

Why Companies with High Revenue Growth Have Successful CRM and MA

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OUR SPEAKERS



**Mustafa Attar - Founder and CEO
AKSURE**

Mustafa has over 17 years managing, developing and implementing innovative, cost-effective and practical business solutions including Online Technology Management, Customer Experience Management, Strategic Planning and Project Delivery. He has successfully negotiated and managed multi-million dollar contracts.



**Gayle Kosokowsky - General Manager
THE MEZZANINE GROUP**

Gayle has 20 years' experience in B2B marketing, lead generation, business development, consulting, training, CRM and Marketing Automation implementations. Gayle understands how sales and marketing work together to drive results.

WHAT WE'LL DISCUSS

1 Who we are.

2 What are CRM and MA?

3 Why are CRM and MA important?

4 What to look for in a CRM and MA platform.

5 Tips for Purchasing and Implementation.

6 Get Started!



POLL: • What percentage of companies have implemented marketing automation?



“How you gather, manage and use information will determine whether you win or lose.”

-Bill Gates



Did you know?

People often get CRM and MA confused, but **CRM** is primarily a **sales tool** and **MA** is a **marketing tool**.

What is CRM?

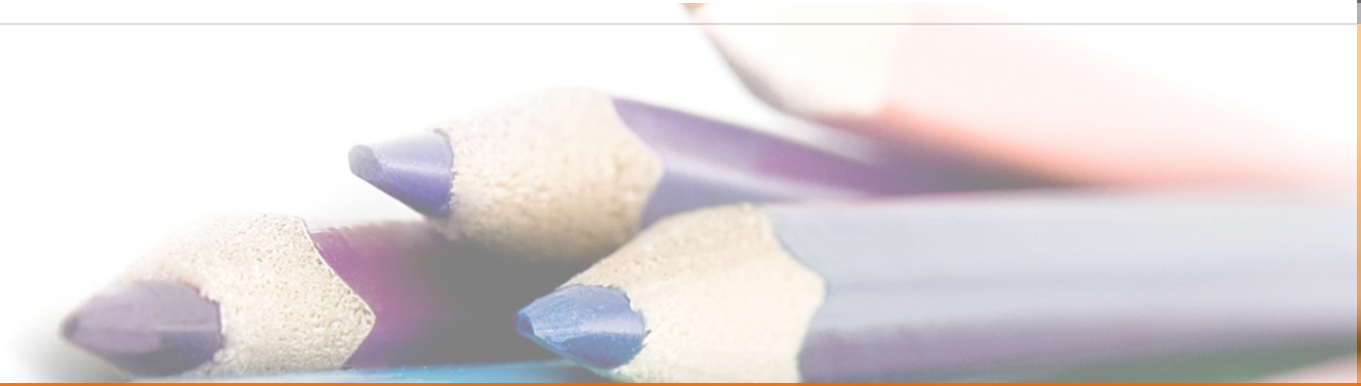
Definition:

CRM (Customer Relationship Management) covers all aspects customer, vendor and partner interactions, whether sales or service related. It refers to business practices, strategies and technologies that companies use to track, manage and analyze interactions throughout the customer lifecycle. Information tracked in a CRM includes contacts, clients, contract wins, sales leads and more.

Why CRM?

CRM is a sales tool that can:

- Help manage, nurture and improve relationships with existing customers
- Attract new customers and uncover new opportunities
- Help businesses sell more effectively
- Deliver actionable data throughout the customer lifecycle
- Organize and maintain contact information and manage communications
- Analyze customers, vendors and partners
- Increase sales and maximize profits



FACT:

Effective sales organizations are 81% more likely to be practicing consistent usage of a CRM.



What is MA?

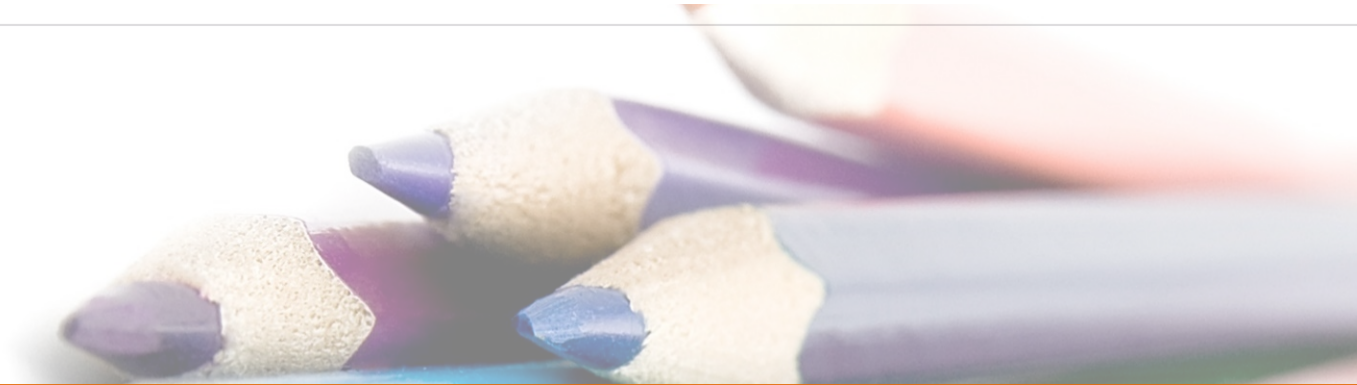
Definition:

