

# CRM FOR MARKETING





The world of business has never been so competitive. Once established brands face start-up disruptors challenging not only their market share but also their entire business models. And everyone has become a marketer. New digital channels, allied to the opportunity of marketing automation, have made it possible for one-man bands to compete on a level playing field with multinationals.

One result of this frenzied competition is an exponential increase in the amount of marketing content produced and shared globally. It has never been harder for marketers to stand out amidst the noise. The way to stand out is no different today than it was 20 years ago – deliver the right proposition to the right people at the right time and in the right way – but actually achieving that has become so much harder. The successful marketers of today are those that leverage the right technology and tools to help them stand-out, and for many of them the solution is a combination of CRM and Marketing Automation.

CRM has been used for many years to help manage and analyse interactions & data throughout the customer lifecycle. CRM is increasingly used by the marketing function to help it organize customer data, gain insights into customers, track customer journeys, organize resources, manage relationships and create positive feedback loops.

**In essence, CRM is helping marketers deliver the right propositions to the right people at the right time and in the right way. This paper maps out the specific ways in which it is doing that.**





**ACCURATE**  
*data*

# THE FOUNDATION FOR EFFECTIVE MARKETING IS GOOD DATA.

**Marketers can use a CRM platform to gain a single, real-time view of their prospect and customer universe.**

For many organizations simply pulling all their data together from the multitude of spreadsheets, Outlook contact directories or simply people's heads delivers an immediate improvement to marketing activities.

They gain a clear view of who they want to speak to, and that helps inform messaging and content creation. They can assess the state of the pipeline and target activity onto the part that needs the most work. They can build up-to-date and accurate contact information, seeing where the gaps are and then put a strategy in place to fill them so that all marketing activity is delivered.

And perhaps most importantly, they can stop the reputational damage that is caused by un-coordinated marketing activity. The telemarketing or sales team for example can see that a prospect received an email communication yesterday, so can adapt its actions or messages accordingly. They can stop inviting prospects to events they are already signed up to. Your marketing is immediately more professional and effective.

# Sharpen TARGETING

That is just the beginning. Once you have all your data in one place you can start to build up more and more information and start segmenting your audience. On one level, you can add in relevant demographic information, such as industry, company size, location, job role – whatever you feel is relevant for your business. This allows you to then segment your database and create campaigns targeted at say HR Directors in retail based within 100 miles of London.



**Demographic segmentation** is useful to marketers but when combined with the sort of **behavioral segmentation** that CRM allows, it becomes very powerful.

Because CRM helps track interactions and data throughout the customer lifecycle, you can start segmenting customers using historical engagements, purchases and preferences. You can target prospects at a certain stage in the sales cycle. And if you have

integrated your CRM tightly with a Marketing Automation tool you can then take this targeting to even greater heights. All online activities and actions can be recorded and tracked in your CRM against individuals and companies and you can start using that information for enhanced targeting: such as visitors to your website and which pages they visited, who has opened and clicked through in specific emails, and even what individual prospects have been doing, saying or searching for on Social Media. This is vital information that allows you to time your marketing activity more precisely and deliver highly personalized messages.

Marketers know that if they send the same generic message to everyone on their database they will get a lower response rate than if they deliver the right messages to the right people at the right time. That is what the business intelligence from CRM (and Marketing Automation) drives. You can develop lead scoring processes so that your activity is focused on the prospects you know are most likely to convert, and you can deliver content to them that you know is most likely to excite them. In short, you will make your marketing activity more efficient and effective.

# CO-ORDINATE *your work*

Internally too, a CRM platform can help you become a more efficient and effective marketing function.

## ACTIVITIES CAN BE RECORDED IN ONE PLACE,

**enabling you to have a better overview of what campaigns are running and the workload associated with them.**

Alongside this, you can begin setting out the different tasks that need to be completed for a particular campaign and split them amongst your team. It gives a clear view of what everyone in the team is doing and where you are in the process, so you can easily identify any issues that may impact a successful completion. It gives you a clear overview of how tasks are allocated across the team so you can manage resources effectively, ensuring no one is over-stretched, and that no tasks are left undone.

