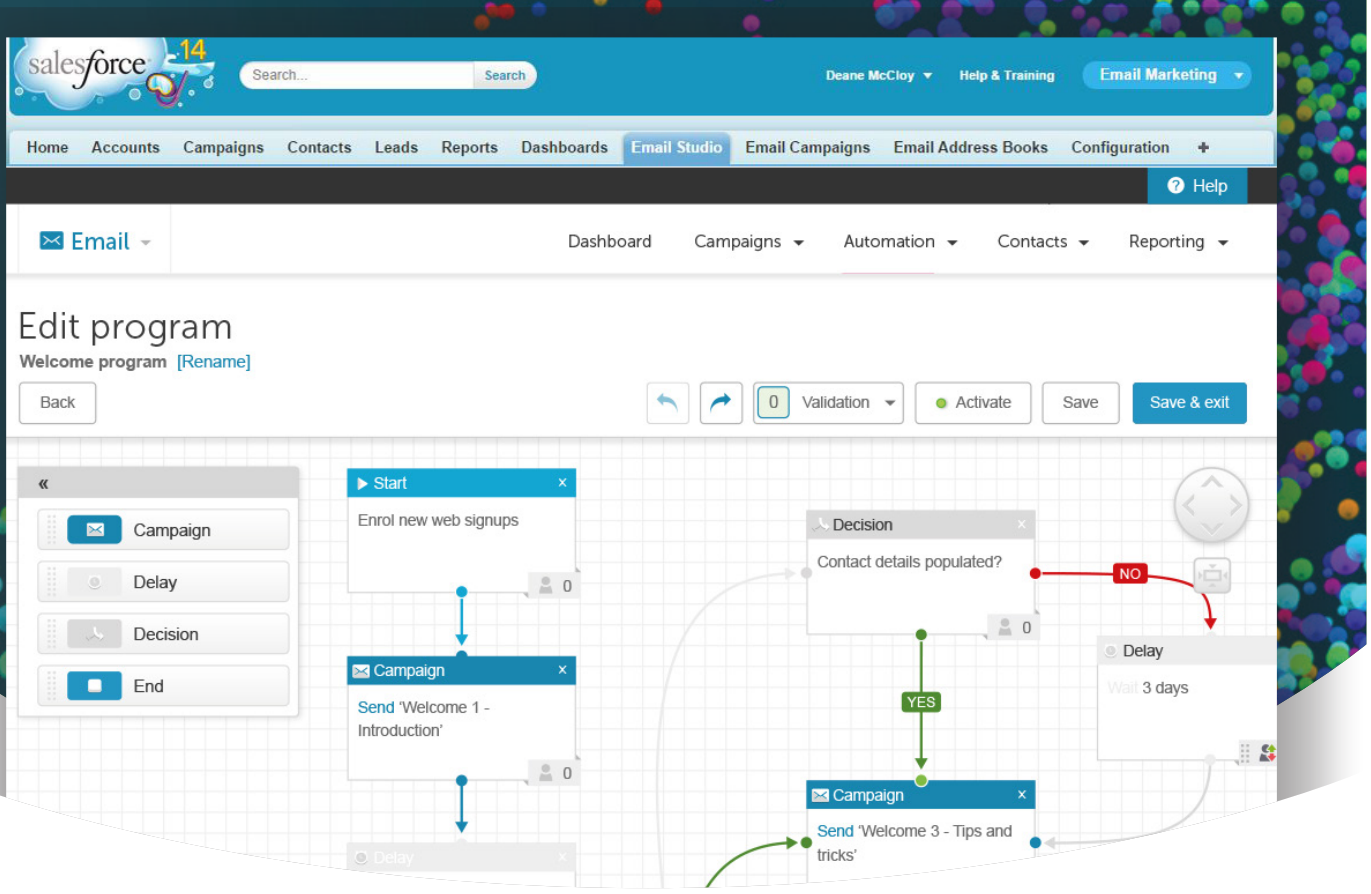
STRATEGY GUIDE

Salesforce and marketing automation

Building the bigger picture



dotmailer
IMAGINATION...DELIVERED

salesforce

If you are planning to integrate your Salesforce CRM with marketing automation, this guide will help you understand the key benefits and give you advice for implementation.

