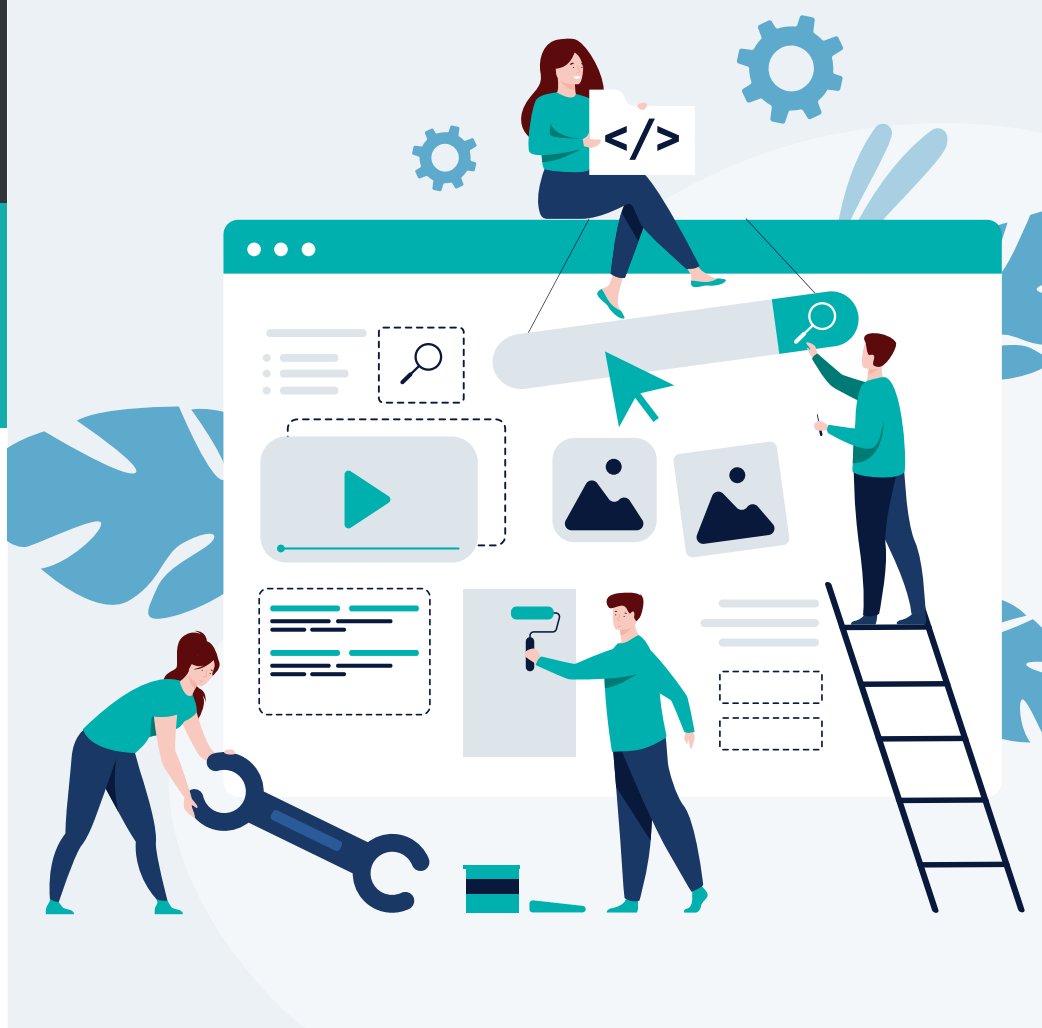


WHITE PAPER

PROMX



More than just newsletters:  
**Why you need a marketing  
automation tool**

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## Introduction

When leads are few and far between, existing customers are deserting and new customers are not exactly rolling in, you have ample reason to look at what is not working about your current marketing activities.

What could it be? Maybe your marketing campaigns are **not as effective** as they should be, but you can only guess about that because you do not possess the insights to assess their efficacy or to understand your audience in the first place. How are you supposed to know what to improve? Perhaps the issue also lies in the **collaboration between your marketing and sales departments**, or the lack thereof.

Whatever it is, it is a problem. And you probably have enough headaches to deal with: too few resources, too little time, too many tasks. There may even be some issues that you feel you do not have the power to influence, such as too **long sales cycles**.

