

GROWING BEYOND EMAIL MARKETING WITH MARKETING AUTOMATION

An Essential Guide for Organizations
Using Microsoft Dynamics 365

 **ClickDimensions**

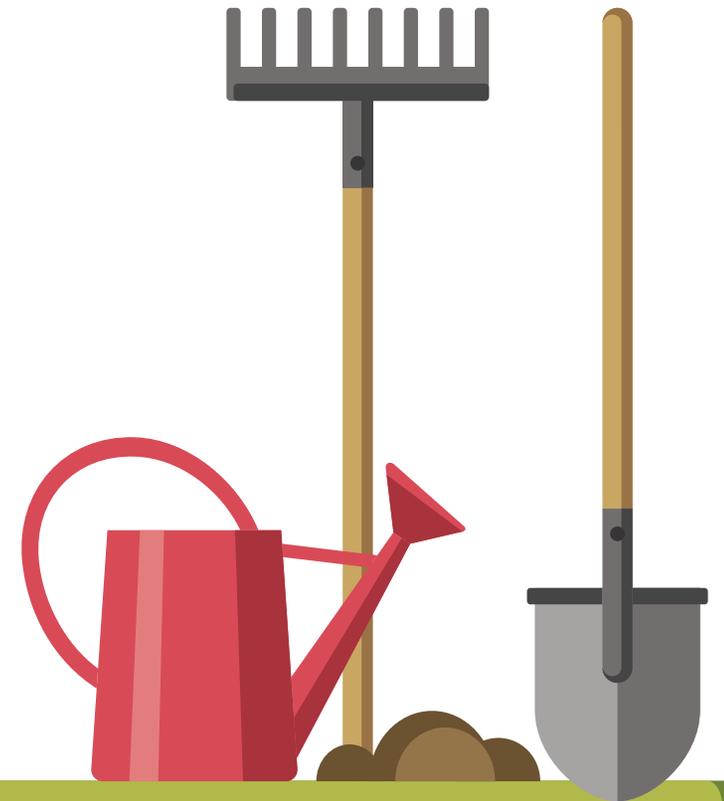
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INTRODUCTION

Marketing automation and email marketing go hand in hand. In fact, they are used in the same sentence so often that they are sometimes thought of as one and the same. But despite seeming so synonymous, the two are quite different. While email marketing is an important component of a marketing automation solution, marketing automation platforms go well beyond email marketing in terms of features and benefits.

As the only marketing automation solution natively built in Microsoft Dynamics 365, ClickDimensions is well-versed in this technology and the ways in which organizations using Dynamics can grow and prosper by moving from simple email marketing to multifaceted marketing automation. We created this guide to help you better understand marketing automation, how it can help cultivate success and whether it's right for your organization.



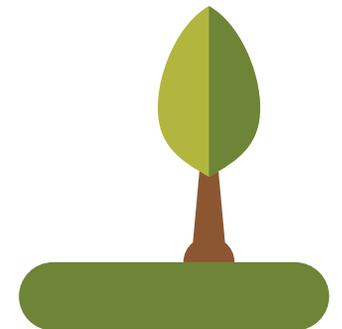
WHAT IS MARKETING AUTOMATION?

In the intro to this guide, we established that email marketing and marketing automation aren't one and the same. So, what is marketing automation exactly? In short, marketing automation is the technology that helps companies find, nurture, convert and engage their ideal customers.

We will take a closer look at a variety of marketing automation features later in this guide, but marketing automation platforms bring together an essential modern marketing toolkit in one convenient piece of technology. It allows organizations to build on their email marketing efforts and create campaigns that resonate across marketing channels.

Marketers' biggest obstacles for maximizing ROI on marketing technology are inconsistent data across technologies (41%) and integrating technologies (39%).

- Dun + Bradstreet



WHAT ARE THE ADVANTAGES OF MARKETING AUTOMATION?

The internet and social media have changed buyer behavior, which has in turn changed how companies market and sell. With information so readily available, buyers are now in more of a power position than ever before. They expect more relevant, personalized and timely communications from brands.

This presents companies with tremendous opportunities to connect with prospects and customers and form lasting relationships, but it also introduces a significant business challenge. How can marketing teams find the time and have the tools to create the experiences buyers today demand? Marketing automation offers some significant advantages, particularly when compared to email marketing.