Key highlights in this strategy guide include:

- Why CRM alone falls drastically short in supporting the marketing activities of today's companies.
- Why today is the 'age of the customer' and what this means for sales and marketing teams.
- For implementing successful marketing automation.
- The 5 key benefits of combining your Salesforce CRM and marketing.

"58% of top-performing companies; where marketing contributes more than half of the sales pipeline, have adopted marketing automation."

Forrester Research "Gauging Your Progress and Success" (2013)

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Introduction

How can you understand your customers better, nurture your leads more effectively and use your data to be more relevant and targeted?

If only it were simple.

Customer data is plentiful, and it comes from many different sources. But to use this data and benefit from the insight it gives your sales and marketing teams, you have to piece together a coherent picture of your customers from all those data sources. It's like putting together a puzzle, piece by piece.

With the pressure on companies to maintain and use this data, Forresters Research have titled this period the "Age of the Customer". For marketers, it means extra attention must be paid to personalization and lead segmentation, delivering the right content, at the right time, to the right person.

The last four decades have seen marketers go from mass push marketing "batch and blast" to intelligent customer targeted communications (one-to-one marketing) in response to the 'age of the customer'. What's more, the International Data Corporation (IDC) that the marketing automaton software which enables this will grow to $4.8 billion in 2015, up from $3.2 billion in 2010.

The increased understanding of customer segments and the journey they take is leading marketing and sales teams to improve retention, reduce churn rates and increase upsell and cross-sell opportunities.

And all of this is enabled by integrating your CRM and marketing automation systems and the data that they hold – combining the pieces of the puzzle - to build a marketing strategy that supports the customer journey and helps your sales team to close those leads!

The evolution of marketing automation to support the age of the customer

1960s:

Zip/post code segmentation, merging and purging of files, computer generated letters.

1970s:

List testing and advanced (for its time) segmentation.

1980s:

Targeted campaigns driven by relational databases.

1990s:

One-to-one marketing emerges with targeted communications based on an individual's needs.

2000s:

Social media and email communications become primary tools for any marketer, outweighing ROI and affect against other channels. Also, commercial messaging laws are passed to decrease the amount of spam and unsolicited communications.

2010s:

"The age of the customer" emerges and along with the new Internet of Things concept, customers communicated and impart data via a network of millions of different devices.

Why you're missing a piece before you even start

The 1990's changed sales and customer service forever with the introduction of CRM systems. The aim of these systems was to help sales people, the relationship managers, to track and target their leads and opportunities. The resulting benefits were improved use of salespeople's time and a more complete view of the potential customer.

However it wasn't until Salesforce launched their SaaS model which added lightweight marketing capabilities, that SMEs were able jump on the bandwagon. As a result CRM became the standard for all sales-led businesses.

