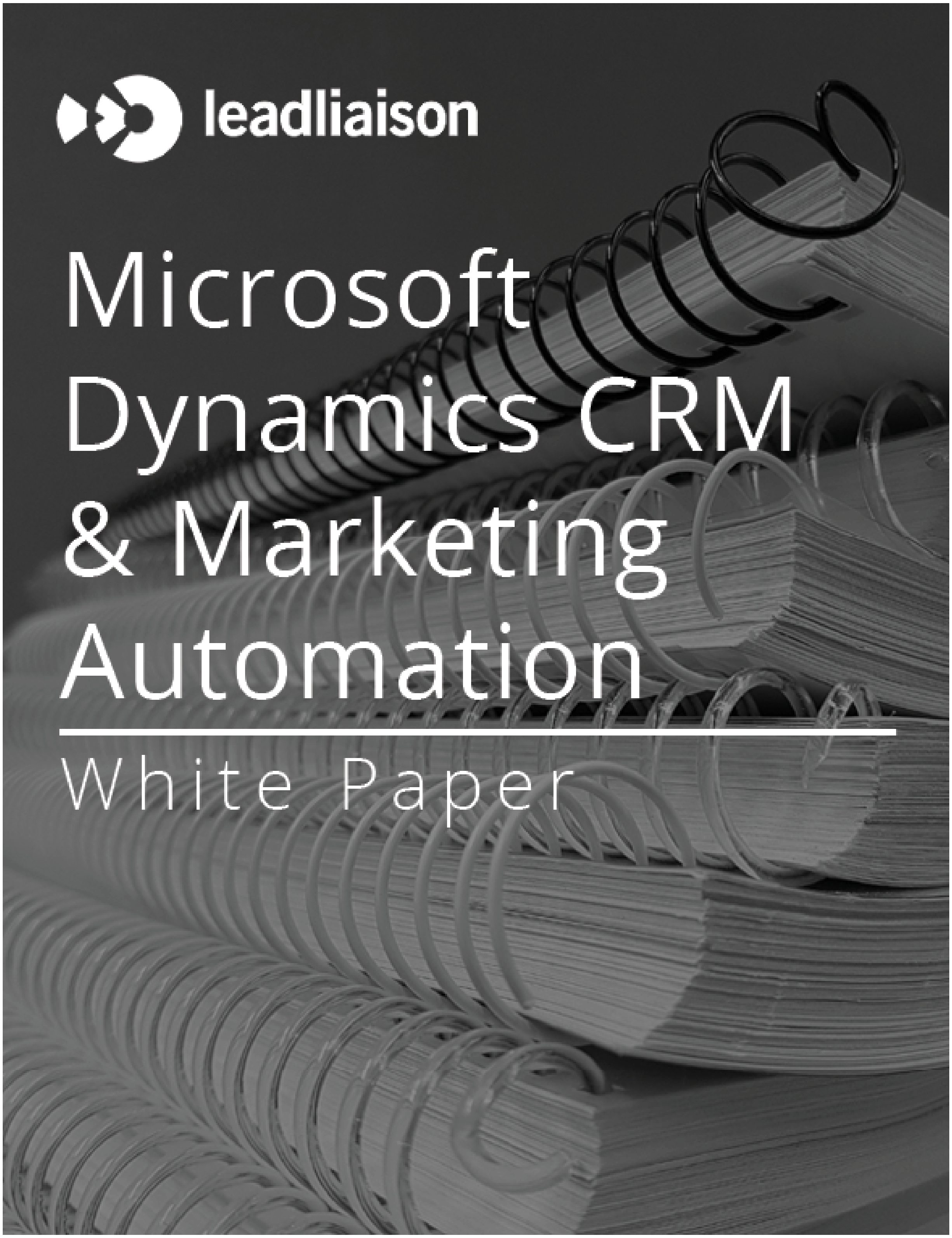

leadliaison

Microsoft Dynamics CRM & Marketing Automation

White Paper

MICROSOFT DYNAMICS & MARKETING AUTOMATION

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The Difference Between a CRM and Marketing Automation

When you step into the world of marketing and sales, two phrases you will hear a lot are CRM and marketing automation. They can often be used within the same sentence, but they are not synonymous with one another.

A CRM, which stands for ***customer relationship management/manager***, does exactly that – it manages your customer relationships by organizing your contacts (by company name, job title, potential deal size, etc.) and the interactions your company has with those contacts.

