



Using Marketing Automation to Increase Your ROI on CRM

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Helping Businesses **Grow**

## Introduction

Technology can dramatically increase the productivity of sales and marketing. In this new age of high-tech, most organizations have gone beyond Rolodexes, paper lead sheets or Outlook address books and have adopted CRM systems. These systems provide excellent return, but could you be getting more?

CRM systems have their core strengths, but the area where they provide the most benefit is from certain additional applications that support specific business goals. These applications can range from sales productivity tools, like phone dialing assistants, to more comprehensive solutions around sales management, contract management or marketing.

Marketing Automation is one of these comprehensive solutions that can dramatically increase the ROI of the investment in your CRM system. In this paper we briefly present the key benefits of CRM systems, and show how Marketing Automation can increase the effectiveness of the entire sales and marketing function.

**The fusion of CRM and Marketing Automation allows you to increase the ROI of your sales and marketing organization, improve close rates, deliver more predictable revenue and make both teams more successful.**

## What is Marketing Automation?

What is Marketing Automation? Many CRM systems have a module for marketing. While the scope of this module varies from one CRM system to another, in all cases Marketing Automation adds another layer of value on top of this. The goal of Marketing Automation is to provide the marketing team with a comprehensive lead management tool that helps companies turn more leads into revenue.

A common issue in organizations is that there is no process for managing leads, other than saving them in the CRM system. For-

ward-thinking marketing organizations recognize that they need to follow up with leads until they are qualified enough to be assigned to a salesperson. This lead management process is one of the key responsibilities of Marketing Automation.

The lead management process starts with capturing leads through web forms or list imports. From there, a dialogue is started via email in order to deliver relevant information to the lead. This can also be called lead nurturing. At the same time, every activity is monitored: does the lead open the emails and click through the links? Do they download white papers? Are they visiting your website? Which web pages do they look at?

Based on this information, an email campaign can be optimized, and a numeric score can be assigned to the sales readiness of the lead. Sales qualification people can monitor this, and prioritize who they are going to call first. As they gather more information about this lead, the better they can incorporate it and improve the campaigns and lead scoring processes.

Here are some of the key features offered by Marketing Automation systems:

- **Email marketing:** Allows for unlimited emails optimized for deliverability
- **Lead nurturing:** Includes trigger-based emails and multi-step campaigns
- **Landing page builder:** Includes a form builder to capture leads
- **Lead scoring:** Both demographic and behavioral activity
- **Activity tracking:** Based on email and web activity
- Sixth-sense lead intelligence for the sales team
- Bi-directional integration with the CRM database
- Comprehensive marketing reporting and analytics

These features are all essential to create an automated lead management process. While some of these features may be present in

some CRM systems, it's really the fusion of CRM and Marketing Automation that allows you to increase the ROI of your sales and marketing organization.

## Benefits of CRM Systems

While many sales and marketing teams have been using CRM systems for years now, we'd like to give a brief overview in order for you to be completely aware of the benefits CRM systems can provide.

The first benefit of CRM systems is that there is a central location for all leads and contacts. This easily allows everyone with the right permissions to find the most up-to-date contact information. It's easy to update contacts, or to add call logs. Additionally, CRM systems provide scheduling tools, such as the ability to create tasks and set reminders.

Another benefit of CRM is how Marketers don't need as many licenses. Because one license can sync up with other systems, everything is available for anyone to view. For some companies, the saving costs of having less licenses can cover the price for a marketing automation system.

Keeping track of sales opportunities is another important task a CRM system can help with. The responsible sales person can record all details in a single location, and sales management can use the information to better manage and forecast the pipeline.

However, it's not just sales that benefits from CRM. Marketing can also make great use of the system. Having every lead and contact in a single location is just as valuable for marketing as it is for sales. The fact that sales opportunities are captured, including win/loss information, provides an opportunity to calculate closed-loop marketing effectiveness.

In short: CRM provides a great platform to manually capture leads, contacts and sales opportunities, and to manage the work of sales executives and sales managers. That's where CRM excels.

## Benefits of Marketing Automation

The Marketer's goal is to generate and develop leads until they are ready to talk to sales. A marketing automation system is essential to make this process scale. Let's look at some of the benefits of marketing automation, for both marketing and sales.

