



Got CRM?

WHY YOU NEED
MARKETING AUTOMATION, TOO

AN ACT-ON eBOOK



MARKETING AUTOMATION IS THE MARKETING COUNTERPART TO YOUR CRM SALES SYSTEM.

CRM SUPPORTS SALES...

Your established customer relationship management (CRM) system has already proven its value. Introduced in the 1990s, CRM technology changed sales and customer service forever, providing the backbone of knowledge and power for coordinated prospect and customer engagement, sales, and service. When Salesforce introduced a SaaS model, the door to CRM was opened for small-to-mid sized businesses, who had all the same responsibilities as their enterprise cousins, but far fewer resources. As a result, CRM has become the standard for companies of all sizes.

...BUT FAILS THE MARKETER

For all CRM's many strengths, no CRM system offers what today's marketer must have to support sales and business goals.

End-to-end visibility and control over the entire lead lifecycle are essential, from attracting new leads to facilitating the prospect's exploration of your website, to bottom-of-the-funnel sales enablement tactics such as supporting product evaluation.

CRM doesn't deliver.



In a nutshell, the only thing CRM systems do is organize your information. They don't actually do anything. They keep track of your sales, but they don't engage your prospects. That's still up to you. They capture your sales process, but they don't execute it.

A good marketing automation system, on the other hand, proactively helps you. If set up and managed well, you can sit back and do nothing and the system will drop interested prospects in your lap ... I don't actually recommend someone choose one or the other. World-class sales and marketing organizations need both to succeed and scale.



*– Matt Heinz,
President, Heinz Marketing Inc.*

CRM AND MARKETING AUTOMATION ARE COMPLEMENTARY

This chart notes the typical capabilities of most CRM and marketing automation systems.

Certain CRM or marketing automation systems may have different capabilities, so this chart will not be accurate for every comparison; it is intended to serve as a general guide.

CAPABILITY	CRM	MARKETING AUTOMATION
ALERTS FROM WEBPAGE VISITS	NO	YES, SPECIFIC VISITORS AND/OR SPECIFIC PAGES (E.G. PRICING, FORMS, ETC.)
AUTOMATED CAMPAIGNS	NO	YES; DRIP, TRIGGER, NURTURE, RE-ENGAGEMENT, ETC.
CALL LOGGING	YES	YES, IF INTEGRATED
CONTACT LIST PRIORITIZED BY LEAD SCORE	NO	YES, WITH MANY (NOT ALL) CRM INTEGRATIONS
CONTRACTS	YES	NO
DE-DUPLICATION	NO	YES
DYNAMIC LIST SEGMENTATION	NO	YES, BY MULTIPLE FACTORS
EMAILS: TO INDIVIDUALS	YES	YES
EMAILS: TO GROUPS	YES, W/LIMITS	YES, W/O LIMITS
EVENT REGISTRATION	NO	YES, INTEGRATED WITH EVENT APPS AND ALSO CONTACT DATABASES
FORECASTING	YES	NO
FORM CREATION	YES	YES
FORM FEEDS INTO DATABASE	YES, TO CRM	YES; CAN BE DIRECTED TO CRM OR MA OR OTHER
LANDING PAGE CREATION	NO	YES; CAN BE CREATED FROM SCRATCH OR FROM AN EMAIL
LEAD-READINESS IDENTIFICATION	NO	YES, THROUGH BEHAVIORAL PROFILES AND LEAD SCORING
LEAD SCORING - ACTIONS	NO	YES; CAN BE CHANGED ON THE FLY, CAN BE AGED OUT
LEAD SCORING - ATTRIBUTES	LIMITED	YES, NOT LIMITED
MEDIA LIBRARY	LIMITED	YES; DOCUMENTS, IMAGES, ETC.
NATIVE EMAIL MARKETING	LIMITED	YES; MARKETING-CREATED EMAILS AVAILABLE IN CRM
OPPORTUNITY CREATION	YES	NO, BUT HELPS IDENTIFY AND QUALIFY OPPORTUNITIES THROUGH LEAD SCORING
SOCIAL MEDIA INTEGRATION AND TRACKING	NO	YES, OFTEN WITH PROSPECTING CAPABILITIES
WEBSITE VISITOR TRACKING	NO	YES, AND TRACKING DATA FEEDS INTO CONTACT ACTIVITY HISTORIES

CHANGES IN BUYING BEHAVIOR DRIVE CHANGES IN MARKETING

So what's changed in marketing since the introduction of CRM? Certainly management's bottom-line goal remains constant: revenue generation, and more of it. However, the B2B buyer has changed; the buying process has changed drastically; enormous volumes of digital data have become available; and management now pressures marketers to correlate and justify marketing spend with ROI.

