself, "Do I have a digital marketing strategy already in place?" A company that is not successfully implementing a digital marketing strategy will struggle with marketing automation. You need to walk before you run. Having the tactical pieces in place when implementing marketing automation is critical. CRM is one of those pieces. In this eBook, we'll start off with understanding the foundation of marketing automation and then we'll dive in to what digital marketing is and how it fits into your overall marketing plan.

STEP-BY-STEP

Marketing automation starts once an action has been triggered. There are basic steps to every marketing automation solution: Time, Condition, Action, and Next Step. Look closely when watching demos for marketing automation solutions. They will almost always have a wait condition, which is the "Time" variable; a step to check if an action has or has not occurred, which is the "Condition" variable; a medium for a customer to interact with such as an email, link, etc., which is the "Action" variable; and finally, based on an action taken or not taken, a "Next Step" variable where you define the next step in your customer's journey with your organization. This is how simple marketing automation really is.

When looking at marketing automation solutions, identify each of these steps. This is where the real value comes from. If you do not identify each step, you won't understand the strengths and limitations of your marketing automation solution and you'll find yourself wondering, "Why doesn't this have the condition I need?" or, "Why doesn't this have robust enough actions for what I want to do?" Most importantly, ask yourself, "Can I do this with Microsoft Dynamics CRM?" The answer to that question should always be yes!

MARKETING AUTOMATION WITH MICROSOFT DYNAMICS

You can implement marketing automation for Microsoft Dynamics CRM with some basic CRM customizations and workflows. Remember, we have to handle the Time, Condition, Action, and Next Step components. Sounds like CRM to us! Before you start customizing, however, you should have a solid understanding of what these components are and how they factor into marketing automation with CRM.

TIME

Every marketing automation has a Time consideration. As we mentioned earlier, after the initial trigger that kicks of an automated marketing campaign, a marketing automation solution should set a Time between that trigger and the next step in the process. This tells the automation when to proceed to the next step. It's tricky to specify an exact date and time because each communication gets triggered by an action which will be different for each person, so we use a relative time. This is almost always done with a wait condition. For example, if we send a contact an email, we might want to wait two days until we send the next one. While the first step in a marketing campaign might be an immediate action, the following steps will almost always wait a period of time.

There is one very important concept to remember. After you wait, you must check to make sure the campaign and step have not changed while you were waiting. For example, say your workflow gets triggered because step one sent an email offer to a lead about a product and updated the marketing automation process to step two. Step two is a follow-up about the offer two days later. During the two days when the workflow was waiting, however, the lead called in and ordered, which updated the workflow to "stop." All workflows should check to see if the current step belongs to this marketing campaign and should verify the next step or steps. Conditions can and do change while workflows are asleep.

CONDITION

This is where the magic happens! It's also the hardest part to do with a CRM out-of-the-box workflow, but the more conditions you support, the more robust your marketing automation will be. The Condition has to evaluate if a user has or has not performed an action. Did they open an email, did they visit a web page, did they register, or did they submit an order?

Not only do we need to check if the user has performed an action, we have to check if it was done during a specific time period. For example, say you want to know if someone visited a web page, but you specifically want to know if they visited the page within the last five days. The goal here would be to check Condition A in the last X days. From there, we can determine what happens next. If the user did meet the condition criteria by opening your email or clicking a URL, they go down one branch of your marketing automation. If not, they go down another branch.

ACTION

The Action component of this is what CRM does best. What do you want to do once you've determined your user has or has not met a condition? Send an email, send an SMS, schedule a phone call, add to a marketing list, remove from a marketing list, assign to a sales person, or trigger a workflow? Again, this is where CRM shines, so why be limited by a marketing automation system that works outside of CRM?

NEXT STEP

Every marketing automation workflow knows what message it's currently processing and what message should be processed after it. After one step successfully processes, the workflow simply updates the marketing automation record to the next campaign step. This triggers the workflow, firing off the next workflow that is assigned to this campaign step. Then, the entire process starts again. If there is no next step, the action might be to stop the automation by updating the step to "stop" or "null."

MARKETING IN DYNAMICS 365

We believe that CRM is the center of all communications with a customer, which means that marketing, sales, and service all need to reside in CRM. Don't struggle to get your marketing, sales and customer support teams to work together. First, handle your tactical aspects of marketing. Then, by leveraging CRM entities and workflows, you can easily handle the automation in CRM next.

