

# 2016 Marketing with Microsoft CRM IDEA EBOOK



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### WANT MORE INSPIRATION?

# About this eBook

We've written a lot about how to make marketers who use Microsoft Dynamics CRM more effective. Our [Marketing with Microsoft Dynamics CRM blog](#) has become a destination for marketers, and we've enjoyed putting ideas out there as well as sharing them in our monthly [Marketing with Microsoft CRM newsletter](#).

We've compiled some of our articles into this eBook to give you ideas for how you could use Dynamics CRM in your marketing efforts. We've grouped the articles into a few broad categories to help organize the content. Some of the articles involve our own marketing automation solution for Microsoft Dynamics CRM, which you can learn about by visiting our [website](#).

We hope you enjoy this eBook and we welcome your feedback or questions. You can contact us at [marketing@clickdimensions.com](mailto:marketing@clickdimensions.com).

Thanks for downloading this eBook and happy marketing!  
The ClickDimensions Team



# Chapter One

# EMAIL MARKETING

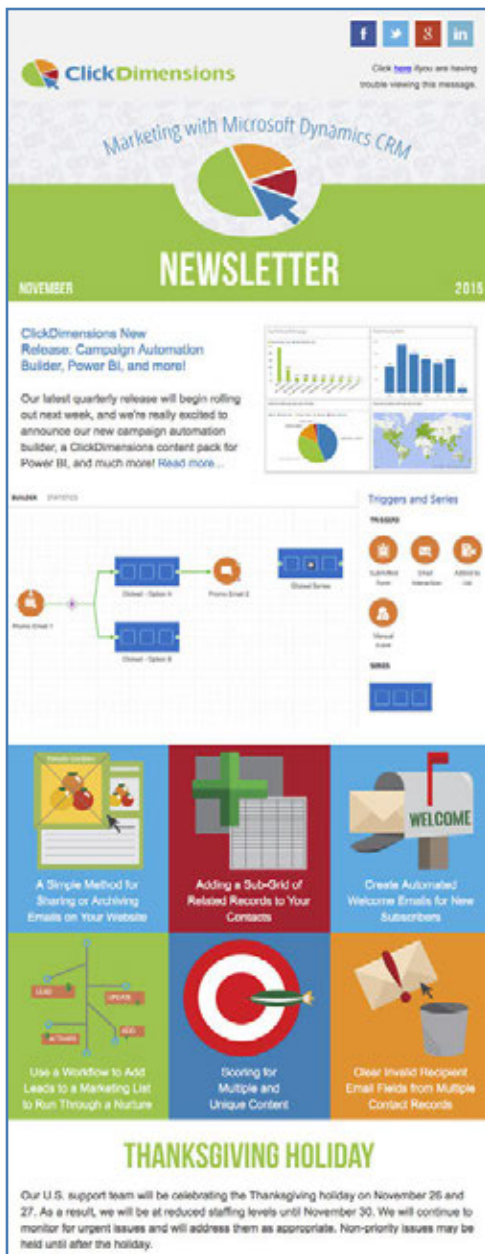
According to research firm MarketingSherpa, 72 percent of those surveyed named email as their preferred method of communication from businesses. And marketers love email as much as their customers and prospects, ranking email as the most effective tactic for awareness, acquisition, conversion and retention (Gigaom Research). As the top-rated marketing automation solution for Microsoft Dynamics CRM, ClickDimensions is well-versed in the ways of modern email marketing. In this chapter, we've included some of our favorite tips for ensuring the success of your email marketing campaigns.

## TIPS AND TRICKS FOR A SUCCESSFUL NEWSLETTER

So you're already using ClickDimensions to send your newsletters - great! Now it's time to improve your stats and increase those opens and clicks. Here are some tips and tricks to get you started:

**1. Look at the big picture.** How often do you read emails? Think of all the times you received an email and immediately discarded it without opening or reading it. It probably





takes you just a few seconds to scan an email and decide whether it's worth reading all the way through or simply clicking delete. Coupled with the fact that many people check their emails on mobile devices with smaller screens, it's easy to see why your emails should be easy to digest in both content and design. To accomplish that goal, it's important that your email is built on a solid foundation.

Don't:

- Use one large image as your entire newsletter
- Write one long body of text
- Use hard to read fonts
- Include every single detail in your newsletter. You want your recipients to engage with your content by clicking on links that will lead them to your website, blog, and even forms and surveys.

Do:

- Place your logo and business name on your email's header. Let them know it's from you.
- Choose a color palette and stick with one or two colors. You'll want to choose colors that compliment your logo and relate to your company identity.
- Use easy-to-read, web-safe fonts and only use one or two fonts (there are exceptions). It's best not to overwhelm the reader with many different font choices.
- Prioritize your content with the most important information first.
- Keep things short and break up your content into small sections. If you have more to write, consider writing a summary instead and use a call to action to lead your readers to your website.
- Use headings and subheadings to organize your newsletter.
- Use a responsive template so your newsletter looks great on all devices. (Use the ClickDimensions Drag and Drop editor!)

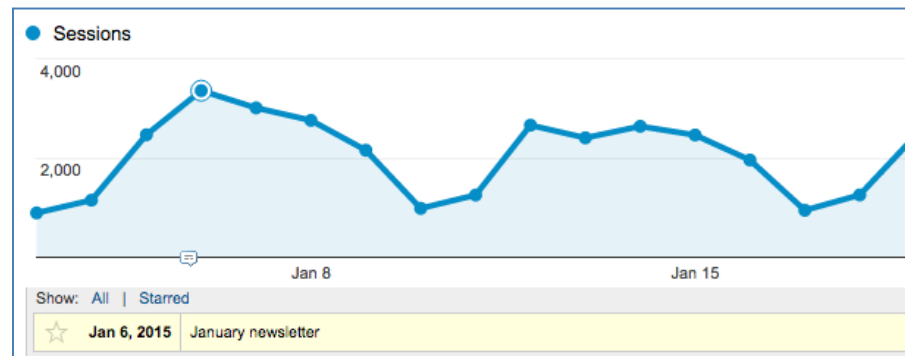
**2. Hook them with a good subject line.** You could be the master of all newsletter content, but if your subject line is blah, your readers may never see all that your newsletters have to offer. Sure, you can learn headline copywriting or use Subject Line testers and tools on the web, but often the best method is just learning what works best for you and your customers. You can use Split Testing to see which email subjects generate more opens and clicks.

**3. Actions speak louder.** What do you want your readers to do? Fill out a form? Read your blog? Take a survey? Sign up for an event? Share your email on Facebook? Decide on your call to action for your email and make it easy for them to do it. Include action phrases that will get them engaged such as “Click here” or “Share this.” Add it in a few key sections throughout your email in case they don’t make it to the end, but keep in mind that you don’t want to overwhelm your readers with multiple call to actions in one email.

**4. It’s not [about] you, it’s them.** Clichéd break-up lines aside, your newsletters are not just a way for you to promote your business. Think about your customer and how your newsletter can be relevant and helpful to them. It’s not enough that you are talking about the next big thing or your newest offer, link it back so they can see how it benefits them. When you get this right and you start to connect with your customers, your newsletters will become an email they look forward to receiving!

## ANALYZE YOUR NEWSLETTER PERFORMANCE: SUBSCRIBER GROWTH VS. 3-DAY VISIT TOTAL

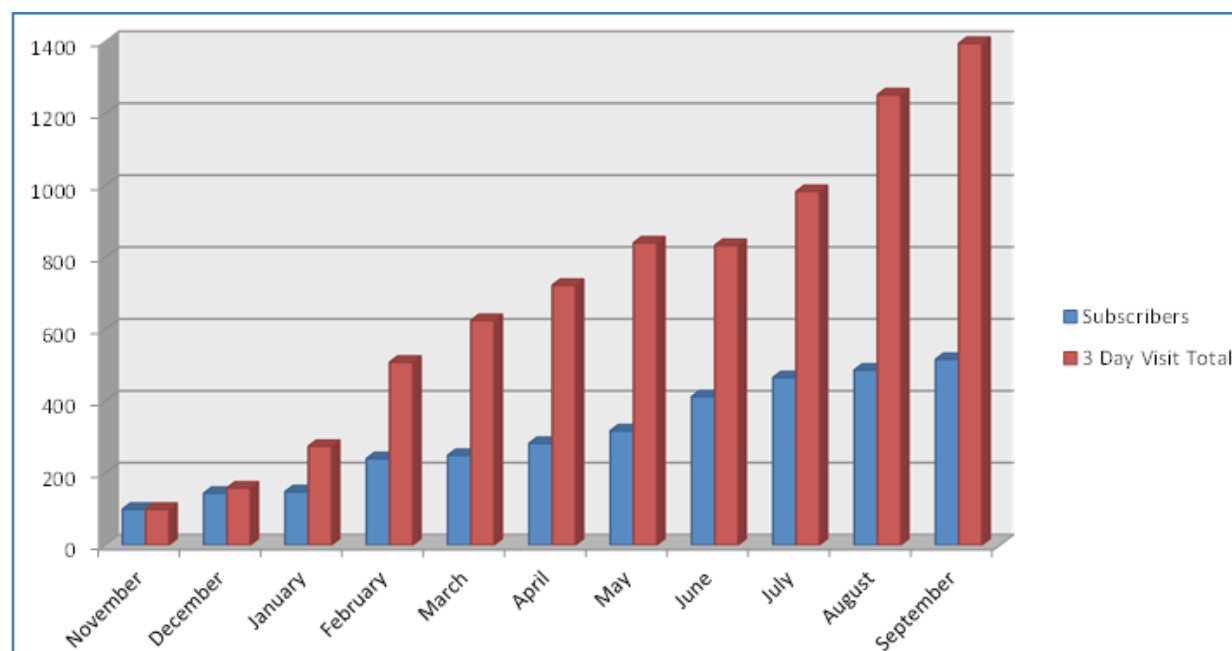
At ClickDimensions, we send a monthly newsletter to our subscription list. To analyze how the newsletter is being received, we look at a number of variables. Clicks, opens, unique opens and newsletter sign-ups are obvious measures. However, the number of visits the newsletter generates in the three-day period starting with the day it is sent is equally important to us. We call this the three-day visit total. We want to know that our newsletter is generating traffic back to our site and, since we are a global provider, we need to look at visits for at least three days to get a clear picture of the impact of the newsletter. Since Google Analytics allows you to easily make annotations on your web tracking, you can use this as a way to mark when you sent your newsletter so you won’t forget.



We like to contrast the three-day visit total to the number of subscribers (i.e. the number of people on our newsletter list). We have provided this data in abstract format with our first month starting at a basis of 100. We can see that over this time period our list has increased five-fold, but our three-day visit total has increased nearly 14-fold.

Graphing this data shows us a trend. As our list grows each month, the visit total grows proportionately larger. This tells us our content is working, and the newsletter is driving more and more traffic to the site each month. Our conclusion is to find ways to sign up more subscribers since our data shows that the newsletter is doing an increasingly effective job at bringing traffic to our site.

Newsletter	Subscribers	3 Day Visit Total
November	100	100
December	144	159
January	149	275
February	241	509
March	250	625
April	283	723
May	318	841
June	413	834
July	466	984
August	487	1,253
September	517	1,396



*Want to get a copy of ClickDimensions' newsletter delivered to your inbox each month? [Click here to subscribe.](#)*

## BENCHMARK YOURSELF: WHAT IS YOUR NEWSLETTER RESPONSE RATE?

We're big on metrics over here at ClickDimensions, so we look at just about everything we can measure in terms of marketing and sales growth. Some important metrics for us are around our monthly newsletter. We pride ourselves on putting together an informative newsletter every month, so we want to make sure people are opening and clicking it. We also measure the growth of our subscriber base from month to month to make sure our list is growing at a healthy rate. In fact, we have more than doubled our newsletter list in the past months.

Back to response rates now; it is important to verify that your subscribers are opening your mailings. To do this, you really need to look at "unique" email opens. You may also hear of this referred to as "distinct" email opens, but it is the same thing. Since people often open your emails more than once, (or forward them to others that open them) it is important to know the number of unique/distinct people who

open the email. For example, you may send your email to three people and one of them may open the email four times while the other two open it only once. In this example, you would see a total of six opens, but only three people opened the email, so you see three unique opens.

Another important metric is the click rate. Clicks let you know that your content was compelling enough that the reader wanted to read more of it. With clicks, we tend to look more at overall clicks, knowing that some people will click more than one link. Clicks tell us that we have designed an email in such a way that entices people to click links and that, of course, the recipients found the links/content compelling enough to click.

As you can see by the embedded graphic, we have steadily increased our unique open rates (unique opens/total emails) since our January newsletter. We have also increased our click rate (total clicks/

total emails), although it dropped a bit from January to March before rising again. Based on everything we have read and seen elsewhere, unique clicks and opens at this level are very good. In fact, for the average technology company, either of these metrics in the double digits (i.e. over 9%) is very positive.

Month	Unique Open Rate	Click Rate
January	28%	16%
February	30%	15%
March	31%	14%
April	33%	16%
May	36%	18%

And now a nice tip for your newsletter: always take the most advantage possible of the area "above the fold." By above the fold, we are referring to the area that is generally visible in email preview panes. Since most newsletters have a header, this is a great place to embed a call to action. All our newsletters now contain a button and link to take some action.

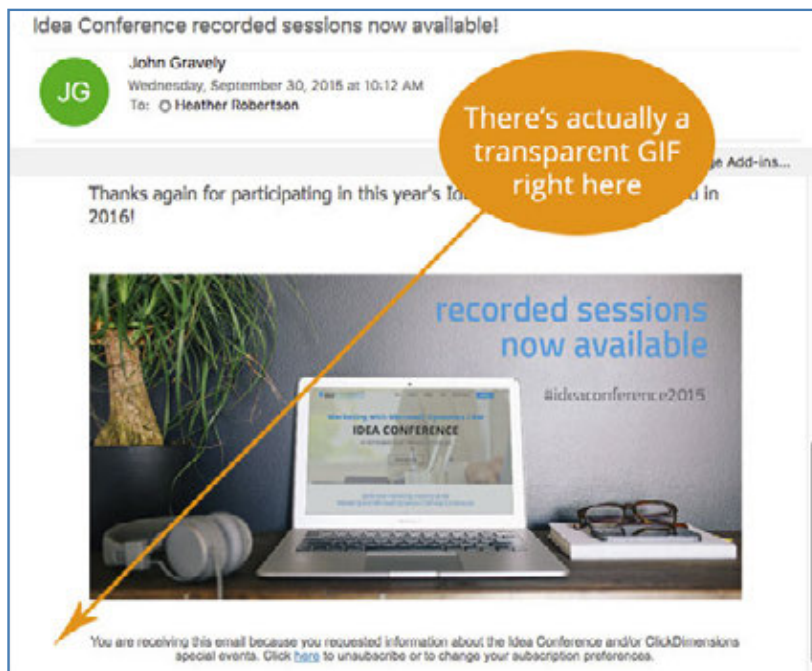


## UNDERSTAND EMAIL STATISTICS: OPENS

Ever wonder how open rates are calculated for your marketing emails? Here's a glimpse at how they work, and a caveat about how reliable your open rate numbers are:

### How Opens Are Counted

When you compose an email and send it through ClickDimensions (and most other marketing automation tools), the system inserts a tiny, transparent 1x1 pixel GIF image into the email. This GIF is hosted on our system. When we insert the GIF into an email, we also insert a unique identifier at the end of its address. That



unique identifier corresponds to the recipient to whom you've sent the email.

So, for example, if the GIF is hosted at <http://files.mycompany.com/tracking.gif>, we'll add a unique ID for each and every email recipient to the end of the address in the email's HTML. Now the URL for the tracking GIF might look like this: [http://files.mycompany.com/tracking.gif?\\_id=1234567890](http://files.mycompany.com/tracking.gif?_id=1234567890). (This is simplifying things a bit – the image is actually generated programmatically – but you get the idea.)

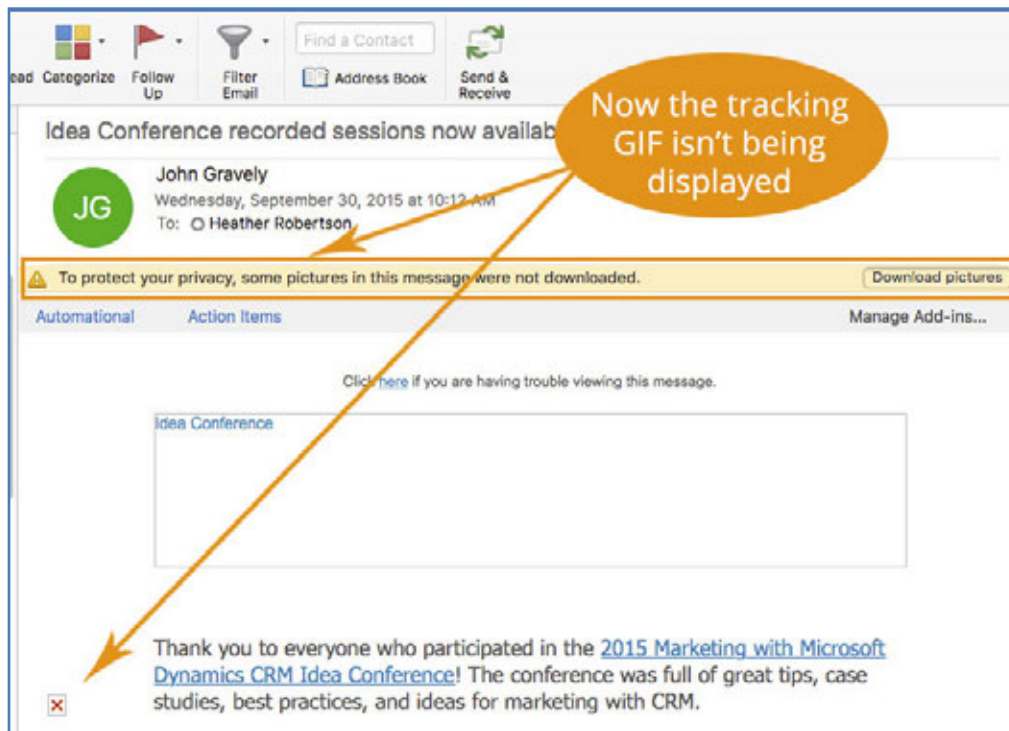
Now, when the recipient views the email you've sent, our web server sees the request for that transparent GIF and the attached ID, and now it knows who viewed the email.

When ClickDimensions sees that Joe opened an email, we record an "Open" email event in your CRM. Now you can see that Joe opened the email you sent.

### Simple, right?

Tracking GIFs are a proven and widespread method for tracking whether someone opened an email. They are used by most every email provider out there. So what could go wrong?





**Most email applications today block the display of images by default.** This is true of desktop email applications like Outlook, as well as webmail providers like Gmail and Yahoo. As shown in the illustration, a recipient can actually open and read your email without it being possible to count the open event.

The recipient would need to click Outlook's informational message to download all the pictures for the email, including your

tracking GIF. In some email applications, if the user adds the sender to the "Safe Sender" list or whitelist, then images will always be displayed automatically in emails from that sender.

**An email can be forwarded.** So what would happen if I received the email above, didn't tell Outlook to download all the pictures, and forwarded it to my mom (who is still using Outlook 2000 on Windows ME)? Well, in that case, the tracking GIF

would be downloaded because her outdated system doesn't block tracking images automatically, and the pictures would be displayed for my mom. But the unique ID that was appended to the tracking image is still correlated to me. So our system would think that I opened that email.

**Some people don't clean out their inboxes.** Another potential wrench in the cogs of your attempts to measure your

readership's engagement is that there are some people (we won't name names!) who don't have great inbox management habits. You send them an email and it stays in their inbox for months. Years even. Each time they happen to scroll past it and the email is displayed in the preview pane, the tracking GIF is loaded and an open event is counted.

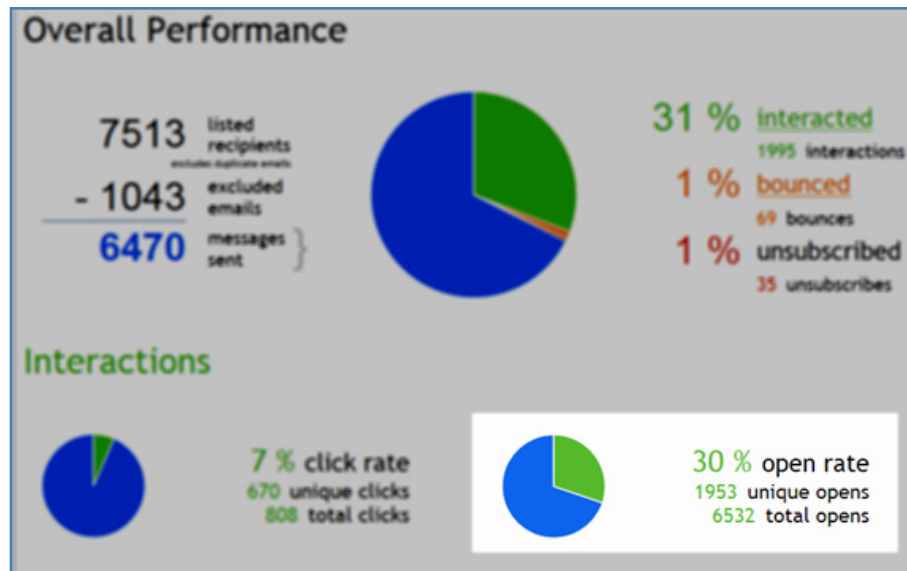
### So what's the takeaway here?

The potential for missing real opens or counting opens that shouldn't count is why we focus on "Unique Opens" – how many people opened your email (or, in other words, downloaded the tracking GIF) as opposed to how many times your email was opened – to calculate your open rate.

In this example, there were 6,470 total messages sent, and 1,953 unique opens – a 30% open rate:

Since we know that the open rate may not be 100% accurate – it's likely quite a bit higher than the total number of unique opens that were possible to record – then what good is it? Well, the trend is your friend! Looking at your unique open rates over time can give you an idea if you are getting better or worse at reaching your audience with relevant messaging.

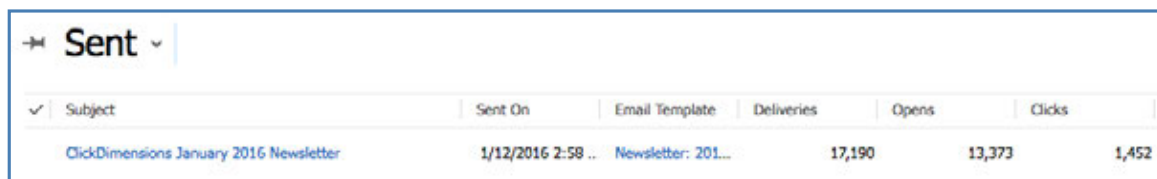
*Check out [this blog](#) to get some cool charts to monitor your email statistics trends using ClickDimensions!*



## UNDERSTAND EMAIL STATISTICS: DELIVERIES

Counting an email's deliveries seems like a pretty straightforward concept, right? It is for the most part, but it's helpful to understand how they work so you know what a delivery means – and what it does NOT mean.

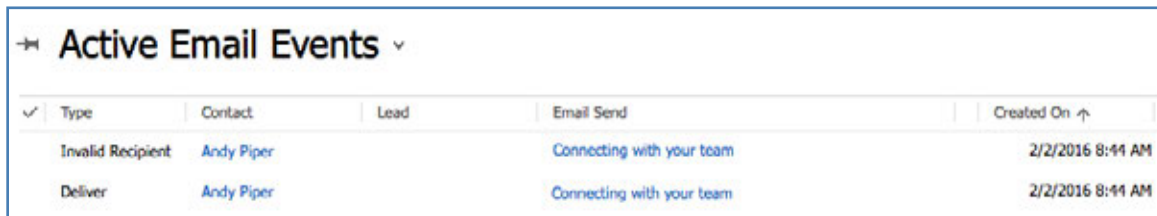
A “delivery” is counted when we get an acknowledgement from an ISP or mail server that they have accepted an email message that has been sent to one of its customers.



A screenshot of the 'Sent' tab in ClickDimensions. It shows a table with columns: Subject, Sent On, Email Template, Deliveries, Opens, and Clicks. The data row shows 'ClickDimensions January 2016 Newsletter' sent on 1/12/2016 2:58 PM using the 'Newsletter: 201...' template, with 17,190 deliveries, 13,373 opens, and 1,452 clicks.

✓ Subject	Sent On	Email Template	Deliveries	Opens	Clicks
ClickDimensions January 2016 Newsletter	1/12/2016 2:58 ..	Newsletter: 201...	17,190	13,373	1,452

The illustration above shows 17,190 deliveries for the January newsletter. This does not *necessarily* mean that the email made it into 17,190 inboxes. After the ISP acknowledged receiving the email, there are still a number of reasons why an email might not make it into someone's inbox such as spam filters, a mailbox that is over its size quota, mail server rules, and even in some cases an invalid email address – though in most cases the ISP would have returned an invalid recipient message instead of an acknowledgement of receipt.



A screenshot of the 'Active Email Events' tab in ClickDimensions. It shows a table with columns: Type, Contact, Lead, Email Send, and Created On. The data rows show an 'Invalid Recipient' event for 'Andy Piper' at 2/2/2016 8:44 AM, and a 'Deliver' event for 'Andy Piper' at the same time.

✓ Type	Contact	Lead	Email Send	Created On ↑
Invalid Recipient	Andy Piper		Connecting with your team	2/2/2016 8:44 AM
Deliver	Andy Piper		Connecting with your team	2/2/2016 8:44 AM

In some cases, the ISP or mail server will provide additional information after the delivery acknowledgement if the email can't make it all the way to the inbox.

Below, we see that the recipient's mail server told us the message was delivered, and a few seconds later it said that the email couldn't be delivered because the email address was invalid. A situation like this is an exception rather than the rule, but it happens frequently enough that it's helpful to be aware of it.

## UNDERSTAND EMAIL STATISTICS: CLICKS

What is a “click?” A click is recorded when a recipient clicks on a link in an email you’ve sent them (clicks are recorded through ClickDimensions, as with most email management systems). Looking at your click stats, the click rate – or “click-through rate” – tells you how many people are engaging with your email’s content. More than deliveries and opens, clicks can tell a marketer how well his or her message is resonating with the audience.

There are two ways of looking at the click statistics: Total Clicks and Unique Clicks.

**Unique Clicks:** How many individual recipients clicked on different links in your email. If a recipient clicks one link one time, and another link two times, there will be two unique clicks recorded.

**Total Clicks:** The total number of times all links were clicked. If a recipient clicks the same link 14 times, 14 clicks are counted.

So, how are clicks recorded? When you send an email through ClickDimensions, our service looks through the email’s HTML and converts any links it finds into trackable links. For example, in the email below, the template had a link to <http://www.clickdimensions.com>. When the email was sent through our

system, we converted it to a much longer link. Now, when the recipient clicks the link, their browser will actually first go to <http://elink.clickdimensions.com> before being rapidly redirected to the website the marketer put in the email.



You can also see a few other things in this trackable link. There’s a contact ID that lets us tie the click back to the contact in CRM so we know who clicked the link. You can track clicks to websites that are not under your control, so even if the website doesn’t have the ClickDimensions tracking script on it, you can still see the “click” and who did it. But if the link goes back to a website that has the ClickDimensions tracking script on it, then that page view will also be recorded. There’s a parameter that is passed on to the final destination (the part that starts with `_cldee` towards the end of the link) that enables our tracking script to correlate the page view with the recipient’s CRM contact record too.

## WHEN IS THE BEST TIME TO SEND MY EMAIL?

We've been asked this question many times (and have asked it a few times ourselves): When is the best time to send a marketing email to get the most attention from recipients?

There are a few widely accepted rules for sending marketing emails:

**Avoid nights and weekends.** For most B2B marketers, it's best to send your email when your audience is at work and paying attention. This may not be true, however, if you are marketing to a consumer group that is active after hours.

**Avoid Mondays and Fridays.** Most marketers typically avoid sending an email on Monday for fear of it being deleted by busy readers jumping into their weekly workload. Similarly, Fridays are avoided for the opposite reason – readers are anxious to wrap up for the weekend and may not give your email the time and attention you'd like.

**Mid-day, mid-week emails are the most successful.** Tuesdays and Thursdays in particular are the most popular days to send marketing emails. And getting that email in the reader's inbox between 9:00am and 1:00pm seems to be the sweet spot.

These generalities are important to keep in mind, but they don't need to be followed to the letter. There is not one "perfect" time to send an email; it depends on your audience. And if you market to different demographic groups, countries or time zones, it can be nearly impossible to reach everyone at the same time.

So, how do you pick a good time to send? Watch the behavior of your readers and make some educated predictions.

**Vary Email Sends and Compare Send Statistics.** If you send an email on a regular basis – such as a weekly newsletter – try sending it on different days or times



each week to see which send gets the highest open or click rates. Or if you plan to send the same email more than once to the same marketing list – an event invitation/reminder, for example – vary the days/times for each email send and evaluate the results.

Keep in mind that if your emails contain different content (i.e. two different weekly newsletters), the content will also affect the click and open rates, not just the delivery time. However, trying out different times may reveal a preference with your audience.

**Keep an Eye on Trends.** This can be particularly important if you market to an audience that is younger or highly tech-savvy. While users still open the majority of emails on a desktop, mobile open rates are steadily increasing. This could mean that your email is opened later at night or during the weekend as readers are using their mobile devices outside the office. Watching social media to see when your followers are the most active could be helpful as well. Your readers may be likely to interact with an email sent during the same window of time.

Through a little observation and testing, you should be able to get a feel for when your emails have the most impact with your readers. Happy marketing!





## 6 STEPS TO CHECK PRIOR TO SENDING YOUR EMAIL

When you send emails, you want them to be as effective and informative as possible. How successful they are largely depends upon their content, but more minor issues, such as typos, vague sender information, and broken links can have a seriously detrimental impact on their performance. Before you send out your email, take a moment to check the following steps:

### **Proofread**

Be sure to check your email for spelling and grammar errors prior to sending it out. These errors can damage your organization's professional reputation and make your recipients less likely to pay attention to your message. The ClickDimensions Block, Freestyle and Drag and Drop email template editors include a spell checker to streamline this process for you.

### **Use clear From Name and From Email values**

Make sure that the values you use for your From Name and From Email on your Email Send clearly indicate who you are in order to avoid confusing your recipients. If they do not recognize who the email is from, they are less likely to interact with it, thus damaging your open and click rates. If you encounter a situation where your company name changes or you merge with another company, consider discussing this change within an email prior to changing the From Name/Email in case your recipients are not yet aware of the name change.

### **Have backup values for dynamic content**

Include a default value if you incorporate dynamic text into your emails. This will ensure that some content will be displayed even if the data you are trying to reference on your recipient's record is not available.

When you add dynamic text to your template, it will look something like this: `${Recipient.contact.firstname[0]!""}`. You can type text between the quotation marks at the end of this dynamic text in order to display that text if the data you are referencing is not available. `${Recipient.contact.firstname[0]!"Customer"}`.



### **Check your links**

Make sure all of your links are functional prior to sending your email. Broken links will prevent your recipients from accessing your content and may make them less likely to try again in future emails. Beyond ensuring that your original links are functional, make sure your email CNAME is valid. When your email is sent out, your links will be branded with the CNAME you set in ClickDimensions settings. If the CNAME is not properly set up, it will break your links. If you find that your branded links are not working or if you want to confirm that your CNAME is properly set up prior to sending your email, you can learn how to do that [here](#).

### **Check your template on mobile devices**

An increasingly large percentage of emails are being read on mobile devices. Be sure to send test copies of your email to mobile devices to be sure that everything looks how you want it to. You can find some tips for designing mobile-friendly templates [here](#).

### **Check your subject line**

Your subject line is the first thing that your email recipient will see, so it is vital that it grabs their attention and gives them a good idea of the purpose of your message. As such, if you use a placeholder subject while testing your email, be sure to replace it with the real deal before you send the email out to your recipients. Sending out emails with the wrong subject line or with a subject line containing typos or grammatical errors can decrease your email open rate and harm your credibility.