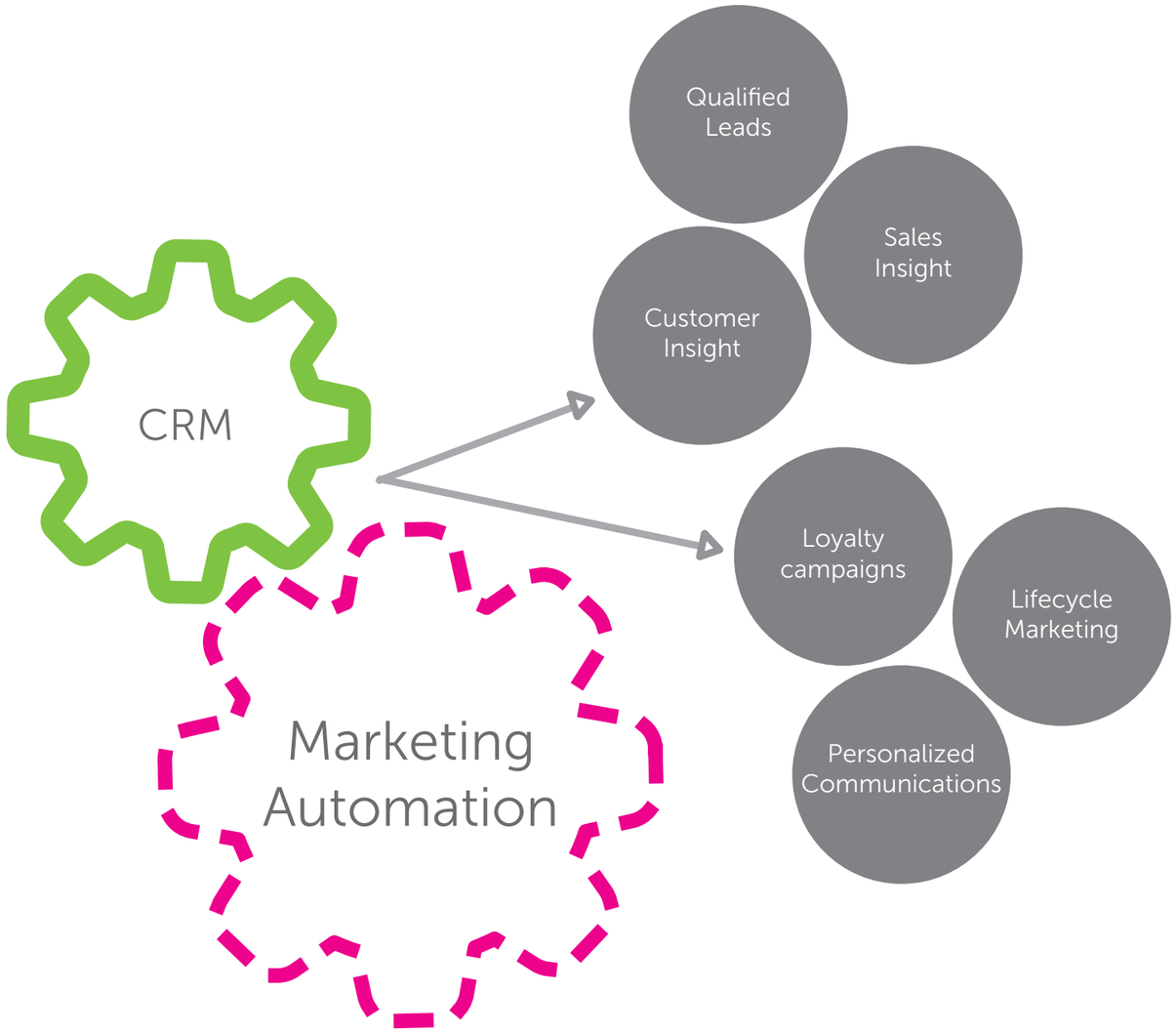
"In a nutshell, the only thing CRM systems do is organize your information. They don't actually do anything. They keep track of your sales, but they don't engage your prospects. That's still up to you. They capture your sales process, but they don't execute it.

A good marketing automation system, on the other hand, proactively helps you. World-class sales and marketing organizations need both to succeed and scale."

Matt Heinz, President, Heinz Marketing Inc

But for all its sales support, it falls drastically short in supporting the marketing activities of today's companies.

Tracking and automating campaigns, lead scoring and ROI reporting, are all key functionality that marketing requires and CRM systems lack.



Salesforce CRM vs marketing automation functions:

While marketing automation and CRM have some of the same functions, the primary focus for a CRM is to track the sale teams interactions with leads and customers. In comparison, marketing automation helps to schedule, track and use the insight from communications to target leads and customers.

	Salesforce / CRM	Marketing Automation
Opportunity creation	✓	x
Forecasting	✓	x
Call logging	✓	Sometimes
Individual ad-hoc emails	✓	Sometimes
Products & Pricing	✓	x
Bulk email - crm no, MA sometimes	✓	Sometimes
Case management	✓	x
Contracts	✓	x
Native email marketing	x	✓
Nurture campaigns	x	✓
Automated campaign	x	✓
Segmentation	x	✓
Web analytics	x	✓
Team collaboration	x	✓
Form builder	x	✓
Landing page builder	x	✓

Building a bigger, better puzzle

Customers are self-educating and self-navigating, judging the quality, relevance and personalization of the communications in their purchase-making decisions. In fact, 9 out of 10 B2B buyers now begin their purchase decision process online.