MA (Marketing Automation) is technology that helps companies automate marketing across multiple channels, including email, social media and websites. It helps companies streamline, optimize and measure repetitive marketing tasks and workflows, so they can spend more time on analyzing and personalizing messages to better connect with their audience.

Why MA?

MA is a marketing tool that can:

- Help manage campaigns
- Measure campaign performance and generate reports
- Lead score, nurture and generate more qualified leads
- Simplify lead and market segmentation
- Increase overall marketing efficiency
- Quantify and deliver marketing ROI
- Grow revenue faster



FACT: 84% of marketers describe their MA strategy as somewhat or very successful.



CRM and MA: Where Sales and Marketing Intersect

CRM & MA ARE COMPLIMENTARY

Marketing automation is integrated with CRM. There is a bi-directional syncing of data that helps generate quality leads that convert to increased revenue through a process of:

- Generating new lead opportunities;
- Nurturing and upselling existing customers;
- Scoring and nurturing leads through the funnel; and
- Alerting sales when prospects are primed and ready to buy.

Sales and marketing can also see the activity and content areas prospects have engaged with, in order to create more personalized conversations.

What to Look for in a CRM Platform

- Simple to use, intuitive
- Scalable cloud-based system
- Easily integrated with other systems
- Real-time and predictive analytics
- Self-serve capability
- Context mining of voice and text
- Social media engagement and messaging
- Connection to the Internet of Things (IoT)
- Automation of engagement using artificial intelligence (bots, virtual agents)
- Digital workflow/business process management support
- Clearly defined support and maintenance structure
- Training manuals and structured training sessions for various levels of staff
- Clear roadmap for future updates and development
- Allow for future modifications and integrations without relying on a single company or team
- Work with client's hosting infrastructure, or can justify independent hosting



FACT:

A CRM can help increase sales by up to 29%, sales productivity by up to 34% and forecast accuracy by 42%.



What to Look for in an MA Platform

- User friendly
- Able to integrate into CRM system
- Able to integrate disparate marketing technologies (social media, blogs, website) into one platform with dashboards
- Lead nurturing programs
- Campaign management and performance measurement and reporting
- Intuitive workflows
- Email delivery
- Templates for emails, newsletters, landing pages
- Compliance accountability
- Services to help with implementation
- Good technical support and maintenance structure
- Clear roadmap for future updates and development
- Allow for future modifications and integrations without relying on a single company or team