A marketing automation solution specializes in communicating with those contacts based on many different factors that may are may not be tracked within a CRM. The goal is to educate or nurture those contacts until they are ready to buy. Or, if the contact has already made a purchase, marketing automation can help continue that relationship to encourage renewals or repeat business.

What is the difference between a CRM and marketing automation?

CRMs manage your company's interactions with current and prospective customers, while marketing automation helps create, automate, and distribute those interactions. Marketing automation can also measure the effectiveness of those efforts, so that companies can minimize "wheel-spinning" and really focus on what works for their specific business.

If you are familiar with marketing and sales terms, you may have heard some (or many) references to "the sales funnel." At the top of the funnel, you've got a large group of people who may or may not be interested in the products or services your company has to offer. As the funnel narrows, uninterested leads are filtered out, leaving Sales Qualified Leads (SQLs) at the bottom – those that are ready to buy.

Marketing automation helps track prospect activity closer to the top of the funnel (but not the very top, as is commonly misconceived!), while CRMs are used to track interactions closer to the bottom of that funnel. However, marketing automation can also be used to track the entire Lifecycle Funnel - from anonymous website visitor to MQL to SQL to customer, and beyond!

It's important to note that marketing automation is not for the tip-top of the funnel. It should not be used to "spray and pray" or "batch and blast" marketing material. Doing this will result in being flagged a spammer. True nurturing using marketing automation should focus on prospects that are interested enough in your product or solution to be on your website, reading your educational content, and actively reaching out to learn more. *They* provide their email address to *you*.

Another common misconception is that sales teams and marketing teams are communicating to different audiences. This can be a dangerous and divisive way to think. In reality, marketing and sales teams should be working side-by-side to generate revenue. Marketing teams build brand awareness, educate, and nurture prospects until they are ready to buy. Then, those prospects are handed of to the sales team as Sales Qualified Leads (SQLs), however the communication and nurturing should NOT stop there (and neither does the involvement of marketing automation!). It only needs to shift gears. Once a prospect has become a customer, the education and nurturing should shift gears again – but never cease.

CRM and Marketing Automation: How Do They Work Together?

The distinction between a CRM and a marketing automation solution has been made. Customer relationship management (CRM) software collects customer data and manages sales opportunities. It's mostly used as a sales tool. Marketing automation generates leads and collects data to create personalized communications. It's essentially a lead generation and nurturing tool.

They might be two different things, but they only reach their full potential if you use them together. They're like peanut butter and jelly. Sure, you can put them on separate sandwiches, but they become so much more when you mix them together.

Let's look at some reasons why you need to combine your CRM and marketing automation processes.

Build Relationships Before Sending a Lead to Sales

When your CRM and your marketing automation solution work together, you can interact with and nurture your leads before they even make it to the sales team. This saves the sales team time since they no longer have to sift through the sales data to determine how to nurture the leads. Instead, the marketing automation process takes care of this. It analyzes data and sends the right information to the right people. It moves people through the sales funnel and qualifies them. By the time the sales team gets the lead, they know so much more about the person.

Closed-Loop Reporting

Have you ever wondered which campaign closes the most deals? You can find out when you run your marketing automation and CRM systems together. You can use closed-loop reporting to find out what revenue goes with which campaigns. Then, you will know what's working and what isn't.

If you run the two processes independently, you won't see the whole picture. You will know that you're making money, but you won't know how. That means you won't have the information necessary to tighten up your marketing campaigns.

Assign Lead Scores

Your CRM collects all kinds of data for each lead, and it can be overwhelming. When you pair it with your marketing automation system, you can assign scores to each lead based on the data. Then, your system can rank the leads and send the data out to your sales and marketing teams. Everyone can have access to this important data and act accordingly. This allows both teams to communicate and understand each other better.

Your CRM and your marketing automation solution should go hand in hand. Don't make the mistake of separating the two. When you pair them, your sales and marketing strategies will finally align.

Why Microsoft Dynamics CRM and Marketing Automation Integration Matters

Why Does Microsoft Dynamics CRM and Marketing Automation Integration Matter?

In this article we'll discuss why Microsoft Dynamics CRM and marketing automation integration matter to businesses with a sales and marketing team. I've always been a proponent of CRM systems. As a user myself, I first started using Salesforce.com. I couldn't imagine trying to keep track of my activities and tasks anywhere else (oh no, not a spreadsheet!). When I hear about companies that don't have a CRM, I cringe! Whether you're using enterprise-level CRMs such as Salesforce.com or Microsoft Dynamics, or something with the essentials such as OneFocus™ or Pipedrive, having a marketing automation system coupled with your CRM is vital these days.