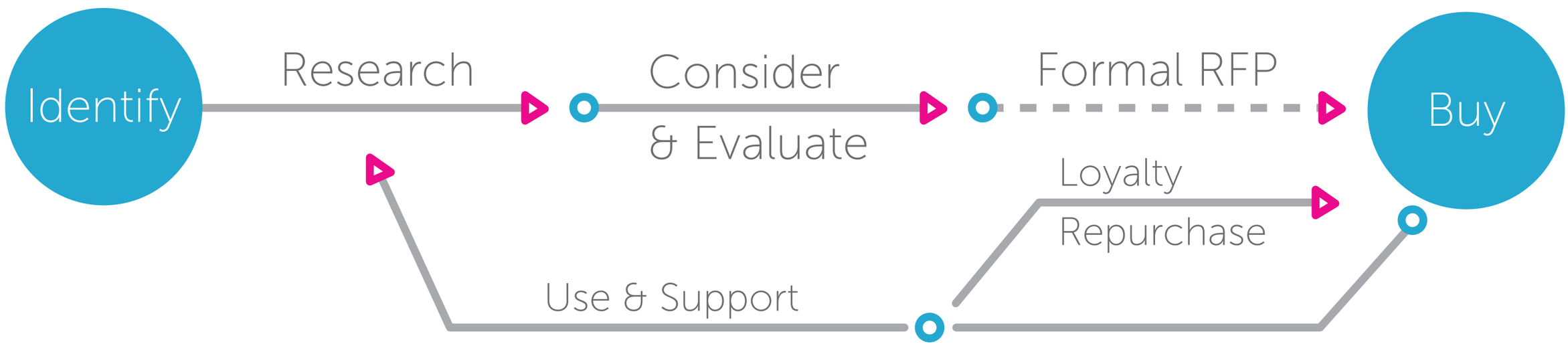
The reality is that leads now spend the majority of their buyer journey in the hands of marketing teams, long before sales are even aware of them.

Customers expect to be treated as individuals and to be spoken to on a consistent basis. But with more customer touch points than ever before, how can you expect to access, consolidate, and make intelligent decisions about your available customer data to move them successfully through the purchase journey?

Marketing automation provides a solution, improving the effectiveness of marketing departments by removing the 'one size fits all' marketing approach that many businesses have adopted. By engaging customers with targeted and relevant communications, it helps to get across the value of the products and services your business offers more effectively, therefore significantly increasing revenue and ROI.

Then, through tracking all your customers' interactions via a centralized database, you can easily analyze their behavior with marketing activities and develop a better understanding of what drives their purchase decisions.

Armed with this information, you are in a position to develop more effective marketing strategies. This intelligence can be used to build a clearer picture of your customers' needs, leading to more effective future marketing campaigns.



Make your life easier. Don’t leave a piece unturned.

Creating a data infrastructure that gives a 360 degree view of each customer is a complex task. This involves maintaining detailed records in a CRM system that could be integrated with your email platform, web content, and ultimately, purchased data.

While both CRM and marketing automation platforms are powerful in their own right, the impact of integrating them is a game changer. This is primarily due to the two way data synch. So updates to data fields in the CRM platform from sales tracking activities are also made in the marketing automation platform and the reporting data from marketing campaigns feeds back into CRM. This gives you a clearer picture of all your customer interactions, helping you to define your customers purchase journey and align marketing efforts.

The more seamless the customer experience, the more likely they are to buy, remain loyal, and become advocates of your brand, products and services. By combining the key elements of web, Salesforce and email you can capture and report on all interactions between you and your customers, helping you to better manage the customer experience.

Marketing automation lets you tailor the messages you send. Rather than sending out mass emails, you can target your email content to individuals and engage with them on a much deeper level based on their email and web behavior. And through connected marketing automation and CRM platforms, you can scale and manage these targeted communications on a one-to-one mass basis.

Marketing automation doesn’t just help with pushing the right message to the right person at the right time; it also creates sales-ready leads and enables the movement of these leads from marketing to sales by aligning sales and marketing objectives.

CASE STUDY

Danone Nutricia

In 2013, Nutricia launched a revolutionary Food for Special Medical Purposes (FSMP) called ‘Souvenaid’, a nutritional drink for the dietary management of early-stage Alzheimer’s disease.

A large factor contributing to the effectiveness of Souvenaid is patient compliance. Patient’s need to remain on the product for the recommended period of time to realize the best outcomes. This factor called for an innovative approach to marketing in terms of Nutricia’s customer retention strategy and hence the ‘Souvenaid connections’ program’ was born.

