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THE VALUE OF
COMBINING
*CRM & Marketing
Automation*



Marketers face more pressure than ever before to produce commercial results. Where once marketers were measured on their activity levels – how many mailshots sent, how many events organized, delivery of quarterly ad campaigns and so on – and perhaps on the number of leads they generated, now they are measured on their contribution to pipeline, revenue and business growth.

That is not all. Top executives are demanding better operational effectiveness at all levels of the marketing and sales process. They want marketing to demonstrate return on investment. It is no longer acceptable for marketing and sales to operate in their traditional silos; they must align. Finally, today's top executives expect their sales and marketing functions to make use of data and insights and to adapt rapidly and effectively.

It is a significant change and it is happening across all industry sectors and in companies of every size. No one is immune from these changes. Fortunately marketers now have far more tools at their disposal to help them meet these mounting challenges.



The trend **TOWARDS INTEGRATION**

Two of the most prevalent and successful tools have been CRM and Marketing Automation.

Used alone they produce impressive results for many marketers. However, a growing number of firms are now discovering that by tightly integrating CRM and Marketing Automation they can produce even greater results.

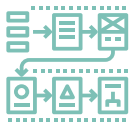
We look here at the benefits that can accrue from combining CRM and Marketing Automation – from aligning sales and marketing, to generating a greater quantity and quality of leads, to sharper targeting, more personalized communications, greater insight into the customer journey, more comprehensive prospect nurturing, and much more.

The arguments for using both in tandem are already compelling, and as marketers and salespeople look for ever greater results and return on investment, those arguments may become irresistible.



Understanding CRM & MARKETING AUTOMATION

The two platforms are frequently confused with each other, but are in fact quite different, dealing with different tasks and parts of the sales funnel.



MARKETING AUTOMATION

helps marketing teams automate campaigns, generate and nurture leads and qualify sales-ready contacts. It helps with better segmentation, campaign management, lead scoring and nurturing.

Marketing Automation is a lead generation tool. It enables more effective online marketing by streamlining, automating, and measuring tasks and workflows, and also by delivering valuable insights into customers' online behavior.

It captures the "hand raisers" i.e. identifies people who appear interested in your services or products, and then automatically delivers personalized communications to them. The result is to push prospects further down the sales funnel. In addition, Marketing Automation can track the extent to which prospects engage with your content, and once they reach a certain score, it can pass them to the sales team for further development. It is a powerful tool that produces results: research from Marketing Sherpa reveals that businesses that use Marketing Automation gain 50% more 'sales ready' leads than rivals who do not.





CRM

helps manage and analyze customer interactions and data throughout the customer lifecycle.

CRM helps organizations manage customer interactions and relationships. CRM tends to be used further down the sales funnel. It helps organizations categorize and store details of leads, manage opportunities and quotes, and track data on sales team performance, revenue pipeline, conversion rates, customer service engagement, and so on.

It gives you a single view of the journey your customers take with you from first becoming aware of you, through to research, purchase, use, and advocacy. It pulls together many strands of complex data and presents it back in a clear, single view that can then inform decision-making across the entire organization.

Whilst CRM comes from a sales orientated background, Marketing Automation starts with an online marketing focus. And as marketing and sales are meant to be working closely together, so should Marketing Automation and CRM.



Aligning SALES AND MARKETING

The most significant benefit of combining CRM and Marketing Automation is typically the alignment of the sales and marketing functions.

For many organizations the misalignment of these key functions continues to hold them back. According to research from Sirius Decisions, aligned organizations achieve up to 19% faster revenue growth – and 15% higher profitability than other companies. A significant difference if you can get it right.

Often salespeople feel that marketers are insufficiently focussed on revenue generation. For their part, marketers often feel that salespeople have too little understanding of, or interest in, long-term brand building. There is poor communication around lead handover, lead scoring, lead development and a host of many other areas.

By integrating Marketing Automation with CRM, you create a 'single source of the truth', or 'a common lens', with which to view your revenue funnel.

This tackles the frustration and waste that occurs when sales teams feel marketers are passing leads that are not ready, or marketing feels sales are failing to follow up on good leads.

If both are visibly working within the same funnel – each taking the lead in different parts – they begin to work together for optimum results. Salespeople can get a better understanding of the journey of a lead to the point it falls into their hands. Rather than become frustrated by the lack of immediate leads, they can become excited by, and prepare for, the leads that are 'bubbling up' in the background.

Marketers then work closely with sales to support them once the lead is in their hands. They can provide helpful intelligence such as what content the prospect has engaged with. Business development teams can define how they can best help move the prospect along. The end result is mutual respect for the contribution of each party, a common view on performance metrics, transparency on performance, and far greater co-ordination of effort towards the shared goal of driving revenue. You break down the barriers between marketing and sales, start thinking about the revenue funnel as one unique integrated funnel where both teams are working the full length of the funnel, sometimes in the driving seat, sometimes not. You make better decisions and drive greater efficiency and effectiveness throughout.



SCORING, PERSONALIZATION AND MARKETING INTELLIGENCE

*for improved lead
generation*

Above and beyond this alignment, the integration of CRM and Marketing Automation delivers many benefits that are specific to the marketing and sales functions.