## VARIATIONS ON RESENDING EMAILS TO NON-OPENERS

Whether you're resending your email simply to reiterate your message or if you're using it to weed out old and unresponsive records, here are some tips for resending an email to non-openers:

### 1. Modify the original email

When you clone an email send record, your subject has the "[CLONE]:" prefix. Make sure you delete this before sending your email, but also consider making additional changes. What if your recipients didn't open your first email because the subject line wasn't that interesting? In that case, change your subject line to see if you get different results.

You can also go one step further and make changes to your email. Maybe you need to rephrase the opening line or change the text on your call to action button.

Don't forget to save!

### 2. Change the pre-header text

Have you checked out our pre-header text feature on the email send and email template record? If you haven't used it in previous emails, now is a good time to capitalize on that inbox real

estate. If you're already familiar with using this feature, consider changing the text for your new send. After all, this is text that your recipients will see right after the subject and gives you a chance to make a great first impression on your email.

### 3. Send it at a different time

If most of your recipients don't open or click their emails until a few days after you send it, then wait until that time has passed before resending your email. From there, try other variations for timing your email such as:

- Sending on a different day of the week
- Sending at a different time of the day

### 4. Change the "from" settings

Did you mark your email to send from the record owner? If yes, try marking it as "no" and use the "from name" and "from email" fields to send your email from a different person. If you're using a "noreply" email address (ex: noreply@clickdimensions.com), send it with a real name and email address instead.

### 5. Refine your marketing list

Don't just follow up to recipients that don't click links or open that particular email send. This could also be an opportunity for you to reach out to other leads and contacts that haven't interacted with other email sends in the past few months. When creating your

marketing lists, make sure you remove leads and contacts that were excluded or are inactive.

## 6. Behavioral profiling

Take a look at the stats from past email sends to see how subscribers responded. Perhaps informative emails and newsletters are more effective than promotional emails, or maybe your recipients respond to promotional emails above all other types of emails. The size of marketing lists in each subscription list can help you determine what types of emails your subscribers are interested in. What if you combine the content of your email to merge information with promotion (see #1 and #2)?

## Final words and warnings

Resending your email can be tempting when you need to see some short-term results, but can also have some downsides. Your subscribers may instead click “unsubscribe” or even worse, mark your message as spam. Only resend important

emails and do so sparingly. Once you’ve sent your email, be sure to measure statistics and take note of the impact of your resending initiative. Take this as an opportunity not only to learn more about your subscribers, but also to keep your lists clean and bounces low.



## SPLIT (A/B) TESTING FOR EMAILS TO SEE WHAT WORKS BEST

Not sure which subject line, “from” address, or content to use in your newsletter? With A/B (split) testing, marketers can test two versions of their email with varying subject lines, content (i.e. template) and/or “from” address.

The two versions are referred to as the A version and the B version. You will determine what percentage of your recipients should receive the A and B versions until a winning version is chosen automatically by our system or manually by you. The winning email version, A or B, is then sent to the remainder of the recipients. For example, let’s say you have a marketing list of 100,000 recipients, and you want to test how an email performs with two versions of the subject line. You will create an A and B version with the two subject lines and then you might decide to send these versions to 1,000 of the 100,000 recipients and let the system determine the winner after a period of

two hours. At the end of the two hours, the system will choose a winner based on either unique open rate or unique click rate (your choice). The winning version, A or B, will then be sent to the remaining 99,000 recipients. The benefit is that the vast majority of your recipients will receive the better performing email version and you will learn what caused the increased engagement.

We’ll start by creating an Email Send just as we normally would. We’ll select a template, subject line, “from” name/address, marketing lists, etc.

To perform a split test on this email we’ll click the Split Test button. The “Split Test” option is located in the drop down [...] menu at the top of the page (see below).



We are now able to set the content options for the B group (the content options for the A group were set when we created our Email Send record). In this screen, we changed both the "from" name and "from" email address. As you can see, we could also even select an entirely different email template if we wanted to test a new design format or content option...

The next step in the process presents the email template for the B version. Here we would be able to make changes to it if we wanted it to differ from the A version. Note that whatever ClickDimensions editor you used to create the template (our Drag and Drop, Block, Freestyle or Custom HTML editor) will be shown for the B version as well.

The next screen lets us set our testing variables. We'll start by moving the slider bar to change the size of the A and B test groups. These will be randomly selected recipients from our marketing lists and the groups will always have an equal

## Split Test Content

Content options for Strategy B

### Content for Strategy A

To edit - make changes under General Tab.


Subject: ClickDimensions January 2015 Newsletter

From Name: John Gravely

From Address: john.gravely@clickdimensions.com

From Record Owner: ☐ Yes ☒ No

### Email Template

☒ Newsletter: 2015-01 (January) ; 

### Content for Strategy B

Please change at least one of the following:

Subject: ClickDimensions January 2015 Newsletter

From Name: ClickDimensions


From Address: newsletter@clickdimensions.com

From Record Owner: ☐ Yes ☒ No

### Email Template

☒ Copy existing template from strategy A

☐ Choose new template



### Select the size of your test group


To select the sizes, slide the bar on the left to the right

A  
24% (2794)


B  
24% (2794)

Winning Version  
52% (5589)

Total test group: 5588 (A: 2794, B: 2794)

Winning Strategy: Unique open rate 

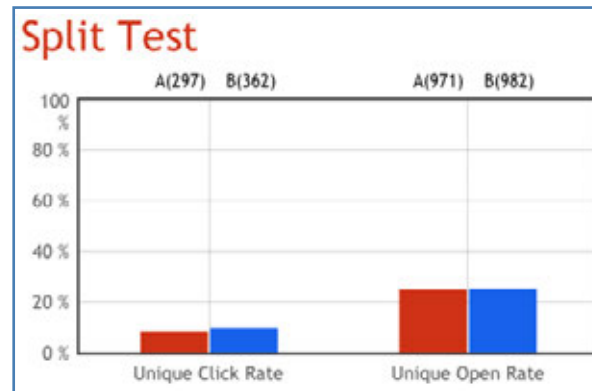
Select winning strategy automatically: ☐ No ☒ Yes

Select a winner after: 3  Hours 

number of recipients. Here we can also select whether we want to pick the winner based on how many people opened it (unique open rate) or clicked on links in it (unique click rate). We will also set how long the test should run before the winning version is sent to the remaining recipients. Alternatively, we can choose not to automatically select a winner. We can check back periodically and pick the winner manually based on the click or open rate at that point.

Once we click “Save and Send” the email will be sent to the A and B groups, and the test has begun. In the Email Sends view you will notice a system view called Split Test where the Email Send record will reside until a winner has been selected. At that time, the remainder of the emails will be sent, and the Email Send record will then appear in the Outbox view briefly and then the Sent view as per the normal process.

As the test is underway, we will be able to see the results of the A and B version unique open and click rates in the statistics area of the Email Send record.



In addition, the content options for the B version are recorded on the Email Send record so you can be reminded of what made that version work better or worse for you.

If you are looking at an individual Sent Email email record, you will also notice that an A or B will appear in the Split Strategy field if this recipient was in either of the test groups. This would allow you to further segment and see if perhaps

one type of recipient (i.e. male vs. female) responded better to one version or the other.

Email Send	Split Strategy	Created On
ClickDimensions August 2014 Newsletter	B	8/6/2014

And, believe it or not, we even record the A/B version at the email event level (i.e. open, click, etc.) should you want to get extra deep in your analysis.

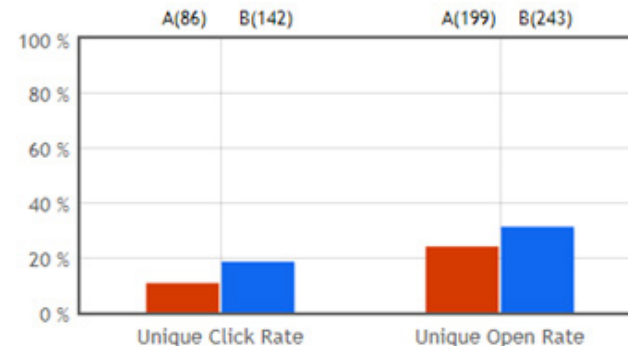
## 25 WAYS TO SPLIT (A/B) TEST YOUR EMAILS

You've probably heard of split (A/B) testing, but have you ever tried it? Split testing allows you to test two versions (an "A" and a "B") of your email with your mailing list. The recipients' interaction with the email (either opening the email or clicking a link in the email – your choice) decide the "winning" version. By trying different email content, senders or subject lines, split testing is a quick and easy way to get valuable feedback that can be used to improve your marketing message.

Sounds good, but not sure what to test? Here are 25 ideas to get you started:

### Content

- Use dynamic content to include a personalized greeting. Include the recipient's first name in the header or the body of your email.
- Test bulleted lists vs. paragraphs.
- Use questions to engage the reader. "Have you read the latest best seller?" vs. "New best seller from John Doe available today."
- In a newsletter, rearrange the stories on the page or test two different "headline" stories against each other.
- Add a personal touch to your content – perhaps include a customer testimonial or a quote from an online review.
- Include a seasonal or holiday message.
- Try a different tone. Test a fun or goofy message vs. a serious or straightforward version.



## Creative

- Change the colors, fonts or sizes of your images. Red vs. blue, or serif vs. sans-serif. Sometimes subtle differences can make a big difference.
- If you use stock images, test illustrations vs. photographs.
- Try using photos of “real” products or people (i.e. employees, customers) vs. stock photos.
- Compare a graphical version of the email to a version that is text only (one that appears to be personally written by the sender).
- Use the same content, but create two versions of your email with different layouts.

## Subject line

- Try different subject lengths. “ClickDimensions Newsletter” vs. “ClickDimensions Email Marketing and Marketing Automation Newsletter.”
- Personalize a subject line using dynamic content. Include the recipient’s name or their company name.
- Integrate a call to action into your subject line. “Sign up for our weekly webinar” or “Save 20% on your next visit with this coupon.”

## Sender

- Compare a generic email address (customerservice@email.com) to a personal address (john.doe@email.com).
- Maybe even sending from the same email address, change the sender name from a person (John Doe) to your company name (ABC Computers).
- Try sending a version of the email from a recognizable person in your company (perhaps the CEO).

## Call to action

- Try different phrases to see which call to action converts more readers. “Buy now” vs. “Add to cart,” or “Download the white paper” vs. “Read more here.”
- Change the color, size or placement of the call to action.
- Test different sales propositions. “10% off your order” vs. “Get the first month free.”
- Compare buttons vs. hyperlinked text.
- Include a sense of urgency in your call to action. “Sale ends Friday” vs. “All products on sale.”
- Compare one strong call to action vs. giving the reader multiple options.
- Change the size and/or placement of your social sharing icons.

## PUT YOUR PROSPECTS ON AUTOPILOT WITH LEAD NURTURING

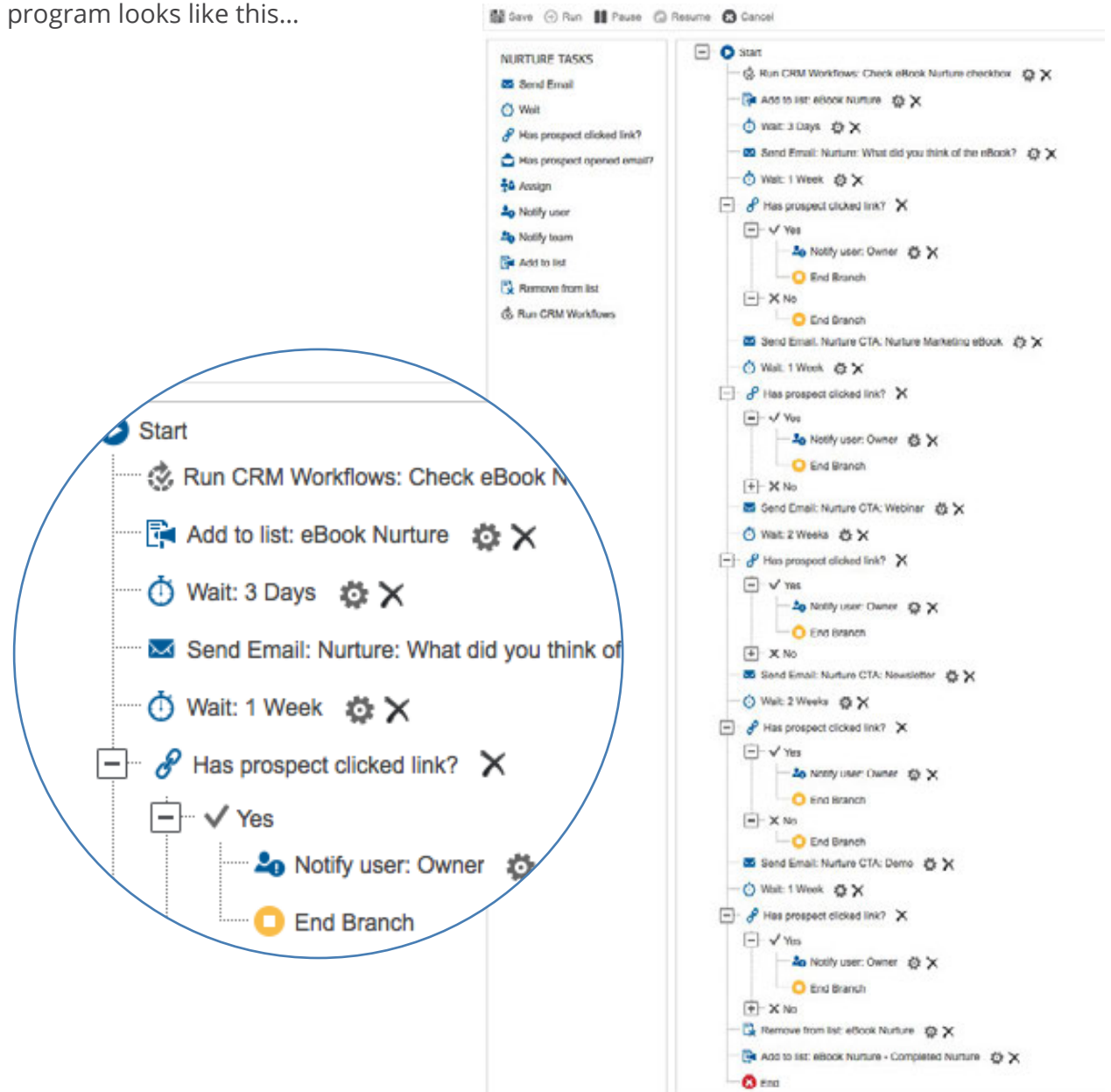
In this article, we will take you through a nurture program we have created for use here at ClickDimensions. The goal of the nurture program is to allow our salespeople to stay in touch with prospects that hit our site for a content download (i.e. eBook, guide, etc.), but are not quite sales ready. The nurture program sends out a series of personalized emails with a few days between each email. Each email is short and simple and focuses on a specific call to action like signing up for our newsletter or watching a demo video. As each email is sent, the nurture program is checking to see if the call to action was taken by the recipient (i.e. did they click the link to sign up for our newsletter or watch the video, etc.). If the prospect did respond to the call to action, then the salesperson is notified. If the prospect receives all of the emails in the nurture and takes no action, the salesperson is notified and the prospect is added to a marketing list so we can then decide what further action, if any, to take.

The flow of the nurture looks like this:

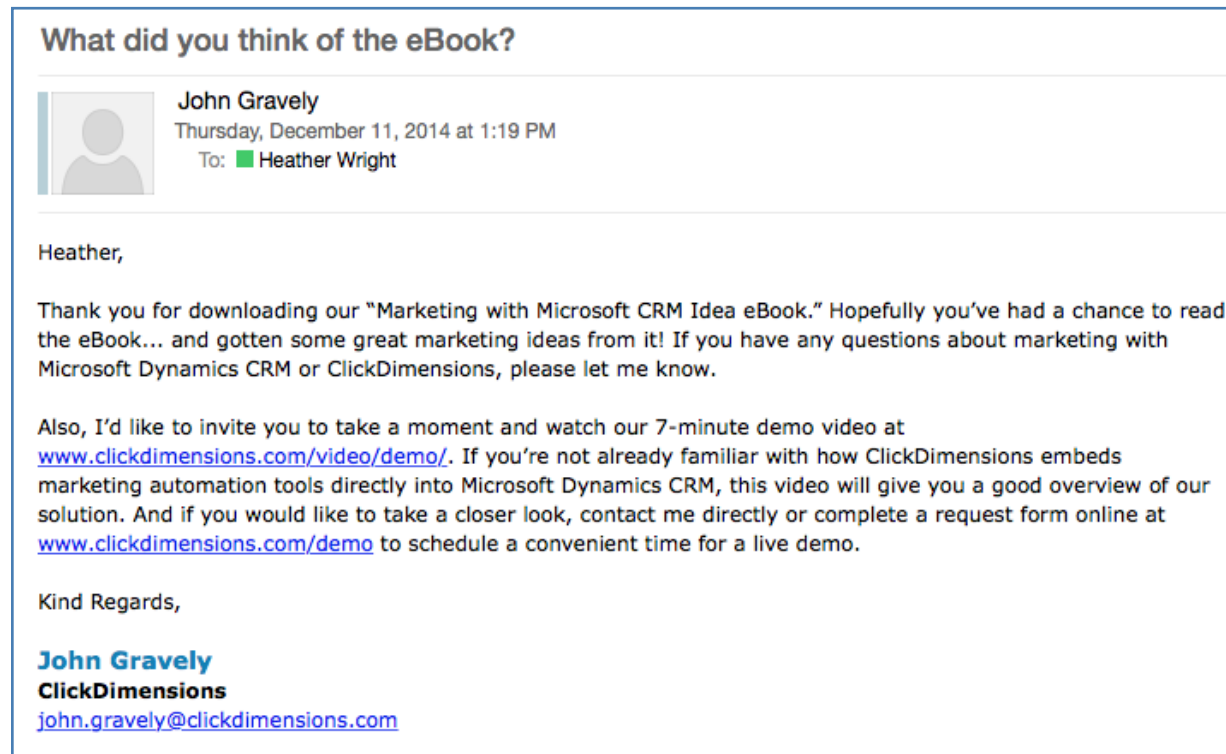
- **Send email 1:** What did you think of the content? (e.g. [eBook](#), [Training Guide](#), etc.)
  - If a link in the email was clicked, then notify salesperson
  - If no action was taken, then send email 2
- **Send email 2:** Call to action is to download an eBook
  - If call to action was taken, then notify salesperson
  - If call to action was not taken, then send email 3
- **Send email 3:** Call to action is to attend a webinar
  - If call to action was taken, then notify salesperson
  - If call to action was not taken, then send email 4
- **Send email 4:** Call to action is to subscribe to our newsletter
  - If call to action was taken, then notify salesperson
  - If call to action was not taken, then send email 5
- **Send email 5:** call to action is to view a demo of ClickDimensions
  - If call to action was taken, then notify salesperson and end nurture
  - If call to action was not taken, then notify salesperson and add lead/contact to a marketing list
- **End of Nurture**



In the ClickDimensions nurture builder the program looks like this...

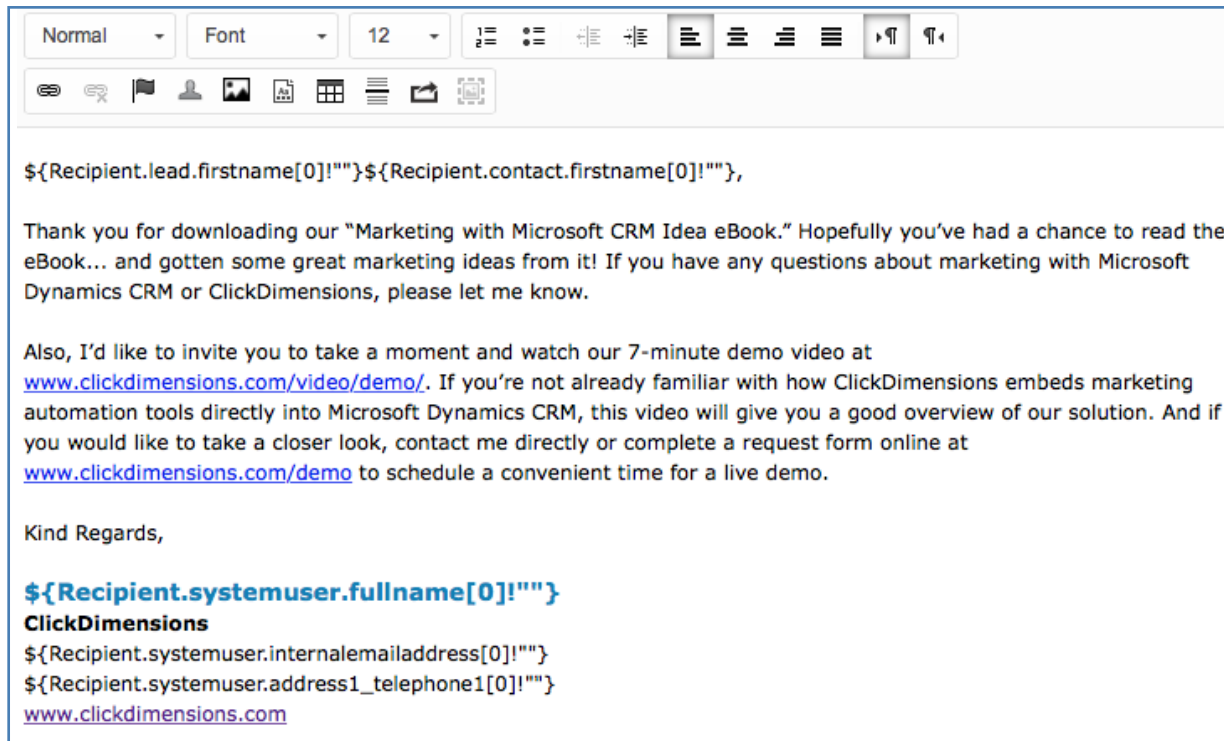


Each email is simple and personal. We want the email to drive the prospect to a clear call to action. Below is an example of one of our emails.



*The email came from John because he is the owner of the CRM lead record to which the email was sent.*

Below is what the email template looks like. Note that the template uses personalization so we only need a single template for all of our salespeople.



The screenshot shows an email template editor with a toolbar at the top containing options for font (Normal), size (12), and various alignment and formatting icons. Below the toolbar, the email body is displayed with the following content:

`${Recipient.lead.firstname[0]}${Recipient.contact.firstname[0]},`

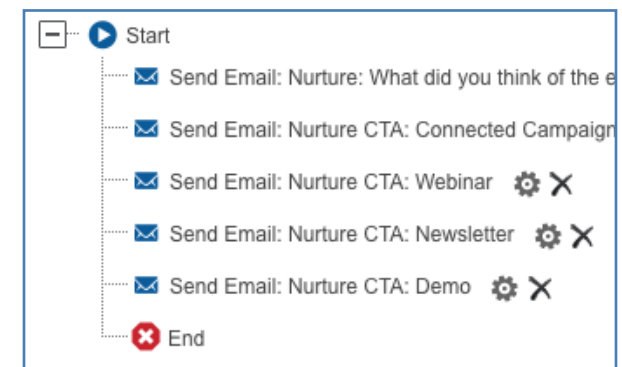
Thank you for downloading our "Marketing with Microsoft CRM Idea eBook." Hopefully you've had a chance to read the eBook... and gotten some great marketing ideas from it! If you have any questions about marketing with Microsoft Dynamics CRM or ClickDimensions, please let me know.

Also, I'd like to invite you to take a moment and watch our 7-minute demo video at [www.clickdimensions.com/video/demo/](http://www.clickdimensions.com/video/demo/). If you're not already familiar with how ClickDimensions embeds marketing automation tools directly into Microsoft Dynamics CRM, this video will give you a good overview of our solution. And if you would like to take a closer look, contact me directly or complete a request form online at [www.clickdimensions.com/demo](http://www.clickdimensions.com/demo) to schedule a convenient time for a live demo.

Kind Regards,

**`${Recipient.systemuser.fullname[0]}`**  
**ClickDimensions**  
`${Recipient.systemuser.internalemailaddress[0]}`  
`${Recipient.systemuser.address1_telephone1[0]}`  
[www.clickdimensions.com](http://www.clickdimensions.com)

When creating emails, you may want to get your sales team or others to provide feedback on the wording of the emails. To simplify this process at ClickDimensions, we created a test nurture that sends out the five emails immediately and in sequence. With this, you are able to quickly and easily send those five emails to various people to get their feedback before you officially launch the program. You can see the test nurture to the right.



John Gravely	
ClickDimensions marketing for Microsoft Dynamics CRM demo...	12/11/14
Heather, Can you spare 30 minutes for me to give you a personal demonstr...	
John Gravely	
Great tips for marketing with Microsoft Dynamics CRM	12/11/14
Click here if you are having trouble viewing this message. Great tips for M...	
John Gravely	
Marketing with Microsoft Dynamics CRM webinar	12/11/14
Heather, Do you have 45 minutes to raise your marketing game? If so, plea...	
John Gravely	
10 elements of highly effective marketing campaigns	12/11/14
Click here if you are having trouble viewing this message. 10 elements of h...	
John Gravely	
What did you think of the eBook?	12/11/14
Heather, Thank you for downloading our "Marketing with Microsoft CRM I...	

When I run the test nurture against my own CRM record, I get the five emails immediately, as shown above.

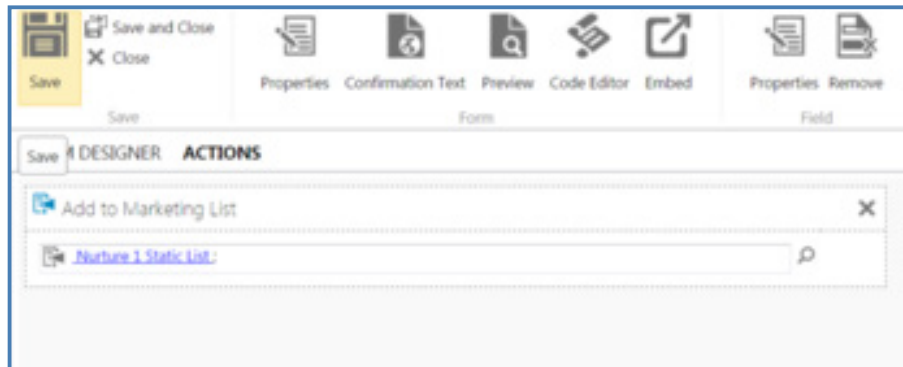
Once we have incorporated our team's feedback, we are ready to turn over the nurture program to our sales team. Each time a lead comes in from the web, the appropriate territory salesperson will take a look at it and decide whether to actively work it or to put in on autopilot with our nurture program. The salesperson knows that they will be notified when/if the prospect "comes alive" and clicks on a call to action. The salesperson also knows that they will be notified in a couple of weeks if the prospect has not taken the bait and responded. Either way, they can work a lot more leads much more easily.

*For more information and examples of nurture marketing, download our eBook, [Grow Your Business with Nurture Marketing](#).*

## RUNNING CONTINUOUS NURTURES TO EVALUATE LEADS AND CONTACTS

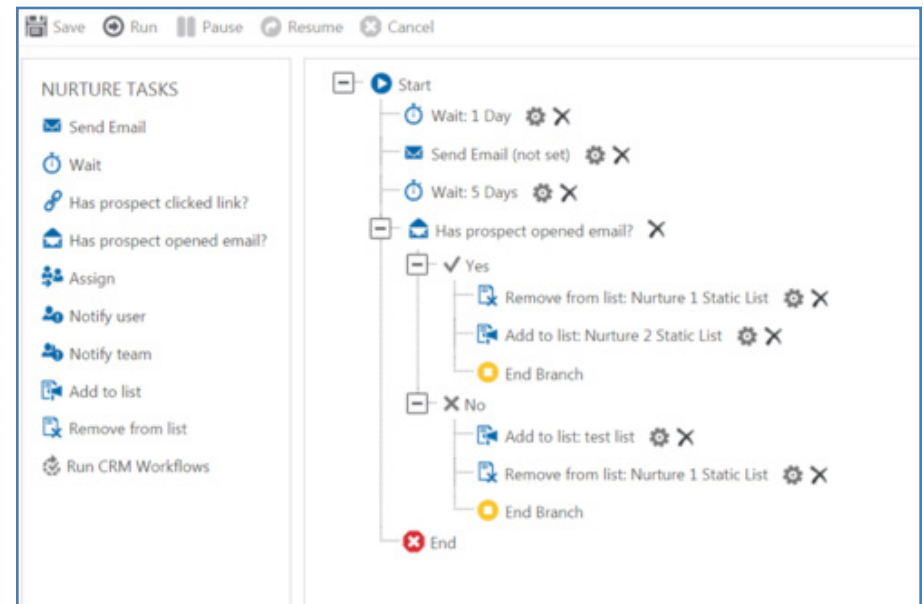
Nurture programs allow you to keep your messages in front of prospects without committing valuable sales resources. You can also run them continuously to create marketing lists of people showing various levels of interest in your communications.

Create a web form for prospective customers to fill out, and then embed the form on a landing page you created for a new campaign. Form actions enable you to add someone to a marketing list once they fill out this form. That marketing list could be attached to a nurture program so when the person fills out the form, they will immediately be run through a nurture program prompting them to receive an email. In our example, we have added someone to the Nurture 1 static list as soon as they submit a form.



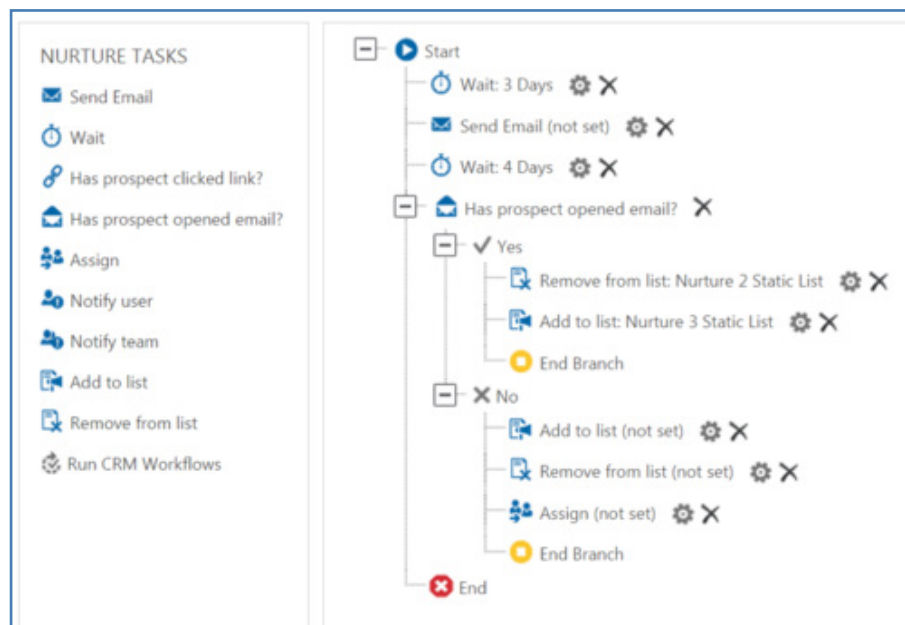
That marketing list is attached to a nurture program that sends them an email after a wait period (we have it set up for one day, but you could wait as long as you want). Then we will wait five days to see how they respond to the email. If they open it, they are removed from this marketing list and added to our Nurture 2 static list. If they do not open it, they are removed from this marketing list and added to another marketing list, ending the nurture for everyone.