MICROSOFT DYNAMICS & MARKETING AUTOMATION

Let's focus on Microsoft Dynamics CRM for the sake of discussion. Without a marketing automation system married up with Microsoft Dynamics CRM, the CRM is just one big database. A large data repository. Companies can "bring their data to life" by implementing a number of different automated processes. For example, nurturing, qualification, tracking, and more will all make your operations run smoother. Without establishing these processes, businesses risk not being able to effectively scale. Below are four reasons why integrating Microsoft Dynamics CRM and marketing automation matters:

Four Reasons why Integrating Microsoft Dynamics CRM and Marketing Automation Matters:

Nurturing

Nurture prior to sales interaction. Sales and marketers widely view Microsoft Dynamics CRM as a standalone software system for sales. When pairing up a marketing automation system, such as Lead Liaison's Lead Management Automation (LMA) platform, this changes. Marketers can take part in the traditional sales funnel, and support their sales teams. For example, Lead Liaison's LMA has a concept of Lifecycle Stages. Lifecycle Stages provide a framework for marketers to "own" the top of the funnel, to transition prospects from anonymous > known > engaged > marketing qualified, and then hand warm leads off to sales for them to qualify. During these initial stages marketers can use lead nurturing to build stronger relationships with prospects. They'll be able to educate them in ways that are important to them.

Sales Insight

Sales has greater visibility. A huge benefit of using marketing automation with Microsoft Dynamics CRM is that sales has more insight. This applies to both Leads and Contacts inside Microsoft Dynamics. When the sales team opens up a Lead or Contact record inside Microsoft Dynamics, they will see marketing metadata (score, last website visit, etc.). They'll also see recent inbound and outbound activities (website pages viewed, documents downloaded, tracking links clicked, videos watched, forms submitted, email engagement, etc.). This insight helps prepare your sales rep. Sales people will be more successful when they reach out. Sales reps will be equipped with more knowledge about their prospect's key careabouts and interests.

Prioritization

Prioritize leads. When using Microsoft Dynamics CRM and marketing automation, marketers can establish scoring rules. Scoring is a way to measure engagement. Marketers can configure individual scores to be associated with different types of inbound activities. For example, 10 points for an email link click, 50 points for submitting a form, 100 points for visiting your pricing page, etc. The higher the score, the more qualified and "hot" the prospect is. Using marketing automation, marketers can then establish a score threshold, to trigger an alert to the sales rep to take action. Another feature that's not commonly used, but should be, is the ability to decrease a prospect's score if they don't engage. Lead Liaison's LMA offers a feature called "Inactivity Periods". If there's no inbound activity within the inactivity period time frame, any number of actions can be triggered. For example, you could notify the sales rep, reach out to the prospect on behalf of the sales rep, or send the prospect and incentive to come back.

Revitalization

Revitalize old leads. Using marketing automation, it's easy to segment and target leads/contacts based on last inbound activity. Without hooking up your Microsoft Dynamics CRM instance to marketing automation, this wouldn't be possible. Dynamics will be a great database of record to track demographic data (job title, role, location, name, etc.) – things you might find on a business card, but it won't track behavioral information (how the prospect engaged, inbound/outbound activities, etc.). All of this wonderful inbound activity that's tracked by marketing automation gets appended to each record in Microsoft Dynamics CRM. As a marketer, you can use this information to better segment and nurture prospects that might need to be re-invigorated. After all, according to Demand Metric, 60% of customers are encouraged to seek out a product after reading content about it.

Leads, Contacts, Accounts, and Prospects – Making Sense of It All When Using CRM and Marketing automation

Let's talk about CRM objects for a minute. If you look at most major CRMs like Microsoft Dynamics or Salesforce.com, you'll notice a few different objects: Leads, Contacts, and Accounts. But then look at marketing automation like Lead Liaison and you'll see one object: Prospects. Does this mean that the two systems are incompatible? Not at all.

This is where Account Based Marketing (ABM) meets Inbound Marketing. You probably use ABM marketing when you're bringing in new accounts. To get in, you find your suspect (Lead); then, you build a relationship with them and build rapport (Contacts); next, you qualify them by learning about their organization and meeting the key players (Account); eventually, your proposal is out and you have an opportunity in your sales funnel.