## Marketing headaches

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not enough leads



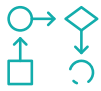
long sales cycles



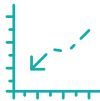
deserting  
customers



costs too high



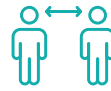
too many tasks



lack of insights



too few resources



insufficient  
collaboration  
w/ sales

To make your job as a marketing manager easier, you need your team's activities to be **customer focused, sales-oriented, and measurable**. Your goal is to realize effective campaigns to generate leads. You also want to be able to assess how well your activities worked.



## What you need is a marketing automation tool.

In this white paper we explain what exactly marketing automation is, how it will improve your work and introduce you to our recommended solution, Dynamics 365 Marketing.

## What does marketing automation mean?

Marketing automation is **more than merely automating your workflows**, even though – as the name suggests – this clearly is the point. However, if you just do what you are doing now but with the help of a fancy tool, the results will not be that different. **Nor does marketing automation mean mass marketing**, i. e. providing the same content to all the leads you have got, regardless of their engagement history, progression in the sales process, or preferences, and hoping some will bite.

Instead, if you decide to use a marketing automation tool, **you must also decide to do marketing in a new way.**

The secret of marketing automation is that it enables you to track contacts' engagement with your content (newsletter opens, link clicks, landing page visits etc.) and use that data to create personalized customer journeys. A marketing automation tool gives you full insights into how effective your content and journey are. You can then leverage this data to continually improve your activities.



### What marketing automation is

- a more efficient way of marketing
- a timesaver
- a cost reducer
- a way to get more relevant leads



### What marketing automation is not

- e-mail marketing only
- a substitute for a good strategy
- laziness
- a spam generator
- a one-size-fits-all solution
- a guaranteed success
- a CRM tool
- only for enterprise businesses

## Marketing Automation ≠ CRM

Implementing a marketing automation tool especially makes sense if you already have a CRM system in place.

Customer relationship management is not the same as marketing automation, however.

This is a good time to get our terms straight: **CRM stands for customer relationship management**. A CRM system provides an overview of leads, opportunities and customers and is mostly used by sales departments to automate tasks and synchronize data. However, it also allows different departments, such as service, marketing, controlling or management, to access aggregated data and use it operatively. A CRM system can, and often does, include some marketing functionality.

**Marketing automation** is focused on automating marketing tasks aimed at generating and nurturing leads. A marketing automation tool is used to run campaigns, create assets and manage leads.

However, there is some overlap between marketing automation and CRM, and the tools complement each other. Which is why many businesses use them in tandem. This allows users to get a 360° view of potential customers, from the contact stage to the purchase decision (and beyond).

**When combined with a CRM system, a marketing automation tool will help to improve collaboration between marketing and sales, generate more leads and close deals faster.**





## How marketing automation can improve collaboration between marketing and sales

Aligning marketing and sales is essential. It can lead to 36% higher customer retention rates and 38 % higher sales win rates. The first step in bringing sales and marketing activities closer together is to **simplify cooperation**. After all, digital transformation does not mean providing each department with digital tools but to digitally align processes across one's organization.

### Problem areas between sales and marketing



goal definition



lead scoring



resource allocation



data silos



different focuses



poor communication



redundant/duplicate interactions



unclear processes

### Results



lost leads



lost revenue



inefficiency



fewer opportunities



irrelevant content



blame game

## How to find the right marketing automation tool

A marketing automation tool may be a standalone solution or a module to be integrated with a CRM system.

When evaluating your options, you should **prioritize integration into your CRM** over the tool's features.

Then consider how easy to use the tool is, what its features are, and which integrations are necessary.

Finding the right solution depends on the type of your company (B2B or B2C) and the software you already have in place.

## What a marketing automation tool does

Marketing automation solutions usually include data integration, customer segmentation, campaign management and lead management (lead generation, scoring, nurturing and routing) functionality.

### These components enable marketers to

- send mailings
- generate and segment leads
- publish and disseminate content
- publish social media posts
- score leads
- increase customer loyalty



## Benefits of marketing automation

Marketing automation frees up time and resources and provides data that helps businesses better understand their customers and helps them realize more effective marketing campaigns.