Nurture 1:



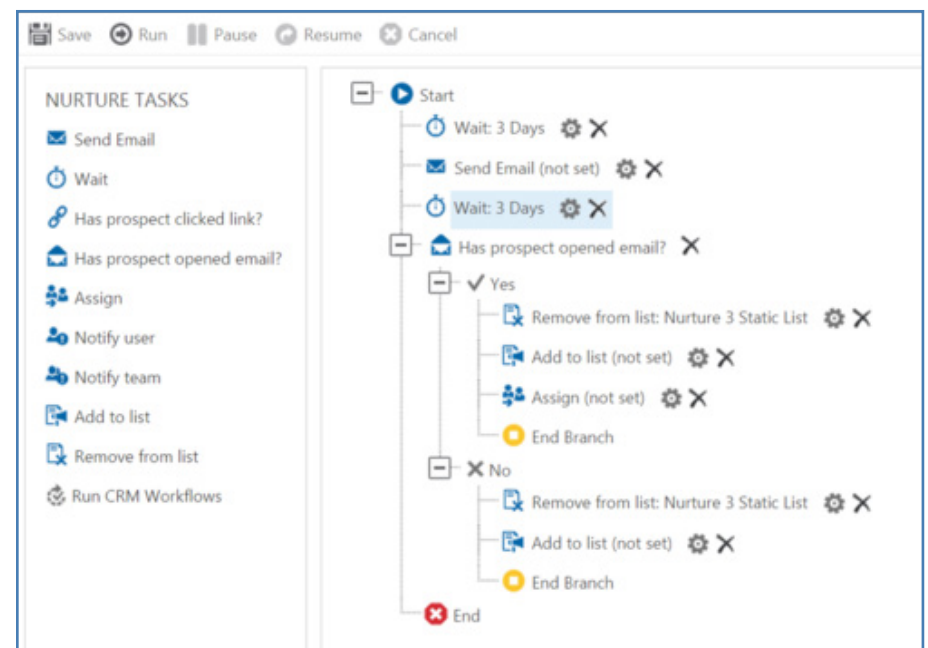
Now you have two lists of people, one includes those who opened your original email and one that includes those who did not. There are a few options you have to further investigate the leads or contacts who did not open the email. You could run them through another nurture and send them another email, assign them to a user, or you could just leave them on the marketing list and follow up with them at some point in the future. Those leads or contacts who opened the email are added to our Nurture 2 static list, where they will be run through another nurture and receive another email.

#### Nurture 2:



The following step is to wait three days and send a different email to the people who opened the original email in the first nurture program. Then we will wait four days to see if the recipients opened this newer email. Those who opened the email will be removed from the Nurture 2 static list and be added to the Nurture 3 static list to participate in the next nurture. The people who did not open this email will also be removed from the Nurture 2 static list, ending the nurture for them. You could also add them to another list and assign them to a user to follow up at a later time.

#### Nurture 3:



Our final nurture will do the same thing as the previous two nurtures and send an email to people who opened the first two emails. Once sent, we will check after three days to see if the email has been opened, and once again add the leads or contacts who opened the email to another marketing list. You could also assign them to a user. Likewise, we will add people who didn't open the email to a different marketing list. Now you have four marketing lists: one for people who didn't open the first email, one for people who opened the first and not the second, one for people who opened the first two emails but not the third, and finally one for people who opened all three emails. From there, you can continue to evaluate these leads or contacts, but this gives you a concrete measurement to use when you determine how much time to devote to the members of each list.



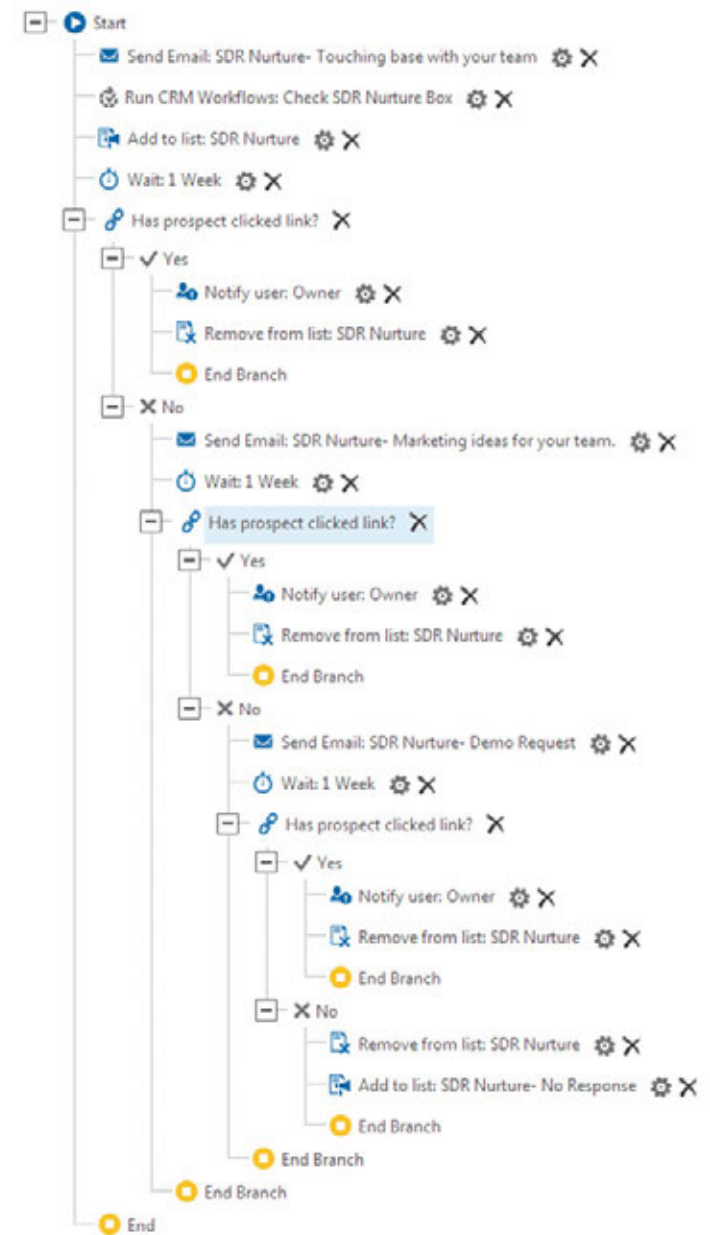
## TRANSFORMING A NURTURE PROGRAM

One of the ways that we keep in touch with our prospects is through our ClickDimensions nurture programs. The nurtures allow us to slowly drip emails to prospects, inviting them to download our premium content, attend a webinar or request a demo of our solution.

A popular nurture program used by our Partner Account Managers (PAMs) is a three-week nurture that sends one email per week. It's a simple program that sends out an email and, if there's no response, sends another. However, if the recipient clicks on a link in the email, we alert the owner of the record and stop the nurture (the recipient gets no other emails through the nurture).

This was all well and good, but eventually the PAMs decided that they would rather have the recipient receive all of the emails regardless of whether they clicked a link. Based on the nurture structure discussed in this blog post, we could automate emails with this nurture program regardless of the interactions by the customers. Without having to create an entirely new nurture program, we were able to restructure our existing nurture to be more streamlined and to meet our new requirements.

To accomplish this task, we first moved each Send Email step to the top level of the nurture (out of any encompassing conditional statements), so that all the emails go out regardless of whether the lead or contact clicked on the email. We did this by dragging and dropping the steps out of the "No" scenario of the "Has prospect clicked link?" and outside any other conditional statements. In this case, they were nested below the other Send Email and click steps. I repeated this step until all Send Email



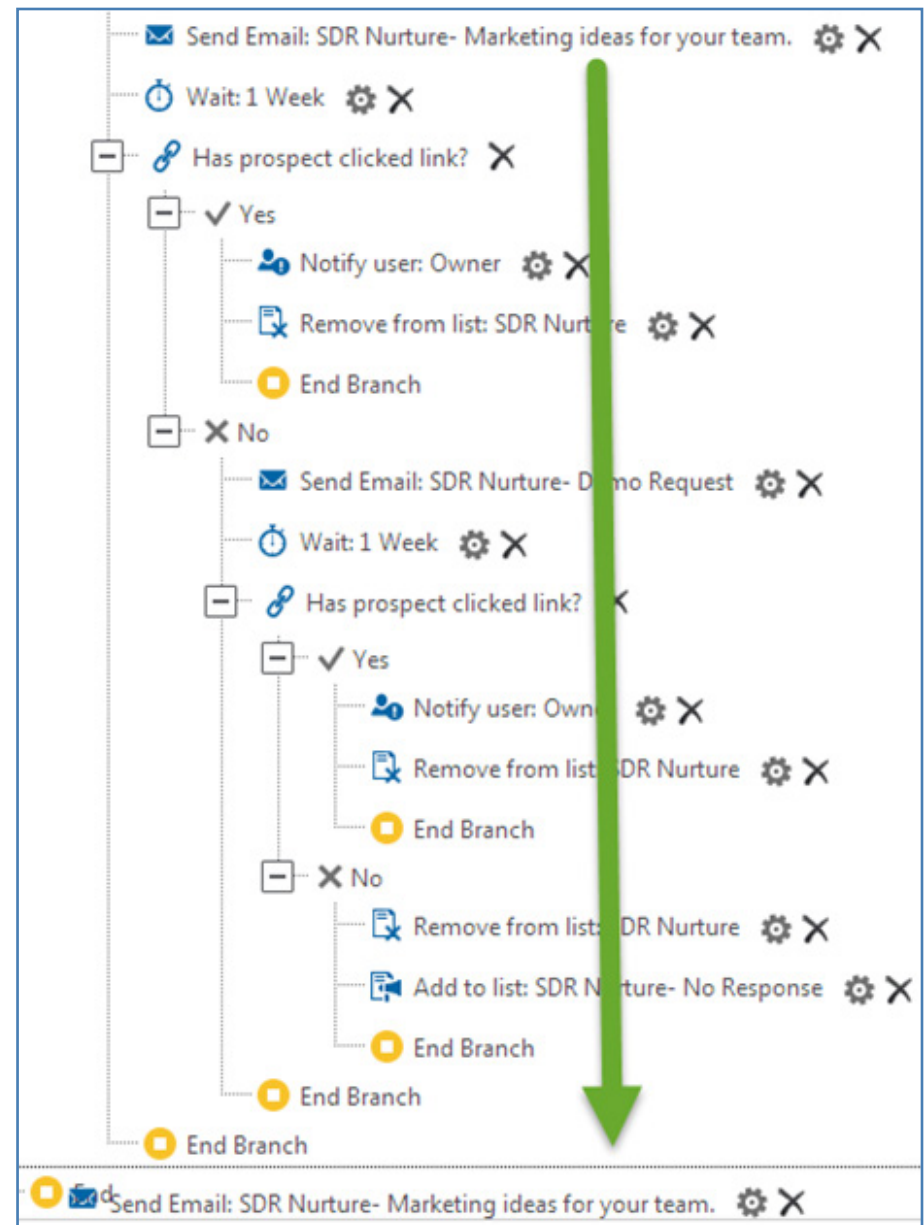


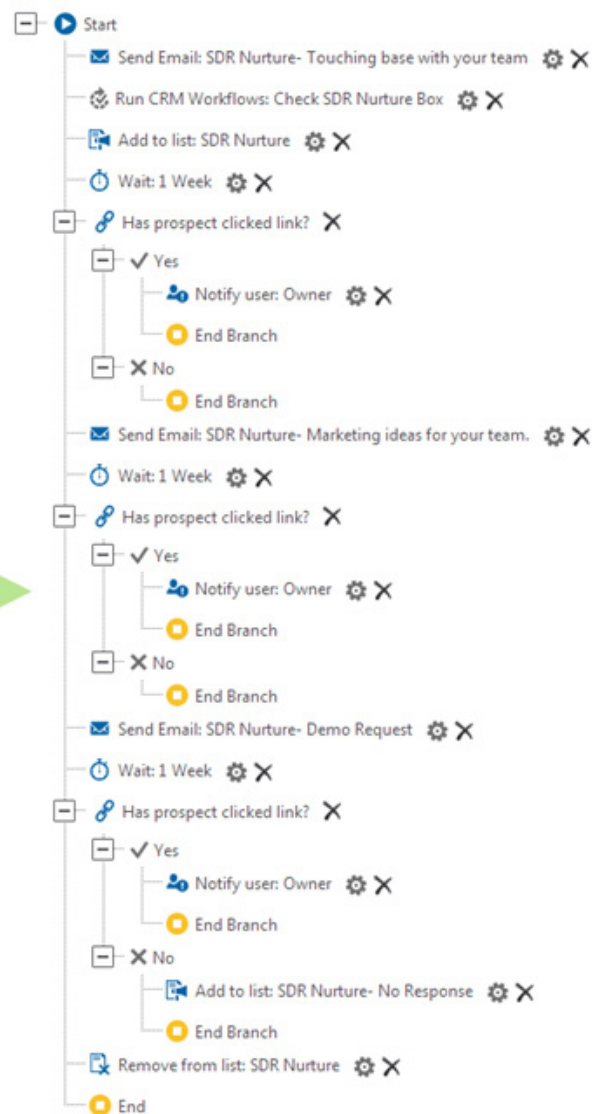
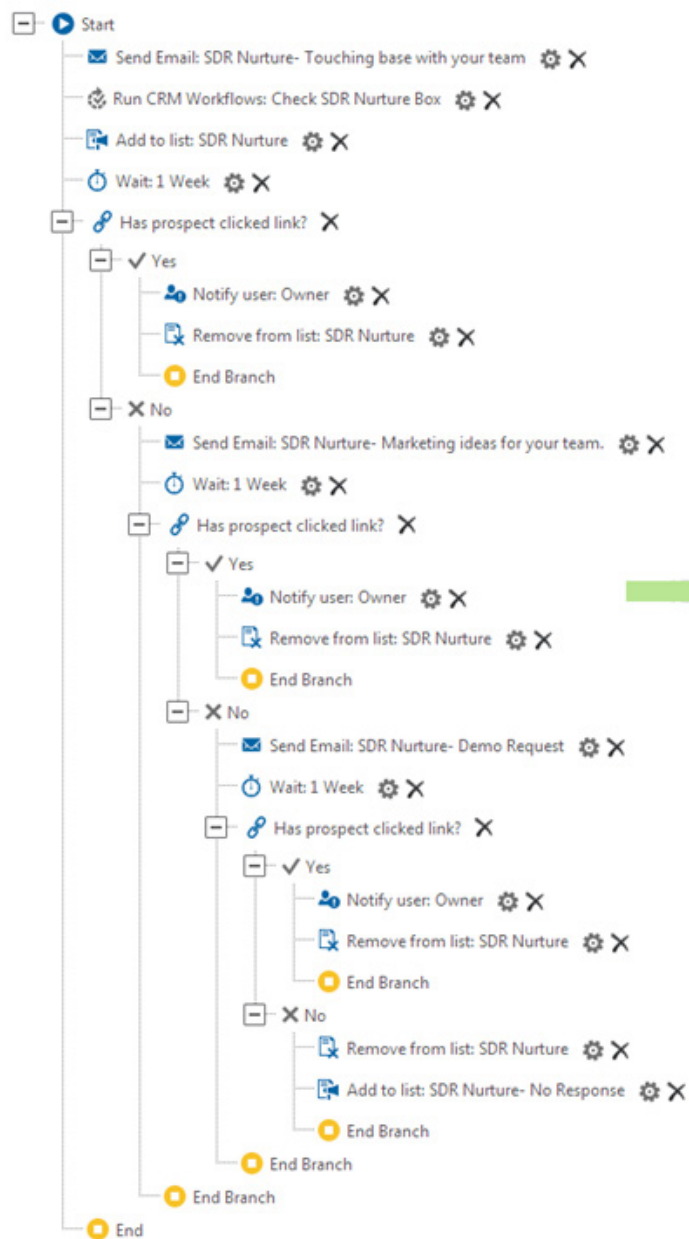
nodes were lined up on the main branch.

Since it would be valuable for our PAMs to know when a lead or contact interacts with our emails, we can still check for clicks and notify the owner when the recipient clicks a link. However, the click will not end the nurture; it will just notify the record owner and the nurture will continue running.

We then moved a few of the steps to the very end of the nurture so that they will run at the end of the program for everyone. The “End Branch” step just ends that set of instructions; the nurture will move out to the next branch and continue on until the final “End.” Therefore, everyone who goes through the nurture will eventually hit these last steps right before the program ends. In this case, we’ve decided to remove each person who finishes the nurture from the marketing list that runs the nurture, so they don’t get re-added to another nurture. This keeps us from duplicating steps.

Our new program has less steps, is a little shorter and is much clearer. Most importantly, it gives us the behavior we were looking for.





## AUTOMATED WELCOME EMAILS

Many marketers believe it is important to send a prompt welcome email to everyone who signs up for your mailing list. This welcome email sets the tone for your new relationship and is a key opportunity to get the customer engaged with your content. Whether your mailing list contains leads, established customers, or a mixture of the two, these people have expressed interest by signing up with you, and now is your chance to meet or exceed those expectations with a quality welcome email.

Speaking generally, there are two basic methods that you can use to automatically send a welcome email:

- Use a CRM Workflow to send an email to a lead, contact or account.
- Run a lead or contact through a nurture program by adding them to a marketing list associated with the nurture program.

Exactly when and how you use these two methods depends on what you decide works best for your business' current processes and goals. The rest of this post is a discussion of different welcome email automation scenarios and things to look for when setting them up.

### Forms and Subscription Pages

If you are using a profile management form or a subscription management page as a lead generation tool, you have a very intuitive point at which to start a welcome email automation. Someone has just given you their email address and possibly other personal information, so it is only natural that you will want to follow up with them to solidify that relationship.

However, there are some important details to consider. For example, is there a chance that your form/subscription page will receive submissions from someone that has already signed up? This is a welcome email, so you want to make sure that

you are only sending it to people who have just signed up for your mailings and not sending it to people who are simply modifying their existing subscription preferences.

If your form/subscription page is only going to be submitted by new leads/contacts, (maybe this is a sign-up form on your website, and you have a separate form that you direct existing contacts to for any future updates) then you have a few options:

- Set up an auto response action on your form/subscription page so that the welcome email is sent to the respondent immediately upon submission.
- Set up an add to marketing list action on your form/subscription page so every respondent is added to a nurture program's marketing list immediately upon submission.

If, on the other hand, your form/ subscription page is going to receive submissions from both new and current leads and contacts, you can ensure that the welcome email is only sent to new leads and contacts by creating a workflow. In this workflow, we reference posted forms and contacts; however, these can be swapped out for posted subscriptions and leads as needed.

The workflow would have an organizational scope, run on the creation of a posted form and check that the posted form equals [your form]. If so, ensure that it times out for two minutes, then checks that the contact field contains data. Then have it check that the posted form's related contact's "created on" is greater than or equal to one minute before the posted form's "created on" AND less than or equal to one minute after the posted form's "created on." Lastly, if all of these steps are met, have it send the welcome email to the contact. This ensure that the welcome email is only sent to contacts that were

created within one minute of the posted form.

The screenshot shows the configuration window for a workflow titled "Process: Welcome Email Posted Form Workflow". The interface includes a sidebar with "Common" (Information, Audit History) and "Process Sessions" (Process Sessions) sections. The main area has tabs for "General", "Administration", and "Notes".

**General Tab:**

- Hide Process Properties:**
  - Process Name: Welcome Email Posted Form Workflow
  - Activate As: Process
  - Available to Run:
    - ☒ Run this workflow in the background (recommended)
    - ☐ As an on-demand process
    - ☐ As a child process
  - Workflow Job Retention:
    - ☒ Automatically delete completed workflow jobs (to save disk space)
- Entity: Posted Form
- Category: Workflow
- Options for Automatic Processes:
  - Scope: Organization
  - Start when:
    - ☒ Record is created
    - ☐ Record status changes
    - ☐ Record is assigned
    - ☐ Record fields change
    - ☐ Record is deleted

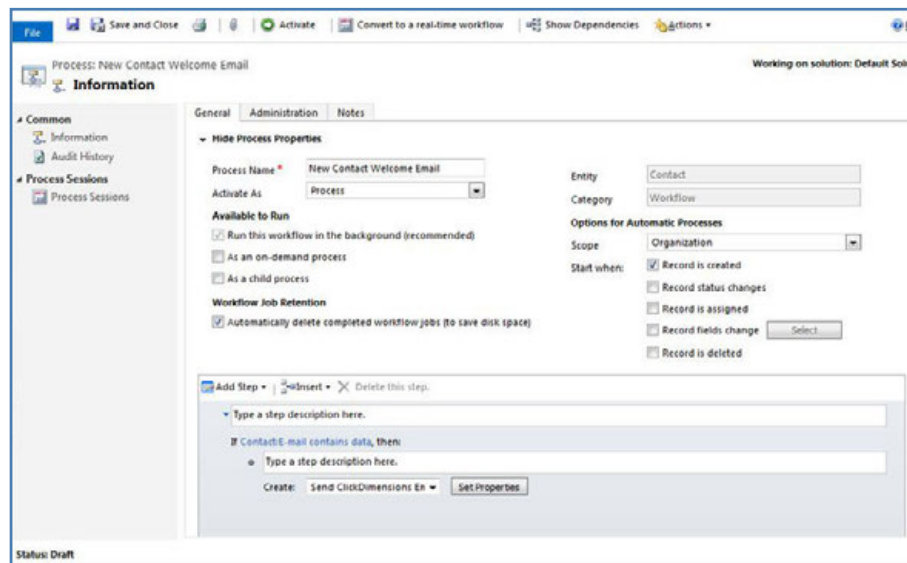
**Workflow Steps:**

- 1. Type a step description here.
  - If Posted Form:Form equals [Sign-Up Form], then:
    - 2. Type a step description here.
      - Timeout until 2 Minutes then
        - 3. Type a step description here.
          - If Posted Form:Contact contains data, then:
            - 4. Type a step description here.
              - If Contact (Contact):Created On >= [ 1 Minute Before Posted Form:Created On] AND [Contact (Contact):Created On <= [ 1 Minute After Posted Form:Created On]], then:
                - 5. Type a step description here.
                  - Create: Send ClickDimensions En

Status: Draft

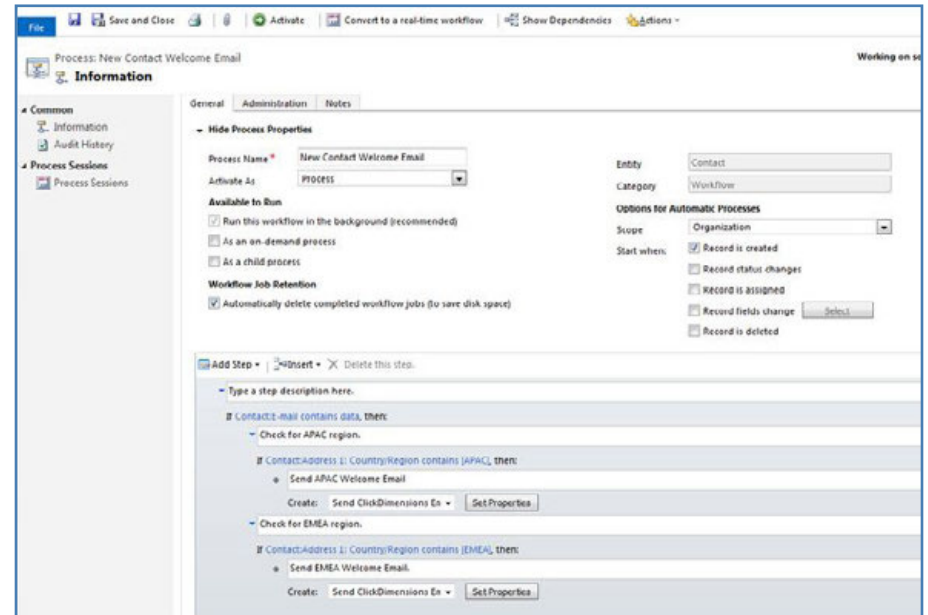
## Manual Record Creation

Perhaps your business operates such that every new customer is created as a contact in your CRM, and you would like to send a welcome email to every contact. This workflow is much simpler than the workflow outlined in the previous section. You would simply create a workflow that runs on the creation of a contact record, checks that the contact's "email address" field contains data and then sends a welcome email to the contact.



If you want some contacts to receive different welcome emails than others based on some criteria on the contact record, you can build this into the workflow by adding some check conditions that look for the desired criteria and then sends the appropriate email.

Here is an example based on the contact's region:



Note that if you are building a workflow to send a welcome email based on some criteria, it's important to know that a CRM workflow can only access data on the record that the workflow is running on and data on records that the primary entity has an N:1 relationship with.

While there was only room for a few specific examples here, the general concepts presented can be expanded to accommodate a wide variety of business processes and CRM configurations. The ability to trigger welcome emails based on both the automatic and manual creation and updating of records opens up a huge range of potential starting points for your welcome email automations.



## FINDING THE POTENTIAL OF AUTO RESPONDER EMAILS

Auto responder emails are a great tool to strengthen the relationship between your organization and your leads and contacts. These emails are sometimes composed more hurriedly than a bulk email send, but they should be taken more seriously. Auto responder emails can offer a customer a sense of completion when they submit a web content record, often they are used as a means of confirmation to the customer.

Here are a few examples on how to get the most out of your auto responder emails:

**The Double Opt-In** – Using auto responder emails for double opt-ins is a great way to practice permission-based email marketing. This allows your website visitors to sign up for your mailings, but doesn't add them to your marketing list unless they also confirm that they have signed up when they view the confirmation (auto responder) email. This can be especially helpful if you are working to comply with the CAN-SPAM act.

**Reward Loyalty** – Give the people who submitted your ClickDimensions forms and surveys a little bonus: include an offer or reward for providing feedback or information; make it worth their while. ClickDimensions auto responder emails can be associated with subscription management pages, forms and surveys as an action, so the possibilities for adding in trackable content exponentially increase!

**Send Thanks** – A simple thank you message can go a long way when it comes to building and maintaining a relationship with your customers. Consistently following up with the customer will build trust and leaves him or her feeling appreciated.

**Confirmations** – This is possibly the most standard use of an auto response email: confirm to the customer that you received their form, survey, subscription management page, etc. This lets the customer know that their submission

was successful, and that they can expect you to contact them moving forward. We live in a digital age where we can expect a confirmation on orders, appointments, reservations, etc., so when a confirmation email is absent, it seems peculiar.

Make use of your auto responder emails by creating a thoughtful email template, tailored to your campaign, and include auto responders for marketing forms, surveys, and subscription management pages.



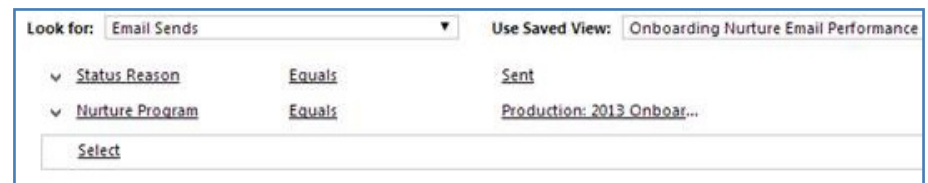
## CREATE A CHART TO SHOW NURTURE PERFORMANCE

Here at ClickDimensions, we have a nurture program for onboarding new customers. Over the course of the first few months after customers sign up, they will receive a series of emails introducing them to ClickDimensions and our features and services. Below is one method that we use to display the performance of emails sent through a ClickDimensions nurture program.

**1. Templates are named by the nurture step.** We have used a naming convention for our templates to make it easier to build the nurture and report on its performance:

- i. Onboarding Template: 01 Welcome
- ii. Onboarding Template: 02 Training
- iii. Onboarding Template: 03 Help
- iv. ...and so on
- v. Onboarding Template: 13 CD Certification

If your nurture has branching in it (such as “If the recipient clicks = Yes, send template X, and if the recipient does not click, send template Y”), you might consider naming your templates something like “Nurture Template: Step 1A” and “Nurture Template: Step 1B” (where the 1A is the template they get if they clicked, and 1B is the template they get if they did not).



**2. We have built a view of Email Sends called “Onboarding Nurture Email Performance” with this criteria:**

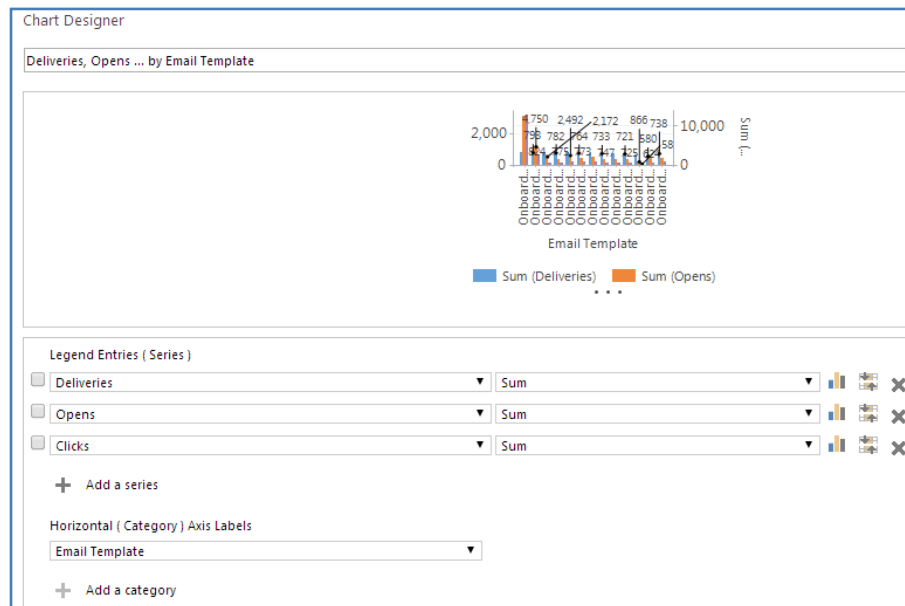
Notice that the Nurture Program that originated the Email Send is a field that you can look up from the Email Send entity. It is not on the Email Send form, but you can use it in views and report or add it to the form if you wish. The columns for this view are laid out like this:

| ✓ | Subject                             | Nurture Progra... | Email Template ↑                | Status Reason | Created On       | Deliveries | Bounces | Opens | Clicks |
|---|-------------------------------------|-------------------|---------------------------------|---------------|------------------|------------|---------|-------|--------|
|   | Thanks for choosing ClickDimensi... | Production: 20... | Onboarding Template: 01 Welcome | Sent          | 4/9/2014 3:41 PM | 1          | 0       | 0     | 0      |
| ✓ | Thanks for choosing ClickDimensi... | Production: 20... | Onboarding Template: 01 Welcome | Sent          | 8/4/2014 3:03 PM | 1          | 0       | 30    | 13     |

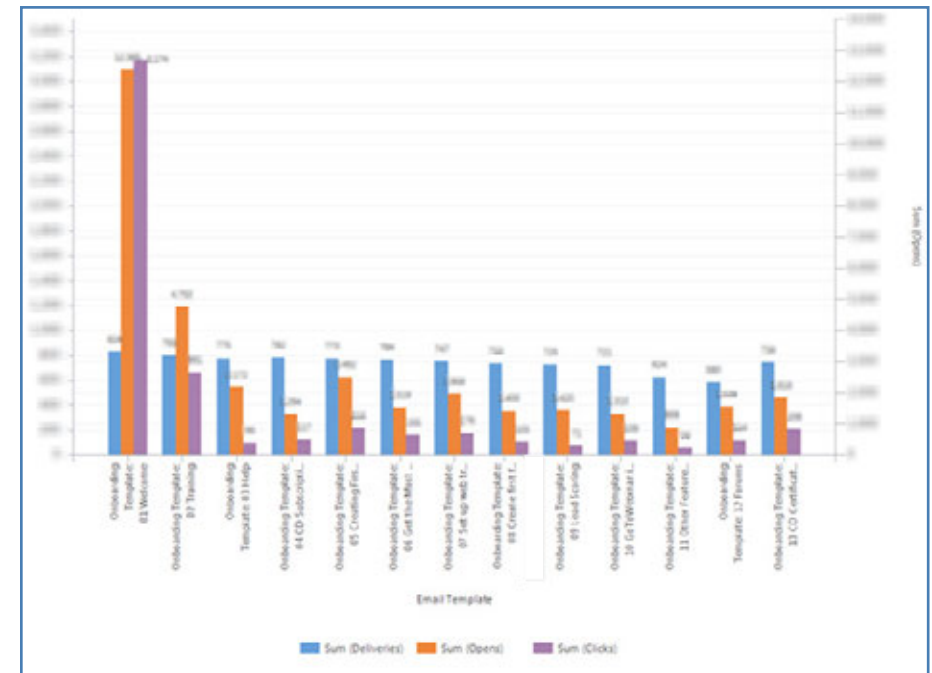


Notice that we have set the view's "Sorting" to sort by Email Template. Since we have given the Email Templates names that correspond to the order the nurture will send them out, it makes it easier to make sense of the view when it is ordered this way too.