Still not seeing the connection? Here it is: at the end of the day, all of these objects represent people.

We use Inbound Marketing to connect with those people and build a personal experience. It's this kind of relationship building that will get you into those big accounts. That's how you go from having a list of suspects to a list of Closed-Won opportunities.

Now, let's look at those CRM objects and learn about marketing to the people behind them.

Leads

Leads are people that you think might be your entry point to an account. They have the right job title, the right industry, and you think your service could benefit them. However, you don't really know them yet. Maybe you got their card while cold calling, briefly met them at an event, or even just got their name off a list. It's going to take some time before you can even think of writing that proposal!

As a marketer, these are the people that will need some love. They might not have even heard of your organization before. You've got to create content that will appeal to them and bring them to you. You can't just rely on sending them an email blast; there's a good chance they won't even read it. Create a blog, send them videos, interact on social media. Every different type of content you have is another way to get them to your website.

And if they do make it to your content, how will you know? Luckily, Lead Liaison makes this super easy. Through visitor tracking and our powerful lead qualification tools, you can find out what your Leads are responding to the most.

Contacts

When you've finally made a connection with a Lead, it's time to convert them into a Contact. Contacts have shown at least some interest in your organization, and you know they are a good starting point. Not all of them will be the decision maker either; anyone in B2B sales can tell you that building a good relationship with an influencer will eventually get you to the right people.

It's time to get personal. You've learned more about these people, and you should know what interests them. Stop sending them generic marketing material! For contacts, it's important to use nurture campaigns that are relevant. Through Lead Management Automation™, you can create personalized content automatically from the prospect owner. It's a win-win for everyone.

Accounts

Accounts are the actual organizations you're targeting. Chances are, you'll be working with more than one contact at the account level. Don't be fooled though; it's no less personal here than it was with Leads and Contacts. To be successful in ABM marketing, you've got to prove to your Contacts that you know and care about their company. You've also got to keep track of the moving parts. Who needs to sign off on the deal, who handles the budget? The Account object gives you a consolidated place to organize that.

Each person in this account needs something different. What's great is that like Contacts, you can personalize your content through Lead Liaison using attributes like their company, job title, and area of interest just to name a few.

Want to look really cool? Through SiteEngage™, you can create custom rules that change what is displayed on your website! Imagine how awesome it would be if someone from your biggest account visits your site and gets a banner with a special video produced just for them.

Prospects

Like we said before, people are at the core of both ABM and Inbound marketing. Through our deep integrations, we take all of the information we know about a person from all three objects and create a Prospect Profile. Then, you can use any piece of information for segmentation, automation, personalization, and more. Heck, we can even trigger automations based on a prospect being upgraded from a Lead to a Contact.

Through Lifecycle Stages, we keep track of the prospect's journey. You can always tell where your prospects are in the funnel, and give them the right kind of marketing. Lead Management Automation™ powered by Lead Liaison is the perfect complement to your CRM.

5 Reasons **Marketing** Teams Benefit from Microsoft Dynamics CRM and Marketing Automation Integration

In this article we'll discuss 5 ways marketing marketing teams benefit from integrating Microsoft Dynamics CRM with marketing automation. Sales reps have always had their system of record, a CRM. A CRM is a common repository, a place to keep notes, contact information, and opportunities. Besides a need for pulling reports, marketers never had the need to access the CRM. The demand for businesses to grow, increased competition, and advancement in software as a service, has fostered a new suite of software capabilities – commonly referred to as marketing automation. Marketing automation is a suite of software services that help marketers do their job better and more efficiently. The problem is that marketers have their software to work with, and sales has their own. By integrating the two systems together sales and marketers can share data and help each other get the job done faster.

In particular, there are 5 ways marketing teams benefit from Microsoft Dynamics CRM and marketing automation integration:

1. Integrated views that include prospect activity.
2. Better segmentation.
3. Trigger actions on data changes.
4. Integrated lead qualification.
5. Data is in sync.

1. Integrated Views

A marketing automation platform, such as Lead Liaison's Lead Management Automation software, helps marketers with outbound marketing, as well as inbound marketing. One key aspect of these platforms is being able to track all inbound marketer and engagement with outbound marketing. A marketing automation platform will build rich profiles of prospects as they download documents, watch videos, click paid ads, submit forms, visit web pages, and more. This information is crucial sales insight that needs to be available to sales reps in real-time. When integrating marketing automation and Microsoft Dynamics, this insight is mapped to Lead and Contact records in Dynamics. As a result, a sales person never has to leave Microsoft Dynamics to understand how their Lead/Contact has engaged with their company. It's all inline in the Lead/Contact record.