The majority of potential B2B buyers have moved online to explore solutions, research your company and your competitors, and read peer reviews. And while in a very small company the CEO may be the sole decision-maker, in most cases at least three to five people will participate in the decision. The reality today is that the B2B buying process begins when prospects access your website, blogs, downloads, ads, or webinars.

Leads now spend the majority of their buyer's journey in the care of the marketing team, usually well before sales is even aware of them.

The marketer has adapted by employing new strategies. Lead management has become a multi-phase task of its own, under the purview of the marketing department.

- Identification of and outreach to prospects occurs sooner to turn information-seekers into leads.
- Lead analysis and list segmentation enable lead nurturing, which helps the buyer's progress through the sales funnel.
- Lead scoring, a tactic in which historic buying signals are given point values that aggregate, allows marketers to evaluate a lead's sales-readiness.

Easing the buyer through the journey with well-calibrated content marketing and other engagement strategies is a demanding and necessary task that falls to marketing, and it is hard to scale manually.

Effective lead management benefits your sales team:

- *Prioritization enables focus on hot prospects*
- *Nurturing prospects with relevant content helps leads become sales-ready*
- *Shortened sales cycles*

GREAT EXPECTATIONS

PULL PROSPECTS
FROM DATA. DEVELOP
RELATIONSHIPS.
DELIVER **SALES-READY**
LEADS TO THE CRM.

Trade show interactions, downloads, web page visits, online display and social advertising clicks, and other digital footprints signal interest and opportunities. Ignoring these opportunities leaves potential revenue on the table. Acting on this data identifies prospects who can be nurtured into sales-ready leads. Delivering the right content at the right time creates meaningful dialog with prospects.

Question is, how can this volume and variety of data be sorted out, put into a marketing-oriented system, acted upon, and managed – with your lean team? And how can you track attribution and engagement across multiple channels, and correlate your initiatives to revenue? How can you possibly keep up with all of it?

When you create a campaign in your marketing automation system, it should map back to your CRM so that you can tie closed deals back to the campaigns that created them.

This closed-loop reporting capability allows you to attribute revenue to campaigns and more accurately measure your ROI, giving you the information you need to make data-driven marketing decisions.