### 3. Next, we added a chart to this view as below:



**4. Here is the final result.** This chart shows how well each step in our nurture is performing in terms of deliveries, opens and clicks:



The nice thing about charts that correspond to views in CRM is that you can drill into them. For example, if you click on the "clicks" column (the purple one) for the third template, the view will update to show just the Email Sends that have a click. Likewise, you could filter the view to show just those nurture Email Sends from last month, and the chart will update to show the deliveries, opens and clicks for the nurture from last month.

## MAINTAINING A CLEAN MARKETING LIST

For an email marketer, few things are as frustrating as when a carefully designed email returns a high number of bounces and spam complaints. One of the most important steps you can take toward achieving and maintaining low bounce and spam rates is to keep clean marketing lists. Here are some tips and suggestions for growing and keeping clean marketing lists:

### **Build your list up from scratch**

Include only email addresses that have been freely given for the purpose of receiving marketing communications. If someone has taken the initiative to give you an email address because they are interested in what your business has to offer, it is unlikely that they will provide an invalid address or view your messages as spam. However, if you use an email list that was compiled for another purpose, it is likely that a significant portion of the members of that list will have no interest in your messages, resulting in higher

numbers of spam complaints and bounces. Purchased lists are even worse; nobody on such a list is expecting to receive your messages. In fact, purchased marketing lists are in violation of the ClickDimensions Terms of Use.

### **Monitor your Excluded Emails and Email Events**

Every time you do an Email Send, be sure to take a look at the related Excluded Emails and Email Events, particularly the Bounce events. Excluded Emails are email addresses that were not sent to due to excessive past bounces. You should seriously consider removing these email addresses from your marketing list. Invalid Recipient and Bounce type Email Events will contain a specific bounce code in the record's Message field. This bounce code provides additional information on the exact cause of the bounce that will be useful in deciding between removal and remediation.



If the email address has been excluded, they did not get that email and therefore it could not count as a bounce or a spam complaint again. However, it is good to remove these people from your marketing list so that the number of people you think will receive the email will be much closer to the number of people that actually receive the email.

### **Remove fake, invalid and “spamtrap” email addresses**

Keeping up with the Excluded Emails and Email Events is a good way to catch fake or misspelled email addresses; particularly Invalid Recipient type Email Events.

“Spamtrap” email addresses are valid email addresses that are created for the sole purpose of luring spam. While most often hidden from view so as to only wind up on marketing lists compiled with an automated email address harvester (thus ensuring that all of the emails received are unsolicited), it is not unheard of for someone to submit a spamtrap email address maliciously. Some examples of

spamtrap addresses include nospam@somewhere.com, abuse@antispam.net, postmaster@somedomain.com, etc. While there is no catch-all for identifying these kinds of addresses, it is always good to keep an eye out any time you look through your marketing lists.

### **Remove role accounts**

While it may not seem like it, role accounts such as sales@somecompany.com often have a negative impact on email campaigns. These email addresses are often checked by multiple people and may change hands frequently. Even if it was collected legitimately, it is likely that this email address will become a source of spam complaints.

### **Prompt customers to update information and give subscription options**

It is a good idea to prompt your customers to update their personal information and subscription preferences as often as possible. If customers are aware that they

have the option to stop receiving your messages and are consistently presented with the opportunity to provide a new email address, it is likely that each person on your marketing list has given you a current email address and is on that list because they have chosen to be. This can be as simple as including a link to a Form or Subscription Management Page in your marketing emails and receipts.

Maintaining a clean marketing list is an ongoing process, but with the above steps you should be able to increase your delivery rate by weeding out harmful and unnecessary list members.

## PERMISSION-BASED EMAIL ADDRESSES

Effective email marketing relies on excellent deliverability – getting your emails to your recipients' inboxes – and excellent deliverability requires making sure that you establish and maintain an excellent sender reputation.

As your Email Service Provider, ClickDimensions works around the clock to monitor and maintain our email systems' reputation. We use leading techniques and testing to ensure that our platform provides the best deliverability possible. However, deliverability relies as much on your efforts as on ours. Part of the equation that you control is the quality of your data.

Here are some tips for keeping your data nice and clean:

### **Permission, permission, permission.**

Always use opt-in methods to gain the permission of your prospects and

customers to send them email. Never use third-party lists (our terms and conditions forbid it). Build your lists organically through permission – you'll get better results and you won't risk being blacklisted for spamming.

**Ask your audience to keep you up-to-date.** It's a good practice to ask your recipients to update you if their information changes. You can use the ClickDimensions' Profile Management feature for this. Including a link to the profile management form in your monthly newsletter is a great way to let people keep their data clean for you!

### **Clean up your lists from time to time.**

Even when following the best practices for maintaining your data, it can get out-of-date or include typos and other inconsistencies. Here are a few services that you can consider using to clean up your permission-based marketing lists.

(We do not have a relationship with any of these providers, so do your homework before using any of them.)

### **Email List Cleaning Services:**

- [LeadSpend](#)
- [DataValidation](#)
- [BriteVerify](#)
- [emailanswers](#)
- [Email Validator](#)

## RE-ENGAGING INACTIVE SUBSCRIBERS

### Measuring Engagement

Good email marketing is about more than maintaining and sending to a large, permission-based marketing list. While it is generally a good idea to get your content in front of as many people as possible, it is also important to monitor the level of engagement those recipients have with your content and, when necessary, trim down your marketing lists by removing inactive subscribers. This can benefit both your open/click rates, and with strong re-engagement efforts, actually increase the number of people engaging with your content.

Engagement is usefully measured by the ratio of opens and/or clicks over a period of time:

| Category    | Open and/or Click Frequency        | % in Average Marketing List |
|-------------|------------------------------------|-----------------------------|
| Very Active | 2+ times in the past 90 days       | 3.28%                       |
| Active      | At least once in the past 30 days  | 21.24%                      |
| Engaged     | At least once in the past 90 days  | 11.74%                      |
| Unengaged   | None in the last 90-180 days       | 9.77%                       |
| Dormant     | None in the last 180+ days         | 3.81%                       |
| Zombies     | None in the past 12 months / Never | 40.16%                      |

[Source: Campaign Monitor](#)

So, based on the above statistics, it is likely that your marketing lists contain a fair number of “zombies” who have long since stopped engaging with your content (or perhaps never did!). Instead of continuing to send these people content that they will not engage with, it may be beneficial to send them a strong, targeted email asking them to confirm their continued interest in your content. If they do not reconfirm, remove them from your marketing list. As this is potentially your last communication with these subscribers, be sure that your re-engagement email includes your very best content, offers or deals.

### Identifying and Re-engaging Your Zombies

You can use Microsoft CRM’s Advanced Find feature to generate a marketing list that contains only a given marketing list’s zombies. To illustrate, let’s say that you have a “Special Offers” static marketing list targeted at contacts that you know contains a number of zombies. To generate a “Special Offers Zombies” list, you would follow the steps below:

- Create a new static marketing list targeted at contacts, named “Special Offers Zombies.”
- Click “Manage Members” and use the “Add Using Advanced Find” function to add all contacts who are members of the “Special Offers” marketing list.
- Then, use the “Remove Using Advanced Find” function to remove all contacts who have a Click or Open Email Event

that occurred in the last year (or whichever time frame you decide is best).

Now you're left with a marketing list that contains only those subscribers who have not engaged with any "Special Offers" content in the past year, and are ready to send your strongest re-engagement content to these subscribers. Once the recipients have had a chance to open and/or click on your content, simply re-run the above "Remove Using Advanced Find" on the "Special Offers Zombies" marketing list to remove members you have successfully re-engaged.

Finally, go back to your original "Special Offers" marketing list and use "Remove Using Advanced Find" to remove all members who are included in the "Special Offers Zombies" marketing list, and you will have successfully removed the truly "dead" subscribers from your "Special Offers" marketing list.

**Remove Members**  
Use search criteria to find members to remove from the marketing list.

Find

Edit Columns

Look for: Contact Use Saved View: [new]

Details Clear Group AND Group OR

Select

| AND | Type       | Equals      | Click      |
|-----|------------|-------------|------------|
| OR  | Created On | On or After | 10/14/2013 |

Select

## REFRESHING YOUR EMAIL MARKETING

Is your email marketing feeling a little stale? Not sure what to send? Check out these tips on how you can refresh your email marketing strategy.

### 1. Make Some Changes

Revive your subject lines: Steer clear of spammy words like “free” or “% off,” and try to keep it short but insightful. Many of your customers will be opening your email on their smartphones, and subject lines greater than 30-40 characters (depending on the device) won’t display fully.

Change the template: If you’re still using an old design, think about updating your template. Change the color scheme, fonts, etc. A change of scenery may be what you need to catch your reader’s attention.

Change the layout: If you’re not ready to completely change your template, consider a change in the layout instead. You can still keep the same fonts and colors, but change where the image is located. If

you’re using a two column set up, try using a body and sidebar layout instead.

Update your call to action: If you’re using hyperlinked text to get your readers’ attention, try using a button instead. Both get the job done, but a button provides a cleaner look. You can now drag and drop images into the image manager—drop the button image on the image manager, add it to your template, and link it to a form, landing page, survey, blog or wherever you want to direct your readers.

Social Media: If you have a social media presence, be sure to add the social sharing buttons to your template as well.

### 2. Review Your Content

Voice: Stay true to your readers and speak in their language using the voice of your business. There’s a difference between selling to parents versus selling farming equipment. Use your voice!





Relevant: Keep your content relevant. Your readers signed up for your emails for a reason, so don't stray too far from the subject of your content. Your readers should know the kind of emails and frequency of emails to expect from you. Make use of Subscription Management to allow your readers to pick and choose the kind of emails they want from you.

Concise: Keep your emails short, sweet and to the point. If you have more to say, use your call to actions to lead them to your website. No one wants to open an email that reads more like homework.

### **3. Only Send Worthwhile Emails**

If you're tired of repeating the same content, send something new! For example, send:

- Weekly/Monthly Digests
- Anniversary Recognitions
- Holiday/Seasonal Greetings
- Birthday Wishes

- Last Minute Reminders
- Welcome Messages

### **4. Know the Rules**

Email regulations vary by country. Be sure to read up on anti-spam laws not just for your country, but for any countries where you are marketing. Look at the SpamAssassin rules generated from the test email. If you're not familiar with a rule, go to SpamAssassin to search for the rule or enter the rule name in a search engine. Remember that a spam score of 3.0 or lower will yield better results.

### **5. Present Multiple Opportunities to Gather Email Addresses**

This means knowing how to grow your marketing lists. Offer incentives that your recipients can access or download by filling out a registration form—free eBooks, discounts, coupons, white papers, contests etc. Fire up your social networks to ask your followers to register on your Subscription lists. Offer email registration/sign-ups for live events. Get in the habit

of keeping your marketing lists relevant. This gives you a more accurate perspective of your email statistics and keeps your deliverability high due to less bounces. You'll actively avoid spam traps along the way.

### **6. Test. Test. Test.**

Test your email before you send, and test any changes. If you're using dynamic content, the best way to witness your email's behaviour is to actually send your email. Use Split Testing to see how well your readers respond to these new changes. Inbox Preview lets you see what your emails will look like to your recipients.

## KEEP YOUR EMAIL FROM BEING DELIVERED TO “JUNK”

Try as we might, many of us end up with a painstakingly developed email that unfortunately goes into a spam queue or junk folder while testing or sending. While it's not possible to backtrack and get the email back into the inbox if it's already hit spam, there are some preventative measures you can take to increase your overall deliverability.

### Set up an SPF record

SPF (Sender Policy Framework) records are a fairly easy set up and can have a large impact. When you send out an email through ClickDimensions, our processes handle and actually deliver that email message. When your receiving email client software gets that message (whether that's Outlook, Gmail, Yahoo, etc.), it sees that ClickDimensions is the one actually sending the email, even though the branding on the message is from your company. This can appear suspicious to some particularly strict email clients or networks.

The SPF record acts like a little note that essentially says “We give ClickDimensions permission to send emails on our behalf.” This lets the email client know these types of messages are expected and allowed, not a take-over of your network.

### Check the Spam Score while Testing

Once you've loaded your Email Template into an Email Send for a live test, make sure to check the Spam Score on the test window. The Spam Score is run by SpamAssassin and will give your email an overall score based on code and content. A score of 3.0 or higher is what you'd like to avoid, but the lower the score the better. The score will come with rules that will tell you what about your email is raising your score. You can check the



Spam Assassin website or the web to see what exactly about your template you should tweak in order to get a lower score.

### **Read through the Content—Critically**

If your email still consistently comes in as spam, double-check your content. Most of the time the SpamAssassin report above will catch keywords that can trigger a spam delivery, but another read-through can help you spot potentially problematic words and phrases. Words like “discount,” “pharmacy,” and even “spam,” as well as large numbers or amounts of money can make your message seem less credible. Using professional language and punctuation as well as providing relevant content with an appropriate subject line will also help boost the legitimacy of your communication.

### **How Many Times Have You Sent the Email and Who Are You Sending To?**

While we do always recommend thorough testing, when you continue to send the same, slightly modified email to yourself, it can over time land in the spam box. Your Outlook or Gmail won’t necessarily know that you’re intentionally sending the message to yourself and may decide after a few sends that the repeated message looks suspicious.

This can especially be a factor when sending to many of the same internal email addresses; it can sometimes be interpreted

as an attack on your network. This is normally not indicative of a problem with the content, and in most cases the real send will go out fine. As a test, you can try sending to a few other platforms such as Gmail or Yahoo to see how those get processed.

### **Final Word**

ClickDimensions helps get you off to a great start by providing trusted sending IPs, but sending consistent, relevant content will help boost your deliverability and trust amongst your recipients. If you consistently aim to send clear content to clean lists, your emails should continually go directly into the inbox.

## SPAMASSASSIN REPORT – FOLLOW THE RULES!

Nobody wants their email to get caught in a spam folder, so let's talk about steps to take to prevent that from happening as often as possible. ClickDimensions users are able to test their emails using a spam filter called [SpamAssassin](#). Testing the email will allow you to see what it looks like in your email client. But that's not all – SpamAssassin will also give you a spam report. This tells you what might get flagged by a spam filter when you send your email.

| Spam Assassin Report |                       |   |
|----------------------|-----------------------|---|
| Is Spam: False       |                       |   |
| Spam Score: 4.7      |                       |   |
| Points               | Rule Name             | Rule Description                                      |
| 00                   | FREEMAIL_FROM         | Sender email is commonly abused enduser mail provider |
| 00                   | DKIM_ADSP_CUSTOM_MED  | No valid author signature, adsp_override is           |
| 00                   | HTML_MESSAGE          | BODY: HTML included in message                        |
| 02                   | HTML_IMAGE_ONLY_08    | BODY: HTML: images with 400-800 bytes of words        |
| 01                   | MIME_HTML_ONLY        | BODY: Message only has text/html MIME parts           |
| 01                   | HTML_MIME_NO_HTML_TAG | HTML-only message, but there is no HTML tag           |
| 01                   | NML_ADSP_CUSTOM_MED   | ADSP custom_med hit, and not from a mailing list      |

Each rule is worth a different number of points, and they add up to the Spam Score. Try to keep your spam score below a 3.0 for better delivery results.

In this article, we will explain some of the common spam rules so that you can avoid them from the start. While the rule codes in our example are from SpamAssassin, the concepts are helpful for any bulk email.

**HTML\_MESSAGE:**

This will appear every time and adds nothing to your score. Do not worry about this one at all.

**MIME\_HTML\_ONLY:**

Problem: There is no text version.

Solution: We highly recommend having a text version for people who may not be able to read HTML on their device.

**HTML\_MIME\_NO\_HTML\_TAG:**

Problem: There are no <html></html> tags in your template.

Solution: Open the full screen editor of your email designer and go to the HTML tab at the bottom left. At the very top, before all the other text type <html>. Then go to the very bottom of the text and type </html>. Save and re-test.

**HTML\_IMAGE\_ONLY\_08 or HTML\_IMAGE\_RATIO\_08:**

(Note: the number (08) may be different depending on the ratio)

Problem: The ratio of images to text is too high (there are too many images and too little text).

Solution: Either increase the amount of text or decrease the amount of images. On this one, also pay attention to the number of points it's giving you – if it's lower, you don't need to worry about it as much.

**FREEMAIL\_FROM:**

Problem: The From Email address in your Email Send is from an email address from a free provider like Google (@gmail) or Yahoo (@yahoo).

Solution: Use a different email address with your company domain.

Note: There are a couple of others in the screenshot above that are a result of this same issue – DKIM\_ADSP\_CUSTOM\_MED and NML\_ADSP\_CUSTOM\_MED

There are many other spam rules, but the ones discussed above come up most often. If you receive any spam rules you can fix, just make your changes, save, hit test again, and repeat until you've got a low score!

## DESIGNING EMAILS FOR OUTLOOK

When designing your email, you'll want to test and consider the display in many different email clients. We make this easy to do with our test feature where you can add multiple email addresses to multiple inboxes. (Think Outlook, Gmail, Yahoo, and your smartphone—you can test all of those at once with ClickDimensions.) However, at the end of the day, Outlook remains one of the most widely used email clients, especially for business settings. Since Outlook 2007, the software now uses Word's internal system to render HTML and CSS, the code your email ultimately consists of. Word itself doesn't support all features of HTML and CSS, resulting in some limitations on how code can be interpreted by Outlook.

### Coding Practices

**Tables vs Divs:** As we mentioned above, HTML is your base language for emails (like web pages). Within emails, simple is best since we want our code to populate

amongst as many clients as possible. That's why while web pages have mostly moved to using CSS divs, emails still work with the tried-and-true table (especially when you consider the float property in CSS doesn't populate in Outlook). Therefore, it's recommended to build all of your email layouts as tables, and many times even tables within tables. Likewise, the newest properties of HTML, like HTML5 and CSS like with CSS3 are often not supported.

**Applying CSS:** If you're using outside coding software or if you're used to coding web pages, you may want to create classes and IDs and call the appropriate part of your template in an internal style. However, support of this seems rather spotty. The best way to make sure your CSS is applied is to apply it often—in inline styles for each element. This can be a huge task by hand, but thankfully there are online tools to help.

### Accepting the Limitations

There are a couple of things that we are generally asked that unfortunately are just

not possible in Outlook and therefore, to not create confusion, we don't allow you to do in email templates. This includes embedding forms or videos directly into the email. Unfortunately, Outlook also does not accept background images or tooltips. Support of image maps is spotty as well. As a side note, JavaScript is also not suitable for emails.

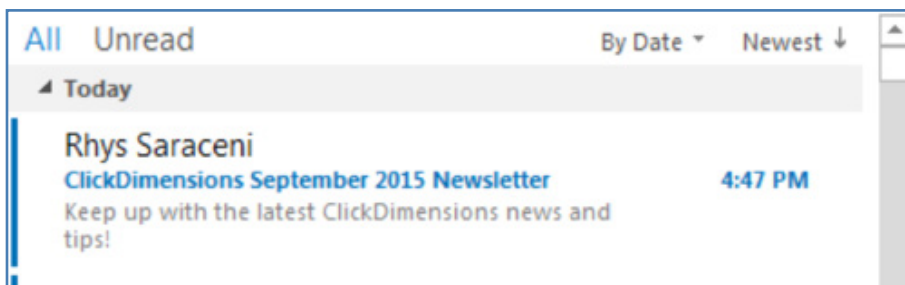
### The Good News

In the case of emails, less is often more. While we did mention that Outlook is one of the most popular email clients, mobile platforms are increasing in popularity. Some sources even cite the iPhone mail app as the most-used email client (over Outlook). So while some of these things are restricted, imagine trying to download a wallpaper-sized background image or loading a video within your email app. Lightweight emails with simple, structured designs are easier to download and navigate on smartphones.

## POWER UP YOUR EMAILS WITH PREHEADER TEXT

In an email, the preheader text is the text that appears after your email's sender information and subject. Generally, the preheader is used to give you some insight into an email's content before you open it.

Preheader text is easy to add to your email and can be a powerful tool that will help drive higher open and click rates. When customers receive your email, the subject and preheader text will be the key elements they will use to determine if opening and interacting with your email is worth their time. The preheader text allows you to reinforce your subject to help encourage your customer that opening your email will be a valuable experience.



So, what are some different ways to maximize preheader text?

### Be Aware of Character Display Limits

Preheader text is generally brief because of the limited space it

displays in your customer's inbox, and because email clients set a strict limit on the number of preheader text characters they will display. In general, 40-50 characters is a good length to stick with because this will be acceptable for most email clients. For a more in-depth breakdown, Litmus provides the following average character display counts for various popular email clients:

#### Desktop

- Outlook 2013: 35
- Outlook for Mac 2015: 55
- Apple Mail: 140

#### Webmail

- AOL: 75
- Gmail: varies depending on subject length
- Yahoo: varies depending on subject length

#### Mobile

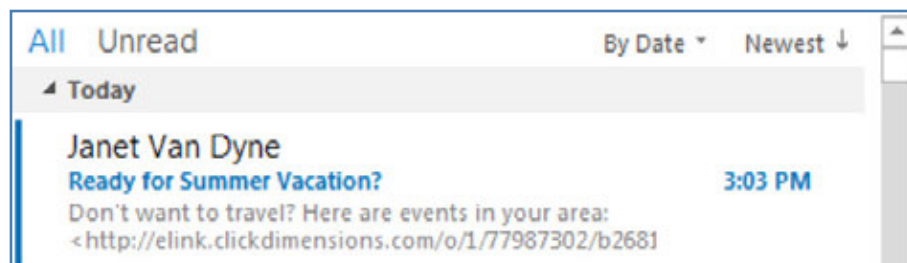
- Android Native Mail App: 40
- iOS Native Mail App: 90
- iOS Yahoo and Gmail Apps: 50
- Windows Phone: 40

Given these limitations, you want to make sure every character counts!



## Use the Preheader as an Extension of Your Subject

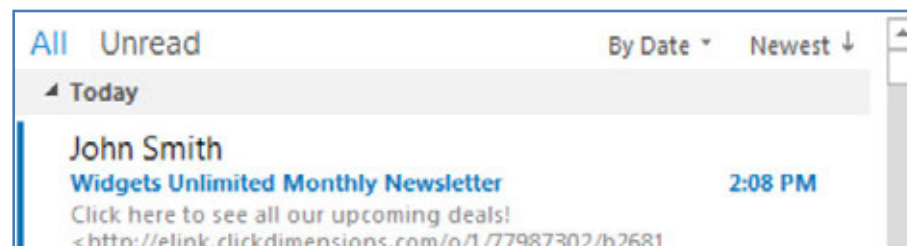
Rather than using your subject line and preheader text to convey separate pieces of information, you may get better results by using your preheader text to build upon the message in your subject. A good example would be the use of a question as your subject.



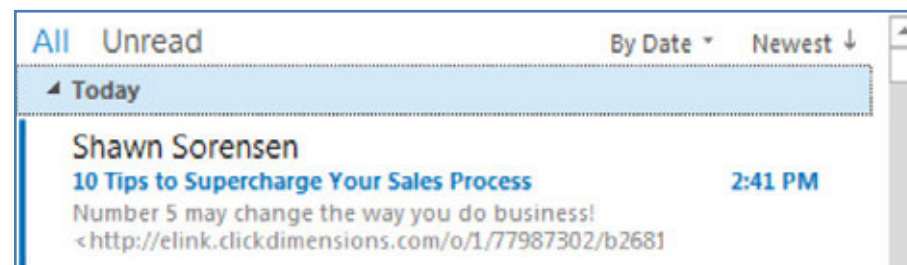
The preheader question is useful because it helps attract recipients by relating directly to the subject line. However, it is possible that the question may not be relevant for many of your recipients. In this case, the preheader text can be utilized to indicate to this second group of recipients why it is still worth their time to open your email and see what you have to say.

## Include a Call-to-Action

Another simple but effective use of preheader text is a call to action. Simply telling the recipient to “click here” in the preheader can help drive opens.



If you want to have a little fun with your emails, you could use the preheader text in conjunction with your subject to mimic the format of BuzzFeed lists and similar types of articles. The lists generally have a title like “Top 10 shocking facts about bananas; you’ll never believe number 7!” There’s enough information to indicate what’s in the message, but vague enough that you can’t resist checking it out.



Doing this could pique your recipients’ interest enough to cause them to open the email, but you need to be sure to not sound so extravagant that you come across as spam.

Using preheader text in your email sends can give recipients more context and help drive higher opens rates. Try using the preheader in your next send and see how it affects your results.

## TWO WAYS TO BETTER ENGAGE YOUR EMAIL RECIPIENTS

“*Not everything that can be counted counts, and not everything that counts can be counted.*”

ALBERT EINSTEIN

Often, we marketers can get so hung up on elaborate designs and content that we forget the reason we are building these communications to begin with. Most of the time, it's all about engagement. Whether for new prospects, existing customers, partners, vendors or members, the point is to drive interaction, and we do that through a value proposition and call to action.

But sometimes, we can end up saying things just for the sake of saying things, and we spend valuable time, energy and resources going down a path of self-serving metrics to validate the time that was probably misallocated.

This can be especially true for email marketing.

While open rates and click rates, whether unique or total, can be good indicators of whether or not a recipient has experienced

your email, it is not necessarily the tell-all truth as to the quality of the interaction. This can be even more cumbersome if you are overwhelming the inbox with links and calls to action, or worse yet, you create inconsistent bait-and-switch style messaging.

Remember, if the point is to drive engagement, then it is likely that your goal is to send the recipient to your website or blog to find the information prefaced in the email. One way to increase engagement from email is to use fewer, more relevant items in your emails. Don't overwhelm the reader with too many links scattered throughout your message. While content is still king, you don't have to pack it all into one big email. In fact, it may be more beneficial to send out weekly updates in lieu of a monthly consolidated mailing. You could end up with more frequent conversions.

Another simple way to optimize your emails for maximum engagement is to design consistent and obvious calls to action. We've all received an email where there is an image that looks like it could be a link, but no matter how many times we click on it, it doesn't take us anywhere. Or perhaps you've been the recipient of an email where you click on a link and are taken to a page that had little to do with what you just clicked on. You don't have to be a "spammer" to come off as "spammy" in the eyes of your recipients. In our recent newsletter, the main call to action is front and center, letting people know about our upcoming event, and inviting them to register.

Pre-register for the Marketing with MSCRM Idea Conference 

When clicked, the link leads them directly to the conference website with a registration form. Each month, our newsletter has a similar call to action that features our top story or opportunity for that month. The design is consistent, and the call to action is not only obvious, but it delivers on its message.

There are definitely other ways to optimize your email marketing efforts, but you don't have to boil the ocean. Taking small steps to simplify and properly position calls to action while setting clear expectations for recipients will help drive true conversions in your emails.

## MEASURING ENGAGEMENT FOR EMAIL MARKETING

As a marketer, it's important to understand the level of engagement your audience has with your email.

Engagement really means: how much does your audience interact with your emails? How often do they read them? How often do they click on your calls to action?

Measuring engagement provides a few key benefits:

- It lets you know how you are doing. How relevant is your messaging? How effective are your calls to action?
- It lets you see how different parts of your audience respond to your messaging. Are some people more likely to be engaged? Are there parts of your audience you are losing?
- It provides a way to segment your audience for re-engagement efforts

Here's an example of looking at engagement data overlaid on a map:



With the powerful combination of Dynamics CRM and ClickDimensions, measuring audience engagement is easy. Let me show you how.

### Where is Open and Click activity recorded?

First, let's take a look at where you can find open and click data for the recipients of your emails. If you are using ClickDimensions for your email marketing,

*This material was originally presented by ClickDimensions' chief customer officer, Matt Wittemann, during the 2015 Marketing with Microsoft Dynamics Idea Conference. [Click here](#) to watch the full presentation.*

this information is stored in a “Sent Email” record for each Contact you send an email to. There is a new “Sent Email” record created for every email, and we automatically summarize the Contact’s interactions here for you.

Let’s take a look at my Contact record.

Here I can see in list format how many emails I have received, how many times I have opened them, clicked a link in them, etc.

| Subject                                 | Contact           | To Email                 | Score | Delivered | Opens | Clicks | Bounces | Spams | Unsubscribes | Created On         |
|---|-------------------|--------------------------|-------|-----------|-------|--------|---------|-------|--------------|--------------------|
| Rate Correction ClickDimensions Co...   | Matthew Wittemann | matt.wittemann@clickd... | 0     | 1         | 0     | 0      | 0       | 0     | 0            | 5/26/2015 10:07 AM |
| ClickDimensions July 2015 Release       | Matthew Wittemann | matt.wittemann@clickd... | 0     | 1         | 4     | 0      | 0       | 0     | 0            | 7/27/2015 4:32 PM  |
| July 2015 Release of ClickDimensions... | Matthew Wittemann | matt.wittemann@clickd... | 0     | 1         | 0     | 0      | 0       | 0     | 0            | 7/12/2015 4:22 PM  |
| Test steps to testing Salesforce        | Matthew Wittemann | matt.wittemann@clickd... | 0     | 1         | 0     | 0      | 0       | 0     | 0            | 7/10/2015 1:57 PM  |
| Your email marketing effort has an...   | Matthew Wittemann | matt.wittemann@clickd... | 10    | 1         | 2     | 1      | 0       | 0     | 0            | 5/1/2015 5:06 PM   |
| ClickDimensions June 2015 Newslet...    | Matthew Wittemann | matt.wittemann@clickd... | 0     | 1         | 7     | 0      | 0       | 0     | 0            | 6/4/2015 12:32 PM  |
| ClickDimensions May 2015 Newslet...     | Matthew Wittemann | matt.wittemann@clickd... | 10    | 1         | 0     | 1      | 0       | 0     | 0            | 5/7/2015 2:00 PM   |
| Congratulations on becoming CMO...      | Matthew Wittemann | matt.wittemann@clickd... | 0     | 1         | 0     | 0      | 0       | 0     | 0            | 5/6/2015 4:16 PM   |
| ClickDimensions April 2015 Newslet...   | Matthew Wittemann | matt.wittemann@clickd... | 0     | 1         | 1     | 0      | 0       | 0     | 0            | 4/30/2015 10:02 PM |
| ClickDimensions April 2015 Release      | Matthew Wittemann | matt.wittemann@clickd... | 0     | 1         | 0     | 0      | 0       | 0     | 0            | 4/29/2015 5:42 PM  |
| How to Success at ClickDimensions?      | Matthew Wittemann | matt.wittemann@clickd... | 0     | 1         | 0     | 0      | 0       | 0     | 0            | 3/10/2015 4:18 PM  |

This is great information to have if I want to drill into each Contact. But let’s take this data a step further in our analysis.

## Rollup Fields

CRM 2015 introduced the concept of a “rollup field.” This is a custom field you can add to the Contact record in CRM and use it to rollup the values from records related to the Contact.

