



Closing the Loop:

# **Integrate Marketing Automation, Lead Management and CRM**

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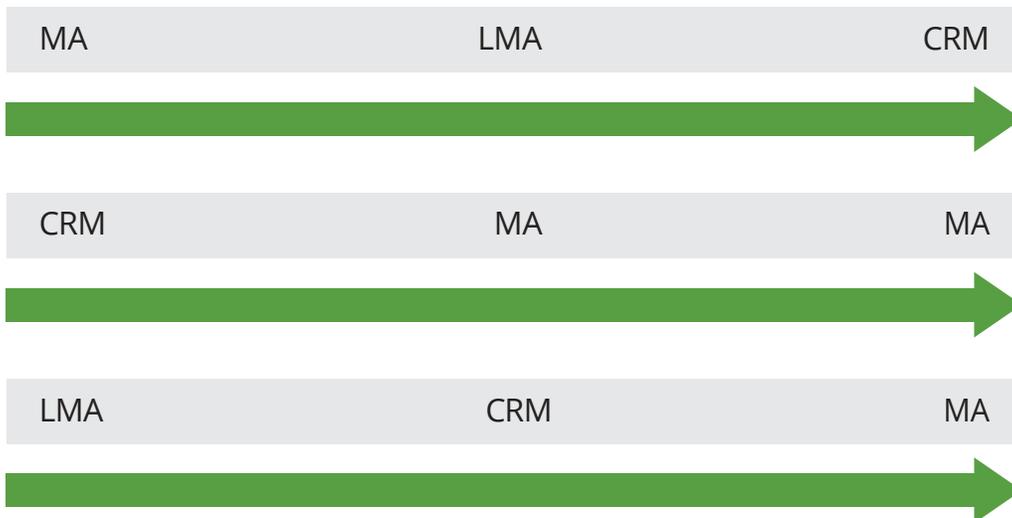
# Closing the Loop: Integrate Marketing Automation, Lead Management and CRM



## Circular thinking for marketers

As marketers, we need to deliver leads to hungry sales teams and we have an array of software tools to help us. Whether in an SMB or mid and large enterprises, we are likely to use some combination of Marketing Automation (MA), Lead Management Automation (LMA) and Customer Relationship Management (CRM) tools.

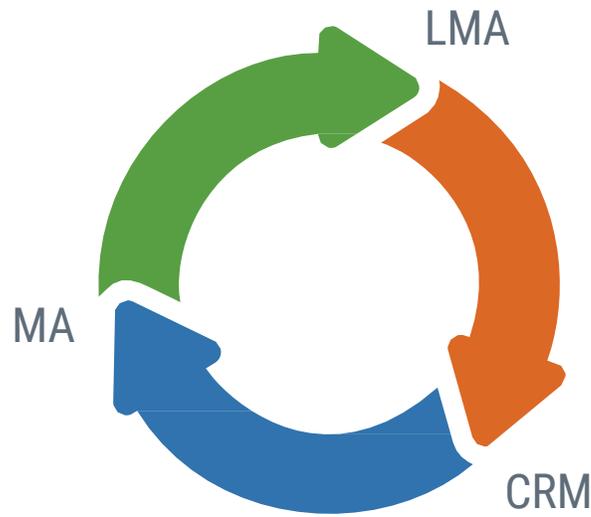
**In any scheme to logically link MA, LMA and CRM in a linear fashion, there are three possible variations:**



Frequently, the variation an organization uses is determined by which one of the three software technologies the business first acquired.

However, we need our systems to be able to adopt the logical flow of all three of these variations at once. This is because new data may be introduced to our systems through any one of the three, and it is produced dynamically, in real-time, and needs to be rapidly assimilated, processed and applied.

So the best way to link MA, LMA and CRM (or indeed CRM, MA and LMA; or LMA, CRM ad MA!) is to design our scheme like this:



Quantum physics majors who dropped out and opted for more challenging careers in marketing (!) may recognize that this is a lot like some of the theories about time. In one version, time is a railroad track that goes to the future in one direction and the past in the other. There's also the idea that time loops back and goes around on itself. If you didn't major in quantum physics then you probably just learned something!