The team at Nutricia chose a combination of Salesforce.com and dotmailer to deliver an integrated automated messaging solution for their produce replenishment program enabling them to:

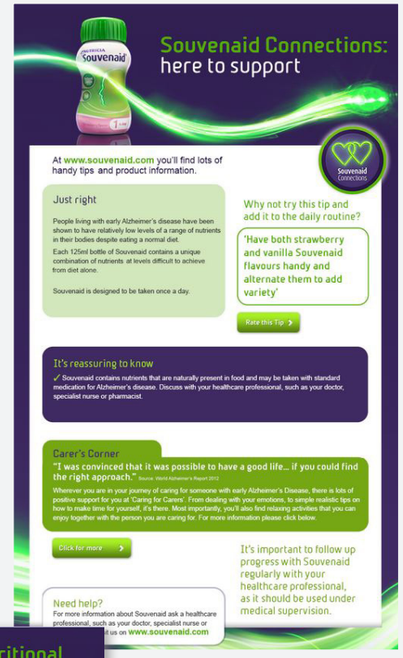
- Segment customers based on their purchasing habits – those who re-stock earlier or more frequently – and tailor programs around each group.
- Test incentives and calls-to-action for maximum conversions.

Automation, driven by Salesforce is a key foundation for Nutricia’s online marketing and dotmailer’s ability to create multiple content approaches is a significant benefit.

The campaign results have been impressive, enjoying an average open rate of 48%, with 21% of recipients clicking through to the website for further information.

“Setting up such a comprehensive program called for a lot of behind-the-scenes work before we even started to send out any kind of content.”

Lloyd Rees, Danone Nutricia





Replenishment program - email 1

Danone Nutricia trigger product replenishment emails with variations in message and timings based upon customer data in Salesforce.

Replenishment program - email 2

Frequent communication based on recipient behavior is continued throughout the program, building trust via supporting value-added content.

Read the full case study:
dotmailer.com/danone

Top tips to achieve marketing automation success

#1
Segmentation is key

With a marketing automation platform, you can use the transactional, demographic and behavioral data you hold in your CRM to segment your customers into highly targeted, responsive groups. For example, studies have shown that email segmentation can result in 50% more click-throughs (source: MarketingSherpa).

#2
Personalize your emails

Use the data fields you hold in your CRM to have one-to-one conversations with customer and prospects at scale. Marketing automation features such as dynamic content, mass customization and automation can make your email messages appear personalized to each subscriber or customer. This boosts conversion rates and establishes brand loyalty.

#3
Speak to your customer, not at them

We're all busy people and receive a huge number of emails daily. So referring to your customers and prospects as 'subscriber', 'reader' or 'friend' is unlikely to make them pay attention. At the same time, signing off an email from the salesperson, account manager or face of your business builds trust. Using words like 'you' in your emails will help deepen the customer relationship; also sending emails from an individual looks friendlier.

#4
Optimize your call to action

Create a CTA that is easy to see, and shows above-the-fold in your email. According to Marketing Sherpa, 41% of marketers rank CTA optimization as very valuable.Test in-text links, end of paragraph links and buttons and analyze your results in terms of clicks.

#5
Be consistent

Consistent content is easier for customers. By streamlining your email and landing page, you nurture trust in your customers. Take them to a dedicated landing page that builds on the look, feel and messages of your original email campaign. This gives them all of the information they need without them having to hunt for it.

#6
Regular communication

Develop and nurture customer relationships through regular contact. For example, let subscribers to your newsletter know how often they can expect to hear from you. In addition, with marketing automation, you can optimize your communications based on the opening habits of your contacts, such as the time of day they usually open them.

#7
Triggered emails

Send out automated emails when your prospect signs up for anything on your website. Nurtured leads produce, on average, a 20% increase in sales versus non-nurtured leads (Source: DemandGen Report).

#8
A/B testing

Test and track email sends with different variables. These could be subject lines, full landing pages or your creative. Split testing is a simple way to compare different versions of the same email, based on metrics such as opens, clicks and forwards. Split testing gives you an insight into what wording works best for nurturing and converting your customers. One dotmailer client, Spicerhaart, recently achieved an ROI of 6229% by utilizing A/B split testing.

#9
Analyze results

By making time to track results you can continually improve your email programs and maintain up-to-date, integrated profiles of all customer interactions, for improved conversion and nurture.

#10
Repeat!

Breaking down the barriers between sales and marketing

By using two disparate systems, you are splitting the sales cycle in two, leaving sales and marketing to work on their individual parts separately, effectively leaving one half in the dark.