I have added three rollup fields to the Contact entity:

- Sent Emails
- Opened Emails
- Clicked Emails

**Sent Emails of Contact**

**General**

**Schema**

Display Name:  Field Requirement:

Name:  Searchable:

Field Security: ☐ Enable ☒ Disable

Auditing: ☐ Enable ☒ Disable

Description:

**Type**

Data Type:

Field Type:

Format:

Minimum Value:

Maximum Value:

IME Mode:

Let's look at how the rollup field for Sent Emails is configured by clicking on the Edit button:

SAVE SAVE AND CLOSE

ROLLUP FIELD

## Sent Emails

SOURCE ENTITY

Source: **Contact**

Use Hierarchy: **NO**

RELATED ENTITY

Related: **Sent Emails (Contact)**

FILTERS (OPTIONAL)

+ Add condition

AGGREGATION

COUNT of **Sent Email**

I did something similar to create rollup fields for the Opened Emails and Clicked Emails. However, in these fields, I am only interested in counting them if they have opened or clicked. I am not summing up the total number of opens or clicks – in other words, if the recipient opened the email five times, I am only counting it once. This is a decision I made on how I want to calculate engagement. My end goal is that I want to see the percentage of emails that

I send that are getting opened or clicked at least once by a contact. I could sum the numbers if, for example, I wanted to measure and compare Contacts to see who is the most active “clicker,” but in this case, I am just counting if they have at least opened the email once or clicked on one link. Here's how I did that...

I added a filter to only count the Sent Email records for a Contact if the Opens > 0. So the “Opened Emails” and “Clicked Emails” rollup fields use this filter:

ROLLUP FIELD

## Opened Emails

SOURCE ENTITY

Source: **Contact**

Use Hierarchy: **NO**

RELATED ENTITY

Related: **Sent Emails (Contact)**

FILTERS (OPTIONAL)

**If Opens is greater than 0**

+ Add condition

AGGREGATION

COUNT of **Sent Email**

### Calculated Fields

CRM also has a great function to make

calculated fields where I can take the values of two fields and perform math on them. I am using this function to show me the percentage of emails that the Contact has received and which they have opened or clicked. So I added two fields for this:

- Open Rate (%)
- Click Rate (%)

For information about how to interact with entities and fields programmatically, see the [Microsoft](#)

Type

Data Type \* Decimal Number

Field Type \* **Calculated** Edit

Precision \* 2

Minimum Value \* -100,000,000,000.00

Here's the calculation I'm making in this field:

CALCULATED FIELD

## Set Open Rate (%)

IF...THEN

CONDITION (OPTIONAL)

If **Sent Emails** is greater than 0  
and **Opened Emails** is greater than 0

+ Add condition

ACTION

**Set Open Rate (%)** (decimal number)

= (cdi\_openemail / cdi\_sentemails) \* 100

+ Add Else



Once I have added these rollup fields and calculated fields, CRM handles the process of populating them. I don't have to create any jobs or anything. CRM does that for me. The rollups will start within 12 hours of when I created the fields. (There is a way to get this to run sooner, but we won't go into that. I'll assume you're patient enough to wait for CRM to fill these fields in for you!)

### Adding the fields to the form

After I created these fields, I thought this might be interesting information for our salespeople to see when they are talking to a customer, so I added them to the marketing area of the Contact form:

Microsoft Dynamics CRM | Sales | Contacts | Matthew Wittemann

SAVE SAVE & CLOSE + NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN

CONTACT Matthew Wittemann

**Details**

**PERSONAL**

Gender: Male  
 Marital Status: Married  
 Spouse/Partner Name: --  
 Birthday: --  
 Anniversary: --

**PERSONAL NOTES**

--

**MARKETING**

Originating Lead: Matt Wittemann  
 Last Campaign Date: --  
 Marketing Materials: Send  
 Sent Emails: 212  
 Opened Emails: 149  
 Clicked Emails: 56  
 Open Rate (%): 70.28  
 Click Rate (%): 26.42

### Adding the new fields to a view

Now here's where we really start to get interesting. Let's add our new columns to a view. In fact, I've created a new view called "Email Engagement." I've filtered this view to show only active contacts where the "Emails Sent" field is greater than 0. I also added columns from the Contact's Parent Account (Industry, City, Country, Relationship Type) as well as the Contact's Originating Lead (Lead Source and Source Campaign) to make it easier to analyze data about our engagement levels:

Microsoft Dynamics CRM

Service

Contacts

Search CRM data

NEW DELETE NEW EMAIL LINK RUN REPORT EXPORT TO EXCEL EXPORT DATA CHART TOOL

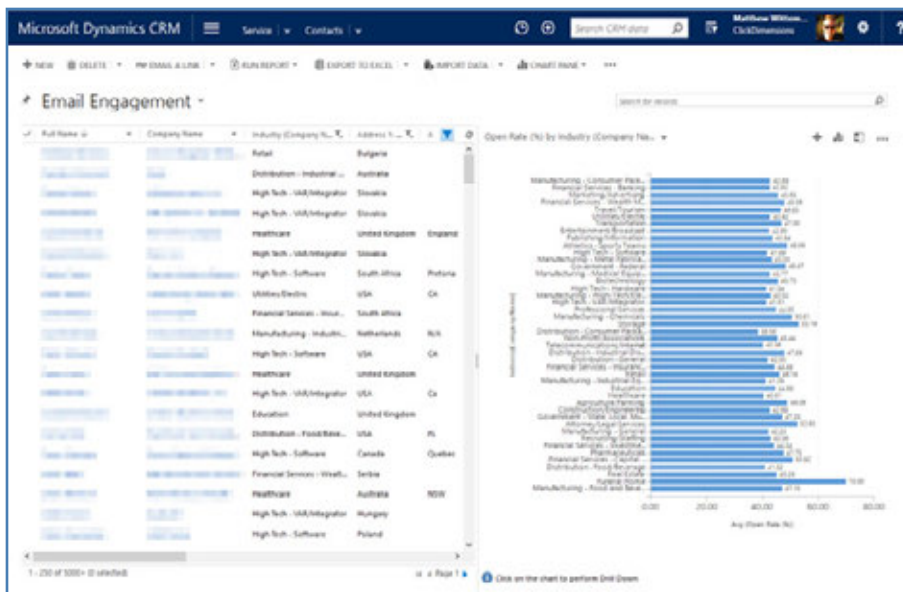
Email Engagement

Search for records

| Full Name                         | Company Name                                   | Industry       | City       | Country                  | Relationship Type        | Lead Source | Source Campaign | Sent Emails | Opened | Open Rate | Clicked | Click Rate |
|-----------------------------------|--|----------------|------------|--------------------------|--------------------------|-------------|-----------------|-------------|--------|-----------|---------|------------|
| <a href="#">Matthew Wittemann</a> | <a href="#">Non-Pharmaceuticals</a>            | Australia      | Wagga      | Customer                 | Referral - Not in person | Wagga 2011  |                 | 18          | 11     | 72.22     | 1       | 5.56       |
| <a href="#">Matthew Wittemann</a> | <a href="#">Non-Pharmaceuticals</a>            | Australia      | Wagga      | Customer                 | Referral - Not in person | Wagga 2011  |                 | 3           | 0      | 0         | 1       | 33.33      |
| <a href="#">Matthew Wittemann</a> | <a href="#">Non-Pharmaceuticals</a>            | USA            | CA         | Customer                 | Referral - Not in person | Wagga 2011  |                 | 18          | 9      | 50.00     | 2       | 11.11      |
| <a href="#">Matthew Wittemann</a> | <a href="#">Manufacturing - Process</a>        | USA            | CA         | Customer                 | Referral - Not in person | Wagga 2011  |                 | 7           | 0      | 0         | 1       | 14.29      |
| <a href="#">Matthew Wittemann</a> | <a href="#">Professional Services</a>          | USA            | CA         | Customer                 | Referral - Not in person | Wagga 2011  |                 | 18          | 9      | 50.00     | 1       | 5.56       |
| <a href="#">Matthew Wittemann</a> | <a href="#">Professional Services</a>          | Australia      | Queensland | Referral - Not in person | Wagga 2011               |             |                 | 18          | 9      | 50.00     | 1       | 5.56       |
| <a href="#">Matthew Wittemann</a> | <a href="#">Manufacturing - Process</a>        | United Kingdom | London     | Referral - Not in person | Wagga 2011               |             |                 | 1           | 2      | 20.00     | 1       | 20.00      |
| <a href="#">Matthew Wittemann</a> | <a href="#">High Tech - Software</a>           | United Kingdom | London     | Referral - Not in person | Wagga 2011               |             |                 | 7           | 0      | 0.00      | 1       | 14.29      |
| <a href="#">Matthew Wittemann</a> | <a href="#">High Tech - Software</a>           | United Kingdom | London     | Referral - Not in person | Wagga 2011               |             |                 | 25          | 11     | 44.00     | 1       | 4.00       |
| <a href="#">Matthew Wittemann</a> | <a href="#">Transportation</a>                 | United Kingdom | London     | Referral - Not in person | Wagga 2011               |             |                 | 22          | 11     | 50.00     | 1       | 4.55       |
| <a href="#">Matthew Wittemann</a> | <a href="#">Financial Services - Insurance</a> | United Kingdom | London     | Referral - Not in person | Wagga 2011               |             |                 | 7           | 0      | 0.00      | 2       | 28.57      |
| <a href="#">Matthew Wittemann</a> | <a href="#">Education</a>                      | USA            | CA         | Customer - Partner       | Wagga 2011               |             |                 | 27          | 20     | 74.07     | 1       | 3.70       |
| <a href="#">Matthew Wittemann</a> | <a href="#">High Tech - Software</a>           | USA            | CA         | Referral - Not in person | Wagga 2011               |             |                 | 22          | 11     | 50.00     | 1       | 4.55       |

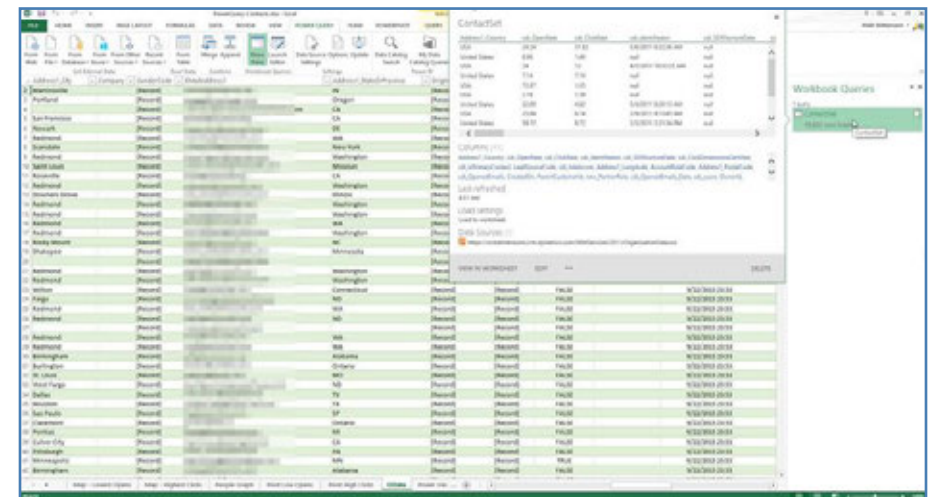
Once I have the view created, it's easy to create some charts so I can slice and dice my engagement rates and see if any patterns emerge. For example, I've created a chart called Open Rate by Industry:





## Excel: The best BI tool

Once you have the data in CRM, you can use the best BI tool to analyze the data: Excel. I say it's the best because it is often the most familiar tool to marketers. You can simply export your views to Excel, or you can get a little more advanced with tools like Power Query:

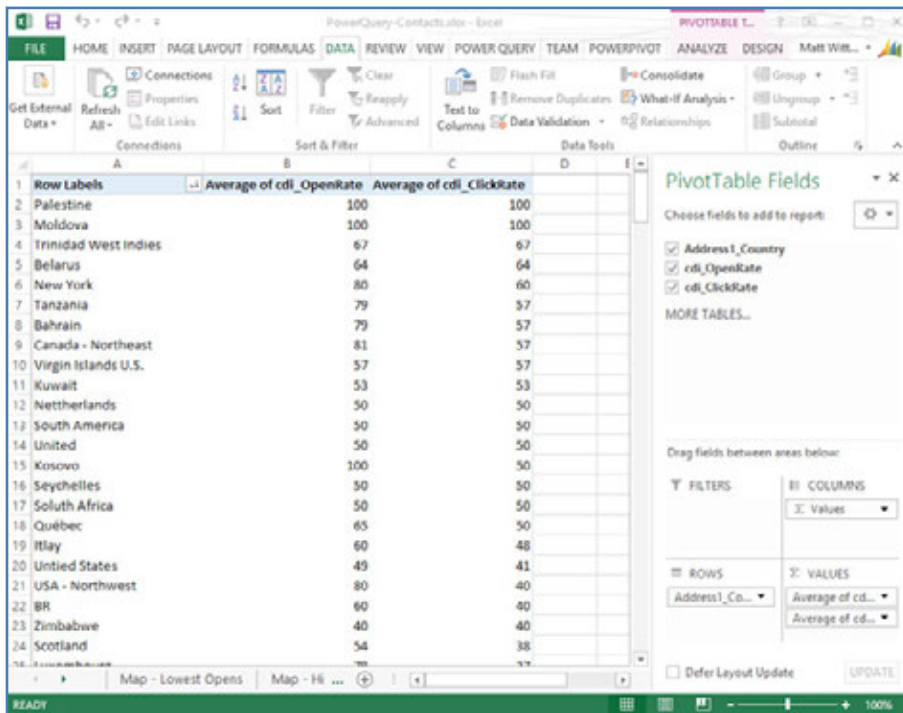


From this chart, I can see that we've got our best readership engagement in the "Funeral Home" industry! Who knew? That's an interesting insight. Maybe we can do some more targeted marketing to that industry and develop some content that would be of interest to them.

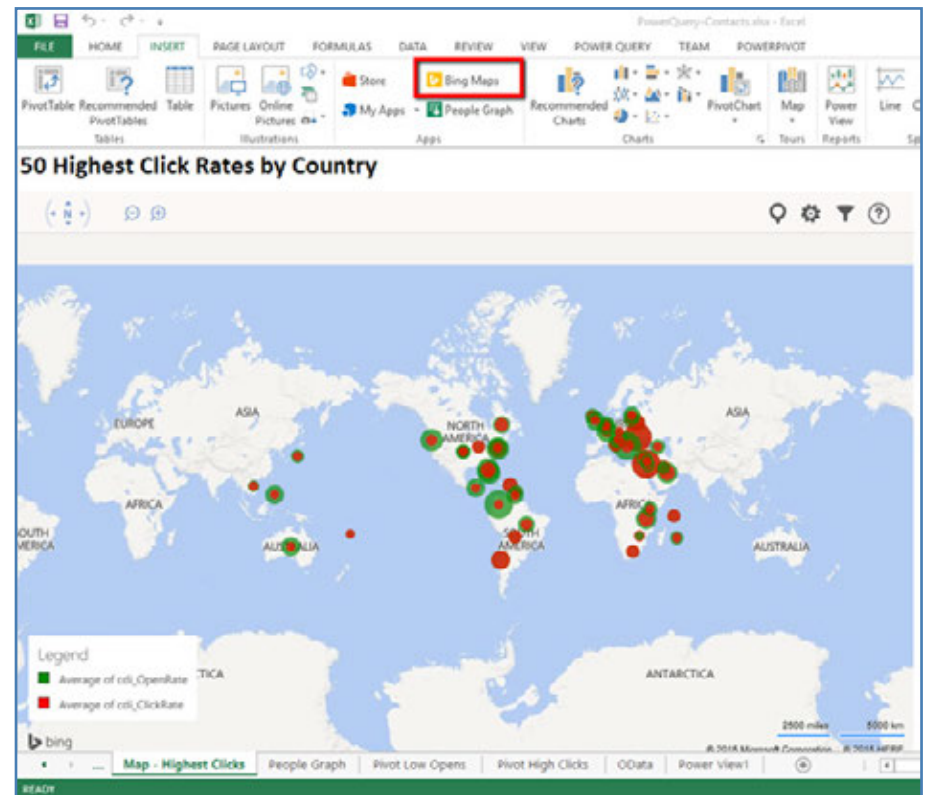
I can also see our least engaged readership is in the "Distribution: Consumer Packaged Goods" industry. Sounds like a good opportunity to improve our messaging there and do some research and experimentation to see how we can become more relevant to that industry.

Getting your data into Excel is the first step, and from there, you can do all sorts of great things. I've dropped a few columns into a Pivot Table to group open and click rates by country:

## Pivot Tables from Power Query Data

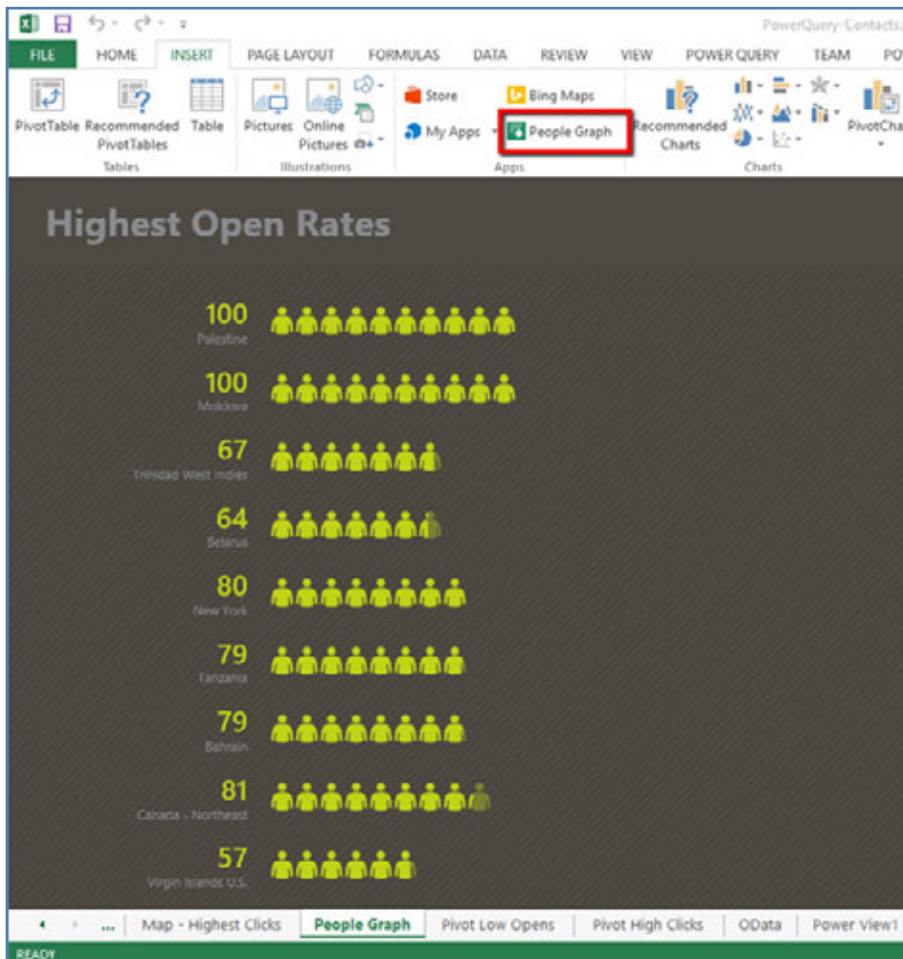


## Bing Maps in Excel from Pivot Table Data



These are great because they are interactive. Zoom in/out, click, etc. They also provide interesting visuals that may show correlations or outliers that you don't see by scanning the data in table format.

## People Graphs in Excel from Pivot Table Data

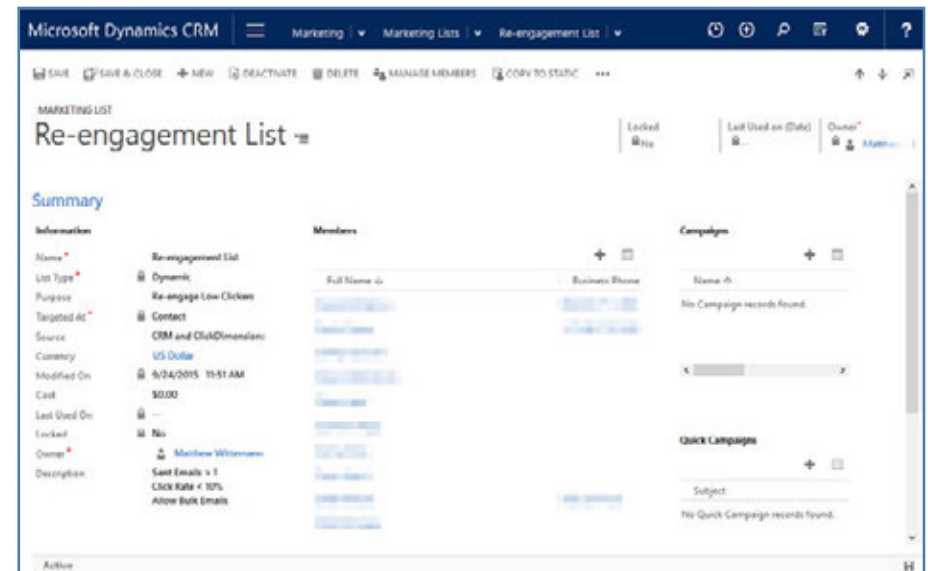


## Re-engagement

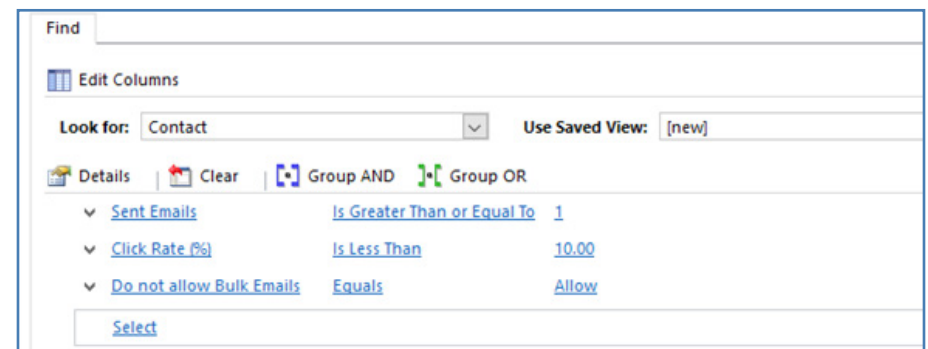
This also opens up new possibilities for a re-engagement campaign. In addition to slicing and dicing our engagement by industry, region or relationship type, we can plan to target

individuals who have not opened or clicked at high levels. Maybe there is something we can do to re-capture their interest.

To start, I have created a new dynamic marketing list.



The criteria I've used are as follows:



This gives me a good list to start with. I know we've sent them at least one email, but so far they have clicked less than 10% of the time. Yet, they still have not unsubscribed (otherwise, we would have automatically set the "Do Not Allow Bulk Emails" to "Do Not Allow"!)

## Tips for re-engagement

### 1. Clean up your lists

- Measuring engagement is the first step. Some parts of your audience may no longer be appropriate targets of your marketing (aged out, not reachable, inactive for years, etc.).
- Don't re-engage with really old inactives – they'll drive up your rate of spam complaints.

### 2. Experiment

- Which campaigns have the highest engagement rates and why?
- How can you replicate this success?

### 3. Be persistent

- Re-engagement often takes more than one email. Successful re-engagement campaigns are often a series of emails.

### 4. Give your audience a reason to re-engage

- What's in it for them? (Special offers, new products/services)
- Give prominence to your call to action.

## Some questions about measuring engagement in this manner

**Q:** We want to maintain calculated percentages on the Email Send record. Can I add rollup fields and calculated fields to ClickDimensions entities like the Email Send?

**A:** Yes, you can add fields like these to the Email Send. We already put the sum of opens, bounces, clicks, etc., on the Email Send record, though they are not displayed on the form, so you could add your own calculated field to calculate percentages.

**Q:** Are rollup fields and calculated fields available in CRM 2011 or CRM 2013?

**A:** No, Microsoft introduced these field types in CRM 2015.

**Q:** Isn't there a limit on the number of records you can bring into Excel?

**A:** Microsoft increased the limit on the number of rows that can be exported to Excel using the "Export to Excel" function in CRM 2015. It now allows up to 100,000 rows to be exported for analysis. PowerQuery uses CRM's OData endpoint to retrieve data. While the OData endpoint does not have a limit, it downloads 50 rows at a time, meaning it can take a long time to get a large number of rows. I recommend filtering your queries in order to return targeted sets of data, rather than, for example, "all contacts."




## EFFECTIVE EMAIL MARKETING: THE AMAZON WAY

There are many reasons why Amazon has dominated the ecommerce marketplace – they offer a seemingly unlimited selection of products (from books to treadmills) and services (such as Amazon Prime), and they somehow make their shopping experience even more addictive (free two-day shipping!).

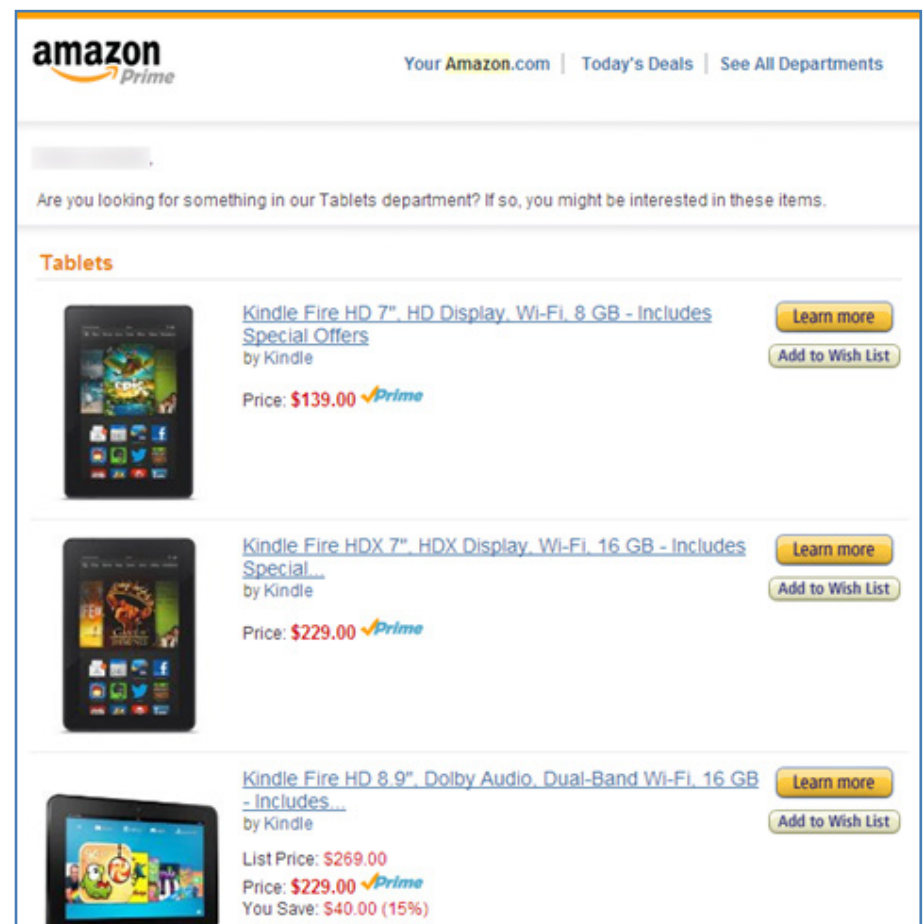
Even with all that Amazon has to offer, they didn't evolve into an online retail titan without a rock-solid email marketing strategy. Their email marketing strategies aren't new, but Amazon seems to have harnessed these ideas and made them work successfully. Here are four ways that Amazon implements successful email marketing, and by using ClickDimensions, you can practice these strategies too!

Molly [REDACTED], will you rate your transaction at Amazon.com?

 **Amazon Marketplace** <marketplace-messages@amazon.com>  
to me ▾

**(1) Personalization** - When Amazon sends an email to a customer, there is almost always dynamic content included; at the very least, customers are usually addressed by their personal names. Adding dynamic content to an email send is an easy way to appeal to your recipients on a more personal level.

**(2) Template Consistency** - Amazon effectively brings their website directly into customers' inboxes through consistency in their designs and templates. Notice the same colors and layout schemes used in both their email sends and throughout their



website. While Amazon's content is constantly evolving (especially based on the customers' interactions), the familiarity of the layout and templates keep the content relevant to the Amazon brand. For example, emails from Amazon usually contain a "big yellow button" that is also found on their website.

ClickDimensions gives you the ability to clone templates, so you can keep your emails familiar and consistent, even though your content is changing.

**(3) Call to Action** - Amazon interacts with their customers by sending out interactive emails. It's very common for customers to receive an email from Amazon encouraging them to "check out" a certain set of items or to order within X amount of time to get XYZ. Amazon shows customers product recommendations based on what they have previously viewed or purchased and invites customers to give feedback and submit reviews of products they have recently purchased.

This benefits the customer (customers can earn recognition and perks by submitting feedback), the reseller (helps improve business practices or helps promote products), and Amazon as a business (generates more customer interaction, which leads to repeat business and product suggestions).

An interactive email is an email that isn't quickly disregarded.

The screenshot shows an Amazon.com feedback form. At the top, it says "amazon.com" and "Hi [redacted], will you please take a minute to share your experience?". Below this, it says "You Purchased:" followed by a product image and the name "BlueLounge Design CableDrop Cable Management System - Bright (New)". A seller note says "BRAND NEW | MANUFACTURER". It then states "From BlueLounge (Fulfilled by Amazon)" and "Estimated Delivery Date: May 30, 2014". The main section is "How did the seller do?" with several questions and radio button options: "Item arrived by May 30, 2014?" (Yes/No), "Item as described by the seller?" (Yes/No), "Prompt and courteous service?" (Yes/No/Did not contact), and "How would you rate the seller?" (5 stars to 1 star). Below this is a text box for "Tell others about this seller:" with a character limit of 400. There is a "Submit Feedback" button. At the bottom, it says "Does the product meet your expectations?" with a link to "Rate and Review Purchases" and a "Helpful Links" section with links to "View Order Details", "Contact Amazon Customer Service", "View Seller Profile", and "Feedback Help".

ClickDimensions offers the ability to build surveys and forms, which can include a rating system and the ability to submit feedback. Through ClickDimensions, you can track how customers

interact with your emails and how they respond to these surveys. You can also build effective nurture programs, which help automate and organize the process of interacting with customers.

**(4) Open Options** - With Amazon, it's easy to manage which of their subscription lists you wish to receive emails from. Amazon is transparent with subscribers about how often they can expect to receive emails, and subscribers can opt out any time and easily change subscription preferences.

ClickDimensions allows you to build and track subscriptions, as well as create your own opt-in and opt-out menu options. With the recent implementation of Canada's Anti-Spam Law, this is especially relevant to our Canadian customers and those who conduct business in Canada.

It's easy to see how Amazon sets the example when it comes to email marketing. You can't be an online retail giant without effective marketing strategies. With ClickDimensions, it's easy to take these strategies and implement them to yield better results.



**E-mail Preferences**

- ☒ Send HTML e-mail messages (pictures as well as text)
- ☐ Send mobile friendly e-mail messages (Mobile HTML if Available)
- ☐ Send text-only e-mail messages

**Amazon.com Marketing E-mail**

**Note:** even if you choose not to receive some marketing e-mails from us, you will still receive our transactional e-mail, such as messages related to your orders, listings, updates about products or services you have purchased from us, or information about your account. You will also continue to receive email about programs you are enrolled in, such as Associates, Amazon Mom or Amazon Student.