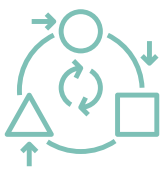
This also means that your marketing team can co-ordinate and time their activities - your telemarketing team knows when the email campaign went live and so can time follow-up calls for example – and can do it without the need for time-consuming co-ordination meetings. They simply look at the CRM system.



The other area where a CRM platform can generate efficiencies is in **document storage**. In many marketing functions the volume of mails, documents and activities involved in a project can be overwhelming. A CRM system provides a central, accessible place to store them. It allows you to allocate permissions to team members, lets them search for specific items, and gives everyone confidence that important documentation is safely stored.



# Manage MARKETING SUPPLIERS



In essence CRM platforms help you to manage complexity, and one key area of complexity for many marketing functions is in their supplier relationships. From data providers, to lead nurturing

agencies, to content writers, to event venues, designers, printers, and so on, there is a plethora of information to remember such as contract details, key people, start dates, end dates, terms and conditions, costs and activity logs. **How do you keep track of it all?**

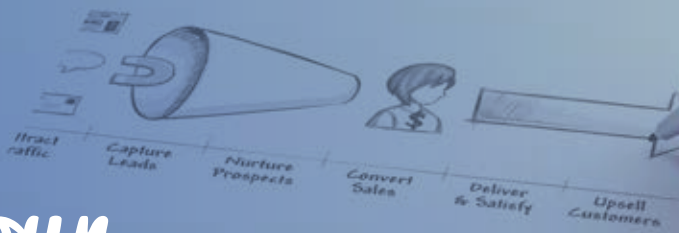
Get it wrong and contract renewals can be missed, notice periods slip by, non-disclosure agreements lapse, and so on. So, in many marketing functions the management of all this information is a time-consuming task.

As with customer information, a CRM platform can provide

**A SINGLE,  
ACCESSIBLE AND  
SEARCHABLE PLACE**

to store all this information, freeing up the time and focus of marketers for higher value activities.

# Track your CUSTOMER JOURNEY



One of those higher value activities is tracking the customer journey. Beyond a certain size, the growth of any business depends on its ability to see, understand, map out and interact with its customer journey.

By recording marketing activities and the journeys your prospects take from raw leads to valued customers you gain insight into which activities work best at which stage. That is of course valuable insight into individual prospects for your salespeople to use, but the aggregate view also helps you to model your customer journey.

As you map this out and document it, you can provide standardized guidance to marketers on how to act in certain situations. You create a process, and it is processes that drive scale and revenue in any business. Furthermore, freeing your marketers from having to work out the best time to engage with specific marketing activities gives them more time to focus on creating truly compelling content and then pushing it out through the most effective channels for optimum reach and impact. Your marketing becomes more efficient and higher quality.

But keep in mind that your model is never complete.

The longer you feed information into your CRM platform

**THE MORE ACCURATE  
THE VIEW OF THE  
CUSTOMER JOURNEY  
BECOMES,**

**and the more effective your marketing activity is as a result.**

Integrating a Marketing Automation (which tracks online interactions) with CRM will add even greater value to that process.

At the end of the journey, your prospect becomes a customer and then, ideally, an advocate. CRM helps manage this process too, prompting you to ask for a reference from satisfied customers, and it uses past information about the best time or which trigger tended to produce a positive response to pick the optimum time to ask for the recommendation. It feeds these new references into your marketing activities, for example a press release about recent company successes. Then, if you do at some point lose that customer it prompts you to remove the reference from your marketing materials.



# AUTOMATE *activities*

CRM can help automate many tasks and streamline your processes. For example, you can automate lead assignment to ensure fast follow-up - and you can set alerts when follow-up is not happening. You can automatically capture leads from your website via forms and assign them to queues (and notify sales) - based on rules you have set up. You can automate approval processes for purchase orders.