Dynamics 365, including the CRM workload, has plenty of out-of-the-box marketing automation functionality already, but there are enhancements available that allow

ture Add-on for Dynamics CRM lets you sit back while the automation components are taken care of for you. With PowerNurture, PowerPack subscribers can create campaigns to automate communications and actions based on the contact or lead's action or inaction. Combine wait, check, and action steps throughout the campaign to drive the recipient to action. If the recipient doesn't interact with the communication, the campaign will branch allowing users to take other actions such as creating a phone call task or running workflows. It's time to bring the one-on-one digital marketing conversation into CRM!

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DIGITAL MARKETING IN CRM

DIGITAL MARKETING 101

Digital marketing is a big topic right now. Discussions about digital marketing often start with cautions about trying it on your own and warning that a digital marketing strategy is too complicated to execute without help. Those warnings are often followed up with an insistence that you need expensive and complex software in order to run an effective campaign. These conversations more often than not do not tie back to CRM, and like we mentioned before, that's a problem.

Do you know what customers are visiting your Website? If not, how can you score them? Do you capture leads from your Website, import them straight into CRM, and then respond accordingly? If you don't respond, how do you expect to win them as a customer? Do you communicate regularly with your existing customers via newsletters, emails, or text messaging? If not, what do you think the odds are they will think of your company when they are ready to buy?

The other thing to keep in mind is that you should never stop marketing to your current customers. It's a lot easier market to an existing customer than to try and get a sale from a new one. Existing customers need knowledge, validation, services, and education for the product or service they already have. Don't leave them out in the cold, turn them into the gift that keeps on giving.

The way we see it, organizations have Prospects, Leads and Contacts/Customers, and it's critical to market to all of them. Because of this, your marketing needs to be in CRM. Let's talk about why.

WHAT HAS HAPPENED IN THE MARKET?

Most digital marketing solutions started with bulk email functionality, but bulk email on its own isn't a marketing solution. Today, most marketing automation solutions include tactical marketing features such as web traffic tracking, web form submissions, etc. However, some of these solutions still have a few problem areas.

First of all, while some solutions are really good at bulk emailing, they aren't as robust when it comes to monitoring web traffic, integrating web forms, scoring leads, sending surveys, etc. The second problem is that these solutions are stand-alone tools. In order to achieve overall marketing success, you need to be storing your data within the same tool you use for your marketing efforts. Additionally, every organization has different marketing needs. A marketing solution for selling a product on the internet does not necessarily fit an organization that sells professional services, which is why you need a highly customizable solution.

The biggest problem we see with some marketing automation solutions is that they only really fit the needs of large organizations. The cost of purchasing the solution, training the staff, and providing support makes these options too much of an effort and an expense for small organizations. This doesn't mean that small organizations shouldn't use marketing automation tools, it simply means that they need to be looking at a more feasible option.

MARKETING BASICS: SETTING THE FOUNDATION

Organizations can and should focus on the tactical aspects of marketing, however, they shouldn't be looking for a silver bullet to solve all of their lead and sales problems. There is no marketing solution you can buy that will magically create leads and sales for your organization. So what can you do? Start out simply and focus on your business.

Your tactical marketing strategy should consist of sending newsletters, monitoring web traffic, integrating web forms, scoring leads, sending surveys, etc. These are some of the ways you can reach out to your customers and prospects digitally in a one-to-many conversation.

Keep it simple. Start off with something like deploying web traffic monitoring to see which companies, contacts, and leads are visiting your Website. What pages are they visiting? What are your most visited pages? Once you know this information, you can ask other questions like what can you do to increase traffic to other pages? What can you do to reduce your bounce rate? What can you do to get your Website visitors to raise their hand and show interest?

Any organization can track Website visitors in CRM. Once you know the statistics, you can focus on growing that number. Focusing on a metric that is easy to measure and improve on is a good place to start with your digital marketing strategy. ROI is a very difficult number to measure, so try for something easy at first.

> " ANY ORGANIZATION CAN TRACK WEBSITE VISTORS IN CRM. ONCE YOU KNOW THE STATISTICS, YOU CAN FOCUS ON GROWING THAT NUMBER. "

WHAT COMES NEXT?

So now that you've decided to start with monitoring your web traffic, the next step is to create custom web forms in order to capture leads directly from your website, and then import those leads into CRM.

By placing various web forms on your website, you can get potential customers to tell you who they are. A good CRM web form will import new contact information straight into CRM after checking for existing or duplicate records. This way, if someone submits a web form and they are already a contact in your CRM system, a duplicate record will not be created. You should also have a workflow built in CRM that automatically responds to a web form submission with either an email or SMS to confirm that their form was received and that someone will be following up with them shortly. Don't leave them wondering what happens next after they submit the form.