2. Better Segmentation

Marketers used email systems like Mailchimp and Constant Contact before marketing automation existed. In the "olden days", a marketer would use a "batch and blast" approach. They'd create a single email and send that email to a large list. With modern marketing platforms, marketers can easily segment their database. Not only can they use demographic data from Microsoft Dynamics CRM (things such as job title, industry, location), they can segment off of engagement data. For example, easily build a one-time list, or ongoing list that's dynamically created, of all prospects who've had inbound activity within the past 30 days, live in five states, and downloaded a specific piece of content. What's the point? Instead of demographic criteria, they've got more criteria to choose from, allowing them to build smaller segments (groups) of people to better tailor the message to a recipient's interests. This helps marketers deliver a more personalized message – driving higher click through and open rates with email.

3. Trigger Actions

Marketers have greater control over how and when they send follow up content for nurturing when integrating marketing automation with Microsoft Dynamics CRM. Using automation, a marketer can monitor changes in a data field to detect if the value changes to any matching criteria. When this happens, the marketer can execute any number of tasks. For example, if the Lead Status field changes to Customer, they could trigger an automation that onboards a client and walks them through the customer experience, getting them closer to cross-sell and upsell opportunities down the line.

4. Integrated Lead Qualification

Prior to having marketing automation integrated with Microsoft Dynamics CRM, all leads look the same to a sales rep. In other words, the database is flat. The only way to differentiate leads is to use some sort of weighted scoring system. Marketing automation platforms refer to this as Lead Scoring, in Lead Liaison's world it's simply Scoring. For example, when your key documents, such as Case Studies, get downloaded, individual scores can be assigned to the action. With granular level control over scoring various interactions with prospects, the marketing automation system sums all individual scores into a single score, which is then shared with Microsoft Dynamics CRM in a Score field. Now, sales can create reports that give priority to their Leads and Contacts. Reps can make better use of their time by focusing on the highest scoring Leads and Contacts first.

5. Data is in Sync

With sales reps having their own stack, and marketing having theirs, it would be awful if the two systems did not communicate with one another and had data out of sync. With systems like Lead Liaison and Microsoft Dynamics CRM integrated, marketers don't have to worry about disparate systems. When Lead, Contact, and Opportunity data changes in Microsoft Dynamics CRM, it also gets updated in Lead Liaison…and vice versa. Marketers are not slave to the way the data exchange works either. They can set which fields in the CRM map to fields in the marketing automation platform, and set the syncing direction. For example, if the marketer never wants the marketing automation platform to update the Lead Source in Microsoft Dynamics CRM, then they can set the sync direction to one-way, going from CRM to marketing automation only – and not the other way around.

5 Reasons **Sales** Teams Benefit from Microsoft Dynamics CRM and Marketing Automation Integration

We've talked about the 5 ways that marketing teams can benefit from Microsoft Dynamics CRM and Marketing Automation integration here. Today, we want to take a look at how sales can benefit from that same integration.

Let's face it: time is not the sales person's friend. I've seen far too many talented people fail in B2B sales because they couldn't manage time. You certainly don't need to waste time on courting unqualified prospects, hopelessly dialing bad numbers, and sending nurture email after nurture email to the “call me next year” crowd.

Having a CRM like Microsoft Dynamics will certainly help. You can use it to schedule tasks, keep prospects organized, and track your opportunities. But that’s just step one. You’ve still got to figure which prospects are worth your time and make sure you keep the data up to date.

That’s where marketing automation like Lead Liaison’s Lead Management Automation™ comes in. We have multiple ways to help you make the most of your time and find the right prospects. In fact, we’ve got five major ways that sales teams benefit from Lead Liaison and Microsoft Dynamics integrated together.

In particular, there are 5 ways sales teams benefit from Microsoft Dynamics CRM and marketing automation integration:

1. Deliver quality leads straight to your CRM.
2. Easily gauge your prospect’s interest.
3. Automate your nurture.
4. Always have the most up-to-date information.
5. Better insight into marketing efforts.