The integration of Salesforce with a marketing automation platform gives you full visibility to successfully nurture leads through triggered emails, content marketing, and website behavior.

Your teams won't waste time looking for the information. It's right there in front of them, meaning they can work together better, smarter and faster.

In addition, the power of Big Data allows you to understand how your customers behave. Pulling together this level of insight helps you to build the bigger picture – telling a compelling story.

With the right combination of marketing automation and Salesforce:

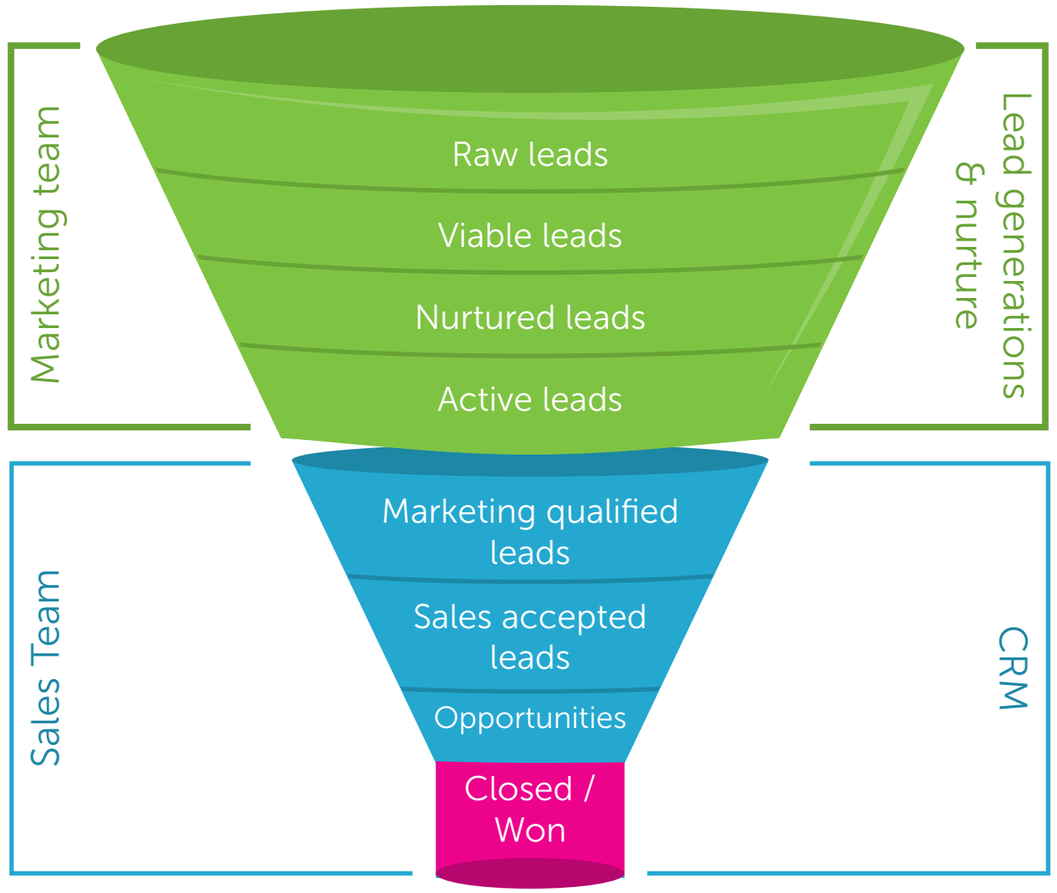
Your marketing team can:

- Create, automate, and measure lead nurturing and marketing campaigns.
- Track website visits and understand your customer behavior.
- Prioritize leads based on behavior, profiles and historical activity.
- Automatically manage, recycle, and reassign customer engagements based on specific behaviors.

Your sales team can:

- Define and manage lead qualification and assignment better.
- See why a lead has been qualified and assigned to a salesperson.
- Understand, prioritize, and interact with your hottest prospects.
- Learn from & utilize intelligence about a prospect's interests and activities.

Marketing team vs. sales team roles without marketing automation:



CONCLUSION

5 key benefits of integrating Salesforce and marketing automation:

Combined CRM and marketing automation platforms provide a comprehensive and dynamic 360 degree view of your entire database.