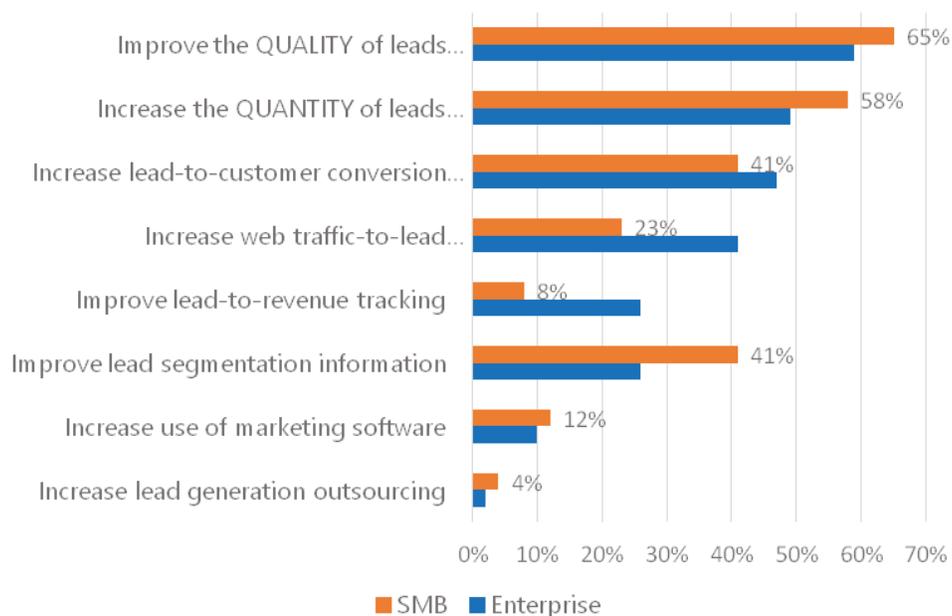


When properly looped, data on suspects, prospects and customers enters the system through any of the data acquisition points and is processed in the most efficient and effective manner.

In this guide we'll discuss how properly looping MA, LMA and CRM, transforms the process letting marketers drastically uplift three key marketing metrics:

## QUALITY ◀ CONVERSION ◀ QUANTITY

### What are the most important objectives for your



**Situation:** *Where is your organization now?*

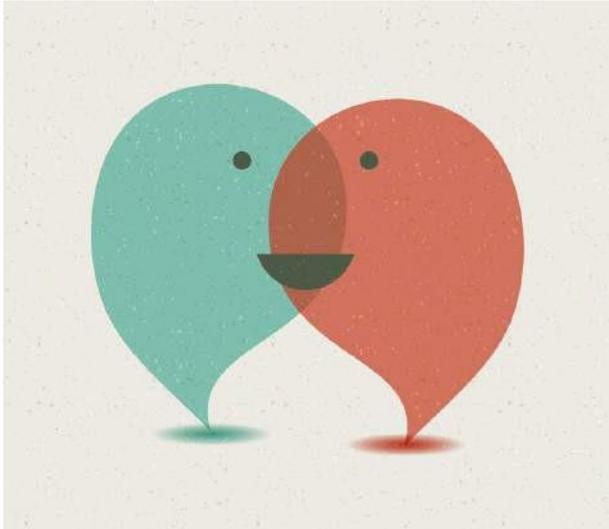
Anything sound familiar?

There are a number of markers attached to a company that is considering how best to develop its strategies for integrating sales and marketing. Although the details may vary, the process of managing leads through to conversion is a universal concept.

It is difficult to imagine a company that does not have some form of CRM; even if it is a custom database built on linked spread sheets; however, most will have a popular CRM and other marketing tools of some description in place.

# Some typical characteristics include:

Some may have silos where separate systems are not integrated or data exchange is a manual process



Some may have, outdated, 'legacy' systems it knows it needs to replace



Some may feel manual processes or using multiple software systems with manual data exchange requirements are holding it back



Generally, all want more effective way to link and manage inbound leads and outbound lead generation activity



# Preserving investment

Many companies have considerable investment rolled up in existing software. In such cases there is often a wish to avoid junking existing systems. Sometimes it's not about system costs. There can be data considerations too. Proprietary formats may tie you in, however, making a clean break with the 'old ways' can be a good decision because it means you have a great opportunity to clean up and de-dupe your data.

If you are an organization with three existing solutions that are not integrated, it is likely

you have three different datasets that are not synced. This in itself is a source of inefficiency that wastes time and may cause confusion and slow up processes. Whether you were considering integrating CRM, MA and LMA or not, cleaning and de-duping would be a good idea, but who has the time? The process of integration simply provides the window of opportunity to start afresh with a cleaned up single information store where data quality is known to be good.