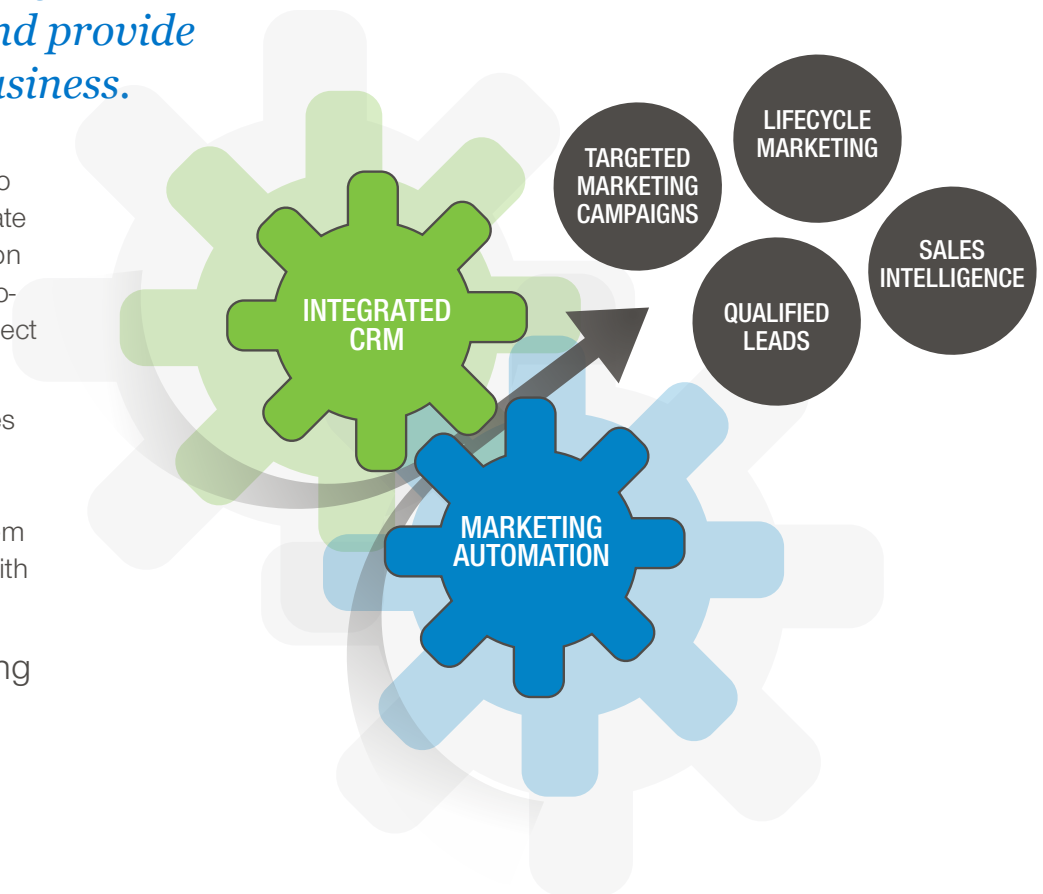
CRM + MARKETING AUTOMATION = THE ENGINE FOR **SALES-READY** LEADS AND ROI

CRM and marketing automation working together allow marketers to generate sales-ready leads and provide salespeople with real data to close more business.

Simply stated, marketing automation is the marketing counterpart to CRM, enabling you to deliver and scale personalized and appropriate outreach. It incorporates and uses your CRM database to execute on marketing tasks, including lead generation and personalized, one-to-one communications informed by the data collected through prospect and visitor tracking.

Notably, MarketingSherpa found that not all leads are ready for sales right away. **In fact, while 61% of B2B marketers send all leads directly to sales, only 27% of those leads are actually qualified or ready to talk to sales.** A B2B-ready marketing automation system enables you to nurture leads to the point at which a conversation with sales will be most productive.

Marketing automation is your backbone for developing and delivering sales-ready leads.



EVALUATING A MARKETING AUTOMATION SYSTEM

Tracking behavior, automating campaign flows, lead scoring, and generating reports demonstrating ROI – important marketing functionality that CRM systems lack.

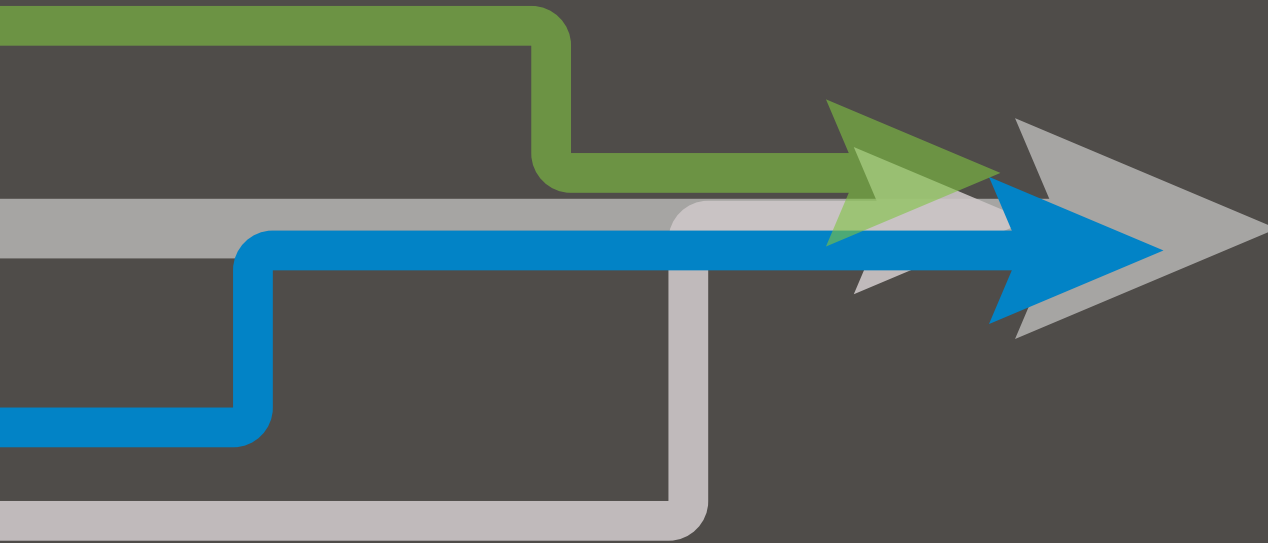
Your own business processes and best practices for engaging with prospects should drive selection of a marketing automation system that fits the needs of your business. Marketing automation that pivots around your needs is the goal.