This provides the following benefits:

1. Deliver more prioritized, sales-ready leads:
Include all of the demographic and behavioral information needed for each lead. This intelligence allows you to build lists of the leads with the highest probability of converting, from which to generate qualified sales leads and accelerate the sales cycle. These may be leads that have visited your site and downloaded content, attended an event and opened and clicked emails or a combination of activities.

2. Shorten the sales cycle:
According to an IDC study, over 50% of leads in the average B2B contact database are obsolete, with a high rate of decay. Implementing marketing automation can help move 'hot prospects' through the pipeline faster and maximize efficiency for the sales cycle.

3. Track and analyze all touch points:
Every touch point can be tracked, from first touch to final sale. Revenue can be assigned to campaigns for ROI reporting with the end-to-end insight demonstrating the success or failure of every campaign. And with a two way data synch, marketers can make better data-driven decisions.

4. Build a profile of your leads and contacts and where they are in the customer journey:
Using marketing automation to educate leads makes them not only more likely to buy, but also more likely to buy bigger. A study by Annuitas indicated that nurtured leads make 47% larger purchases than non-nurtured leads.

5. Sales and marketing teams working together, smarter:
Integrating a marketing automation platform seamlessly with your Salesforce environment means you can keep all your data in one place. Your sales and marketing teams don't have to waste time and resource looking for data; by storing it all in one central, easily accessed environment, it means they can work better, smarter and faster.



"Companies that excel at lead nurturing generate 50% more sales-ready leads at 33% lower cost."

Forrester Research, 2012

dotmailer and Salesforce:

We've taken the best and made it better

Salesforce is already recognized as a global leader. Combine that with dotmailer, a leading name in email marketing automation, and you're onto a winner.

Our fully integrated dotmailer for Salesforce solution allows you to manage all of your digital marketing activity without ever leaving the Salesforce environment, transforming the way you use Salesforce to drive marketing.

Harness data

dotmailer for Salesforce enhances your current Lead, Contact and Person level objects with granular reporting data for each email campaign. Maintain up-to-date, integrated profiles of all customer interactions. Plus, track all opens, clicks, hard bounces, opt-outs, web page views, social sharing and return on investment markers.

Translate and target

Once you've utilized the data, dotmailer for Salesforce allows you to translate it into targeted content, and follow up by sending real-time, dynamic, content-driven campaigns. All data is available to use within your native Salesforce CRM features, automating Apex triggers for customer objects. This allows you to create highly personalized experiences for your customers and prospects.

Know-how to know now

Seamlessly update Salesforce with up-to-the-minute campaign analytics and reports, covering every aspect of email campaign results, web, social activity and data collection. Measure and evaluate the success of your new segmentation and campaign strategy, sales processes – even an individual's level of engagement.

See more, sell more

Identify new opportunities to cross-sell and upsell to existing customers. Increase your email campaign open rates, click through rates and conversions, and drive down your unsubscribe rates. With dotmailer for Salesforce, your teams enjoy visibility into the response of customers and prospects to email marketing initiatives.

Right data, right now

Use your data to deliver compelling, relevant email content to each contact on your email list.