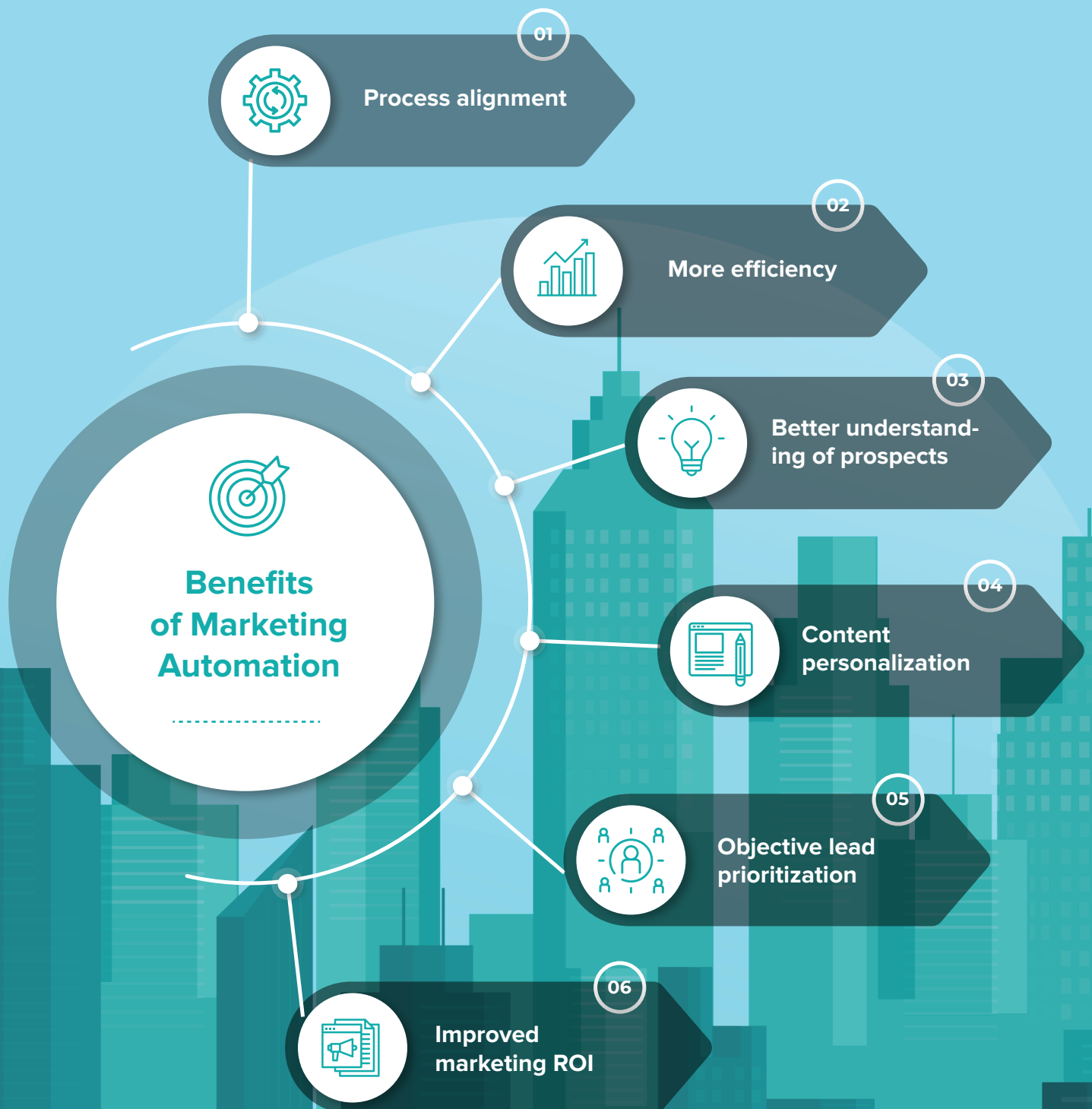
With marketing automation, you can **align your processes to your marketing strategy**. You have more time to conceive your campaigns, i.e. being creative and coming up with a good strategy, because you can set them up much more quickly.