☒ **Send me marketing e-mail from the following categories**

|   |  |   |                                  |
|---|--|---|----------------------------------|
| <input type="checkbox"/> Amazon Appstore            | <input type="checkbox"/> Cloud Player                      | <input type="checkbox"/> MP3 Downloads              | <input type="checkbox"/> Watches |
| <input type="checkbox"/> Amazon Instant Video       | <input checked="" type="checkbox"/> Computer & Accessories | <input type="checkbox"/> Magazine Subscriptions     |                                  |
| <input type="checkbox"/> Amazon Marketplace         | <input type="checkbox"/> Credit Card Offers                | <input type="checkbox"/> Movies & TV                |                                  |
| <input checked="" type="checkbox"/> Amazon Mom      | <input type="checkbox"/> Customer Surveys                  | <input type="checkbox"/> Music                      |                                  |
| <input checked="" type="checkbox"/> Amazon Partners | <input checked="" type="checkbox"/> Electronics            | <input type="checkbox"/> Musical Instruments        |                                  |
| <input checked="" type="checkbox"/> Amazon Prime    | <input type="checkbox"/> Friends & Social Networks         | <input type="checkbox"/> Office Products & Supplies |                                  |
| <input checked="" type="checkbox"/> Amazon Student  | <input type="checkbox"/> General Offers                    | <input checked="" type="checkbox"/> Seller Feedback |                                  |
| <input type="checkbox"/> Associates                 | <input type="checkbox"/> Grocery                           | <input type="checkbox"/> Shoes                      |                                  |
| <input type="checkbox"/> Automotive                 | <input checked="" type="checkbox"/> Health & Personal Care | <input type="checkbox"/> Software                   |                                  |
| <input type="checkbox"/> Baby                       | <input type="checkbox"/> Home, Garden & Pets               | <input type="checkbox"/> Sports & Outdoors          |                                  |
| <input checked="" type="checkbox"/> Beauty          | <input type="checkbox"/> Industrial & Scientific           | <input type="checkbox"/> Surveys & Feedback         |                                  |
| <input type="checkbox"/> Books                      | <input type="checkbox"/> Jewelry                           | <input type="checkbox"/> Tools & Home Improvement   |                                  |
| <input type="checkbox"/> Clothing & Accessories     | <input type="checkbox"/> Kindle Books                      | <input type="checkbox"/> Toys & Games               |                                  |
| <input type="checkbox"/> Cloud Drive                | <input type="checkbox"/> Kindle Devices & Accessories      | <input type="checkbox"/> Video Games                |                                  |

☐ **Do not send me marketing e-mail**

Check this box to stop receiving all Amazon.com marketing communications (except transactional e-mails, subscription emails and email about programs you are enrolled in). To manage your AmazonLocal and Amazon Delivers subscriptions, please [click here](#).



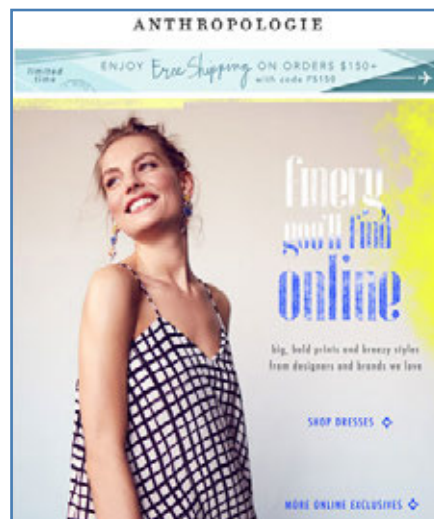
## EFFECTIVE EMAIL MARKETING: ANTHROPOLOGIE

When was the last time you received an email from a company and thought, “Wow, this is stunning,” as you looked over the entire contents of the email, and followed the links that were provided? Anthropologie, the bohemian-chic retailer for predominantly women’s clothing, accessories, housewares and gifts, has found an effective voice when it comes to email marketing and content strategy. Here are some examples of what they’re doing, and how you can achieve the same results:

**Visuals** grab you and invite you to read further – Anthropologie has been successful at finding its brand’s voice, and this is exemplified through the visuals. Anthropologie’s emails use beautiful and romantic photographs arranged in somewhat scrapbook style. You don’t feel like you’re

reading an email; it’s more like you’re reading a magazine or a lookbook. Their graphics are thoughtful and unique, and it’s easy to transition from the email they sent you to their website.

Their **social strategy** is strong. No email from Anthropologie is complete without links to get the message out beyond the context of their emails. All of their respective social media sites are also perfectly coordinated with their website and their email campaigns. This gives the brand a stronger voice and gives viewers a more cohesive browsing experience.



**Value messaging** is in every message. Anthropologie advertises what they sell, but it’s presented in a way that keeps the email recipient reading. For example, if they are selling women’s jewelry, they include



beautiful pictures and ideas on how to style these pieces. There’s a certain “whimsy” to their aesthetic, and they own it and use it to promote their products. The true lesson here is, embrace your brand and find its unique voice – and let the customers be a part of what makes it so special.

These are just a few great email marketing practices to try, especially when you’re building your brand’s awareness. We hope you’ll be inspired to try some of these ideas for yourself!

## PREPARING YOUR EMAIL MARKETING STRATEGIES FOR THE HOLIDAY SEASON

Each year, the holidays seem to approach faster and faster. If the task of preparing your email marketing strategies for the holiday season seems daunting, don't panic! Here are a few things to keep in mind as you gear up your holiday marketing plan:

**Slim Down.** Check your Marketing Lists, Contacts, Leads and Accounts within CRM. Now is the time to take care of any duplications or update any records. Remember, ClickDimensions automatically de-duplicates email addresses as the Email Sends are executed. It might be hard to cut some of these records, but what you're actually doing is trimming the fat and keeping the records that are most likely to drive results. Many organizations may practice this in light of the New Year, which makes sense, but you'll be able to benefit from this practice as we head into

the holiday season and email marketing activity escalates.

**Check Automation.** What is the state of your automated processes? Is everything updated and ready to execute for the holiday season? Have you checked your Auto Responders, Workflows and Nurture Programs? Have you tested the functionality with test Marketing Lists? If not, test them now! Make sure the records you are generating are mapping correctly.

**Involve Your Recipients.** Advertisement emails can be overwhelming – especially when the volume of marketing emails tends to increase with the season. Engage your customers; include a “call to action” in your messaging. Generate excitement and activity by implementing more fun and engaging campaigns and emails. The holidays provide a great excuse for giveaways, contests, exclusive content, etc. This is easily achieved with ClickDimensions. Utilize Campaigns, Web Tracking and Form Capture, even integrate

with social media.

**Shorter is (Usually) Better.** Keep your messages succinct – let them make the biggest impact in the most direct way. Now is a great time to utilize your best subject lines, include your most “clickable” templates (practice Split Testing to see which version generates the most clicks or opens). Everyone seems to have more to do and less time to do it during the holiday season. Don't let possible customers pass up your emails just because they are too long!



## EMAIL MARKETING ETIQUETTE

Here are some reminders about practicing good email marketing etiquette when reaching your audience:

### Permission-based Email Marketing

This is a cornerstone value ClickDimensions holds for our customers. Do not use purchased lists, rented lists, third-party lists or continue to email your contacts against their request. Remember to include a link to a subscription management page within an email template. Remember, there is a person on the other end of your email; he or she is not just a sales opportunity.

### Quality Content

What is the quality of the content you are sending? Are you sending out email messages just to grab the recipient's attention, or is there a true takeaway with valuable information included? Remember to check spelling, use concise sentences, include alternative text (for those who don't render images), use short paragraphs, include relevant details, break up blocks of text with images, and ensure your subject line relates to your email content. All of these suggestions can be implemented in any of our four email template designers.

### Respond to Replies

If a recipient is trying to reach out to you, acknowledge and respond to this feedback in a professional manner.

### Consistency

Consistency can be applied to many areas of email marketing: strategy, design, customer interaction, etc. An example of where consistency can make a difference includes sending emails on a consistent basis (let the content be relevant too). Be sure to include your organization's name in the "from" field and address recipients correctly. To ensure you have the most updated information, include links to profile management forms for your recipients. Additionally, make previous newsletters available to read in an archive setup, provide information for how to contact your organization and maintain consistently-branded templates.

Keep these etiquette strategies in mind to keep your readers loyal because putting out quality marketing and delivering quality products will generate quality customers!



## SEE HOW YOUR EMAIL MARKETING EFFORTS ARE TRENDING

One of the great things about ClickDimensions being built directly on the Dynamics CRM platform is that you get to use all of the built-in reporting and analysis tools that the CRM platform provides in order to understand your marketing data. Here are a few quick examples of useful charts that can give you a glimpse of how your marketing is performing.

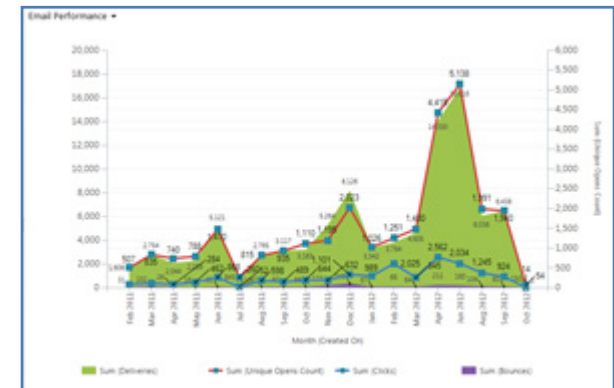
### Email Performance (Email Sends)

Use this chart when viewing “Sent” email sends to see how your sending patterns have changed over time. The green area shows total deliveries per month, the purple area shows the trend in bounced emails and the lines show unique opens and clicks.

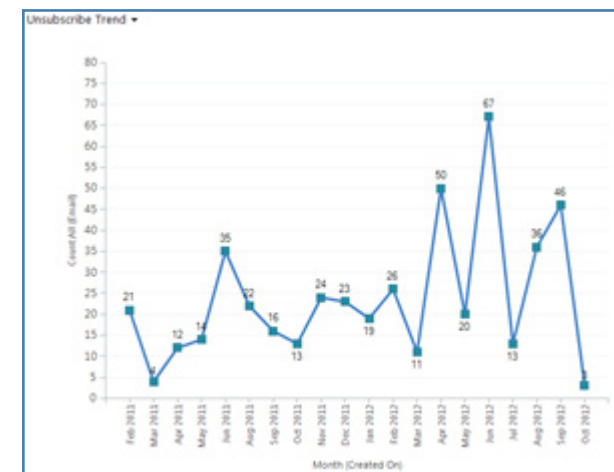
The chart is available [here](#) and should be imported on the Email Send entity. Use this chart on the “Sent” view, since you’ll want to have actual historical data to view in the chart.

### Unsubscribes Trend

If you are sending a consistent volume of email, your unsubscribe trend can give you an idea of how relevant your content has been. This chart is a simple line chart that shows your Unsubscribes by month. This chart is available [here](#) and should be imported into the Unsubscribe entity.



Email performance



Unsubscribes

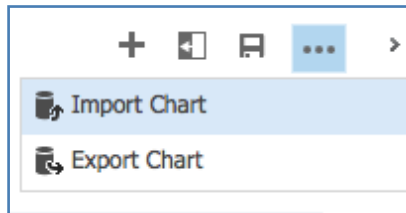
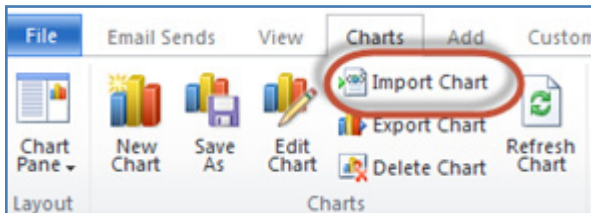
## Subscription Preferences Trend

Similar to your unsubscribes trend, if you're using ClickDimensions Subscription Management to allow your recipients to opt into or out of specific lists, this chart will show you the overall trend of how many preferences you're receiving over time. It will also show the relative performance of opt-ins vs. opt-outs. This chart is available [here](#), and should be imported for the Subscription Preference entity.

## Importing Charts

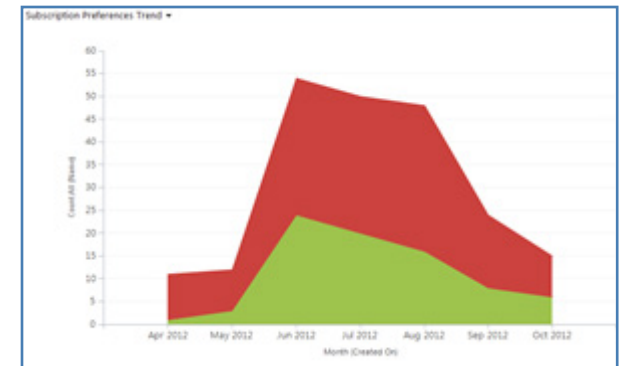
In CRM 2011, 2013, 2015 or CRM Online, you can import charts and use them in the views for the related entities. Download the charts above and save the XML file to your desktop. Then navigate to the appropriate entity.

In CRM 2011, click the "Charts" tab on the ribbon, then click the "Import Chart" button. In CRM 2013, select "Import Chart" from the drop down menu [...] in the Charts pane:



In the "Import Chart" dialog, browse to the location where you saved the chart XML file. Select it and click OK.

NOTE: Remember that the charts are tied to the view you are looking at. If there is no relevant data in the view, then the chart will not display anything either.



*Subscription preferences*

*These are just a few examples of useful analysis that CRM can provide for your marketing team. You can combine these charts in a dashboard pretty easily as well, or share them with other team members.*

## Chapter Two

# ONLINE ADVERTISING

It is simply amazing what can be done these days with online advertising and tracking. Combine that with integration to your CRM, and you can refine your message, ensure it is reaching the right people and understand how to most effectively allocate your budget to broadcast the message. The following articles discuss using online advertising in conjunction with your CRM.

## QUICK TIPS FOR IMPROVING YOUR PAY-PER-CLICK MARKETING CAMPAIGNS

Needless to say, we do a lot of marketing here at ClickDimensions. It's what we do. And, of course, paid search (a.k.a. pay-per-click) is a big part of our strategy. But paid search can be complicated, and it takes a lot of investment of time and money to get it right. So, we wanted to share some simple tips that have made a difference for us.

### 1 - Understand AdWords

It really pays to understand how paid search works. Even if you are using a search advertising consultant, you will want to learn what they are doing with your campaigns. No one knows your business like you do, and you can never be sure that what you explain to a consultant will get correctly reflected in campaigns they create for you. Since the





most effective paid search engine is Google, we suggest that you read Brad Geddes' book [Advanced Google AdWords](#) to learn how AdWords works. If you can build an effective Google AdWords campaign, then you can export it to the Microsoft Bing platform.

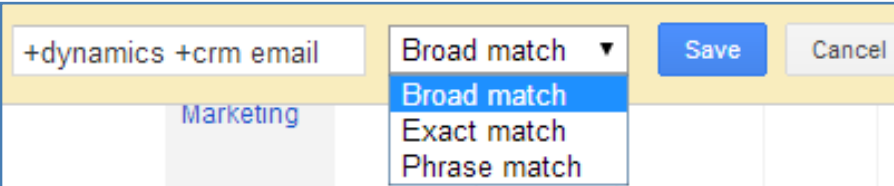
## 2 - Pay attention to quality score

When you create ads on Google AdWords, you will also specify keywords that should trigger those ads to be shown. What you pay for clicks on those ads, how often those ads are shown, and how prominently those ads are displayed are highly dependent on their quality score as assigned by Google. ([Read more about quality score here.](#)) Quality score is mainly based on how much users are clicking your ads. As a rule of thumb, the closer your ad reflects what users searched on, the more clicks it will get. Google does this so that a high bid alone can't cause irrelevant ads to show when you search for something. If they allowed that to happen, then the company that was willing to pay the most for a search term would always have the top spot regardless of whether their ad and offering were relevant.

## 3 - Understand modified broad match

When you are inputting keywords into AdWords, you have three matching options for how those keywords must match the search term the visitor used. The three types are broad, exact and phrase, and you can read about them [here](#). We won't repeat the explanation in the article here; rather, we'd like to call your attention to what is essentially a fourth matching option: modified

broad match. By adding plus signs (+) in front of a word in your keyword set, you are telling Google that the word must be present in the search query. This is important because if you input a keyword like "Microsoft CRM" without the plus signs, Google can actually show your ad when someone just searches on "CRM." It can make a big difference. With modified broad match, it helps to think of the plus signs as locks. Use them to lock in any critical keywords.



The screenshot shows a Google AdWords keyword entry interface. The keyword field contains '+dynamics +crm email'. Below the keyword field, the word 'Marketing' is visible. To the right of the keyword field is a dropdown menu currently set to 'Broad match'. The dropdown menu is open, showing three options: 'Broad match' (highlighted in blue), 'Exact match', and 'Phrase match'. To the right of the dropdown menu are 'Save' and 'Cancel' buttons.

## 4 - Pay attention to location targeting

When you set up a search campaign, you have the option to define the countries and locations where your ads will be shown. We have been in Europe and seen advertisements for US service providers that cannot deliver services into Europe. Surely these companies do not want to pay for clicks from countries they can't service. However, this is what happens if you do not specify where your ads can show. Along with geographic targeting, there are many other options you can set including whether your ad should show on mobile devices. It pays to make sure your targeting is reflective of how and where you want your ad to be shown.



## MEASURE YOUR VISIT QUALITY TO ASSESS ADVERTISING EFFECTIVENESS

In a blog post on the [ClickDimensions Social Dashboards](#), we ended with an analysis of the quality of visits to our site based on the source of the traffic. Prior to having a tool like ClickDimensions, we had always tried our best to analyze our traffic sources and invest in those that, we thought, yielded the highest quality traffic. However, this resulted in guesswork at best. We would end up trying to reconcile what our website analytics said vs. what our pay-per-click said vs. what our website form submissions told us. We never could see the whole truth.

Now that we can tell the exact origination of each visit, we know which visits came from which sources. The only question our system (or any system) doesn't answer is related to direct traffic (or search traffic that used our name in the search keywords and is effectively direct traffic). With these visits, we have learned to ask prospects, "How did you hear about

ClickDimensions?" More often than not, it is a partner or Microsoft who referred us.

The trifecta of visit quality is very easily measured: lead score, number of page views and duration. Our [Social Dashboard post](#) compared three traffic sources using these metrics and the results clearly indicated where we should invest our advertising resources.

| Referrer             | Score | Duration (secs) | Pageviews |
|----------------------|-------|-----------------|-----------|
| Dynamics Marketplace | 35.4  | 225             | 4.9       |
| LinkedIn Ads         | 21.9  | 134             | 3.3       |
| Google Adwords       | 16.4  | 59              | 3.5       |

Our visit quality analysis doesn't end there. Our solution shows you the keywords your visitors use to get to your site, so you can then analyze which keywords lead to the highest quality visits. For example, if you have a product that is higher quality than

one of your competitors, you may find that visits from people who searched on the competitor's name will lead to an above average conversion rate. This is because your visitors search on the name of the competitive product, see your ad and then click through to your site. Once they realize that your product is better, they stay on your site (and never go back to your competitor's site). But how would you ever know this if you didn't tie the visit into

your CRM and website so you could see the duration, score and number of page views alongside the keywords, referring search engine and conversion (i.e. web form completion) information?

## GAINING MORE INTELLIGENCE FROM PAID SEARCH CLICKS THROUGH URL TAGGING

If you are using paid search, you might be interested to know that there is a relatively easy way to get more information about each click on your ads. This is accomplished by tagging your destination URLs with parameters that trigger Google or Bing to send you additional data about each click. Let's start with a discussion of ads and URLs. When you create an ad in Google AdWords or Bing Search Advertising, you have two places where you can set the URLs to be used for the ad. The first, called "display URL" is the URL that web visitors will see in your ad when the ad is displayed on a search engine web page. The second, called "destination URL," is the URL the visitor will actually be sent to when they click your ad. This destination URL can be appended with special parameters that tell Google or Bing to send you back additional information about each click. Below you can see an example of one of our Bing ads.

|                  |  |    |  |
|------------------|--|----|--|
| Ad title:        | {Keyword:Microsoft CRM Marketing}                                      | 33 | <a href="#">{Keyword:Microsoft CRM Marketing}</a><br>#1 rated MSCRM Marketing solution. Drip Marketing. Email,Surveys,Forms<br><a href="#">www.clickdimensions.com</a> |
| Ad text:         | #1 rated MSCRM Marketing solution. Drip Marketing. Email,Surveys,Forms | 70 |  |
| Display URL:     | www.clickdimensions.com  | 23 |  |
| Destination URL: | clickdimensions.com?utm_source=bing&query={QueryString}                |    |  |
| Status:          | Active   |    |  |

`clickdimensions.com?utm_source=bing&query={QueryString}`

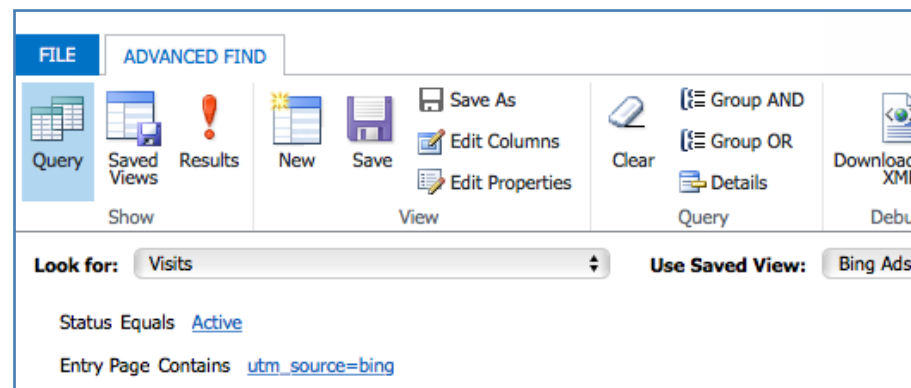
Notice that the destination URL is `clickdimensions.com/tour/email-marketing.asp`, but that is followed by a question mark and then a series of parameters. For example, the first parameter is `utm_source` which is set to Bing. In this case, we are setting Bing as an

absolute value because clicks on this ad are always coming from Bing Search Advertising. However, the second parameter in the URL, query is set to {QueryString}, which, as indicated by the curly brackets, represents a dynamic value which Bing will pass back to us in the URL when the click is made. For this parameter, Bing will pass back the actual keywords that the visitor typed into the search engine. Bing parameters are explained in detail at [http://advertise.bingads.microsoft.com/en-us/help-topic/how-to-moonshot\\_conc\\_querystrings.htm/whos-clicking-your-ad-using-query-string-parameters](http://advertise.bingads.microsoft.com/en-us/help-topic/how-to-moonshot_conc_querystrings.htm/whos-clicking-your-ad-using-query-string-parameters).

An example of what the URL will look like when Bing passes it back to us is shown below. Looking at the query parameter, we can see that the visitor typed the query “microsoft dynamics crm” into the search engine. What we actually see is “microsoft%20dynamics%20crm,” and the “%20” is inserted by Bing wherever there is a space (spaces would break the URL, so they must be filled with characters).

[http://clickdimensions.com/?utm\\_source=bing&query=microsoft%20dynamics%20crm](http://clickdimensions.com/?utm_source=bing&query=microsoft%20dynamics%20crm)

If you are using [ClickDimensions](#), you can create a query on the entry page field of our visit records to look for visits where the entry page contains the text utm\_source=bing. This will let you know which visits came from your Bing Search ads so that you can see which ones turned into sales opportunities. Here you can see the query we use to find these visits:

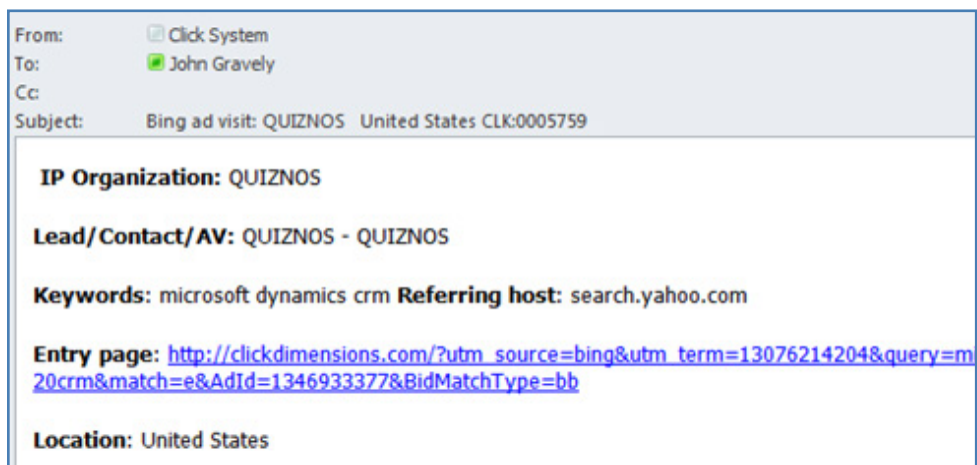


Of course, since we can query this data, we can include it on dashboards and use it in workflow. We have dashboards that we use internally to show us the visits that are coming from Google and Bing.

| Visits from Google Ads - Last 3... |                    |            |                                  |
|------------------------------------|--------------------|------------|----------------------------------|
| ✓                                  | IP Organization    | Lead       | Contact                          |
|                                    | Comcast Cable      |            | microsoft dynamics crm           |
|                                    | Grupo ICE          |            | jobs dynamics marketing          |
|                                    | Internet Solutions | Lona .     | how customizable is Dynamic CRM  |
|                                    | VOO                | Fabian ... | Fabian ... dynamics crm tutorial |

We’ve also created a workflow that emails us with information from any new visits that came from paid search. This produces emails like the one you see below. These emails are helpful to

our Sales Development Representatives who are responsible for finding new leads for the sales team. The emails help them uncover organizations that might be early in the discovery process. The sooner we can reach organizations that are searching on solutions like ours, the sooner we can begin to influence the buying process.



*In this article, we have mainly talked about URL tagging with Bing search ads, but you can also do this with Google. Instructions can be found here: <http://support.google.com/adwords/bin/answer.py?hl=en&answer=2375447>*

## EASILY TRACK THE EFFECTIVENESS OF YOUR ONLINE ADS

When you decide to pay for an online ad with Facebook, LinkedIn, Bing or Google AdWords, you shouldn't have to wonder if it is bringing any traffic. With ClickDimensions, you don't. In fact, you can know exactly which visits were generated by each ad. To do this, just follow this simple process.

Online advertising systems typically allow you to enter two URLs. One will be the URL the person sees (the display URL) and the other will be the URL the person is redirected to when they click on your ad (the "go to" URL). Just add any identifying parameter to the end of the go to URL in your ad. For example, below we added ?s=linkedinad5 to the end of our go to URL (note; the "?" denotes that a variable is being added, the variable name is "s" and its value is "linkedinad5").

**Email Marketing for CRM**  
See demo of ClickDimensions Marketing Automation for Microsoft Dynamics CRM  
From: ClickDimensions  
[www.clickdimensions.com/?s=linkedinad5](http://www.clickdimensions.com/?s=linkedinad5)

With the parameter in place, any visits from your ad will be easily identifiable by their entry page.

VISIT : INFORMATION  
**01-26-2015 23:22:39 (UTC)**

**General**

|             |   |
|-------------|---|
| Time *      | 01-26-2015 23:22:39 (UTC)   |
| Started On  | 1/26/2015 6:22 PM   |
| Domain      | <a href="http://clickdimensions.com">clickdimensions.com</a>  |
| Bounce      | No  |
| First Visit | Yes   |
| Entry Page  | <a href="http://www.clickdimensions.com/?s=linkedinad5">http://www.clickdimensions.com/?s=linkedinad5</a> |

Now, in the Visits area of ClickDimensions, create an Advanced Find view to look for visits where the entry page contains your parameter (e.g. "linkedinad5").

**FILE** **ADVANCED FIND**

Query

Saved Views

Results

New

Save

Save As

Edit Columns

Edit Properties

Clear

Group AND

Group OR

Details

Look for: Visits

Use Saved View:

Status

Equals

Active

Entry Page

Contains

s=linkedinad5

Finally, when you select your Advanced Find view, you will be able to see all visits that came from your ad!

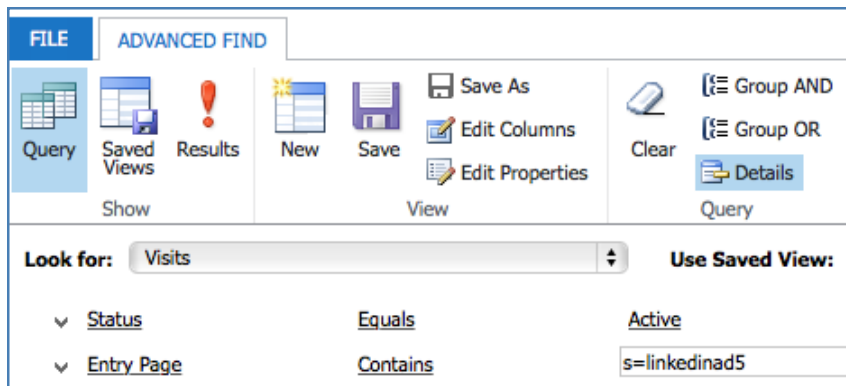
## MONITOR THE EFFECTIVENESS OF PAID SEARCH WITH A SEARCH MARKETING DASHBOARD

If you use paid search, then you most likely have a number of different campaigns running across a number of different providers. You might use Google AdWords, Microsoft AdCenter, LinkedIn, Facebook, private blogs, etc. With each one of these ad platforms, you can login to their respective dashboards and see how many clicks they have sent you and what you've spent. But that requires you to go to a lot of websites, and it doesn't tell you anything about the quality of the visits you're getting.

Wouldn't it be better to login to one dashboard and see all the visits from each source along with an indicator of the visit quality? Of course it would. So let's see how you can do that with ClickDimensions and Microsoft Dynamics CRM.

When you place an online ad, you have the opportunity to specify the URL that the visitor will be directed to when he/she clicks on the ad. LinkedIn refers to this as the "go to URL," while other platforms call it the "destination URL." You can make this URL unique by adding a parameter to the end of it. Then it will be easy to locate visits from that ad inside Microsoft CRM if you are using ClickDimensions. (This process is described in the previous article.)

Every time someone clicks on this ad, the ClickDimensions visit record created inside Microsoft CRM will show this URL in the entry page field. With this information, it is easy to create a CRM view to show all visits from LinkedIn ads.



So, if you follow this same technique for your LinkedIn ads, Google ads, Bing ads, etc., it is easy to create a CRM dashboard that shows the visits from each different ad source. You can look at this one dashboard to see the quality of each visit as indicated by the visit's score, duration and number of page views. The dashboard can also show the keywords used (where relevant) so you can then understand which keywords lead to the highest quality visits. When you see that one of your ad campaigns is leading to a series of one-page visits, you can adjust accordingly to improve the visit quality so you are getting visits from people who stick around to learn more.

Can you see the effectiveness of all your paid search visits in one place?