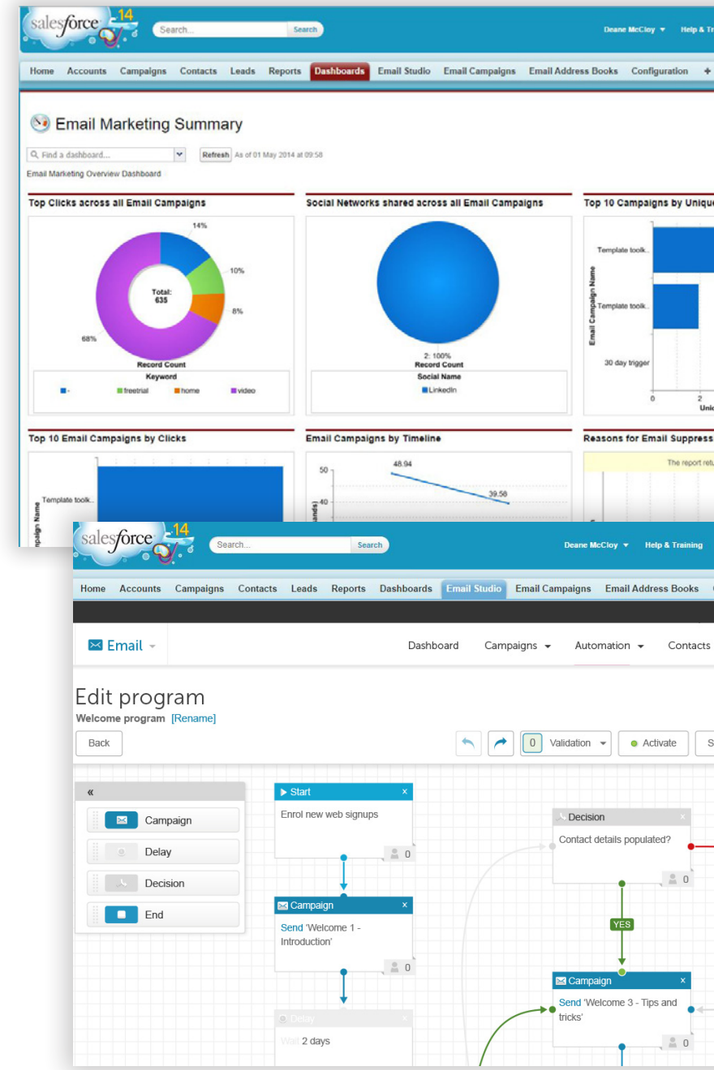
Create and prioritize activities for your sales and marketing teams to focus on your most engaged customers, re-engaging customers or perhaps targeting prospective customers. It's the ideal platform for helping you build much clearer sales and nurture paths.

"Integrating our email marketing with our CRM system has been crucial to streamlining our processes"

Ali Rance, Marketing & Partnerships Manager, Ripleys London

Benefits at a glance:

- A truly seamless environment: you never have to leave Salesforce. Everything your sales and marketing teams need can now be found, all in one place.
- It provides a 360°, single customer view: you get detailed email reporting data at lead, contact and personal levels.
- Leverage digital reporting data in Salesforce reports, dashboards and campaigns.
- Quick and easy-to-use functionality, like dotmailer's drag & drop EasyEditor, Segmentation Builder and automation Program Builder.
- Power Apex triggers based on email recipient behavior as well as web and social activity.
- Benefit from technical support, account management and strategic services – after all, what else would you expect from the UK's No.1 marketing automation experts?



dotmailer pulls real time data from Saleforce into your segments, so you can build campaigns quickly and easily.

About dotmailer

Our mission is to make it as easy as possible for marketers to get results that make a dramatic improvement to their business.

Email marketing. Evolved

dotmailer is the UK's number 1, email marketing automation provider.

In 2009, we developed a successful, innovative ecommerce platform, used by flourishing retail brands like Rodial Rush Hair, Nicol Farhi and Myla.

Today, all our ecommerce innovation, experience and expertise goes into enabling marketers to do the kind of advanced email marketing they only imagined. And they're seeing some remarkable results.

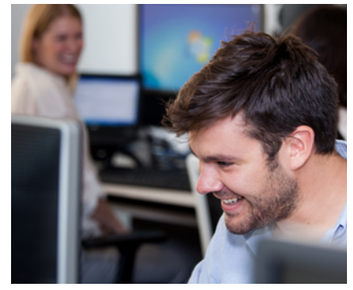
For more information and a free 30-day trial visit dotmailer.com, or call 0845 337 9170 to speak to an advisor.











"Whilst our business has changed almost unrecognisably from our formation in 1999, some qualities remain: a commitment to excellence, dedicated people and a profitable business model."

Tink Taylor
Co-founder & Chief Operating Officer

Discover how dotmailer can help transform your business:

www.dotmailer.com

+44 845 337 9170

HEAD OFFICE
No. 1 London Bridge
London
SE1 9BG
+44 (0)845 337 9170

EDINBURGH
9-10 St Andrews Square
Edinburgh
EH2 2AF
+44 (0)131 718 6037

USA
Suite 307, 3rd Floor,
350 7th Avenue
New York, 10001
+1-212-971-9408

CROYDON
No. 1 Croydon
Addiscombe Road
Croydon
CR0 0XT
+44 (0)845 337 9170

MANCHESTER
Pall Mall Court
61-67 King Street
Manchester
M2 4PD
+44 (0)161 618 1070

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