

Marketing Automation for Dynamics CRM

September 13, 2011



RSM McGladrey, Inc.

Welcome!

Important Web Seminar Notes

- We have automatically muted the line. During the presentation, all participants will be in listen-only mode
- Please turn off all webcams
- There will be a live question-and-answer session at the end of the call (if time permits)
- Submit questions via the Q&A feature. Simply select the Q&A window, type your question into the dialog box, and click the “Ask” button
- The slides and recording of this call will be sent to attendees for today’s program
- Having technical difficulties?
 - Call 800.374.1852 or email pfs@intercall.com

Today's Presenters



Mike Nafziger

Managing Director, IT Services

612.376.9249

michael.nafziger@mcgladrey.com

A managing director, Mike has more than 23 years of experience in the information technology field and is based in the Minneapolis office. Mike is responsible for our CRM practice in our West Region and works closely with our other CRM Practices.

Scott Anderson

CoreMotives

Scott.Anderson@coreotives.com

Scott Anderson is an Account Manager for CoreMotives and helps support McGladrey, and our clients, evaluate how CoreMotives can work as a Marketing Automation Platform.

CRM 2011 Marketing Enhancements

- Dynamic Marketing Lists
- Conditional Formatting
- Excel re-import
- Connections
- Outlook Social Connector
- Dashboards and visualizations
- Contextual document management

The screenshot displays the Microsoft Outlook CRM 2011 interface. The main window shows a table of 'My Open Opportunities' with columns for Topic, Potential Customer, Est. Close Date, and Est. Revenue. The table contains several rows of data, including 'Variety Store (sample)', 'Northwind Traders', 'Litware Inc. (sample)', 'Elemental Goods (sample)', 'Best o' Things (sample)', 'Blue Company (sample)', and 'Basic Company (sample)'. A 'Sales Pipeline' chart is visible on the right, showing a funnel with segments for '1-Prospect' and '2-Quality'. The interface also includes a navigation pane on the left with categories like Marketing, Sales, and Mail, and a ribbon at the top with tabs for File, Opportunities, View, Design, Create Related, and Customize.

Topic	Potential Customer	Est. Close Date	Est. Revenue
Will expand their off...	Variety Store (sample)	Sat 9/18/2010 9:4...	\$150,000.00
Interested in Product B (SK...	Northwind Traders	Fri 10/29/2010 12:00 A...	\$125,000.00
Will be ordering abo...	Litware Inc. (sample)	Sat 3/5/2011 9:43...	\$25,000.00
Very likely will order 10 ...	Elemental Goods (sample)	Tue 1/4/2011 9:43 ...	\$30,000.00
Will order some items soo...	Variety Store (sample)	Sun 9/13/2010 9:43 PM	\$30,000.00
Needs to restock their s...	Best o' Things (sample)	Thu 12/2/2010 9:43...	\$25,000.00
They sell many of the...	Blue Company (samp...	Mon 2/7/2011 9:4...	\$26,000.00
6 orders of Product 5...	Basic Company (sam...	Mon 10/4/2010 9:...	\$10,000.00

What does Microsoft CRM do out of the box?

- Email campaigns sent from Outlook
- Good for small number of emails that are extremely targeted
- Creation and management of marketing lists
- Campaign Management
 - Track costs
 - Track activities
 - Discover ROI
- Marketing capability is limited!

You need your CRM application to...

- ✓ Help you identify your BEST opportunities
- ✓ Understand how your prospects interact with you
- ✓ Take action on your most likely prospects
- ✓ Integrate your customer and prospect interactions into one application
- ✓ Provide ONE tool for marketing and sales

What features should you expect with Marketing automation software?

- Email creation and formatting
- Bulk email marketing
- Email responses
 - Response History
 - Web Activity
 - Form Responses
- Lead Capture
- Lead Scoring and Routing
- Marketing Analytics
- Web Form Integration / Creation
- Surveys
- Lead Nurturing Functions
- Website Tracking

Some Popular Options

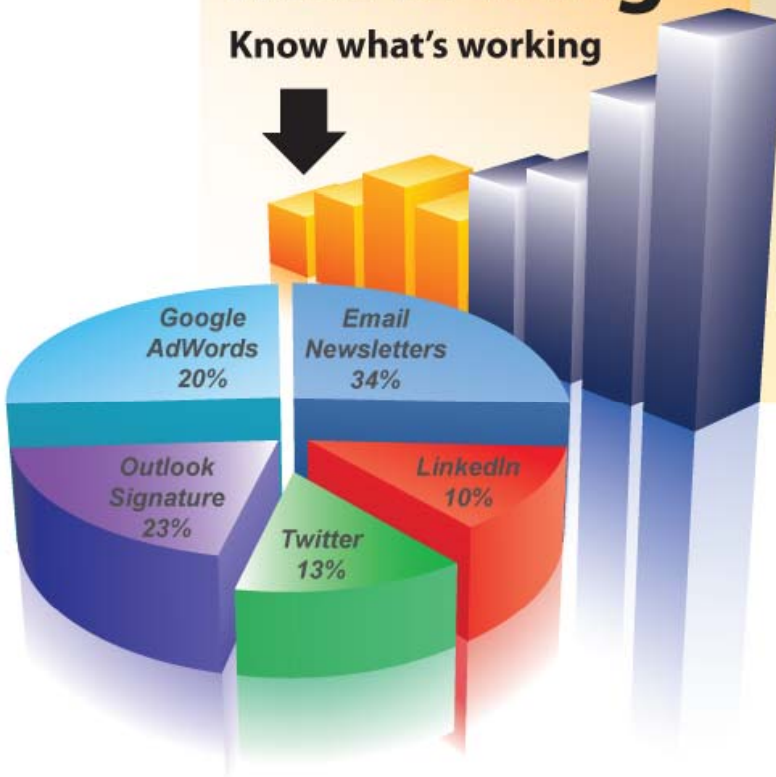
- CoreMotives – www.coremotives.com
- SalesFUSION – www.salesfusion.com
- Exact Target – www.exacttarget.com

- Pricing
 - Typically based upon number of messages sent per month
 - Some have user based pricing
 - Might pay for additional modules

Core Motives

Marketing

Know what's working



Sales

Know who to contact

Name	Company Name	Business Phone
Randy Hughes	Sawgrass Technologies	(843) 884-1575
Dan Rivera	New Vision Sales Inc.	(866) 532-2827
Michelle Johnston	City of Fontana Technology Services	(909) 350-6759
David Carr	Carr Communications Inc.	(954) 757-5827
Barbara Dennis	Colorado State University	(970) 491-5024
Guy Malherbe	ELCA	+ 41 21 613 21 11
Darryl Nitke	Interdyn AKA	+1 (212) 560-5441



Email Marketing



Notification Alerts



Web Intelligence



Landing Pages



Web Forms



Lead Scoring



Things to Consider

- How many emails will you send a month?
- What types of marketing tactics or customer relationship tactics do you use?
- What are your current nurture processes?
- How do you acquire and respond to prospects?
- What types of marketing analytics do you require?
- Do you need web form creation/integration?

Questions?

Schedule a meeting with your McGladrey CRM Consultant to learn what marketing options are best for you!

Mike Nafziger

612.376.9249

michael.nafziger@mcgladrey.com



facebook.com/McGladreyTBS



twitter.com/McGladreyTech
twitter.com/McGladreyCRM