Nurture Prospects

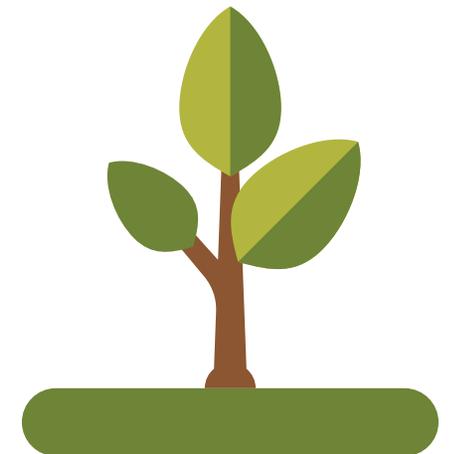
In an ideal world, every potential customer would become a paying customer as soon as they express interest. In reality, businesses today rarely find themselves in that situation and more often encounter consumers that want to be educated and informed, not given the hard sell. Organizations can easily deliver using marketing automation, allowing them to nurture prospects via multiple channels until they are ready to buy rather than losing touch with these individuals as they move through the buying cycle. It should be noted that several popular email marketing providers have added automated capabilities to their platforms, but these are often limited in functionality and to email alone, rather than providing a multi-channel solution.

Better Engage Customers

Marketing automation isn't just for marketing. It's also an essential tool for engaging customers today and fostering brand loyalty. Customer service and account management teams need to deliver personalized communications to their customers across a wide variety of channels, and understand the needs customers have at any given time. While email is a preferred communications tool for companies and consumers alike, the customer experience can be enhanced by marketing automation tools such as SMS messaging, web intelligence, social marketing and subscription management, to name a few.

63% of companies that are outgrowing their competitors use marketing automation.

- The Lenskold Group



Increase Efficiency

Time is one of the most precious commodities today, and marketing automation can help organizations make the most of it. Marketing automation can help reduce the time marketing teams spend creating, scheduling and sending many types of emails or other communications. This means less time devoted to routine tasks and more time executing big ideas and strategies. Marketing automation can also help sales teams increase their efficiency by helping them to focus on the hottest leads rather than on those that need more nurturing.

Align Sales and Marketing

Technology can help with a great number of business initiatives today, including sales and marketing alignment. Utilizing marketing automation with a CRM solution like Microsoft Dynamics 365 is a great way to align your sales and marketing teams. Combining these two powerful technologies gives each team insight into the same data and access to the same tools, allowing for more effective sales and marketing activities. It can also help the two teams more effectively collaborate on campaigns to ensure that prospects get the right message and right attention at the right time.

Generate More Revenue

Email marketing platforms give you a lot of basic statistics, like open and click rates, that show you how one email campaign performed. While these are useful in shaping your future email marketing efforts, they do little to tell you the overall health of your marketing initiatives and how those efforts are impacting your company's bottom line. Marketing automation allows you to track prospects and customers throughout the buying cycle, giving you big picture results. This can help you determine the effectiveness of your individual marketing programs and the impact on revenue.

Marketing automation drives a 14.5% increase in sales productivity.

- Nucleus Research

HOW DO CRM AND MARKETING AUTOMATION SOLUTIONS WORK TOGETHER?

Both Microsoft Dynamics 365 and marketing automation systems are designed to help businesses manage and strengthen customer and prospect relationships for increased profitability, but they each have a different background, focus and strengths.

Marketing automation systems are essentially a marketing engine for CRM, so they should integrate well with Dynamics CRM or, in the case of ClickDimensions, be built natively inside of it in order for companies to reap the greatest sales and marketing rewards.

WHAT FEATURES ARE INCLUDED IN A MARKETING AUTOMATION PLATFORM?