### Search Marketing Visits

Visits from Google Remarketing Ads - Today

| IP Organization                    | Total Pages | Duration | Score | Referring Host               | Referrer Type  |
|------------------------------------|-------------|----------|-------|------------------------------|----------------|
| Time Warner Cable                  | 2           | 1        | 11    | tpc.googleadsyndication.c... | Unknown        |
| Cyprus Telecommunications Auth...  | 2           | 4        | 11    | www.clickdimensions.c...     | Unknown        |
| Pakistan Telecommunication com...  | 1           | 0        | 8     | googleads.g.doublecl...      | Unknown        |
| Dhivehi Raajjeyge Gulhun (Dhira... | 2           | 4        | 11    | www.ustream.tv               | Unknown        |
| SaudiNet                           | 2           | 0        | 11    | www.clickdimensions.c...     | Unknown        |
| Mohakali, Tejaan                   | 2           | 7        | 11    | www.clickdimensions.c...     | Unknown        |
| Cox Communications                 | 2           | 1        | 11    | googleads.g.doublecl...      | Unknown        |
| Sodetal S.a.l.                     | 2           | 6        | 11    | www.clickdimensions.c...     | Unknown        |
| Init Corporation                   | 1           | 0        | 8     |                              | Direct Traffic |
| Visafone Communications Limited    | 1           | 0        | 8     | googleads.g.doublecl...      | Unknown        |
| T.E.S.T. Ltd                       | 2           | 0        | 11    | www.clickdimensions.c...     | Unknown        |
| Comcast Business Communicatio...   | 2           | 0        | 11    | www.clickdimensions.c...     | Unknown        |
| Telecom Italia                     | 4           | 267      | 17    | youmedia.fanpage.it          | Unknown        |
| Opera Mini Proxy                   | 2           | 1        | 11    | googleads.g.doublecl...      | Unknown        |

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Visits from LinkedIn Ads - Today

| IP Organization                 | IP Country       | Total Pages | Duration | Score | Entry Page                    |
|---------------------------------|------------------|-------------|----------|-------|-------------------------------|
| Tele Danmark                    | Denmark          | 2           | 1        | 11    | http://www.clickdimensions.co |
| e-know.net Limited              | United Kingdom   | 2           | 0        | 11    | http://www.clickdimensions.co |
| Velia                           | Ukraine          | 2           | 2        | 11    | http://www.clickdimensions.co |
| Capital Telecom Limited Company | Russian Feder... | 2           | 1        | 11    | http://www.clickdimensions.co |
| Cisco Systems Ironport Division | United Kingdom   | 2           | 1        | 11    | http://www.clickdimensions.co |
| XS4ALL Internet BV              | Netherlands      | 2           | 1        | 11    | http://www.clickdimensions.co |
| ILNetworks LLC                  | Armenia          | 2           | 0        | 11    | http://www.clickdimensions.co |
| Ziggo                           | Netherlands      | 5           | 2,507    | 20    | http://www.clickdimensions.co |
| Energimidt Infrastruktur A/S    | Denmark          | 2           | 1        | 11    | http://www.clickdimensions.co |
| Telefonica Czech Republic       | Czech Republic   | 1           | 0        | 8     | http://www.clickdimensions.co |
| MTD Computer Services           | United Kingdom   | 2           | 0        | 11    | http://www.clickdimensions.co |

1 - 11 of 20



## USE GOOGLE ADWORDS CONVERSION TRACKING WITH CLICKDIMENSIONS WEB FORMS

If you advertise online using Google AdWords, you may want to take advantage of their conversion tracking feature. Let's start by discussing this feature and why you would want to use it. Below is an example taken directly from Google's website [here](#)...

### → EXAMPLE

You have a website for your cheese shop, and when customers submit their orders online, they see a "Thank you for your purchase!" page.

You want to see which of your keywords -- "smelly cheese" or "holiday cheese" -- leads to more purchases, so you set up Conversion Tracking. First, you get a little snippet of code from AdWords. Then, you paste that code snippet in the HTML for the "Thank you for your purchase!" page.

Soon, you start to see that customers who click on "smelly cheese" buy a lot of cheese. Meanwhile, you see that a few people click on "holiday cheese," but none of them make a purchase. So, you decide to stop investing in "holiday cheese" and put more money toward "smelly cheese," resulting in more purchases and a better return on your investment.

So that makes sense, right? [Conversion tracking](#) lets you see which ads, keywords and campaigns are bringing in the visitors that actually convert. In the case of a ClickDimensions web form, the conversion is when the visitor completes the form.

In the case of the ClickDimensions website, we have several web forms that someone can fill out. These are:

- Contact us form
- Partnership information form
- eBook download form
- Newsletter sign-up form
- Demonstration request form

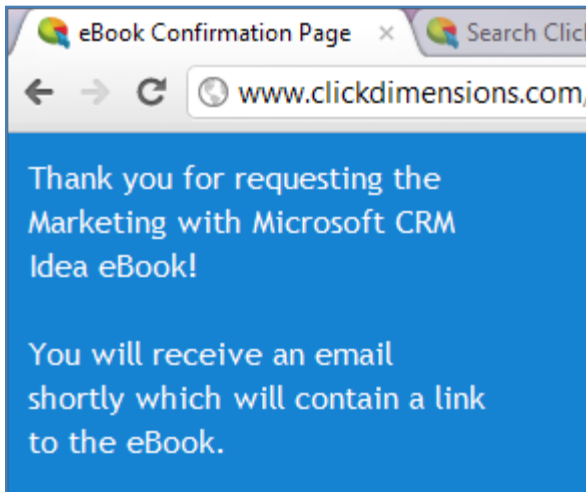
For each of these, we used the ClickDimensions drag-and-drop form designer to build a web form. You can read more about our form builder [here](#). The form builder makes it easy to create a form and then embed the iFrame code for the form into any web page. But, to make Google AdWords conversion tracking work, you need to place the conversion tracking code that Google gives you into a confirmation page that the visitor sees after he/she has completed your form. To do this, you will want to create a simple web page for each conversion. These simple web pages need only contain your confirmation message and the Google conversion tracking code. Then, in the ClickDimensions web form confirmation text area, you can redirect the visitor to that simple web page once they have completed the form. This will cause the Google conversion code to run, which will log the conversion in Google AdWords. This is what will then allow Google to “connect the dots” and tell you which ad/keyword/campaign brought that visitor to you in the first place. Let’s walk through the steps...

**Step 1** – Follow [this article](#) to set up your conversions in Google AdWords. You can see below that our conversions match the forms on our website.

| Conversions  |                                     |              |                       |          |
|--|-------------------------------------|--------------|-----------------------|----------|
| Webpages   |                                     |              |                       |          |
| Settings   |                                     |              |                       |          |
| Code   |                                     |              |                       |          |
| Advanced   |                                     |              |                       |          |
| <a href="#">+ New conversion</a> <a href="#">Import from Google Analytics</a> <a href="#">Change status...</a> |                                     |              |                       |          |
| <input type="checkbox"/>   | <input checked="" type="checkbox"/> | Conversion ? | Conversion location ? | Category |
| <input type="checkbox"/>   | <input checked="" type="checkbox"/> | eBook        | Webpage               | Signup   |
| <input type="checkbox"/>   | <input checked="" type="checkbox"/> | Pricing      | Webpage               | Other    |
| <input type="checkbox"/>   | <input checked="" type="checkbox"/> | Contact Us   | Webpage               | Other    |
| <input type="checkbox"/>   | <input checked="" type="checkbox"/> | Demo         | Webpage               | Other    |
| <input type="checkbox"/>   | <input checked="" type="checkbox"/> | Newsletter   | Webpage               | Other    |
| <input type="checkbox"/>   | <input checked="" type="checkbox"/> | Partner      | Webpage               | Other    |

**Step 2** – For each conversion you set up, create a simple web page on your site with the confirmation text you want the user to see as well as the conversion code you got from Google when you set up the conversion (each conversion has a unique Google tracking code).

When viewed in a web browser, these pages will look fairly plain since their purpose is simply to replace the space where your web form appeared.



However, they should contain the Google conversion code behind the scenes:

```
<!-- Google Code for eBook Download Conversion Page -->
<script type="text/javascript">
/*  */
var google_conversion_id = 1001784531;
var google_conversion_language = "en";</pre></div><div data-bbox="52 646 484 786" data-label="Text"><p><b>Step 3</b> – Go to the confirmation text area of your ClickDimensions web form to redirect the form to your new confirmation page once the form is submitted. This will replace the space where your form appeared with your new page when the form is submitted.</p></div><div data-bbox="507 114 946 505" data-label="Image"><img alt="Screenshot of the ClickDimensions Form Designer interface. The 'Confirmation Text' tab is selected in the top toolbar. A 'Response HTML' dialog box is open, showing a 'Post Redirect' action with the URL 'http://clickdimensions.com/ebook-convi/'. The background shows a form with fields for First Name, Last Name, Company, Email, and checkboxes for 'Sign up for the' and 'Notify me of special', along with a CAPTCHA field and a 'Get the eBook!' button."/></div><div data-bbox="507 534 947 617" data-label="Text"><p>That's it. You now have the insight to more effectively evaluate your Google ads and see which keywords, ads and campaigns are bringing conversions.</p></div><div data-bbox="55 910 233 951" data-label="Page-Footer"><p><img alt="ClickDimensions logo" data-bbox="56 911 95 952"/> clickdimensions.com</p></div><div data-bbox="485 913 509 935" data-label="Page-Footer"><p>87</p></div><div data-bbox="821 916 946 946" data-label="Page-Footer"><p><img alt="Facebook icon" data-bbox="821 916 850 946"/> <img alt="Twitter icon" data-bbox="850 916 879 946"/> <img alt="LinkedIn icon" data-bbox="879 916 908 946"/> <img alt="Google+ icon" data-bbox="908 916 946 946"/></p></div>
```

## TRACKING CONVERSIONS FOR FACEBOOK ADS

Conversion tracking is a way to see how many people that clicked through to your ad actually completed whatever process you wanted them to complete. This could have been signing up for a newsletter or downloading a piece of content. In our case, we have a number of premium content items that visitors to our site can access once they have completed a web form on a landing page. Examples are our [Microsoft CRM Marketing Ideas eBook](#), our [Training Resource Guide for Microsoft Dynamics CRM](#), and our [Grow Your Business with Nurture Marketing eBook](#). Each time a visitor goes to the landing page for one of these items and completes the form, they are redirected to a confirmation page. With Facebook conversion tracking, you can place a piece of code on those confirmation pages so that Facebook can report back the number of people who clicked on that ad and eventually arrived at the confirmation page. Let's take a look at an example.



+1 888.214.4228 ClickDimensions

### Grow Your Business with Nurture Marketing

*Convert leads, close sales, and build customer trust using marketing automation and Microsoft Dynamics CRM*

Nurture marketing. Lead nurturing. Drip marketing. You've heard the buzzwords, but what exactly are nurture programs, and – more importantly – how can they benefit your business? In this free eBook, find out how nurture marketing campaigns can help you:

- Educate prospects about your product or service
- Build rapport with buyers
- Establish trust and credibility with your brand
- Keep your organization top-of-mind
- Help overcome objections during the buying process
- Save valuable sales resources
- Close a higher percentage of leads

Combining marketing automation with Microsoft Dynamics CRM, nurture programs can help to close the gap between marketing and sales. **Download the free eBook today** to see real-world examples of successful nurture programs at each stage of the buying cycle.

**Download Now**

Complete the form below to download the FREE eBook!

First Name \*

Last Name \*

Company \*

Email \*

☒ Sign up for the Marketing with MSCRM Newsletter

☒ Notify me of special events/webinars (a few times per year)

We never share your data. Read our [privacy policy](#).

Tap the lock icon or slide bar to right to unlock

**Get the eBook!**

*For each premium content item that we offer, we create a landing page (like the Nurture eBook page above) that links to a confirmation page when the user submits the form. The confirmation page is an effective way to track conversions.*

When we launched our [Grow Your Business with Nurture Marketing eBook](#), we had to create a landing page to which all our ads can link. This landing page (screen shot above) includes a ClickDimensions web form that, when submitted, redirects the visitor to a confirmation page.

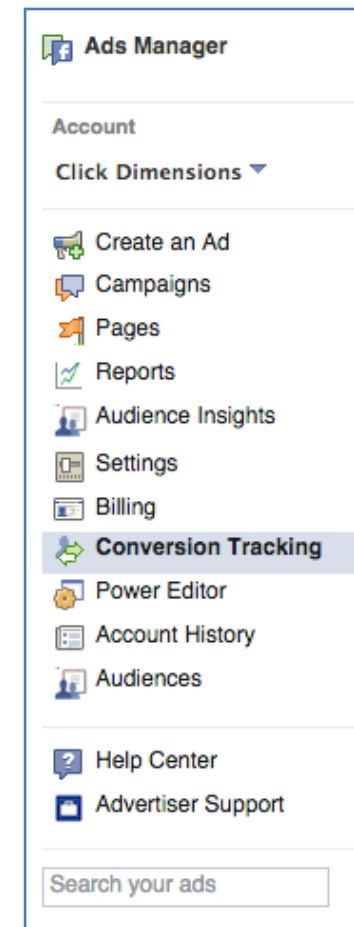
Under the ads section of Facebook, we now see the Conversion Tracking link. We click that and walk through a wizard which results in a block of code that we can place on our web form confirmation page. If you are using ClickDimensions web forms, this [blog post](#) shows you how to place conversion tracking code on a form's confirmation page. Note that the blog post talks about doing this for Google ads, but the concept is the same.

Specify the name of the conversion we want to track, then Facebook will provide our tracking code:

**Configure Conversion Pixel Code**

Copy the code below and paste it between <head> and </head> in the page of the website where you want to track conversions.

```
<script type="text/javascript">
var fb_param = {};
fb_param.pixel_id = 6007048096254;
fb_param.value = '0.00';
(function(){
  var fpw = document.createElement('script');
  fpw.async = true;
  fpw.src = '//connect.facebook.net/en_US/fp.js';
  var ref = document.getElementsByTagName('script')[0];
  ref.parentNode.insertBefore(fpw, ref);
})();
</script>
<noscript></noscript>
```




When setting up our ad, we can specify that we want to track conversions and have Facebook optimize pricing for conversions.

Once we have placed the Facebook conversion tracking code on our web form confirmation page and completed our ad, Facebook's reporting shows us how many conversions we are getting and what we are paying for them. Now we can see how well Facebook ads are working for us.

### Choose the objective for your campaign


Help: Choosing an Objective


- Send people to your website
- Increase conversions on your website**
- Boost your posts
- Promote your Page
- Get installs of your app
- Increase engagement in your app
- Reach people near your business
- Raise attendance at your event



## Website Conversions

Send people to your website to take a specific action, like signing up for a newsletter. Use a conversion pixel to measure your results.

 <http://www.clickdimensions.com/nurturemark> x

 Nurture eBook +

Continue

### How much do you want to spend?

Budget ⓘ

Per day ▼

\$5.00 USD

Schedule ⓘ

☒ Run my ad set continuously starting today

☐ Set a start and end date

Optimize For ⓘ

Website Conversions ▼

Pricing ⓘ

Your bid will be optimized to get more conversions for your website. You'll be charged each time your ad is served.

☒ Get the most website conversions at the best price - You'll be charged for impressions

☐ Set the amount a conversion is worth to you



## ENHANCE TARGETING OPTIONS FOR YOUR TWITTER ADS

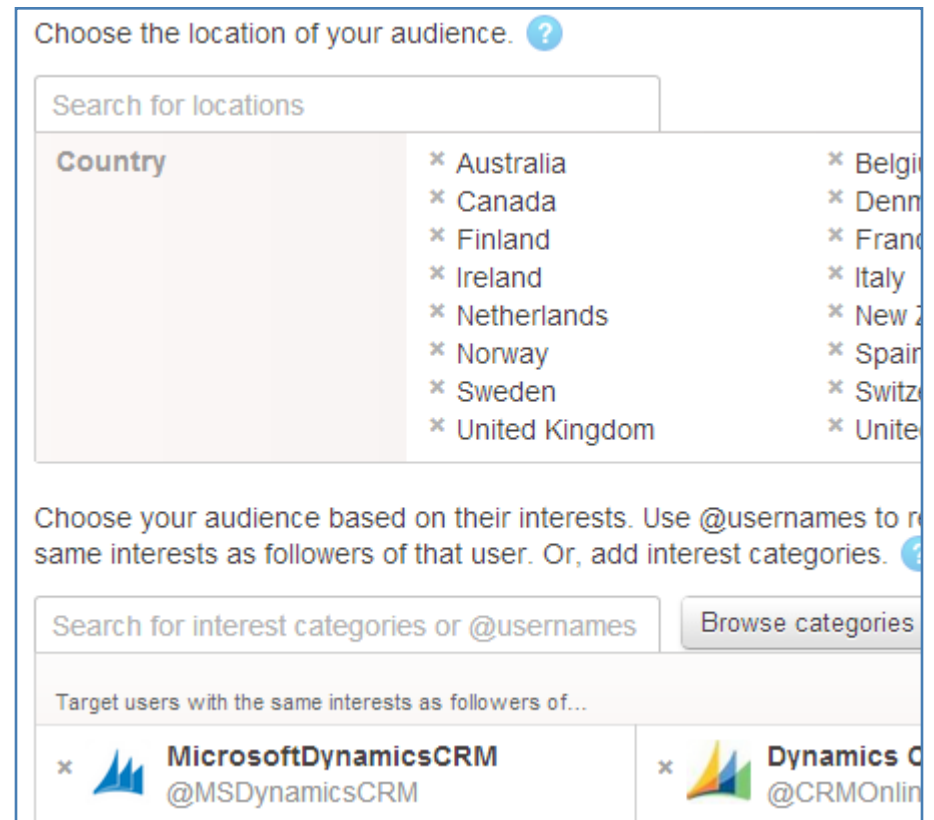
Here at ClickDimensions, we advertise on Google, Facebook, LinkedIn, Bing and Twitter along with some niche blogs and sites. It has been interesting to see these platforms develop; mainly in terms of the targeting options and analytics they provide.

When Twitter launched their advertising platform, we immediately saw the possibilities. The platform allows you to do two main things:

- Promote your account to gain more followers, and
- Promote specific tweets so that more people see, and potentially retweet, them.

Initially, Twitter's targeting options were not very deep. However, Twitter has added the ability to target based on Twitter accounts. With this addition, you can make sure your account or promoted tweets reach people with similar interests to the twitter accounts you choose to target. For an organization like ClickDimensions, this means we can target people who follow Twitter accounts that are related to Microsoft Dynamics CRM.

Targeting options also include device type (i.e. desktop/laptop, iOS) and user gender. With your targeting in place, you can create



The screenshot shows the Twitter Ads targeting interface. At the top, it says "Choose the location of your audience." with a help icon. Below this is a search bar labeled "Search for locations". A dropdown menu is open, showing a list of countries with an 'x' icon next to each: Australia, Canada, Finland, Ireland, Netherlands, Norway, Sweden, United Kingdom, Belgium, Denmark, France, Italy, New Zealand, Spain, Switzerland, and United States. Below the location selection, it says "Choose your audience based on their interests. Use @usernames to reach users with the same interests as followers of that user. Or, add interest categories." with a help icon. There are two input fields: "Search for interest categories or @usernames" and "Browse categories". Below these is a section titled "Target users with the same interests as followers of..." which shows two examples: "MicrosoftDynamicsCRM @MSDynamicsCRM" and "Dynamics CRM @CRMONline".

*Twitter's targeting options for geography and interests*

new tweets to promote or you can select existing tweets or have twitter automatically select your most engaging tweets. Since our goal at ClickDimensions is to achieve conversions on our website, we have chosen to promote tweets about our premium content items listed at <http://www.clickdimensions.com/content/>.



We can also elect to promote our account so that we gain more followers.



With these targeting options, we believe that Twitter can be an effective source to drive additional conversions.

## SEE GOOGLE ADWORDS DATA INSIDE GOOGLE ANALYTICS BY LINKING YOUR ACCOUNTS

If you use Google pay-per-click advertising (Google AdWords) as part of your marketing strategy, you may not be aware that you can see data about your campaigns in your Google Analytics account. Linking your Google AdWords account to your Google Analytics account takes only a minute and can tell you which of your keywords are driving quality traffic to your site.

Start by reading the Google support article on how to make the link here: <http://support.google.com/adwords/bin/answer.py?hl=en&answer=1704341>

Once that is done, wait a day or so and navigate to the Advertising section of your Google Analytics account. There you will be able to see a lot of valuable information.

Of particular interest is which keywords drive visits that don't bounce (i.e. don't view one page and leave) and that have a significant duration. Below we can see that visits we receive from the keyword "+dynamics +crm +email +marketing" have an extremely low bounce rate and spend a lot of time on our site. This insight may not be surprising, but it is validating and encourages us to optimize even more heavily around this search term.

By the way, if you are wondering what the plus signs (+) are doing in front of the key word terms, think of them as "lock" icons. By adding them, we are ensuring that those words, or their close cousins,

must be included in the visitor's search query (i.e. what the visitor searched on) in order to trigger our ad to be shown. This is called the "modified broad match" option. Without these "locks," a visitor could have searched on "crm email" and potentially triggered our ad. Since the term "crm email" is way too broad for our tastes, we do not want to spend money on those clicks.

| Keyword                         | Pages / Visit | Avg. Visit Duration | % New Visits | Bounce Rate |
|---------------------------------|---------------|---------------------|--------------|-------------|
| (remarketing/content targeting) | 1.26          | 00:00:26            | 8.03%        | 92.15%      |
| +microsoft +crm                 | 2.55          | 00:01:57            | 93.10%       | 65.52%      |
| dynamicsuser.net::all pages,top | 1.00          | 00:00:00            | 100.00%      | 100.00%     |
| +dynamics +crm                  | 1.92          | 00:01:05            | 72.00%       | 68.00%      |
| +dynamics +crm +email +marketi  | 5.25          | 00:10:16            | 8.33%        | 8.33%       |
| +microsoft +dynamics +crm       | 3.58          | 00:00:58            | 91.67%       | 58.33%      |
| +crm                            | 1.64          | 00:00:35            | 81.82%       | 72.73%      |

## Chapter Three

# WEB ANALYTICS & OPTIMIZATION

If your marketing efforts have primarily centered around blast emails and traditional marketing, you might be surprised by how your website can easily work with your CRM. It is very helpful to know who's visiting your site, how they got there and what they're doing once they get there. The following articles cover some ways to think about your web presence and the value it can have for your business.

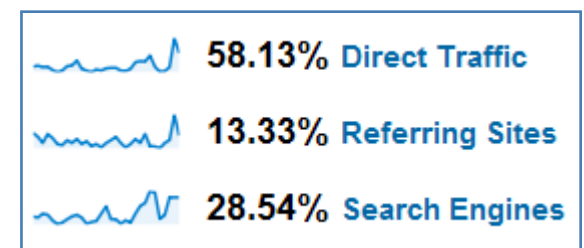
### IS IT REALLY SEARCH ENGINE TRAFFIC? THE POWER OF KNOWING HOW SOMEONE FOUND YOUR SITE

Most of us have seen the graphic to the right before. It is from Google analytics and shows the breakdown of web traffic based on whether it came from search engines, direct (i.e. the visitor typed in your URL or used a bookmark) or referring sites.

This is deceiving at best, because most of us use our search engines as a substitute for typing in the URL. Instead of bookmarking [www.clickdimensions.com](http://www.clickdimensions.com), we go to our Google or Bing search boxes on our browsers and type in "clickdimensions" or something similar.

*“With ClickDimensions, I just love the fact that I know where my leads are coming from, I know when they came in, and I know what's been done.”*

GIANMARCO SALZANO, VICE PRESIDENT  
REPORTING CENTRAL



Using our own solution, we can see the keywords that are used when people visit us from search engines. Since we classify each visit based on whether it came from a search engine, social site (we keep an extensive list), email link click or direct/bookmark link we are able to query all visits classified as coming from search engines and then inspect the keywords.

The result of this analysis is that we see a lot of visits that are technically search engine visits, but, since they used branded keywords (our name or our product name), we can really think of them as direct traffic because the visitor obviously knew about us.

This is great because it allows us to clearly see visitors that came upon us from non-branded keywords like “marketing automation” or “dynamics crm marketing.” When we see a combination of a growing lead score from a visitor that used non-branded keywords, we can quickly assess their value as a prospect. Below is a great example. We have one visitor that came to us from a search on “powered by windows azure.” Now, while our solution is powered by Azure, people buy it because it provides marketing automation functionality. So, there’s probably no point in spending time on this visitor and, as you can see, he/she didn’t accumulate a high score.

| Keywords                   | Referrer Type | Referring Host | Score |
|----------------------------|---------------|----------------|-------|
| 'powered by windows azure' | Search Engine | www.bing.com   | 10    |

In contrast, the visitor below came to us from keywords that related perfectly to our solution and, thus, was very interested and built a high lead score. In addition, because ClickDimensions aggregates all traffic from IP addresses, once we identified one person from this prospect, we could see that several others had also been on the site expressing strong interest. At that point, we knew our odds were good and this tempered the sales cycle. They are now a satisfied customer.

| Keywords                       | Referrer Type | Referring Host | Score |
|--------------------------------|---------------|----------------|-------|
| crm dynamics campaign tracking | Search Engine | www.google.com | 120   |

## COMBINE LIVE CHAT AND WEB TRACKING

At ClickDimensions, we use live chat on our website so that people visiting our site can quickly connect with us while they are on the site. The chat solution we use, Website Alive, is inexpensive and gives us all the features we need. However, you can use any chat solution and you will be able to “integrate” it with your ClickDimensions web tracking using at least one of these two methods:

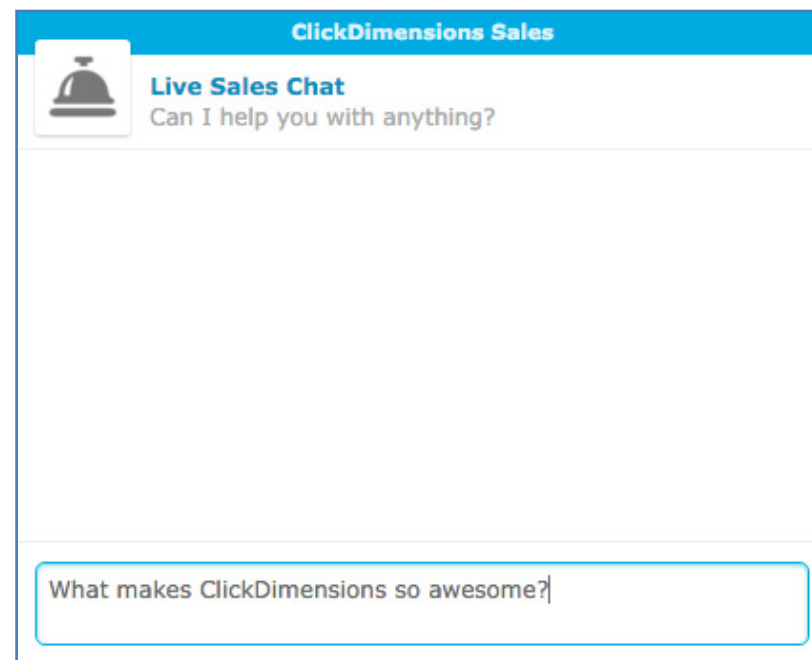
### Method 1: Place our tracking script on the live chat pop-up window

When a website visitor clicks our chat button on the website, a pop-up window launches where they can ask us a question. We were able to place our solution’s tracking code on that page so that when someone initiates a chat, we are able to locate the most recent page view and see the visitor it is coming from. Here is how it works:

Visitor clicks the chat button on our website...



Pop-up window loads and runs our web tracking script...



Page view entry is created in CRM so you can see who the visitor is (hint: it will be the most recent visitor to have opened the chat window)...

| Active Page Views ▾ |                 |      |                |                     |
|---------------------|-----------------|------|----------------|---------------------|
| ✓                   | IP Organization | Lead | Contact        | Page Title          |
|                     | Comcast Cable   |      | Heather Wright | A Live Chat Session |
| Type                | Page            |      |                |                     |


...and what else they have done on your site...

| VISIT INFORMATION   |   |      |
|---|---|------|
| 02-02-2016 20:30:33 (UTC) ≡   |   |      |
| Page View Associated View ▾   |   |      |
| + ADD NEW PAGE VIEW    ADD EXISTING PAGE VIEW    BULK DELETE    CHART PAN |   |      |
| ✓ Time  | Page Title  | Type |
| 02-02-2016 20:31:23 (U...   | Marketing with Microsoft Dynamics CRM - ClickDimensions Blog: Search      | Page |
| 02-02-2016 20:31:03 (U...   | Marketing with Microsoft Dynamics CRM - ClickDimensions Blog: October ... | Page |
| 02-02-2016 20:30:33 (U...   | Marketing with Microsoft Dynamics CRM - ClickDimensions Blog              | Page |


## Method 2: Search for the visitor's IP address when a chat begins:

This is the easier method of correlating what you see on live chat with your ClickDimensions web tracking, and provides an even bigger picture view of the prospect. This solution also works with chat solutions that don't allow you to customize their pop-up chat window with a tracking script. Here is how it works:

Just as in the first example, the visitor initiates a chat and asks a question. Your salesperson will normally see the visitor's IP address in their chat client solution...

|   |                |
|---|----------------|
| Operator Chat   |                |
| willard   |                |
|  willard | Madrid, Madrid |
| 79.147.117.252  | Spain          |
| E-mail: n/a   |                |
| Phone Number: n/a   |                |
| Web Site: Default Web Site  |                |
| Page: n/a   |                |

The salesperson can then simply copy the IP address from the chat client and search for it in the ClickDimensions IP Organization entity in CRM (you will need to make the IP field searchable)...



| IP Organizations: Search Results ▾   |                   |
|--|-------------------|
| 79.147.117.252   |                   |
| Name ▲   | Created On        |
|  Telefonica de Espana | 6/20/2011 3:32 PM |

Open the matching IP Organization record and you will see a history of EVERY visitor, visit and page view from that IP address. You will know exactly how much total interest there is from everyone coming from that IP address...

IP Organization

Telefonica de Espana

Visits: Visit Associated View ▾

| <input type="checkbox"/> | Time  | Anonymous Vis...   | IP Country | IP City | O |
|--------------------------|---|--------------------|------------|---------|---|
| <input type="checkbox"/> |  06-20-2011 19:41:27 (UTC) | Telefonica de Espi | Spain      | Madrid  | V |
| <input type="checkbox"/> |  06-20-2011 19:31:58 (UTC) | Telfort Internet   | Spain      | Madrid  | V |

Either way you decide to use live chat with Microsoft CRM and the ClickDimensions solution, you will have amazing intelligence about the visitors who initiate a chat with you.

## QUANTIFY YOUR PROSPECTS' INTEREST: LEAD GRADING AND SCORING

### Terminology Check

The term “lead scoring” in the marketing automation space can be a bit confusing for CRM users. This is because CRM systems like Microsoft Dynamics CRM have records for individuals named Leads and Contacts. For the purposes of this article, we will just talk about scoring, and it will refer to any individual. That works a lot better when talking about ClickDimensions because our solution actually scores Leads, Contacts and Anonymous Visitors, the latter being a ClickDimensions custom entity.

### Scoring

Scoring specifically refers to the interest level of the individual (i.e. Lead, Contact or Anonymous Visitor). This is because the score is calculated based on email clicks, web form submissions, visits, page views, link clicks and file downloads. The more someone clicks on your emails and visits your site, the more interested

they probably are. However, their level of interest doesn't mean they are a good prospect. That is where grading comes in.

### Grading

Lead grading is the right term for the “fit” of the individual. You can define fit in a number of ways. Depending on the complexity of your product/service line, someone who is a fit for one product/service may not be a good fit for another. Fit can be based off of both demographic (e.g. a person's title) and firmographic (e.g. a firm's industry) attributes. Referring to the graphic, for our prospects, a good fit is someone whose company uses Microsoft CRM and whose role involves marketing. In addition, if the company is a high-tech company, then it will tend to be even more suited to our solution, because high-tech companies are early adopters of marketing technology. So, when we see someone with these attributes and a high lead score, we drop everything we're doing and sell. If



### Grading

#### \* Fit

- \* Role involves marketing
- \* High-Tech company
- \* Uses Microsoft CRM



### Scoring

#### \* Interest

- \* Multiple visits
- \* Took our product tour
- \* Score > 100



you have a lot of prospect volume, CRM's Advanced Find tool can be a great way to pull out which leads/contacts fit your criteria. Sort by score (i.e. interest) and you've got a nice prioritized list.

### How we use our scoring

Internally, we've tweaked our default scoring values to a weight that is right for us. Email link clicks are high value so they get 10 points each by default. Likewise, form submissions are worth 25 points. Each visit is worth five points. Page views are worth three points each, but all of our product tour pages are custom set to five points (except for the main tour page which is 10, and our overview video is worth 15). When someone passes 50 points, they are interested. When they hit 100, it is time to really give them attention.

### Summarizing interest at the organization level

If you are part of a B2B company, which most CRM users are, then you might be asking yourself if you should look at the score at the overall organization level. Well, we do. Since our solution also scores Anonymous Visitors, and since we correlate all visits (anonymous and identified) at the organization level (i.e. at the IP address level), we can often see a bigger picture of interest being generated from a single organization. For example, there may be five different people interacting with us (i.e. with our emails, website and blog) from one organization, but we will see that activity grouped in a single place (on our IP Organization records). So, we can sell with confidence knowing the overall organization is clearly interested. This is informative and encouraging. We are

no longer flying blind wondering who is interested, what they are interested in and how interested they may be.