Going a step further, integrating your CRM with a Marketing Automation system allows you and your team to automatically schedule activities, from email campaigns to online advertising, driving automated workflows based on a customer response. A nurturing workflow automatically kicks in, an email is automatically sent following a specific action from a prospect, reminders are automatically sent to customers who have not yet renewed (3 months, 2 months prior and if they do renew, it stops).

Leads can automatically be scored, managed and developed, with certain actions triggering engagement and moving them down the pipeline. The power of automation combined with the power of creativity.

**The realm of the possible is**

**ENDLESS AND THE  
PRODUCTIVITY GAIN  
SUBSTANTIAL.**



# Performance TRACKING

CRM provides you with visibility of all engagements / activities linked to a particular prospect or customer. You can drill into the data as much as you want. At the press of a button you can pull up reports or create ongoing dashboards where you can track the progress of your leads within the sales cycle and see how marketing is impacting pipeline and revenue - in real-time. This allows you to repeat successful initiatives, stop wasting resources on unproductive lead sources, and build a virtuous feedback loop. Combine CRM and Marketing Automation and you can dig even deeper into that analysis and refine your approach further.

In addition to better decision making, this information can also help you during the planning process when identifying future spend and helping you justify a request for increased marketing budget with the board. If you prove how marketing has added value to the business – mainly driving more pipeline and revenue and you can demonstrate how an increased investment would impact next year's revenue, you approach the discussion on a completely different footing.

## AND THE INSIGHT IS REAL-TIME.

**You don't need to wait till the end of a program to review results and performance.**

This enables you to change course quickly if the campaign is not going as planned or take corrective action to increase ROI along the way. It enables you to be nimble, agile and able to respond to quick market changes.

And finally don't forget that it can also provide information that helps you manage your resources more effectively, whilst giving you useful insight into how your team is performing. Rather than forming views on how industrious or effective members of the marketing team are, you can look at up-to-date information and so reward appropriately, or provide any support that might be needed by under-performing team members.

# SALES AND MARKETING *alignment*

At most B2B organizations, the sales and marketing pipeline is complex. It involves many people engaged in numerous activities with many customers in disparate locations and across varying timescales.

**Bringing all this data together helps all involved to get a clear and single view, and makes it far easier**

## FOR EVERYONE TO STAY ALIGNED.

**This is where technology such as CRM can be a great enabler.**

A CRM system pulls in information from across the business and presents it back to salespeople and marketers in easy-to-understand, real-time dashboards and reports. CRM allows salespeople and marketers to easily see the sales pipeline, allocate tasks between departments, and effectively manage marketing and sales campaigns.

It allows management to track the progress of leads through the funnel and to understand which aspects are performing well and which aspects need focus. It helps salespeople and marketers pass leads between each other at precisely the right moment, neither delivering them too early - where the sales approach can alienate prospects, or too late - when the critical moment may have passed.

Furthermore, it allows salespeople to share learnings from the time they spend with customers. This can help define the exact customer persona for the product so that the organization targets its marketing activities more precisely, and is able to deliver ever more relevant content through ever more ideal channels.

The marketing process is honed, which in turn makes the sales process more effective, in an ongoing virtuous circle.

CRM can underpin sales and marketing alignment, providing you with the tools to really shift the needle, drive “smarketing” and ultimately business growth.



**AND THIS REALLY MATTERS:** according to Sirius Decisions, aligned organizations achieve up to 19% faster revenue growth, and 15% higher profitability, than other companies.



# Get ready FOR SUCCESS



There are many ways that CRM can help marketers succeed in today's increasingly competitive market. It simplifies complexity, offers visibility and control of data, and enables the sort of personalization, process-mapping, and virtuous feedback loops that are the cornerstones of marketing success.

While historically it is salespeople who have tended to buy CRM, increasingly it is their colleagues in marketing who are investing in it, and using it as a tool to help align those two functions more closely. It allows them to deliver the right propositions to the right people at the right time and in the right way, and to continually improve their marketing, sales and overall business performance.

CRM provides significant competitive advantages to marketers. But you can take it one step further... By tightly integrating CRM and Marketing Automation you propulse efficiency and impact even further, driving greater productivity and insights. This topic will be the subject of another whitepaper coming out shortly.