[Email marketing](#) is an essential part of a marketing automation system, but marketing automation features go well beyond creating, sending and tracking bulk emails. While the features may vary according to the selected solution, here are nine popular ways organizations can use marketing automation beyond email marketing:

1. Subscription management.

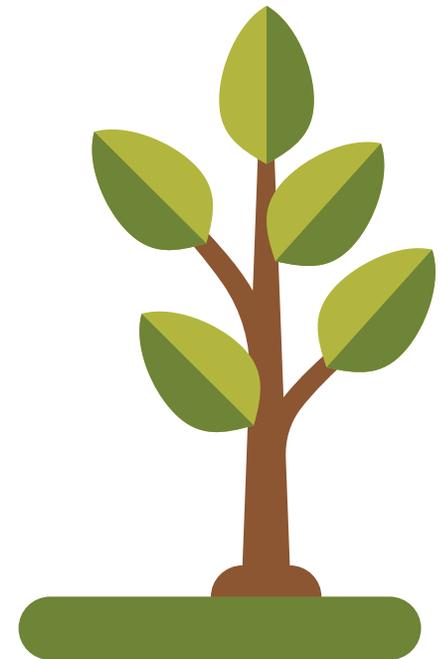
[Subscription management](#) allows email subscribers to choose which emails they receive from an organization by allowing them to opt in to some types of messages while opting out of receiving others. For example, an individual may choose to receive your new product emails and monthly newsletter, but not your lunch and learn invitations. Without subscription management, email marketing is an all or nothing proposition. Your email recipients can either choose to receive all your organization's messages or none of them. Today, consumers demand choices and personalized experiences, which means they would often rather opt out of all communications than receive messages that they feel don't speak to who they are and what they want from your business.

2. Nurture marketing.

Nurture marketing, also known as drip marketing or [campaign automation](#), is the act of sending a series of customized communications to a prospect or customer over a period of time based on their interactions. While nurture campaigns typically feature email, they can also include direct mail, SMS messaging, phone calls or any other "touch" a company makes with an individual. Automated nurture programs respond to actions taken by those being nurtured, thus creating a more personalized experience. Using various decision points set within a campaign automation, nurture marketing helps you respond to your leads' and customers' actions by sending messages that correspond to those actions. It helps people feel like people rather than just another name in a database.

79% of marketing leads never convert into sales. Lack of lead nurturing is the most common cause of this poor performance.

- MarketingSherpa



3. Landing pages and forms.

Landing pages are web pages that stand alone from a company's main website and are designed to accomplish a single objective, typically lead generation. **Forms** are often a part of landing pages in order to capture lead data when someone, for example, downloads an eBook, registers for a webinar or requests more information about a particular product or service. These two marketing automation features allow you to focus on one topic or piece of content and provide a means for collecting lead data. Landing pages create a cleaner experience than a web page by removing distractions like navigation bars and are highly focused on one call to action, which can greatly increase conversions.

4. Surveys.

Although **surveys** can be conducted in a variety of ways, online surveys are now the most common choice for companies and organizations seeking data and feedback from their audiences, and the method you will find within a marketing automation solution. Do you want to know what attendees thought about your company's most recent webinar or their impressions of your new ecommerce website? Surveys can provide you with insights in these situations and countless others. They can help you make more informed decisions about how to exceed expectations in your marketing efforts or gather sentiment about issues that impact your audience.

5. Web intelligence.

Web intelligence, also known as **web tracking** or web analytics, uses a tracking code inserted into web pages to provide insight into how that website is being used and record data about the traffic that accesses it. You can see which pages have been clicked on, how long a user spent on a certain page, how they got to your website and other valuable information. Based on data like site visits, page views, form captures, referring source, duration spent on site and more, you can gain valuable insights into the performance of your marketing campaigns and strategies and adjust them, if needed, accordingly.

6. Event management.

Event integrations allow you to connect online event management systems with marketing automation platforms. These connectors can vary by marketing automation platforms. ClickDimensions, for example, offers connectors to GoToWebinar, WebEx, Eventbrite and Cvent. While many offline marketing channels continue to see declining interest and budgetary allocation from companies, events are bucking that trend. In-person and online events offer brands a powerful way to connect with their audiences and strengthen those relationships, while giving attendees the opportunity to be informed or entertained – or both.

Event technology can help increase event attendance 20% and decrease costs up to 30%

- Frost + Sullivan

7. SMS messaging.

SMS, or Short Message Service, can reach anyone with a mobile device that has text messaging capabilities. SMS messages can be sent in bulk or individually through some marketing automation platforms. SMS is one of the fastest marketing channels available today. With no spam or other email filters to contend with, messages arrive on mobile devices within a few seconds of when you hit send. And when they arrive, SMS messages enjoy rapid and high open rates, making them an especially good fit for time-sensitive information.