**When lead prioritization is automated, for example, your sales teams can dedicate more time on nurturing promising leads.**

You get a clearer view of prospects by tracking their engagement with your content, messages, ads and e-mails. It lets you personalize follow-ups and prioritize leads according to objective KPIs rather than intuition.

**All of which means your marketing ROI will improve.**







## Why marketing automation is so important for B2B companies

During the non-working hours of their days, B2B buyers are also B2C buyers and as such are used to **sophisticated consumer interactions**. They should not be experiencing anything different in a professional capacity. In other words, what they are used to as private consumers, they expect as professional buyers.

**What if business-to-business marketers treated their potential buyers like their B2C peers do theirs?** Nurturing leads with personalized relevant content along a customer journey until they are ready to purchase.

While B2C marketers seem to have such an easy time selling soft drinks, consumer electronics or sneakers, in B2B industries purchase decision are often a long time in the making. Corporate structure, product complexity and the large investment required all factor into the purchase decision as does customer experience. Every touchpoint matters. **An exceptional, personalized customer journey is key.**

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And while B2B companies may think themselves customer-centric, quite often they actually are account focused. What should be a customer journey is still frequently treated merely as customer relationship management.

Therefore, B2B buyers receive largely impersonal content, and experience inconsistent and conflicting interactions that do not meet them where they are in the sales process.

#### **What B2B buyers want**

- ✓ relevant content
- ✓ personalized messages
- ✓ an exceptional customer experience

#### **What B2B buyers often get**

- ✗ inconsistent and conflicting interactions
- ✗ bulk e-mails
- ✗ impersonal messages

Marketing automation can have enormous benefits for B2B companies, particularly because their sales cycles are long and decision making is complex. To convert leads into customers requires a lot of interactions and more lead nurturing than in B2C marketing. Providing relevant content at strategic decision points during the research and consideration phase and analyzing the prospect's engagement with it, allows marketing to generate data that can be analyzed and used for strategic action.

## How to make marketing automation a success

For your marketing automation to be successful, a few basics need to be in place.



## Our recommended solution: Dynamics 365 Marketing

Let us now look at a specific marketing automation tool.

As a Microsoft Partner, proMX recommends Microsoft Dynamics 365 Marketing to our customers, particularly if they already use Dynamics 365 Sales.

Dynamics 365 Marketing is part of Microsoft's suite of cloud business apps. It can be **used as a stand-alone solution or combined with other Dynamics modules**, most usefully the sales automation app. Since Marketing and Sales are based on the same platform (as are all other Dynamics 365 apps), they share records and thus make alignment between the two departments easier (more on that below).

For companies that already use the Dynamics sales app and are looking to automate their marketing activities, Marketing is an obvious choice. They will not face any disruptions of media and can align sales and marketing easily with shared records.



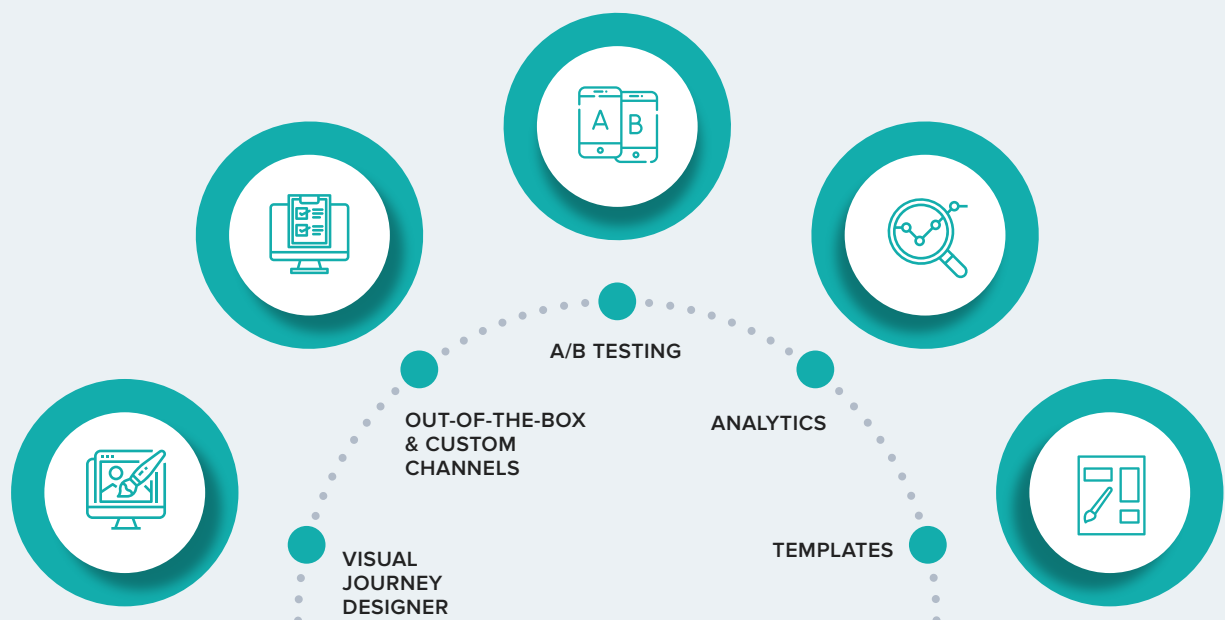
As with all Dynamics 365 modules, Marketing can be personalized and extended easily with third-party apps and services. And of course, it has built-in privacy features to ensure GDPR compliance.



