



STEPPING INTO A NEW AGE OF MARKETING WITH CRM

A best practice guide to integrating marketing and CRM

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According to the latest Chartered Institute of Marketing (CIM) and Bloomberg Marketing Confidence Monitor, many businesses are heading into 2014 with “aggressive” growth ambitions. Marketers are now tasked with:

- Determining key areas of business expansion.
- Exploiting multi-channel marketing to improve customer engagement.
- Managing third party marketing agencies to maximise brand awareness.
- Justifying expenditure with clear Return on Investment.

An effective CRM should be at the heart of all of these activities - but how many organisations regard the CRM as nothing more than an unsophisticated way of recording customer data? Can marketing use the CRM to:

- Demonstrate a detailed understanding of both customers and prospects?
- Prioritise marketing activity?
- Achieve effective communication and collaboration with the sales team?
- Deliver measurable business value?

To move from a primitive use of CRM to a highly sophisticated approach that embeds CRM within the corporate growth model read on...

CIPP Survey info:

http://www.marketingweek.co.uk/disciplines/market-research/news/marketers-prepared-to-take-more-risks-in-2014/4008758_article

1 First Age of CRM:

Build a picture of the customer base

Organisations know that effective sales and marketing activity depends upon accurate information about customers and prospects. Yet most are still constrained by a lack of consistent, accurate information in one location.

Can the business:

- Report on all customer purchases and use that knowledge to drive a marketing campaign?
- Identify the customers who have stopped buying - and why?
- Determine which customers are buying the most products and services?
- Profile customers by industry; revenue size or job role?

If a business cannot answer these questions, it does not have a good handle on customer data.



First Age of CRM:

Creating the Information Source

To truly understand the total lifetime cost and value of each customer, the CRM database needs to be robust, trusted and provide the most detailed and in depth view of the entire customer interaction – including transaction data, such as purchase history and complaints.

Using this information, marketing can:

- Build customer profiles, by industry and/or by size.
- Create detailed buyer personas, including roles and responsibilities.
- Understand vertical market differences; highlight the more and less profitable business sectors.
- Use customer profiles and buyer personas to prioritise markets areas.
- Focus outbound marketing effort into a targeted portion of the market.

A detailed, accurate and complete database of both customers and prospects is the basis for effective use of CRM.

Second Age of CRM:

Improve your weapons

Armed with accurate customer and prospect insight, marketing can transform the effectiveness of on-going campaigns. By using marketing automation tools, intelligent email marketing and tailored landing pages with targeted calls to action, in combination with accurate customer profiles, marketing can improve lead flow and conversion rates.

How effectively is the business using marketing automation today? Is it:

- Driving visitors to the right website pages and tailored content to reflect the customer's profile?
- Tailoring call to actions (CTAs) with:
 - Persona-based Smart CTAs and images to target specific offers based on unique interests and business challenges?
 - Customer lifecycle CTAs to effectively move leads down the funnel?

For example, the Workbooks website will direct prospects towards case studies about customers who have migrated from the incumbent product.



Marketing automation combined with accurate customer profiles transforms the effectiveness of CRM in lead generation and sales conversion.

Third Age of CRM:

Holding Sales to Account



What happens to all these leads that marketing is now generating so efficiently? Is the sales team following up the leads effectively and executing a robust strategy to drive conversion? Probably not. All too often leads are left within the CRM system without follow up or closed loop analysis.

Leads should be either qualified out or converted into opportunities in the sales pipeline.

- Does every lead have a clear next step and follow up activity, from email to phone call or provision of information?
- Is there a report in place to show the status of each lead?
- Will the sales manager be alerted if leads are not followed up within a set timeframe?

This is not simply a process of checking up on sales; it is using the CRM system effectively to support the sales process.

Third Age of CRM:

Healthy Tension between Sales & Marketing

Companies are increasingly exploiting a raft of new ways to generate leads, from email marketing to pay per click campaigns – many of which are handled by third party companies. But how effective is this activity? Is this lead generation aiding or constraining the sales team? Without excellent lead management and follow up, the organisation will be unable to hold these third parties to account.

At Workbooks, the sales people have to complete a 'qualified out reason' category and provide a comment to explain exactly why each lead is irrelevant. E.g. too small, wrong country, lack of specific functionality or feature within the product. With this information, marketing can refine lead generation programmes.

- Exception reporting makes it far simpler to track the status of sales leads.
- With good feedback, the sales team can ensure marketing improves the quality of the leads being generated.
- Marketing has the power to hold third party agencies to account.

Closing the loop between marketing and sales can transform the effectiveness of lead generation and sales conversion.



Fourth Age of CRM:

Nurturing the Business



User engagement is one of the most critical components in CRM success – and it is a lack of user commitment that can rapidly undermine the quality of data recorded within the system.

There are a number of essential factors to address:

- The right level of user training, to ensure individuals can achieve specific objectives – from marketing led reporting and analytics, to sales recording customer information and tracking tasks.
- Keep it simple - overcomplicating CRM by making the fields too complex will result in users failing to update information.
- Cultural change – when used effectively, the CRM system becomes the hub of the business. It is therefore essential for everyone in the organisation to understand the value of CRM in supporting both individual job roles and broader corporate objectives.

Create a better understanding between sales and marketing to gain companywide CRM commitment

4 Fourth Age of CRM:

Reinforcing Value to the Sales Team

It is important to ensure the sales team understands the value of updating the CRM system by:

- Explaining the value of Outlook integration – making it easy to gain access to all information, from emails and task controlled activities to customer information, in one place.
- Outlining the importance of accurate sales feedback to improve the quality of lead generation.
- Improving the quality and relevance of content generated by the marketing team to support the sales process.