For marketing, perhaps the most important benefit is in the personalization of marketing messages. Sales and marketers know that sending the same generic message to everyone on our database produces a lower response rate than delivering the right messages to the right people at the right time. The combination of CRM and Marketing Automation provides the intelligence that drives optimal segmentation and personalization.

This personalization is more than just including a prospect's first name on an email. It is identifying the channel and message that sparked the prospect's interest, and then augmenting this with information from other datasets such as basic demographic information maybe on where they are located or what job they do, through to more sophisticated behavioral information such as what they have been doing on your website, which emails they have opened and clicked, what they have been saying or searching for on social media etc.

This allows you to score your leads so that marketing and sales activity is focused on the leads most likely to convert, but it also allows you to deliver the right content to them. For example, if you know they are based in Seattle you know not to invite them to an event in Atlanta. If you know they work in the manufacturing sector you know they might be interested in your new product aimed specifically at that market. If you know they have just tweeted about opening a new office in Toronto this might be a good time to send them your white paper on HR best practice in Canada. **It is about being targeted, relevant and timely – at scale.**



ROI TRACKING



This is not simply about operational efficiency and seamless customer experience. Gaining a single view of all touchpoints with prospects also allows you to track and analyze sales and marketing performance far more easily than when data is spread across multiple tools.

So, you can track the progress of leads into the sales process and beyond, all in real-time, reporting on how many touchpoints it took for that leads to be 'sales-ready', sources of opportunities in the pipeline, conversion rates and revenue contribution per source, conversion rate and revenue contribution per campaign, and so on.

You can tie closed deals back to the campaigns that created them. You can better understand what helps push people along the buying journey. You can attribute revenue to campaigns. You can track marketing spend. You can accurately measure return on investment. You can project future revenues. Ultimately, you can make marketing decisions that are driven by live data rather than by vague hunches. This can transform the effectiveness of both sales and marketing activities and inform future spending and strategy.





When, where and how to **ENGAGE WITH PROSPECTS**

Combining Marketing Automation and CRM brings sales team many specific benefits too. In a world where B2B buyers are typically between 50% and 75% of the way through their research process before they even reach out or engage with sales, and where the role of salespeople has consequently become more focused on becoming a trusted advisor, information on prospects has become vital to success.

With an integrated Marketing Automation and CRM platform, salespeople can view the entire prospect activity history, which provides unparalleled insight into exactly what leads are interested in.

Sales receive the information they need on when, how and where to approach prospects to optimize the sales cycle. Sales can pick up right where marketing left off, creating a seamless journey for customers. They can track prospect behavior, and engage with each individual at the right time, either personally or through specific automated nurturing campaigns.

They stop wasting time on leads that are not yet ready to convert. Marketers can keep dripping information to them, leaving salespeople free to focus their energy instead on the ripest leads. Then, having information on which parts of the website a prospect has visited, or which files they have downloaded, or being able to

see entire email correspondences, allows sales reps to tailor their phone calls and sales pitches.

Lead nurturing also gives marketing and sales reps the ability to automate communications with prospects who are actively engaging in the buying process – by making it appear as though emails are personalized one-to-one messages from each sales rep. This increases the relevancy of sales emails and reduces a lot of the heavy lifting for sales reps when it comes to follow-ups.

Salespeople are notoriously reluctant to use new tools. They want to be out converting prospects, not getting to grips with new technologies. So, the ideal solution is to provide all of this new insight within a tool they are already familiar with: their CRM platform. And if they find a lead isn't ready to buy yet, they can quickly 'recycle' that prospect by adding them to a marketing-approved nurturing track right from CRM.

Note too that these benefits extend beyond prospecting for new customers; they are also relevant for cross-selling and upselling to existing customers. A single view of your customers across all of your key business functions allows you to communicate with them not only to enrich their experience, but also to show them other products and services they could buy from you.





Look to THE FUTURE

There are then many strong reasons for integrated Marketing Automation and CRM.

Running each alone has brought benefits to many organizations, but you need to be aware of the limitations. CRM without Marketing Automation will give limited insight into the buyer's journey and how a prospect got to this point. Add in the data on where they have come from, what their priorities are, and how they've interacted with your business – all the information that Marketing Automation delivers – and that first conversation with a prospect suddenly becomes a whole lot easier and impactful.

Conversely, if you use Marketing Automation without CRM you will always reach the point where you have to export leads to a spreadsheet and then manually import them to your sales database. It will work,

but is slow, time-consuming, and also provides you with none of the intelligence on which leads convert into customers. You won't have much visibility into conversion and close rates, which means it will be near impossible to measure return.

Marketing Automation and CRM have been viewed in isolation for too long. It is increasingly clear that they are complementary, and only deliver to their full potential when offered as an integrated platform. The arguments for this are clear in theory: better-qualified leads into the sales funnel, extended visibility in both directions, execution efficiency and far greater marketing and sales alignment.

It is seeing the benefits in practice that is persuading more and more organizations to take this option.

Integrated CRM and Marketing Automation solutions are delivering true actionable insights allowing organizations to make better decisions, find new efficiencies, provide a better customer experience, and ultimately drive greater revenues. It is, in short, the future.