Dynamics 365 Marketing has been named a 2020 Customers' Choice for CRM Lead Management by Gartner Peer Insights and has also been recognized by Constellation Research as one of seven Enterprise B2B Marketing Automation solutions to know.

The app supports automated, multi-step, multi-channel customer journeys during which each (potential) customer travels down a customized path according to their engagement with a business's content (e-mail messages, landing pages and so on).

## What makes **customer journeys** in **Dynamics 365 Marketing** great?



Microsoft calls Dynamics 365 marketing “a marketing-automation application that helps turn prospects into business relationships”. **Its features include:**

- e-mails and landing pages creation with customizable templates and drag & drop design tools
- interactive personalized multichannel customer journeys design for lead nurturing
- LinkedIn lead tools
- surveys to gather customer feedback
- event marketing with online event websites for information and registration, and Microsoft Teams
- insights, dashboards, reports to track performance and ROI
- lead prioritization with automated lead-scoring rules and routing to a salesperson for follow-up

Included is a bundle of apps and solutions to support marketing activities and coordination with sales teams:

- core marketing (e-mail marketing, customer journeys, behavior tracking, lead scoring, marketing pages etc.)
- event management (in-person events or webinars, online portal to review schedule and speakers, and to register)
- Customer Voice: (online surveys, analyze results)
- Dynamics 365 Connector for LinkedIn Lead Gen Forms (import leads generated with LinkedIn’s lead tools)
- Dynamics 365 Portals (optional; to publish event website, marketing pages, and online surveys; if not used publish on website or CMS instead)



# How to get started with Dynamics 365 Marketing

## Aligning Marketing and Sales

Since the collaboration between a business's sales and marketing departments are both an important factor for success and a frequent problem area, it makes sense to get started by aligning your processes with the help of the Dynamics 365 platform. Integrating Dynamics 365 Marketing with Dynamics 365 Sales provides both departments with a single customer record, eliminating customer data silos and distinct goals and processes of each department.

Before software can be of use here, both departments need to first **ensure they are targeting the right audience and develop a shared understanding of desirable leads**. To do so, sales can share its experience of the market with marketing, which will enable it to target potential customers more precisely. Marketing on the other hand can contribute its knowledge of buyers' behavior.



Secondly, you need to work out which maturity a lead should have to progress to sales. A jointly developed **lead scoring model** is needed. Demographics, firmographics, activities, actions can play into the score. This way marketing has objective handoff criteria and sales benefits from an ongoing, reliable pipeline of highly qualified leads.

Using the Dynamics 365 platform, both teams now access one version of the truth, they have the same set of contacts, they can implement the agreed upon lead-scoring model and can both access a full record of a contact's interactions. When marketing hands off a lead to sales, the latter knows the prospect's history and can communicate more effectively with it. Salespersons can now focus on closing deals based on their understanding of both the market and the potential customers – what they are looking for and where they are in the sales process. Since sales and marketing functions connect across apps, this helps set up automated follow-up sales activities.