For example, Workbooks' eBook about implementing a CRM system appeared very successful given the number of downloads. Unfortunately, it was downloaded by companies in the process of implementing a system, not interested in purchasing a new one and as such it was not a lead generation success.

Creating strong communication between marketing and sales is essential to refine the lead generation process and ensure content truly reflects the needs of the sales team.



Fifth Age of CRM:

Embracing new Opportunities

Once the core marketing processes are operating well, it is time to explore new channels such as social media to improve brand awareness and generate new leads.

It is essential to embed the same metrics management into any new lead generation process: there is no point generating a load of leads from Twitter if they are not turning into qualified sales opportunities.

- How many leads are being generated by each channel – such as LinkedIn, Twitter, Facebook, email marketing and the website?
- Which leads are generating sales qualified opportunities – and therefore sales?
- What is the return on investment? How many sales are being generated by the spend on Google AdWords? How does that compare to more traditional marketing activity?



With the right analysis of inbound leads, organisations can rapidly adapt marketing activity to reflect changing customer behaviour.

Fifth Age of CRM:

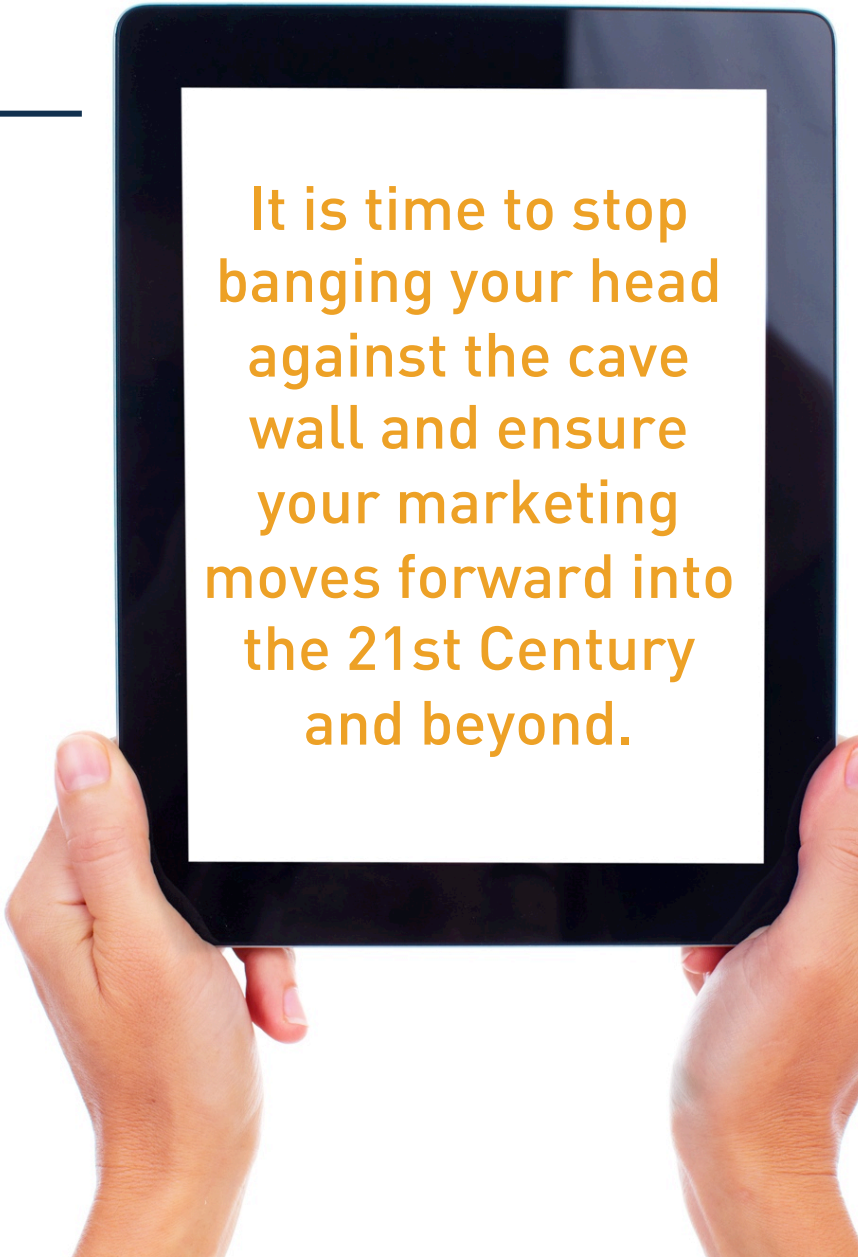
Stand Up and be Counted

In any business the marketing activity must continually evolve. From new verticals and customer opportunities to new ways to market, including social media, marketing needs to continually adapt.

So how evolved is marketing activity today?

- How accurate is the customer information?
- Is the business targeting the most profitable vertical markets? Or exploiting up-sell and cross-sell with the most valuable customers?
- How effectively can marketing learn from sales activity to refine and improve the lead generation and content creation processes?
- How easy is it to generate reports and track progress/ ROI? If it takes a marketing team three weeks to create a report to calculate the source of leads, continual checking and ROI assessment is not going to happen.

Sophisticated use of CRM enhances the marketing activity and delivers measurable business value.



**It is time to stop
banging your head
against the cave
wall and ensure
your marketing
moves forward into
the 21st Century
and beyond.**

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