8. Lead scoring.

Lead scoring involves ranking leads on a scale based on how interested a prospect is in a company's products or services, how likely they are to buy and how soon they will be ready to move from prospect to customer. Using a lead scoring model, prospects are assigned points based on the actions they take. So, a lead that downloads an eBook might earn 10 points, while one that visits your company's pricing page earns 25 points. Lead scoring can help sales and marketing teams come together to agree upon the factors that make for a hot lead, and can follow up accordingly – whether with a sales call or by adding the lead to a nurture program.

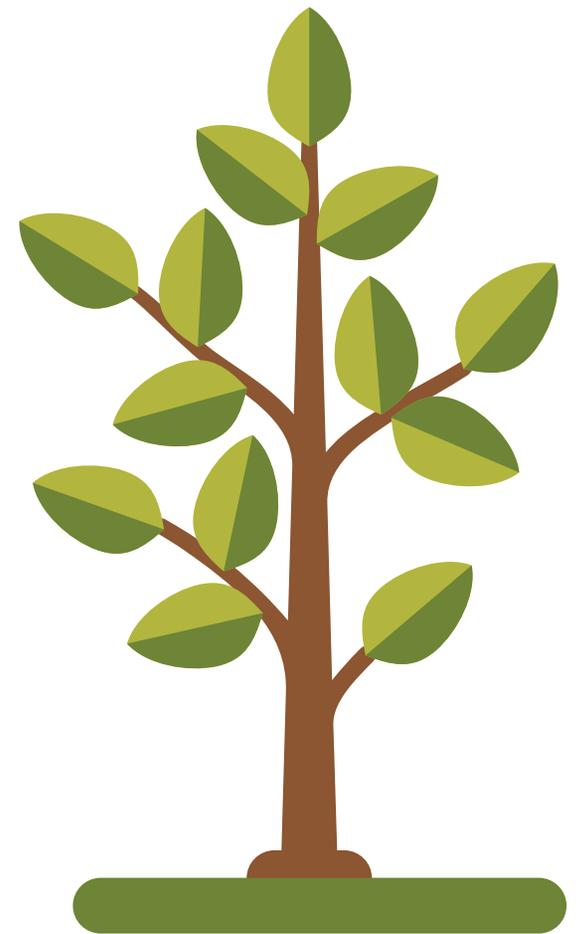
9. Social marketing.

Social marketing tools within a marketing automation solution give you the ability to tap into the power and popularity of social media through features like social posting, social sharing and social discovery. These tools, though they will vary by platform, can help businesses make social an integrated part of marketing, sales and customer experience initiatives, and also report on those efforts. With nearly one-third of the world using social media regularly, according to eMarketer, social is an essential part of marketing for organizations of all kinds.

IS MARKETING AUTOMATION RIGHT FOR YOUR ORGANIZATION?

Despite its benefits, marketing automation isn't right for every business. As evidenced by the discussion of common features earlier in this guide, marketing automation platforms include a variety of essential marketing tools. Some organizations will benefit from adopting and implementing these tools, and others may still be better served by an email marketing solution. If you answer "yes" to any of the following questions, marketing automation could be a good fit at your organization and may be worth exploring:

1. Does your sales team complain about the quantity or quality of leads that your marketing team is generating?
2. Do you have content marketing pieces that you can use to nurture leads?
3. Do you want to increase the efficiency of your marketing efforts?
4. Do you have a long customer buying cycle?
5. Is your marketing team stretched thin and finding it hard to achieve their goals with existing resources?
6. Are you dissatisfied with the results from your email marketing endeavors?
7. Is your marketing team facing pressure to contribute more to pipeline and revenue?
8. Do you need to segment your customers and prospects so you can customize your messaging for each audience?
9. Do you want to experiment with new marketing tools?
10. Are your internal stakeholders committed to marketing technology investments?



READY TO LEARN MORE?

ClickDimensions is the only marketing automation platform that is exclusively created for and natively built in Microsoft Dynamics 365. The solution brings together email marketing, campaign automation, web intelligence, surveys, web forms and landing pages, social marketing and more to help organizations attract more leads, close more sales and more effectively engage customers – all from the comfort of Dynamics 365.

To learn more about how QGate can help you to implement the powerful ClickDimensions marketing toolkit, please contact us.

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