To continually increase the success of your marketing and sales activities, sales should feed back insights from its dealings with contacts and customers to marketing. This lets you improve future campaigns and targeting.

**In short: With Dynamics 365 Marketing and Sales in place, your company benefits from both departments data and insights leading to a consistent, seamless customer experience, lower customer acquisition costs and less overhead costs.**



## Orchestrating a Customer Journey

On average, seven touchpoints with a company are required before a contact makes a buying decision. A customer journey helps you run targeted multi-channel marketing campaigns that uses prospects' buying behavior to provide the right content at the right time. With a strong, personalized buyer pipeline that is tailored to your products or services as well as sales objectives the success rate of your marketing activities improves.

Dynamics 365 Marketing simplifies this process with a graphical and intuitive drag & drop journey modeler. Users simply move journey elements, so-called tiles, from the right side of the screen into a canvas area.

Each tile represents one step in the customer journey:

- **Content:** marketing e-mail message, marketing page, event, survey, marketing form
- **Actions:** activity, launch workflow, create lead, LinkedIn campaign
- **Target:** segment, record updated
- **Flow Control:** scheduler, trigger, splitter, splitter branch

Dynamics 365 Marketing lets users send personalized e-mails, generate follow-up activities, launch workflows, update records and much more. It enables marketing teams to track both the customer journey as a whole and its individual elements.

The app includes a library of templates for different types of campaigns. Each includes a preconfigured pipeline and certain settings that reflect the form and logic of the campaign. However, the various tiles must be configured individually, e.g. the content of an e-mail message.

Here are a few tips to get you started in automating your marketing activities:

### After sales marketing:

Winning new customers is an important goal but keeping those customers loyal is another. Don't abandon people after a purchase. Send them personalized follow-up e-mails recommending similar products or informing them of interesting news.

### Workflows:

You will be thankful for the effort taken off of you by workflows. Still you need to be on top of them. Analyze them regularly (maybe at the same time as you update your database) to make sure they are bringing the desired results. If not adapt them to achieve the results you want.

### E-mail marketing:

When users sign up for your newsletter, download premium content, welcome them. This means sending personalized lead nurturing e-mails with important information.

### Databases:

Keep your database up to date! Make sure to delete obsolete contacts and update important data. This way you avoid sending e-mails that do not reach their customers and unnecessary cost (many marketing automation tools charge for the number of e-mails sent). It will also help you stay on top of your contacts.



## Mistakes to Avoid

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To ensure that your marketing automation will be successful, you need to not only find the right tool for your business but make sure it is set up for success. Don't do the following:

### **1. Don't personalize your content**

Workflows will help you communicate more personalized with workflows. However, a good chunk of the work is left up to you. You will have to have the right strategy and build the best customer journey. Leads must not suspect that communication is automated.

### **2. Treat every user like a lead**

Your goal must not be to generate as many leads as possible but to generate those that are actually relevant to your business. Marketing automation helps you differentiate between qualified and unqualified leads. This way you avoid wasting resources on leads that will never become customers.

### **3. Focus on e-mails only**

You have more than one channel available to you.

### **4. Don't measure your results**

Marketing automation is not just about the automation. This will only save you time, but it does not mean that you will be more successful. For that you need a strategy and you need to make adjustments. Therefore, make you use of the insights your marketing automation tool provides. Take the time to determine KPIs beforehand, analyze them regularly and react accordingly so as to not waste potential.

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## 5. Over-automate

Your marketing automation tool is a shiny new toy that you want to play with. However, if you overdo it – too many mailings, ceaseless tweeting-, your contacts will run away scared. Which is to say they may react negatively, i.e. unsubscribe from your newsletter, unfollow you. That does not mean that you may still win them as customers. However, you will have less control over influencing their decision making.

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## 6. Do too much at once

You will probably be tempted to use all the amazing features and possibilities your tool allows has to offer. However, if you get bogged down trying to master too many things at once, few if any will work out in the end. Therefore, focus on what most made you acquire the tool in the first point. Start off by improving your biggest pain point, achieve that goal, then consider what will be the next logical step.

06



# We offer a helping hand in your digital transformation

The ideal digital transformation partner is not only an expert in theory and technology but also in its customer's industry. Our consultants are familiar with the processes, priorities and challenges of different sectors. Contact us!

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