KEY CONSIDERATIONS

Determine whether these factors are relevant for your business needs:

- Integrates with your existing CRM system, out of the box or in less than a day
- Requires minimal, if any, IT support at your end to get up and running
- Synchronizes data automatically with your CRM database so that data is always consistent
- Delivers relevant functionality that adapts and scales as your business grows
- Enables you to define and execute on marketing tasks without an intensive learning curve
- Allows for collaboration with sales to incorporate their input and flex with their changing needs
- Provides human, hands-on support a phone call away
- Incorporates proven best practices to guide you through successful lead generation, nurturing and management
- Automates many manual processes associated with campaign creation
- Generates ROI reporting on demand
- Delivers marketing functionality that your CRM does not

Marketing Automation Functionality Summary



- Automated multi-step programs
- Website visitor tracking
- Prospect activity histories
- Lead scoring/qualification/assignment
- Segmentation by profile (industry, title, etc.) and engagement (website visits, etc.)
- Easy asset creation (emails, landing pages, forms, etc.)
- Multi-channel campaign creation and coordination
- Integration with CRM and marketing tools
- Real-time activity alerts
- Revenue tracking by campaign
- Sales and marketing alignment
- Reports that enable calibration and fine-tuning campaigns for maximum success
- Funnel reporting and analytics
- A/B testing

WHEN MARKETING AUTOMATION AND CRM CONNECT, MARKETING CAN SCALE

As Forrester Research notes, it's the "age of the customer." Marketing automation lets marketers pay personalized attention to segmented leads, building closer relationships without straining resources. Lead management programs help you make strategic use of assets, delivering them when and where customers expect to find them. Automated programs make it possible to replicate your successful campaigns and run them at scale, with less effort – and more precision.

MARKETING CAN

- Create, automate, and measure lead nurturing and marketing campaigns, leading to conversion through timing and relevance. This is the old "right person, right message, right time" and it still works.
- Track website visits and view digital footprints that provideready clues on potential buyer interest, and in some cases show how sales-ready the buyer might be.
- Understand and correlate website visits from multiple people at the same company, so you can signal the sales team that the buying process may involve more than one person.
- Score leads based on specific activities, profiles, and special events, resulting in lead qualification based on proven factors – actual, genuine, sales-ready leads. For example, if you've done the historical research to know that preferred customers' buying journey usually includes a visit to your pricing page shortly before engaging with sales, then that page view should generate a lead score (and perhaps a phone call).
- Automatically manage, recycle, and reassign sales leads based on specific behaviors, resulting in less waste of valuable leads. This is especially meaningful if you have a long sales cycle or early-stage leads to keep track of that are not yet ready for your CRM database.

SALES CAN

- Be an equal partner in defining lead qualification and lead hand-off timing.
- See exactly why a lead has been qualified and assigned to them.
- Fully understand, prioritize, and interact with only the hot prospects.
- Have the intelligence about a prospect's interests and activities that supports informed conversations targeted to demonstrated wants and needs.
- Collaborate on the amount, type, and timing of content to prospects, resulting in a higher confidence level in leads.

Nurturing leads often results in bigger deal sizes. The buyer is better educated, and the relationships are stronger and more personal.

LIFT YOUR BOTTOM LINE

The nexus of connected marketing automation and CRM is the central command center for managing and tracking campaigns across multiple channels through the entire lead lifecycle, from lead capture to revenue booked. The connection yields intelligence that can be gathered no other way. Marketing and sales work together to make smarter decisions about where to invest precious time, and together validate the activities that lift the company's bottom line.

Interested in learning more about specific ways marketing automation can help you? Connect with Act-On today and let us help you put the wheels in motion.

We work with:



SUGARCRM



saleslogix

NETSUITE

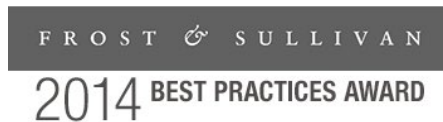


As marketing automation grows, it will become the dominant system of engagement, while integrated CRM acts as the system of record feeding the campaigns.

– Peter Chase,
Executive Vice President,
Business Development,
Scribe Software



ACCLAIM FOR ACT-ON



[See all of Act-On's awards and accolades >>](#)

[Connect with us to learn more >>](#)

ABOUT ACT-ON SOFTWARE

Act-On Software delivers cloud-based integrated marketing automation software. Marketers can manage all their online marketing efforts from a single dashboard that can be seamlessly integrated with CRM, giving sales access into various marketing functions. Act-On's fresh approach to marketing automation gives its users full functionality without the complexity other systems impose, and makes campaign creation and program execution easier and faster.

www.act-on.com | [@ActOnSoftware](https://twitter.com/ActOnSoftware) | [#ActOnSW](https://www.facebook.com/ActOnSoftware)

©2014 Act-On Software, Inc. Trademarks belong to their respective owners. All rights reserved.