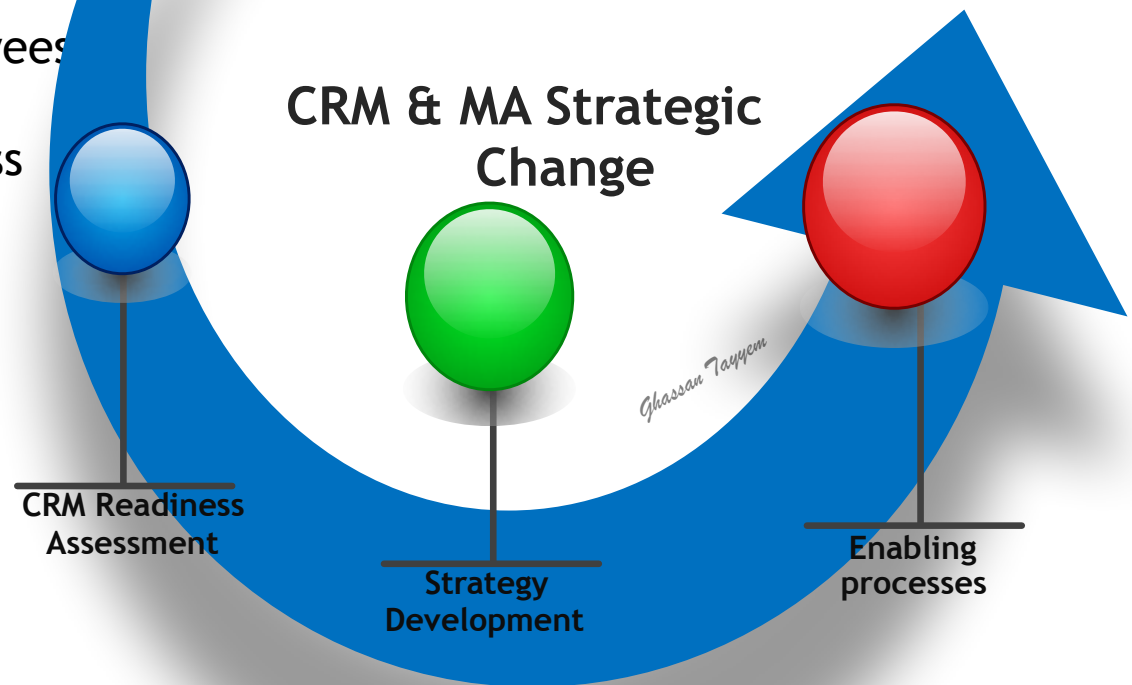
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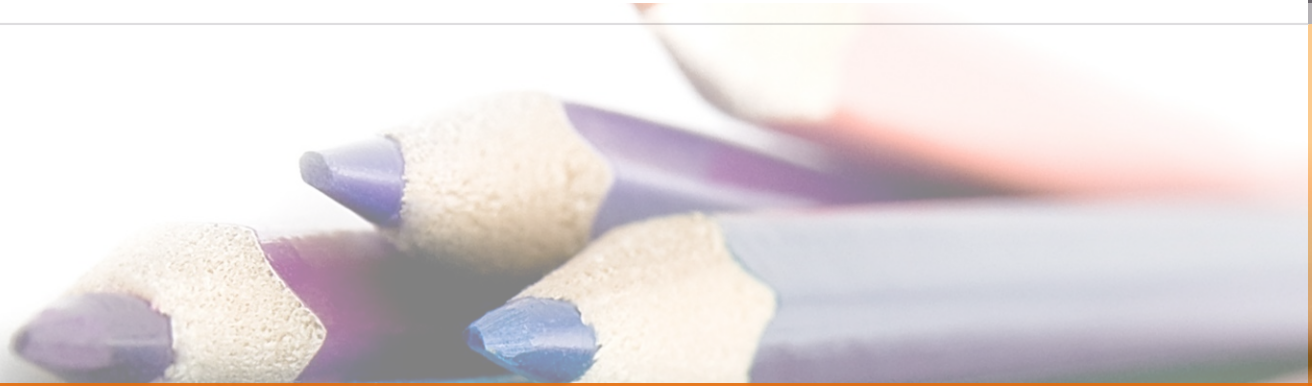
91% of the most successful users agree that MA is ‘very important’ to the overall success of their marketing across channels.

Get Started!

As with any change process, clients should work with a consultant and other experts to perform the following phases:

- Readiness & Needs Assessment
 - Identify gaps in resource availability, qualifications and skills
 - Identify gaps in processes and create new processes as needed
 - Identify weaknesses in existing technologies and infrastructure then initiate fixing plan
- Strategy Development
 - Set an objective
 - Prioritize your customers
 - Communicate with your employees
 - Stagger your changes
 - Set your lead generation process
 - Sync everything to your CRM
 - Evaluate and improve
- Enabling CRM and MA
 - Software evaluation





POLL: What is the average return on investment from a CRM implementation?



Common Pitfalls to Avoid.

DON'T MAKE THE FOLLOWING COMMON ERRORS:

- Neglect to do a needs assessment
- Fail to consider integration into systems - map it out in advance!
- Buy too large
- Fail to consider the amount of customization required
- Have no plan to keep the data clean
- Don't overcomplicate or over-configure the software
- Don't expect it to be perfect on day 1

Conclusion.

The complexity and scope of business marketing has shattered the old ways of reaching customers, ushering in a new C-suite role: the CMT (Chief Marketing Technologist).

The world's most successful companies have embraced CRM and MA to manage and maintain customers; develop, nurture and score leads; manage sales and marketing campaigns; and deliver actionable analytics to drive revenue.

We can help.

Get started!

“The scariest moment is always just before you start.”

- *Alfred Hitchcock*



Questions?

To ask our speakers a question,

type your question into the Questions Panel located in the bottom right portion of the screen.



Thank you for joining us today!

mattar@aksure.com
www.aksure.com

gaylek@themezzaninegroup.com
www.themezzaninegroup.com