1. Deliver quality leads straight to your CRM.

Adding qualified Leads to your pipeline isn’t an easy task. By far, the most time-consuming thing in a sales person’s life is prospecting. In most industries, you’re lucky if 10% of the people you talk to are qualified (even less with cold email and cold phone calls). Even if the prospect has gone so far as to fill out a demo request, they might just be another sales person trying to sell to you!

Lead Liaison tracks visitors to your website and scores them based on engagement. Every time they engage with a piece of content, their score goes up. We also grade them based on your organization’s ideal buyer profile from A-F. When we know that they’re a good fit and have shown real interest, we can send an alert, sync them to Dynamics as a Lead, and even assign them to the appropriate prospect owner.

Now you’ve got a steady stream of Leads in your CRM that you know are qualified.

2. Easily gauge your prospect’s interest.

How many times have you sent an email to a prospect and never heard back from them? I probably just described 95% of your prospecting emails. Even once you have a steady stream of Leads from your site, what’s the point if you don’t know who’s responding to your communications?

Our Send and Track plugin has you covered. We can tell you when your prospect has opened your email or clicked on a link inside. We can even send a browser alert to Google Chrome so you know right away. You get to learn who is interested in what you're sending, even if they don't respond. And, because we track them from the moment they click the link, you get to see what they're looking for on your site.

What does this have to do with Dynamics? Our plugin lets send a copy to your CRM. That means the email and its contents are logged for your reference. If the prospect doesn't exist in Dynamics already, we'll create a new Lead for you. No need to manually create new records after a cold email campaign!

3. Automate your nurture.

We've all run into prospects that just aren't qualified yet. They could be the perfect fit for your organization, but for one reason or another a deal just isn't going to happen right now. However, it's important you don't lose track of these people. They're the ones helping you make quota six months from now. If you've got an opportunity in Dynamics that has stalled out, we're here to help.

With Lead Liaison, you can drop these prospects into an automated nurture campaign. The prospect will get occasional follow ups, interesting articles, or links to relevant videos straight to their email. The emails come from your email address, signed by you, and if the prospect replies, it goes to your inbox. You just put them in the nurture campaign, and we do the rest on your behalf.

We're not limited to email, either. Lead Liaison supports multi-channel marketing efforts. You could automatically send them a postcard, have us text them for you, or write a handwritten letter on your behalf. You can even choose the type of handwriting we'll use!

4. Always have the most up-to-date information.

Have you ever called an old prospect in your database to reconnect and found their number was no longer valid? Or worse, they didn't work there anymore? It's happened to all of us. Now you must take the time to find a new contact, get the right info, and hopefully get it done in time to finish your tasks for the day.

That is, unless you had Lead Liaison. We sync our data with Microsoft Dynamics every five minutes. If a prospect has filled out a form or marketing has just updated your master list of key accounts (without telling you… again), we'll know about it and send that new information to Dynamics.

But it gets even cooler than that. We use the prospect's email address to crawl social media websites like LinkedIn and Twitter. We capture data like their company and job title, and we check back in with them from time to time. If we've noticed a change, we update it on their profile. And yes, that means it gets updated in Dynamics, too!

5. Better insight into marketing efforts.

Sales and marketing have a love-hate relationship in a lot of organizations. Sales depends on marketing for qualified leads, marketing depends on sales to close the leads. Sales feels like marketing wouldn't know what "qualified" was if a prospect came banging on the door begging for service, marketing feels like sales just cherry picks the easiest prospects and whines about the rest.

Let's take a step and look at the root cause: sales and marketing almost never talk to each other! Not so with Lead Liaison. You have an insight to the inbound and outbound marketing efforts your prospect has received. The data marketing collects is stored in their prospect profile, so you have just as much insight as your marketers.

This is embodied in two of our Lifecycle Stages: Marketing Qualified and Sales Qualified. This is a two-step process to allow both teams to equally vet new prospects. No more working separately; it's time for sales and marketing to both be a part of the funnel once and for all.

When that qualified account becomes an Opportunity, we'll pick that up from Dynamics and automatically move them to the Opportunity Lifecycle Stage. And on the wonderful day you get to click Closed-Won, we'll move them to the Customer Lifecycle stage. You've got your deal, and marketing can move on to generating new leads.

If Microsoft Dynamics and Lead Liaison are not a win-win for sales and marketing, then I really don't know what is. To learn more about Lead Liaison's marketing automation & Microsoft Dynamics integration, click here.