

# 7 STEPS TO HEAVEN

## MARKETING AUTOMATION WITH A CRM SYSTEM

Want an easier working day? Better sharing of information, better customer experience management and fewer manual tasks? Leading marketing and advertising agencies are discovering that marketing automation is giving them the power to outflank their competition.

Operations Director at  
EST Marketing,  
Michael Starnes, said:

“Workbooks has already helped us improve the way in which we manage our prospects and sales pipeline. We have seen a noticeable difference in our productivity levels and in how we prioritise our days. We are touching clients we might not have touched before; and more importantly, we are touching them at the relevant stage of the sales cycle – with relevant information. This has directly resulted in more work.”

Here are the steps you can take to automate your marketing, improving your customer service and your profits in the process...



### STEP 1 Automate (or offload) data cleansing and updating

- > Use CRM automated de-duplication tools to clean up customer records with minimal fuss
- > Customers can update their own information via your website, giving them greater control over their preferences

“By 2020, customers will manage 85% of their relationships without talking to a human.”

Gartner Research

### STEP 2 Aggregate all of your customer data into one repository for ease of use and better analytical options



“With a conflux of databases storing information on a single customer, organizations seeking to provide a universal view of customer information, and therefore a more complete service experience for the end customer, must deploy knowledge-powered central databases that can store and automatically present all important and relevant data for a customer.”

Brian Kelly, destinationcrm.com writer

- > Pull together your existing databases, spreadsheets, documents and even your existing marketing automation platform data into a single CRM system
- > Reduce the time taken to retrieve information and carry out analysis



### STEP 3 Generate a complete picture of every contact for better lead nurturing and targeted customer communications

- > Track previous purchases for every customer
- > Track customers who have stopped spending money with you
- > Gain a total overview of client likes and dislikes
- > Target communications and offers accurately based on these preferences

“Nurtured leads make 47% larger purchases than non-nurtured leads.”

The Annuitas Group

### STEP 4 Use analytical tools to automatically segment members based on interests for marketing efforts



“Highly relevant email messages can generate nine times improvement in revenue and 32 times more improvement in net profit over non-segmented broadcast campaigns.”

JupiterResearch

- > Gather clients into target groups based on any metric of your choice; location, purchase history or gender, for instance
- > Track the effectiveness of each message to see what does and doesn't work, helping to tune future marketing efforts
- > Link your existing marketing automation platform, or use the included Workbooks tools according to your own preferences



### STEP 5 Move customers through the sales pipeline

- > Know exactly where each customer is in the buying cycle at a glance
- > Find out where the lead came from in the first place
- > Use that data to provide the right information automatically to move them towards the final sale
- > Send automated emails triggered by each move along the pipeline to keep the sales process moving

“Event-triggered marketing can potentially save 80% of your direct mail budget.”

Gartner Research

### STEP 6 Automate email and mass mailings to keep existing customers “warm”



“A 5% increase in customer loyalty can produce profit increases from 25% to 85%.”

Frederick F Reichheld and W. Earl Sasser, Harvard Business Review

- > Automate offers for customers based on their preferences and to keep them engaged
- > Use analytics like wish lists and abandoned shopping carts to re-engage with customers
- > Boost loyalty with ongoing, targeted messages sent direct from Workbooks or through a third party system



### STEP 7: HEAVEN Increase company revenue

- > Put it all together to improve your turnover and profit
- > Improve customer service and satisfaction
- > Keep your customers coming back for more

“CMOs who invest in marketing performance management will drive at least a 15% increase in revenue for the company.”

Gartner Research

### TO DO LIST

- 🔧 Automate data cleansing and updating
- 📁 Keep all your customer data in one place
- 💻 Keep detailed information about customer behaviour
- 📧 Use segmentation for marketing efforts
- 👤 Track your customers as they move through the sales pipeline
- 🔧 Automate emails
- 📈 Increase your revenue as a result!

Download our **SHARED SUCCESS PROGRAM EGUIDE** to discover how we can guarantee a successful CRM implementation in your business.

Download Free eGuide Now!

