

# Humanize Marketing Automation with CRM!



**From Monologues through Machines,  
To Dialogues with Humans!**

**Importance of Integrating MA and CRM for Revenue Marketers**

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## Introduction

With any business, ROI is the bottom-line and a successful equation is the effective and efficient utilization of people, processes and technology.

As iterated in the previous session of '**How to Boost ROMI with Bots**', Marketing Automation (MA) not only automates, it analyzes and augments introduction of new solutions and processes. From email campaigns, lead nurturing and generation, advertising to social media management, automation has become inevitable.

What Customer Relationship Management (CRM) does is it manages and maintains customer information as well as delivers service and communicates with customers. It is a process that strengthens your relationship with customers. It helps in managing, organizing and building communication.

In order to take Marketing Automation to the next level you have to integrate it with your Customer Relationship Program. This way you will not just have monologues through machines, you will have dialogues with humans!

While every organization integrates MA and CRM systems differently, the baseline is that they want to access, organize and utilize any piece of information or data that will help them communicate and market better.

### Defend Your Marketing Automation Investment with Hard Stats

- In the \$4 billion CRM market space, Marketing Automation shows the highest growth.
- B2B companies that used marketing automation in nurturing experienced a 451% increase in qualified leads. Source: - Annuitas Group
- 19% of B2B companies plan to implement Marketing Automation.
- Another 17% are extending their usage.

Source: - As per Industry Analysts from Forrester Research and Gartner, 2012

**A famous quotation by IDC Group goes, “If you haven't gotten started on implementing Marketing Automation already, you're already behind the 8 ball.”**

To know more on MA access the Marketing Automation Cheat Sheet

# Why Marketing Automation is the Way Forward

Marketing Automation helps in streamlining processes and bridging the gap between sales and marketing goals. It not only makes processes faster, it also helps in targeted personalization as well!

However, Marketing Automation does not automatically deliver emails, analyze results, sell or Segment, target and personalize for you. That's what we as marketers and sales representatives need to do with well defined business goals and action plans.

So, why is MA the way forward? Because it:

- **Increases revenues by 417%** when marketing automation is combined with processes and
- **Increases qualified leads by 451%** when used for lead nurturing.

A marketing automation system will automatically deliver results only if it's managed efficiently and utilized optimally.

*Consider this; by 2017 Chief Marketing Officers will be spending more on IT than Chief Information Officers. B2B marketers are increasing investment in technology and automation.*

## Why Marketing Automation is the Way Forward

|          |  |
|----------|--|
| 50%      | Increase is expected in adoption of marketing automation technology by 2015*                 |
| 81%      | Of Best-In-Class Companies Benefit in Closing Deals Faster Due to Automated Sales Platforms  |
| 47%      | Of Leads Convert To Customers When Nurtured  |
| 76%      | Of Marketing Decision Makers see Generation of High-Qualified Leads as the Biggest Challenge |
| 64%      | Of them have neither an internal nor external process to manage marketing automation         |
| Only 36% | Use marketing automation for lead nurturing  |
| Only 10% | Use marketing automation to follow-up of leads later in the buying cycle                     |

Source: - Annuitas Group; \* Sirius Decisions

# Marketing Automation Platform Evaluating Checklist

Before thinking about integration, it is important to have an organized Marketing Automation platform. Here is a checklist that will help you evaluate marketing automation systems:

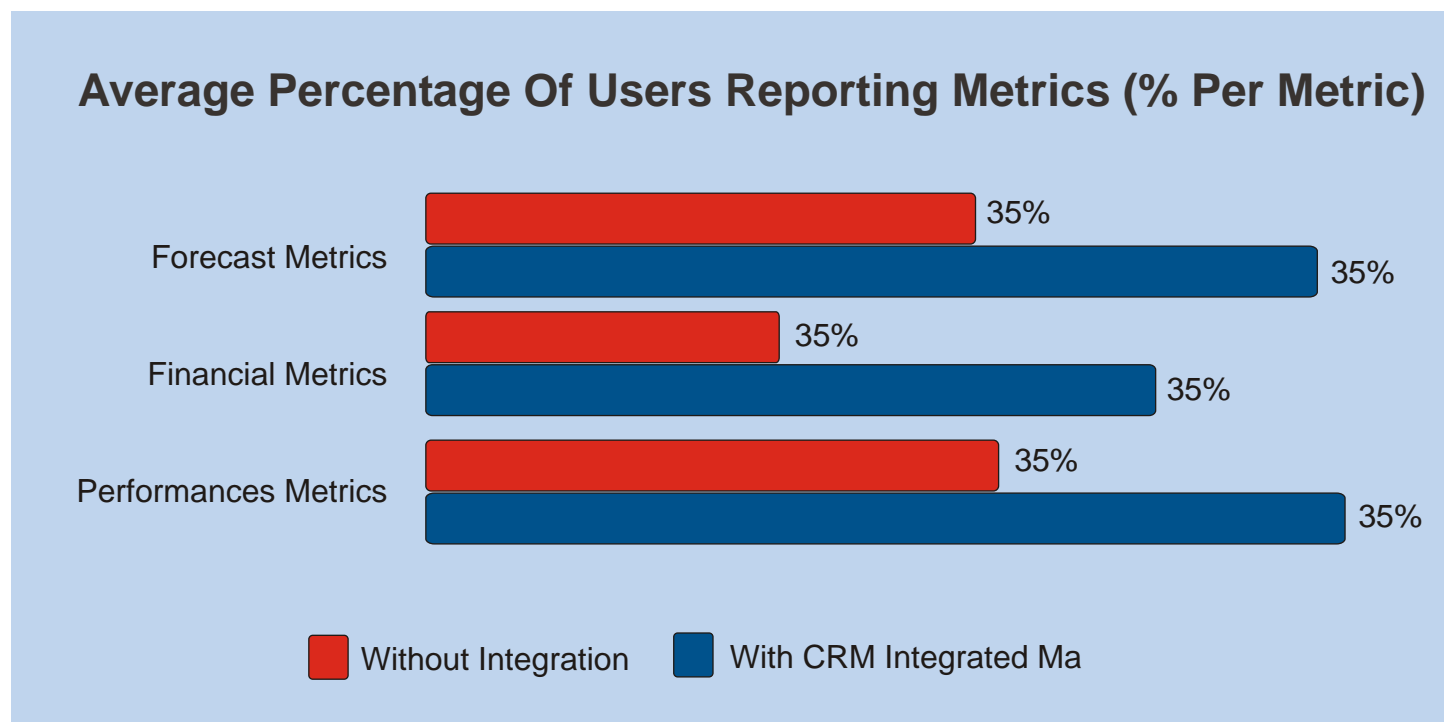
| Question  | Yes                      | No                       |
|---|--------------------------|--------------------------|
| Are there built-in connectors to your CRM system?   | <input type="checkbox"/> | <input type="checkbox"/> |
| With your MA platform, can you import files and refer to new fields to add them to your CRM system?       | <input type="checkbox"/> | <input type="checkbox"/> |
| Does your system often sync with your CRM system?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Based on a lead score, can your systems send leads to your CRM system?                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| Can your system identify and add activity behavior information to your CRM system?                        | <input type="checkbox"/> | <input type="checkbox"/> |
| Can it deliver leads based on campaign results or buyer behavior?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Is it possible for your system to assign leads to sales reps, based on campaign results, lead scores etc. | <input type="checkbox"/> | <input type="checkbox"/> |
| Is there an option for synchronization of campaigns with your CRM system?                                 | <input type="checkbox"/> | <input type="checkbox"/> |

## Integrate Marketing Automation and CRM

Familiarize yourself with the difference between inbound marketing and marketing automation, about how lead scoring increases conversion rates and the importance of integrating process, technology and people in MA. Gain an insight into the best practices. Integrating marketing automation and CRM enables you to:

- Automatically update Lead records in Salesforce.com
- Add nurturing communications to your activities
- Automate Email opt-out management
- Automate follow-up calls for sales staff
- Automate follow-up emails sent on behalf of your sales staff
- Automate scheduled reports e-mailed to you
- Automate time zone sensitive communications

The graph below indicates that by integration MA and CRM processes and systems, reporting of forecast, financial and performance metrics improved by 56%, 46% and 58% respectively.



With Info CheckPoint you can easily integrate your database with one of the leading CRM applications, Salesforce.com. With integration of marketing automation and CRM you can implement coherent nurturing strategies and action plans. We utilize a multi channel email engagement approach to build customer relationship through automating marketing processes. You can either incorporate simple lead nurturing programs within Salesforce.com or create customized integration to suit your specific business needs.

The main objective of marketing automation and CRM is to nurture leads and customers. It facilitates an organized approach to educate, inform, analyze, validate and keep prospects and customers alive, interested and engaged. Nurturing is possible by providing marketing collaterals such as videos, webcasts or whitepapers and through email campaign programs.

Marketing Automation and CRM for us are tools to efficient functioning rather than a bypass process. We prefer dialogues with humans to monologues with machines. What do you prefer?

And if you are planning to implement a Marketing Automation System, what is important is a segmented database. [Sign up for a free trial to know how our databases can augment your ROMI!](#)

**Have you already have adopted a Marketing Automation System?  
Is it integrated with your CRM system?**

Let us know how it is working for you. *Send us a reply to this mail!*

## About Info CheckPoint

Info CheckPoint is a preferred provider of credible business to business (B2B) information, database management and marketing solutions. We understand the value of driven, directed and dynamic databases and therefore emphasize on high quality data which translate to invaluable information. For us a database is a business intelligence tool.

To gain access to power packed databases or for more information, please visit Info CheckPoint

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