You now have set the foundation for your digital marketing strategy: Monitoring who visits your website and giving them the platform to raise their hand.

START COMMUNICATING

Next it's time to solidify your communication channels. You already have prospects, leads and customers, so how do you keep them informed? How do you create offers and information to make sure your company is top-of-mind when customers are ready to purchase, have support questions, or need to validate that their original purchase was the right purchase.

The two primary digital marketing channels are email and SMS. For example, sending a monthly newsletter via email lets you communicate new news, track who opens your emails, and who clicks the links in your emails, which is a great way to identify who your most engaged customers or leads are. You can always get into more complex transactional emails that can be triggered at key action moments later on. But again, if you have not mastered sending a quality monthly newsletter and aren't already tracking who is engaged via CRM, don't attempt to design and manage an action trigger transactional message quite yet.

By this point, you now have 90% of what you need to be successful with your digital marketing efforts. Remember, the key is to start off easy and get more complex.

TYING IT ALL BACK TO CRM

The next tactical effort we suggest implementing is collecting customer feedback in order to measure your customer satisfaction. How? Just ask of course! A great way to do this is by sending out customer satisfaction surveys and collecting the results in CRM. Try building a survey in CRM with tools like PowerSurveyPlus and have a customized workflow send it out after key events. At the end of every sales process, ask how you did. A customer has had a product for a month, ask how they like it. A client called your support desk to resolve an issue, ask if they were pleased with the resolution. There are a million ways you can get feedback from your customers. With CRM and customized workflows, it couldn't be easier!

If you've made it to this point, you're almost a digital marketing rock star! Might as well keep the momentum going by scoring your leads and contacts in CRM. By scoring your leads, your sales and support teams can pursue the most engaged ones. You define basic scoring rules based on lead and customer attributes, title, location, industry, etc. You can also score based on behavior such as who opened an email, who visited a web page, who attended an event or webinar, etc. Using scoring rules can help you identify who you should focus on, which saves time and resources.

> "THERE ARE A MILLION WAYS YOU CAN GET FEEDBACK FROM YOUR CUSTOMERS. WITH CRM AND CUSTOMIZED WORKFLOWS, IT COULDN'T BE EASIER! "

THE STAGE IS SET

Our hope is that after reading this eBook, you stop thinking of digital marketing as an unattainable process that you can't do on your own or can't afford if you are a small or medium sized organization. At PowerObjects, we've built several tools to use within CRM, which we call PowerPack Add-ons, to help you with the tactical components of your marketing strategy. Use one, a few, or all of the tools listed below and you will be on the road to a successful digital marketing strategy with CRM.

SEND NEWSLETTERS WITH POWERMAILCHIMP

Sending a company newsletter monthly, quarterly, or bi-yearly is a great way to kick off a successful digital marketing campaign. Sending a professional and robust newsletter is a great way to get your feet wet with marketing automation. Newsletters can help your organization get new leads, sell more products or services, promote happier customers, and educate existing customers with updates and education.

PowerMailChimp is a MailChimp CRM integration tool that connects the powerful, robust, and affordable third-party bulk email platform, MailChimp, with Microsoft Dynamics CRM. Use static or dynamic CRM marketing lists to send out bulk emails all from within CRM.