## Circular thinking for marketers

### Defining a good solution

When we are talking about a good solution, there are a few strands to consider:

- **The quality of the software**
  - This includes objective performance factors such as stability and reliability and these might be expressed collectively as 'availability'
  - 'Quality' also includes subjective performance factors such as features and ease of use, which may be described as a combination of design, layout and intuitiveness, or collectively as 'User Experience' (UX)
- **The customer service capabilities of the solution provider**
  - A good solution provider is essential if you want a solution that gets your organization to where you want to be while preserving your investment in existing systems
  - There is a significant requirement for a solution provider to be able to deliver the key phases that define an integration project:
    - Pre-sales consultancy – understanding the needs of your company
    - Integration services – the technical capability to integrate systems
    - Post-sales support – ongoing support to ensure the system delivers ROI
- **Leveraging cloud technology**
  - One of the key benefits of online, cloud-based SaaS systems includes reducing long term costs by following a subscription business model. It is likely a good solution provider will deliver the advantages of cloud technology while understanding how to integrate existing or legacy on-premise applications



## Inbound marketing channels

Any solution needs to be able to bring together leads originating from multiple inbound channels. This gives you a single view of all your leads in one place as well as contributing to a better single view of individual suspects, prospects and customers.

Inquiries from company website form responses/email and email marketing are the two most widely used forms of lead gen; this should be no surprise as they are also the most effective lead gen methods!

- **Any solution needs to be able to integrate leads from web forms and email with other channels including:**
  - Third-party lead sources
  - Telephone inquiries to call centers
  - Data captured at tradeshow, conferences & seminars
  - Direct mail response data
  - Telemarketing responses
  - Social media interest - LinkedIn, Twitter, Facebook, Pinterest, blogs

# Mobile enablement

U.S. Bureau of Labor Statistics (bls.gov) projections suggest that in total, by 2020, there will be in the region of 15.4m sales representatives, approximately 28% inside sales and 72% outside sales. Any solution needs to be optimized to meet the needs of these two different types of sales operations.

It is no good providing outside sales with the same data in the same way as you do to inside sales. Any system for delivering leads to field based sales people has to be fully mobile-enabled, to deliver the intelligence sales people on the move need to be able to respond quickly.

- **Outside sales data needs to be:**
  - Presented so it is optimized for mobile sales
  - Present data and features in the most appropriate way for mobile device users

## Convergence

Progressive vendors are continually seeking to offer improved solutions by extending the capability of their LMA platforms. Features such as managing the prospect data to execute automated email marketing and direct mail (DM) campaigns with template-based production of popular DM formats is converging LMA with MA. This offers some significant advantages when compared to integrating three separate software tools together

- **A converged LMA and MA platform:**
  - Consolidates and rationalizes by eliminating the need for separate vendors for LMA and MA
  - Simplifies integration because only integration with the CRM tool is required
  - Can be deployed faster because less integration work is required

# Transforming Quality, Conversion, Quantity

## Improved key metric: **QUALITY**

When we talk about 'lead quality', increasing the quality of leads may be defined as fielding leads faster to reduce contact time, augmenting lead data by applying scoring rules, and providing detailed analytics and reporting.

- **Looping CRM, MA and LMA software systems in an optimized way improves the ability to create better quality leads by:**
  - Automating lead scoring
  - Producing contact times as low as 2.5 minutes
  - Delivering analytics to help improve process

## Improved key metric: **CONVERSION**

Better quality leads that are appropriately and rapidly scored improve conversion rates.

- **Looping CRM, MA and LMA software systems in an optimized way, allows lead conversion best practice to drive the process of turning leads into orders:**
  - Delivering leads to the right sales people first time
  - Ensuring nurturing activity is structured
  - Automating the process of calling leads the optimal amount of times

## Improved key metric: **QUANTITY**

The increased quantity of conversions demonstrates higher efficiency. Consequentially this is reflected in key consequential sales and marketing analytics.

### This includes:

- Reduced Cost per Lead
- Increased lead value
- Increased agent productivity
- Increased revenue
- Greater ROI

## Closing the Loop with ClickPoint

ClickPoint Software offers automated Lead Distribution, Marketing Automation, and Lead Management solutions for leads acquired across multiple channels.

Our solutions provide value, helping our customers to generate more ROI from marketing by:



Enabling sales teams to close



Maximizing lead value by capturing,

Call us today on 1 (866) 372-9431 or come visit [www.clickpointsoftware.com](http://www.clickpointsoftware.com) to find out more about how we are able to help you.

# About ClickPoint Software

Founded in 2007 and located in Scottsdale, Arizona, ClickPoint serves both Fortune 500 companies and small businesses. ClickPoint was born out of a desire to help companies improve the complex process of lead management automation. ClickPoint gives marketing and sales teams an edge by improving lead quality and increasing sales, resulting in higher revenue from leads.