First of all, marketing automation will provide a huge productivity boost for marketing. Where marketing previously had to run campaigns manually, they can now run fully and automatically. The result: marketing can run more campaigns with fewer people, and still deliver more qualified leads to sales.

Additionally, marketing's response times are much shorter. If there is a short-term need for a particular campaign, it's now much faster to design and roll out that campaign. That doesn't mean you shouldn't carefully plan your campaigns, but if there is a need to respond quickly, you now can.

Marketing automation also gives marketing teams better metrics on how their campaigns are performing, and more options to improve those campaigns. You'll see that response to campaigns can easily double when marketing automation technology is used properly.

But it's not just marketing that benefits from automation. Sales will receive more qualified leads, with more information about each lead. Rather than sending an segmented list of leads to sales, they can now get a prioritized leads of leads, sorted by lead score. They can even add their favorite leads to a "watch list", to be proactively notified all new activities by these leads.

## How Marketing Automation Increases Your ROI on CRM

Both CRM and Marketing Automation provide significant benefits for sales and marketing organizations. If you currently have a CRM system, how would Marketing Automation help you get a better ROI on CRM? Marketing Automation helps you:

**Convert:** The biggest impact is that Marketing Automation allows marketing to deliver more qualified leads to sales. It will prioritize the leads in your CRM system. Rather than assume that all leads are equal, it will clearly identify which leads need to be fol-

lowed up with right away, and which still need more time to be nurtured.

**Automate:** Marketing Automation extends CRM's support for manual campaigns with fully automated campaigns, allowing you to save time and money in marketing and sales. With automated processes, you can do more with less, and be more agile at the same time.

**Nurture:** In companies with long sales cycles, it's often hard for sales people to adequately follow up with each and every lead until they show an active interest. Automated lead nurturing solves this issue by developing leads who are not ready to talk to a salesperson yet.

**Prioritize:** Marketing Automation adds a lot more information to each lead profile. The fact that full activity and social media history are available allows salespeople to learn more about prospects before they make their first call. And because this information is real-time, they can make sure to call at the right time. For example, if they get an alert that a lead is currently on the website,

it may be good time to call because it's almost certain that he or she can be reached at her desk.

**Consolidate:** Marketing Automation includes several tools to increase CRM data quality. This includes prevention of duplicates by appending information to the existing record, as well as identifying and merging duplicate records. If you have multiple locations where data is stored, the Marketing Automation system can also be the system of record, holding data from multiple systems. As a result, salespeople can now be sure that the information in the CRM system is actually correct.

**Prove:** And last, but not least, Marketing Automation provides the information to manage the revenue cycle by the numbers. Based on metrics, marketing and sales effectiveness can increase, revenue is more predictable, and it's possible to see how marketing and sales activities contribute to the company's bottom-line.

In effect, Marketing Automation delivers more, and better qualified, leads to the CRM system, and provides real-time information on

leads. And as a result, Marketing Automation will help sales improve close rates, deliver more predictable revenue and make sales reps more successful.

## Why CRM Alone is Not Enough

Your organization may already be spending a healthy sum of money on the CRM system, and most CRM systems include a certain amount of marketing features. So why would marketing need yet another system?

CRM systems are developed to deal with individual leads, while marketing always works with segments of leads. Because sales is one-on-one, they can give leads individual attention, and optimize their approach for each lead. However, marketing has to think in consistent programs, otherwise it's not possible to manage thousands of new leads each month.

To make matters more confusing, some CRM vendors create marketing materials that claim that they include marketing automation functionality. Actual users of these CRM systems will realize that this is a bit of a stretch. Also, CRM vendors all partner with marketing automation vendors, clearly acknowledging the need for dedicated Marketing Automation vendors.

# About NGR

NGR provides innovative enterprise marketing management solutions that turn your passion for marketing into business success. NGR transforms how marketing and sales teams of all sizes work and work together to accelerate predictable revenue.

NGR's solutions are both powerful and easy to use, providing explosive revenue growth throughout the revenue cycle from the earliest stages to demand generation and lead management to deal close and continued customer loyalty.

In past 48 months, we have been working on developing various marketing and sales solutions which assists organizations in improving customer relations and further improves the bottom-line.

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