TRACK WEB TRAFFIC WITH POWERWEBTRAFFIC

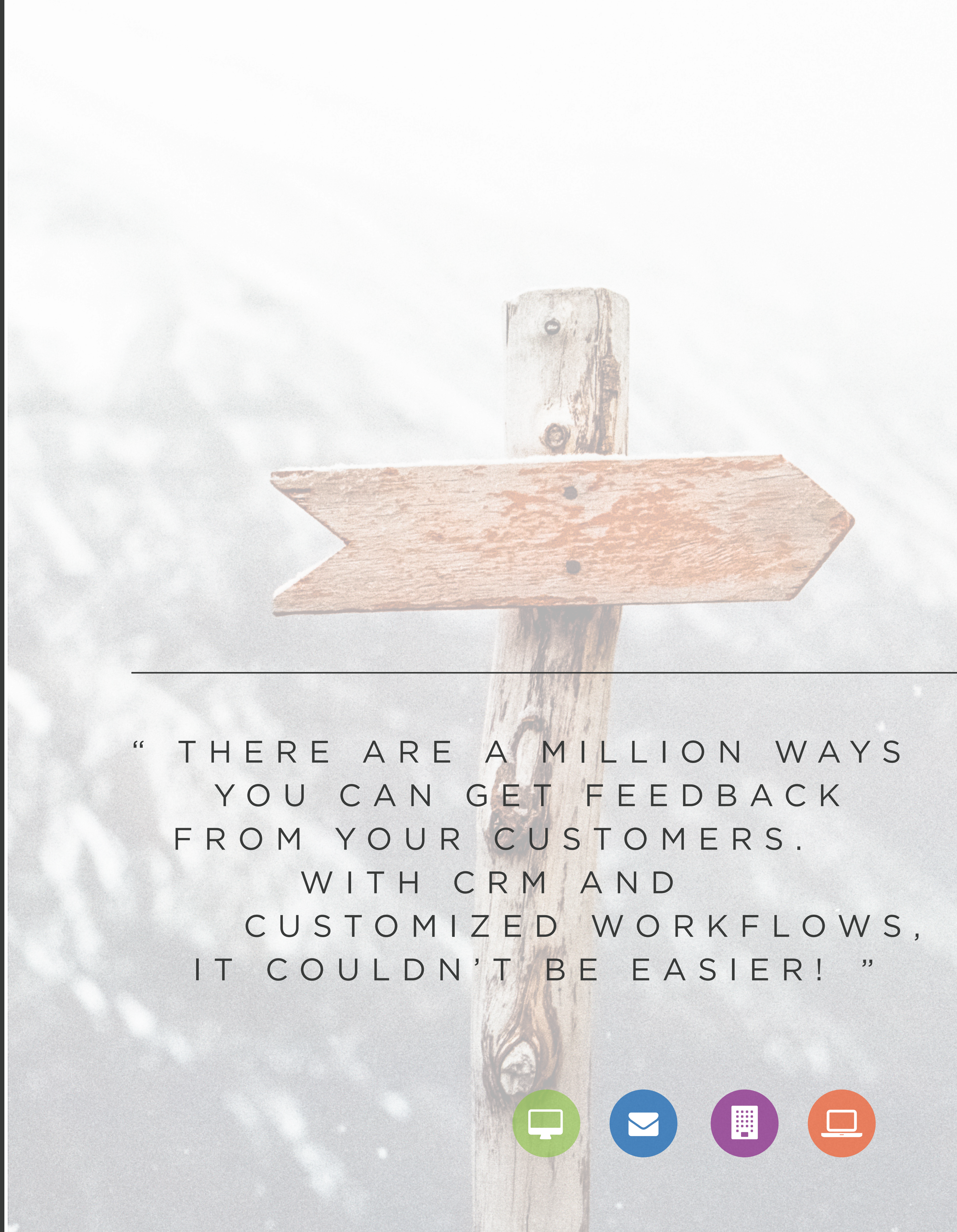
Who is on your Website? Where are they coming from? What are they viewing or interacting with? Many organizations leave the web traffic monitoring to their IT department, but you should really be monitoring it for sales and marketing. While IT can tell you how your website is performing, the bottom line is that you should know how leads, customers and prospects are interacting with your site, which means the data needs to be in CRM. Combine the power of website tracking analytics with the power of CRM and see who is surfing your site with PowerWebTraffic. PowerWebTraffic gives you the ability to see what your customers and potential clients are viewing by collecting website tracking analytics and connecting them to contacts and leads right within your Microsoft Dynamics 365 system.

CAPTURE LEAD INFORMATION WITH POWERWEBFORM

Many organizations have their web forms set up so that when one is filled out, an email notification is sent. Then someone opens the email and decides how to follow up. Simple. The problems with this method occurs when those emails get missed. Maybe someone is out that day or maybe they just missed seeing the email in their inbox, but now we have a lead that is not followed up with in a timely fashion, which can result in a lost sale or dissatisfied customer. Another problem with this method occurs when a person processing the new lead doesn't check to see if is already exists as a lead or customer in CRM, which can lead to awkward sales calls to current customers. PowerWebForm lets you capture information from an online web form, and instantly pull that information directly into CRM, where it checks for existing records automatically.

MONITOR CUSTOMER SATISFACTION WITH POWERSURVEYPLUS

While there are tons of surveying tools out there, the data they collect doesn't pull back into CRM. It's important to track your customer satisfaction information in CRM so that you can easily track and respond appropriately to each individual contact or lead. With PowerObjects' surveying solution, PowerSurveyPlus, Dynamics CRM users can easily build robust surveys right from within their CRM system and send them directly to their Account, Contact, and Lead records. Once a survey recipient has filled out the survey, PowerSurveyPlus creates a survey activity in CRM regarding the recipient with the answers that were given during the survey.



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