“With ClickDimensions, we are significantly reducing the amount of time it's taking to get leads from our website into our sales funnel if they are sales-ready.”

PATRICIA MEJIA, VP OF MARKETING  
SITEWORX

## INCREASE YOUR SEARCH RANKINGS WITH OFF-PAGE SEARCH ENGINE OPTIMIZATION (SEO)

SEO, or Search Engine Optimization, can be divided into two categories: on-page and off-page. On-page SEO involves things you can do to your website to make it easier for search engines to find. Google has long published a [Search Engine Optimization Starter Guide](#) that provides great information on this topic.

Off-page SEO involves getting other sites to link to your website in a credible manner. Properly constructed links to your site from other credible sites make your site look authoritative on a subject and, thus, raise your site's search rankings. At ClickDimensions, we achieve powerful off-page SEO by asking our CRM partners to link to us. However, we are clear in specifying how we want those links constructed so as to provide an off-page SEO benefit. It is important that the link to our site include anchor text (the text of the link itself) with terms that we want to associate with what we do. In our case, those terms are "Email Marketing and Marketing Automation for Microsoft Dynamics CRM," and we have created a program whereby we will prominently link to our partners from our [interactive partner directory](#) in exchange for asking them to following our [partner linking guidelines](#). If you do not specify how you want a link to your site created, many websites will simply link to you from your logo, and that will not have the end result you want in terms of associating important terms to your site.


Our [interactive partner directory](#) (screen shot below) lists our CRM partners, but makes the listings more prominent for the partners that have followed our partner linking guidelines and linked to our site in the manner that is most helpful to our search rankings.

The screenshot shows the ClickDimensions website. The top navigation bar includes links for eBooks, Blog, Training, Support, Contact, Search, and a Request a Demo button. The main content area is titled "CRM Partners" and lists three regions: USA-Northeast, USA-Southeast, and USA-Central. Below this, there is a section for "Ledgeview Partners" featuring their logo, tagline "Relate. Relay. Resolve.", and a description of their services. The ClickDimensions logo and "GOLD PARTNER" badge are visible at the bottom of the Ledgeview section.


Our partner linking guidelines (bottom left) specify how the partner should link to our site. Having clear linking guidelines makes it easy for our partners to properly construct the link to our site.

Do you have partners or other organizations with credible sites that you could get to link to your site? If so, it is an asset worth investigating. In addition to the off-page SEO benefit, you get the obvious benefit of being found by visitors from the other sites that will click the links and come to your site. Happy marketing!

Below are examples of what a typical ClickDimensions listing on a partner site might look like:



ClickDimensions [Email Marketing and Marketing Automation for Microsoft Dynamics CRM](#) empowers marketers to generate and qualify high quality leads while providing sales the ability to prioritize the best leads and opportunities. Providing Email Marketing, Web Tracking, Lead Scoring, Social Discovery, Form Capture, Surveys, Landing Pages, Nurture Marketing, Subscription Management, Campaign Tracking and more, ClickDimensions allows organizations to discover who is interested in their products, quantify their level of interest and take the appropriate actions.



ClickDimensions [Email Marketing and Marketing Automation for Microsoft Dynamics CRM](#) empowers marketers to generate and qualify high quality leads while providing sales the ability to prioritize the best leads and opportunities. Providing Email Marketing, Web Tracking, Lead Scoring, Social Discovery, Form Capture, Surveys, Landing Pages, Nurture Marketing, Subscription Management, Campaign Tracking and more, ClickDimensions allows organizations to discover who is interested in their products, quantify their level of interest and take the appropriate actions.

## LINK YOUR LANDING PAGES TO MICROSOFT CRM CAMPAIGNS AND ANALYZE WHAT IS DRIVING TRAFFIC TO YOUR CAMPAIGN

If you are promoting an event, product launch or other initiative, it is helpful to create a landing page that contains content specific to that event to drive your visitors to a singular call to action like registering for the event, downloading collateral or watching a video. If you can link that landing page to a campaign in CRM using ClickDimensions, then you can see in one place all visits to the landing page. Since a big part of any campaign involves driving traffic to the landing page, this technique will allow you to understand which traffic sources bring the most traffic. Let's look at an example:



**True Stories of Marketing with Microsoft CRM**  
*Real life use cases for generating and managing high quality leads.*

Since he authored the first book on Microsoft CRM in 2003 John Gravely, founder of [ClickDimensions](#), has been using Microsoft CRM to manage sales and marketing teams. Having used every version of Microsoft CRM and a variety of add-on marketing solutions over the years, John has discovered and refined successful tactics for a variety of sales and marketing situations.

To accomodate viewers from various time zones we will hold the webinar at four different times. [Click below to register for one of the live webinar times.](#)

Wednesday, June 22nd @ 8 am, EDT (GMT -5) **Register** ➔

For our True Stories webinar campaign we created a landing page that gave an overview of the event and invited people to register.

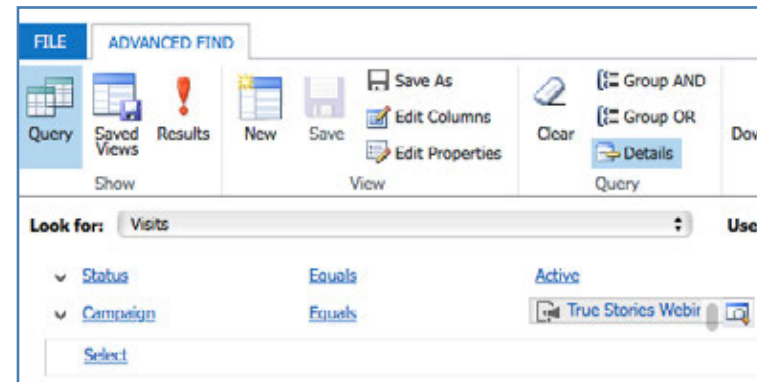
Using ClickDimensions, we linked the landing page to a campaign record we created in CRM. This is a native feature of ClickDimensions' own landing pages, but, just in case you created a landing page on your own, you can still link to a Microsoft CRM campaign by placing the campaign code in inside the landing page...

```
<script type="text/javascript">
  var cdScore = 15;
  var cdPriority = true;
  var cdCampaignKey = 'CMP-01052-J8Y1C9';
</script>
```

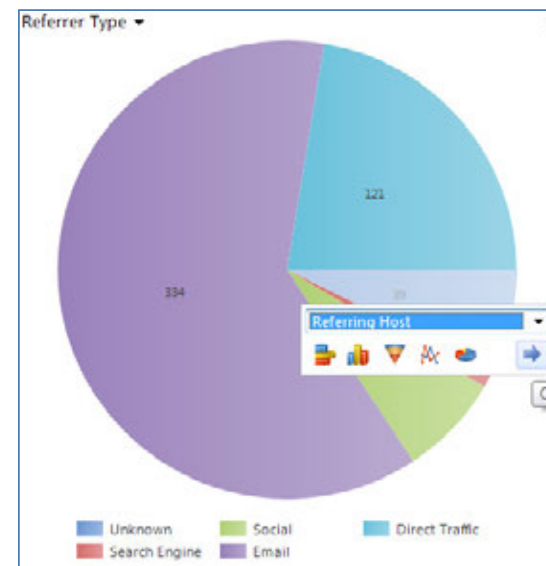
Note that the campaign code in the landing page body matches the campaign code from CRM...



With this in place, all visits to the landing page become linked to the CRM campaign record, and we can easily group them together in CRM using an Advanced Find view...



Using CRM's inline charts, we can look at a pie chart of how the traffic was referred to the landing page...



Drilling into the “unknown” segment, we can see which referring sites brought the most traffic.

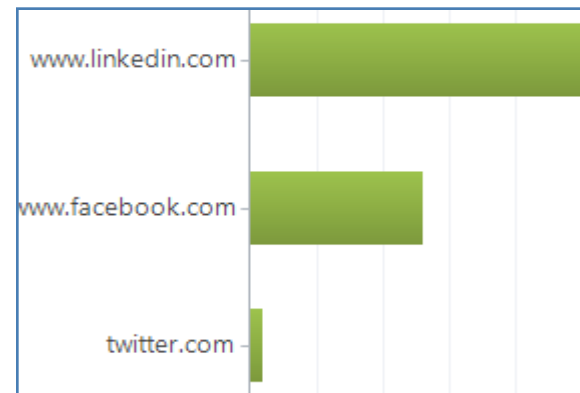
This makes it clear to us that certain blogs drive more visitors than others. With that in mind, we will know who to focus on for help promoting our events in the future. Clearly, three bloggers exert much more influence than the rest. The results were unexpected to us, but very helpful.



We can also see which social channels brought the most traffic (chart below).

The fact that LinkedIn ranked highest is no surprise to us, as we have a business-oriented audience. However, it is helpful to see that many people do view our content via our Facebook page.

It pays to measure everything you can as long as the cost of measuring doesn't outweigh the value. This is where we come in. We make it easy to measure and track, so you can really understand how your ideas and efforts translate into results.



## PRESENT A SURVEY AFTER A WEB FORM HAS BEEN COMPLETED

When you go to the ClickDimensions website and click the button to sign up for our monthly marketing newsletter, you are taken to a short newsletter sign up form that was built using our drag-and-drop form designer.

Click the newsletter button and you will land on the form displayed below...

### Newsletter Opt In

The ClickDimensions newsletter is delivered only **once a month**, normally on the first Tuesday of the month. Topics range from best practices in email marketing, marketing automation and social CRM to ClickDimension's company and product announcements. Each edition of the newsletter has a clearly marked unsubscribe link which is respected. Please also [follow us on Twitter](#) and ['like' us on Facebook](#).

**Email \***

**First Name**

**Last Name**

**Company or Organization**

When you sign up for the newsletter, you will immediately receive a copy of our most recent newsletter. Previously, when you clicked the Submit button on the form, you saw a message telling you that the newsletter was on the way, and thanking you for signing up. However, we realized that, with our survey capability, it would be easy to create a



one question survey that the visitor would see when they sign up for the newsletter. The question would ask the visitor if they would like to receive any past issues of the newsletter and would trigger a workflow to immediately send those past issues once the survey question was submitted.

We simply created a one question survey...

**Which past ClickDimensions newsletters would you like to be emailed upon completion?**

☐ February

☐ March

☐ April

☐ May

☐ June

☐ July

And then embedded it into the confirmation message of the newsletter sign up form...

Thank you for submitting your information. A copy of our most recent newsletter has been emailed to you added to our newsletter distribution list (you may unsubscribe at any time).

If you wish to receive past copies of our newsletter please select them below.

**Which past ClickDimensions newsletters would you like to be emailed to you upon completion?**

☐ February

Now when someone signs up for the newsletter, they are presented with the survey question where the form was previously displayed...

## Newsletter Opt In

The ClickDimensions newsletter is delivered only **once a month**, normally on the first Tuesday of the month. Topics range from best practices in email marketing, marketing automation and social CRM to ClickDimension's company and product announcements. Each edition of the newsletter has a clearly marked unsubscribe link which is respected. Please also [follow us on Twitter](#) and ['like' us on Facebook](#).

Thank you for submitting your information. A copy of our most recent newsletter has been emailed to you and you have been added to our newsletter distribution list (you may unsubscribe at any time).

If you wish to receive past copies of our newsletter please select them below.

**Which past ClickDimensions newsletters would you like to be emailed to you upon completion?**

☐ February

☐ March

☐ April

☒ May

☒ June

☒ July

And, for any past newsletters the visitor requested, a Microsoft CRM workflow immediately sends the emails ...

✓ Contact - Check for the newsletter question

If Survey Answer:Survey Question equals [Newsletters] AND [Survey Answer:Contact contains data], then:

✓ February

If Survey Answer:Value contains [February], then:

- Send February newsletter

Create: Send ClickDimensions Email [View properties](#)

✓ March

If Survey Answer:Value contains [March], then:

- Send March newsletter

Create: Send ClickDimensions Email: ClickDimensions March Update: Social Profiles in CRM, a cool LinkedIn trick and a new team member [View properties](#)

And, of course, all this is documented in Microsoft CRM and linked to the visitor's lead or contact record. Now that's marketing automation!

## Chapter Four

# DATA & RESEARCH

Today's possibilities for pulling relevant data from the web and keeping your data in top shape are incredible. From leveraging the power of the crowd to help you keep your data clean to using automation to help you find new data, here are a few ideas.

### AUTOMATE YOUR DATA WORK WITH AMAZON'S MECHANICAL TURK

As marketers, we are often faced with a list of data that needs to be improved. In this example, we will take a list of organization names, find their URLs and determine their locations. But my list is long, and I have better things to do, so I am going to go to Amazon's Mechanical Turk for help.

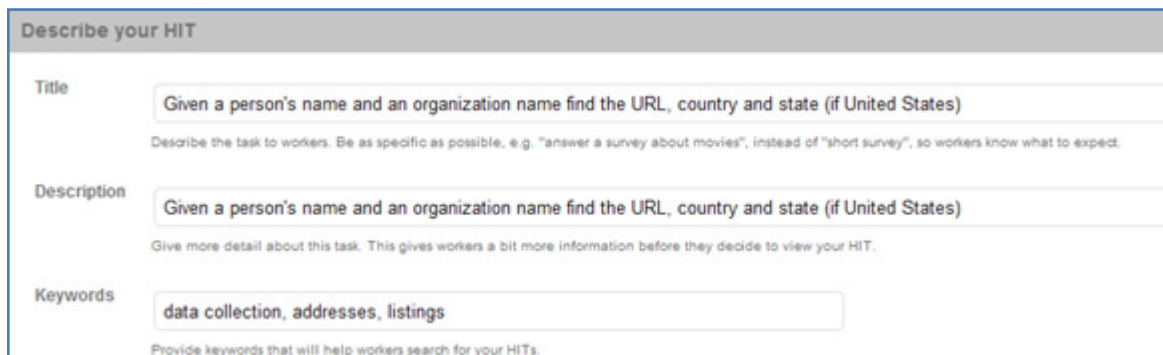


Amazon's Mechanical Turk is a website located at [www.mturk.com](http://www.mturk.com) where you can design a job that various people can do for you. For example, my job is to have people search on a company name (and optionally an individual's name) to find the company URL and location. In Amazon's terms, I am a "requester" of work, and the people that will do my tasks (called "HITS" – human intelligence tasks) are "workers." The workers can be stay-at-home moms/dads, students or anyone else with a computer, internet and a desire to earn

a few dollars. Anyone can sign up and become a worker, but Amazon allows you to only expose your work to people that they deem certified. Let's get started.

We'll begin by creating a HIT template. This is effectively a web form where a worker will read the description of your task, see the input information you provide him or her, and enter the output information you expect them to find. In my case, my form/template will describe the task, list a person's name and a company name, and ask for the company URL, country and, if the company is in the USA, its state. We begin by describing the HITs.

Then we use our HTML skills to design the web form the workers will use. Amazon has starting templates for you and plenty of help resources to guide you in setting this up...



The screenshot shows the 'Describe your HIT' form. It has three main sections: Title, Description, and Keywords. The Title field contains the text 'Given a person's name and an organization name find the URL, country and state (if United States)'. Below the Title field is a small text box with the instruction 'Describe the task to workers. Be as specific as possible. e.g. "answer a survey about movies", instead of "short survey", so workers know what to expect.' The Description field also contains the text 'Given a person's name and an organization name find the URL, country and state (if United States)'. Below the Description field is a small text box with the instruction 'Give more detail about this task. This gives workers a bit more information before they decide to view your HIT.' The Keywords field contains the text 'data collection, addresses, listings'. Below the Keywords field is a small text box with the instruction 'Provide keywords that will help workers search for your HITs.'

Once my form is designed, I can download a .csv file that will accept my input data. I am going to supply an individual and an organization name for each HIT. As the HITs are completed, I will receive a URL, country and state (if USA) for every HIT I upload.

I populate the .csv file, upload it to Amazon and publish the job. As workers begin to accept and complete our HITs we can check the progress of the job in the "manage"

Format  Font  **U** **I** **B** **T** Edit HTML So

**Find the URL, country and state (if USA) this company/organization**

- Perform a Google search on the company name optionally using the individual name to ensure you are finding the right company
- Determine the correct URL for the company and enter it below beginning with the protocol (i.e. include the http://)
- Go to the URL and locate the company/organization's main mailing address (usually on the "Contact Us" page)
- Enter the URL of the main home page below
- Enter the country and state (if USA) below
- Include any comments you feel necessary

Individual Name: **\$(IndividualName)**

Company/Organization Name: **\$(OrganizationName)**

URL:

Country:

State (if USA):

section of the Amazon interface. This shows me the average hourly rate I am paying as well as the number of HITs that have been completed. I can inspect and review the HITs to make sure the quality is good. I have elected to use "certified" workers, so I'm paying \$0.20/per HIT to make sure I get the best quality. You can bid whatever amount you want, so I could perhaps bid lower and get the work done. However, I started at \$0.10/HIT and had no takers for several hours, so I decided to increase the rate.

I have used Mechanical Turk to do many mundane data jobs, and I find the quality to be decent. For something like locating the URL and location of companies, it is good and cheap.

|   | A                        | B                          |
|---|--------------------------|----------------------------|
| 1 | IndividualName           | OrganizationName           |
| 2 | Hit1_IndividualName_data | Hit1_OrganizationName_data |
| 3 | Hit2_IndividualName_data | Hit2_OrganizationName_data |
| 4 | Hit3_IndividualName_data | Hit3_OrganizationName_data |
| 5 |                          |                            |
| 6 |                          |                            |

## WHAT IS A GOOD LEAD WORTH TO YOU? THE LEAD VALUE CALCULATION

Here we will present a very simple way to think about the value of a new good lead. As marketers, we often have to make decisions about marketing investment. When a CEO asks us whether the \$10,000 we plan to spend on a trade show will pay for itself, it helps to have a good idea of what each expected lead is ultimately worth to us.

Start by thinking about your universe of prospects as a funnel. At the top of the funnel is the total number of prospective clients for your product or service. Below that is the number of prospects you know about (i.e. the number that exists in your CRM system). Below that, the total number you have converted to customers.

Dividing the number of prospects you have converted to customers (250) by the number of prospects you know about (1,000) gives you the probability (25%) that you will close any new prospect you find out about. After all, if you know about 1,000 prospects and have closed 250 of them, you are closing one out of four of your leads. At this point, you may realize that you haven't really tried to close all the prospects in your CRM. In this case, make an estimated guess as to the number you have tried to close and then go and attempt to close the others. You get the point.

The next metric to factor is the average profit (not revenue) per prospect. Your financial person can give you an idea of that by providing basic margin and customer data. For example, if you closed 100 customers last year and made \$100,000 profit, then you made \$1,000 profit per customer. Taking the 25% probability of closing a new lead and the \$1,000 profitability per customer, you can determine that your **maximum** spend per



good lead should be \$250. But keep in mind that is the maximum spend, which leaves you with no profit. Depending on how aggressively you want to either grow the top or bottom line, you can determine how close you should spend to the maximum. Companies that are focused on revenue (top line) may be comfortable spending up to \$250 per qualified lead. Those that are focused on profitability will be much more conservative.

Now, if you've been paying attention, you may have realized that we didn't mention the total number of estimated prospects. This is the 25,000 number in our example. While this doesn't play into the lead value calculation, it does serve to give us an idea of the potential for our revenue. If our example company has only closed 250 of the 25,000 total prospects and our probability of close is 25%, then we're justified to do some serious marketing to identify and sell to those other 24,000 prospects.



| Metric  | Sample  |
|---|---------|
| Number of targets in market                     | 25,000  |
| Number of targets in your CRM                   | 1,000   |
| Number of customers                             | 250     |
| Probability of closing new targets you discover | 25%     |
| Initial deal profit                             | \$1,000 |
| Maximum new customer acquisition cost           | <\$250  |

“ClickDimensions has allowed us to collect all the data for our marketing activities onto a single solution, and build our marketing intelligence based on that data.”

JASPINDER SINGH,  
BUSINESS APPLICATION MANAGER  
IMG

# Chapter Five

# SOCIAL MEDIA

And now some topics from the social spectrum...

## TWITTER ANALYTICS WITH EXCEL

File this one under “interesting tools for marketers”: Microsoft has a free Excel application called “[Analytics for Twitter](#)” that enables you to create tweet dashboards inside Excel 2013 by searching on any combination of terms including hashtags, @user mentions and keywords.

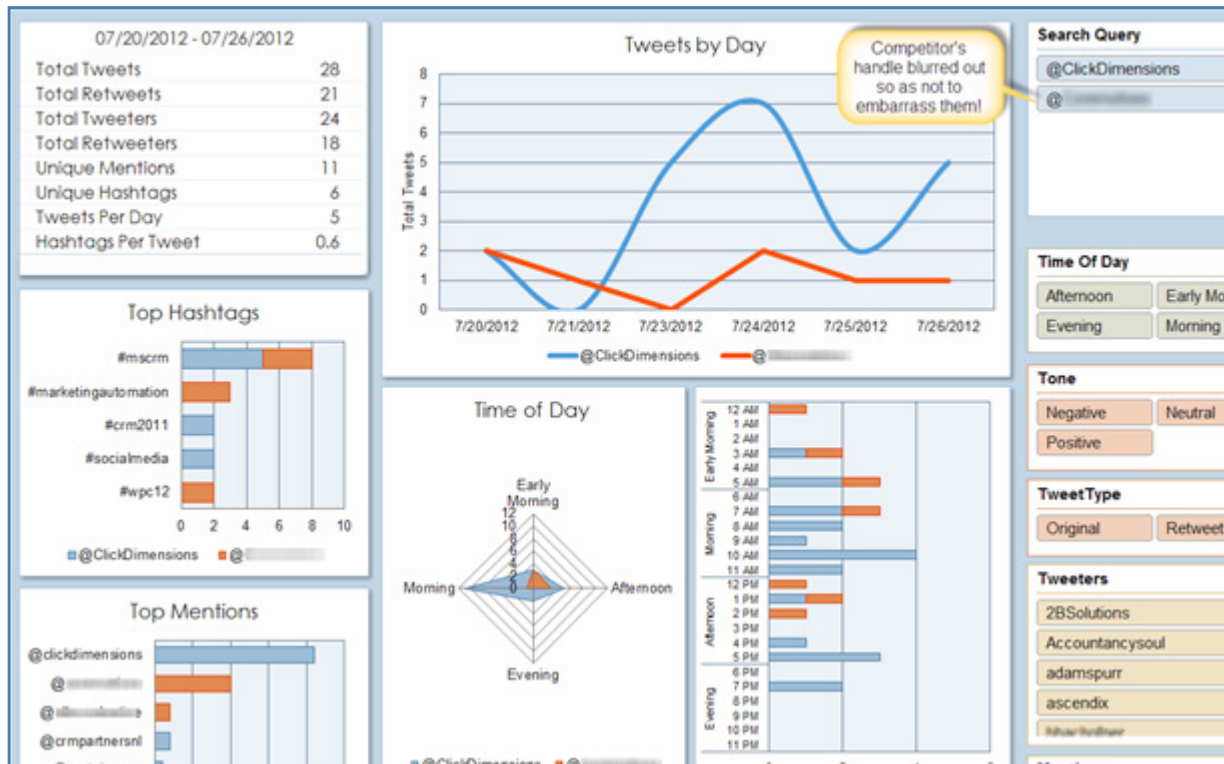
Analytics for Twitter lets you enter Twitter accounts and hashtags as search parameters, and then queries Twitter’s API, bringing in related tweets from the last five to seven days and analyzing them using PowerPivot. It has a number of analytics already set up in dashboard format, as well as sample code if you want to extend it.

But it’s pretty easy and fun to use right out of the gate. I did a quick analysis using @ClickDimensions and the Twitter handle of a company that likes to try to compete with us.



## Topics & Activity

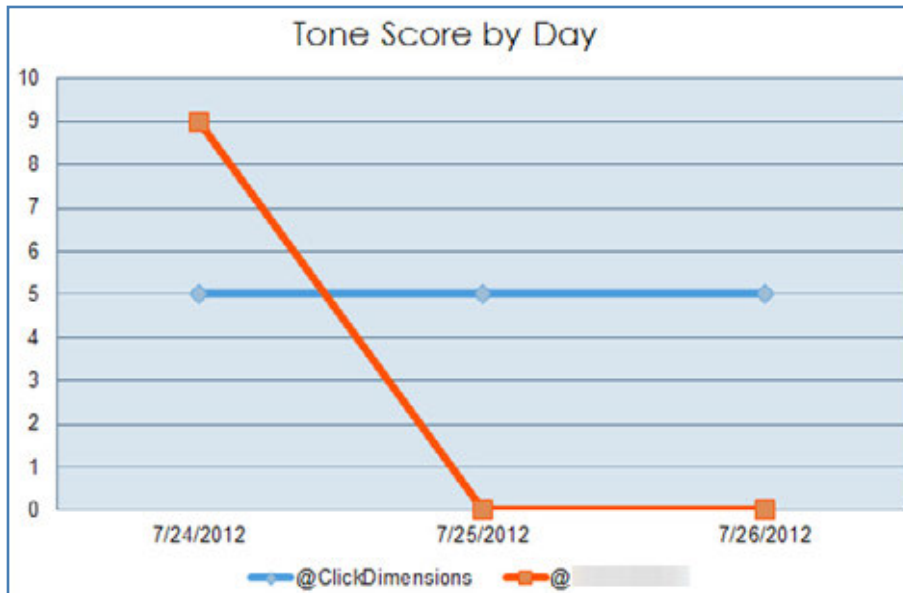
Looking at the dashboard below, I found that we've had pretty good Twitter activity over the past five days. (Our competitor did not fare so well.) We also seem to have lots of morning tweeters. You know what they say about the early bird!



## Tone

The PowerPivot also analyzes a dictionary of positive, neutral and negative words, and shows you how you're trending. The tone has been pretty consistent for us this week.

Uh oh, what was that sudden drop off for the guys in red?



The “Tone Dictionary” is easy to customize right in Excel (right):

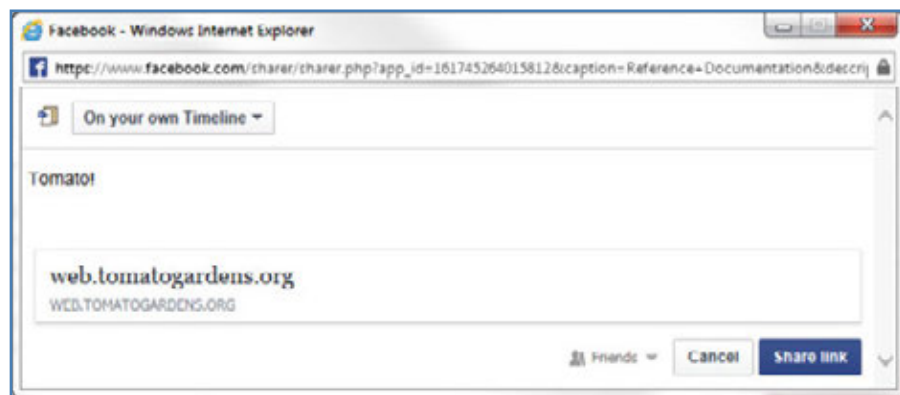
The tool is a pretty neat example of PowerPivot, and provides a simple way to look at your corner of the Twitterverse. It would be nice to have a window into a longer trendline, or an easy way to compare past results. Twitter limits you to 1,500 results per day when you run the query through their API – which is probably more than sufficient for most marketers – but if you add too many search terms, you may find yourself having to wait until the next day to get more data to analyze.

| Do <b>NOT</b> edit Tone or Index fields below. |       | Update Tone dictionary terms below. |
|--|-------|-------------------------------------|
| Tone   | Index | Dictionary                          |
| Positive                                       | 10    | amazing                             |
| Positive                                       | 9     | awesome                             |
| Positive                                       | 8     | best                                |
| Positive                                       | 7     | excellent                           |
| Positive                                       | 6     | exciting                            |
| Positive                                       | 5     | great                               |
| Positive                                       | 4     | good                                |
| Positive                                       | 3     | rocks                               |
| Positive                                       | 2     | cool                                |
| Positive                                       | 1     | :)                                  |
| Neutral  | 0     |                                     |
| Negative                                       | -1    | :(                                  |
| Negative                                       | -2    | poor                                |
| Negative                                       | -3    | bad                                 |
| Negative                                       | -4    | criticized                          |
| Negative                                       | -5    | attacked                            |
| Negative                                       | -6    | humiliated                          |
| Negative                                       | -7    | sucks                               |
| Negative                                       | -8    | terrible                            |
| Negative                                       | -9    | horrible                            |
| Negative                                       | -10   | worthless                           |

## HOW TO CUSTOMIZE THE TITLE AND DESCRIPTION FOR A FACEBOOK SOCIAL SHARING POST

ClickDimensions allows users to insert social links into their email templates that will allow their recipients to share the email content on their personal social media pages, such as Facebook.

When you click the social link, a popup will appear containing a link to your content with a predefined title and description and a text area to add your own description. Facebook will determine what data to display for the subject and description of the post by looking for certain metadata parameters in the source HTML, and will determine what data to show itself if you do not specify the metadata values you want.



ClickDimensions does not automatically include this metadata, but you can easily add it in yourself if you want to define the title and description that will be displayed.

The first step to accomplish this is to open your email template editor. Please note that this will require you to modify the email template HTML <head>, so you will only be able to do this in a Freestyle or Custom HTML template. However, you can save a Block or Drag and Drop template as a Freestyle template by changing the value of the editor type field on the email template record if you want to create the rest of the template using those editors then just swap to Freestyle to modify the social sharing.

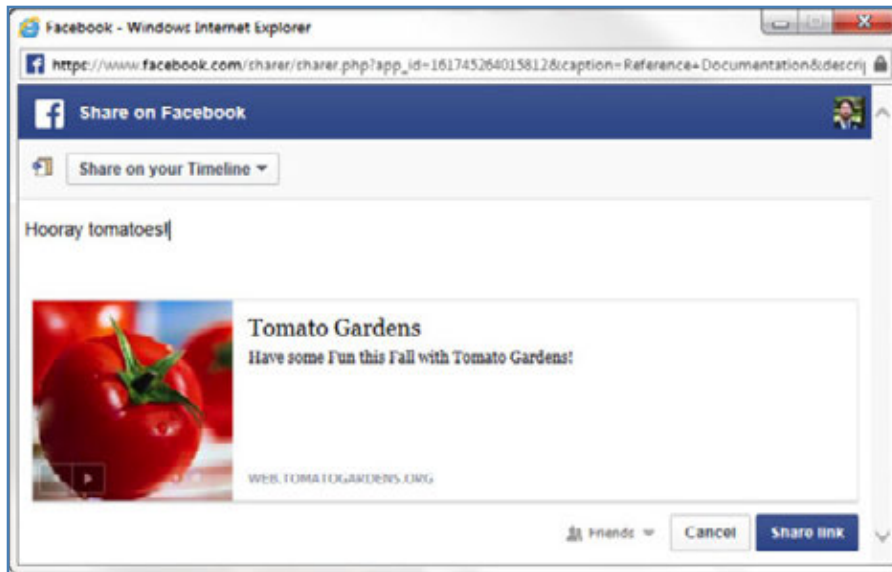
At a basic level, your template HTML should have this format:

```
<html>
<head></head>
<body></body>
</html>
```

The body contains the actual content of the email, and the head will contain our metadata. To set your Facebook post's subject and description, add something like the following code between the <head> and </head> tags:

```
<meta name="title" content="Tomato Gardens">
<meta name="description" content="Have some Fun this Fall with
Tomato Gardens!">
```

The “title” text determines the social post’s title, and the “description” text determines its description.



Including this metadata in your template will allow you to have a greater degree of control over what your recipients share on Facebook. This may result in more of their Facebook friends viewing your content, which could potentially result in new leads or customers for you!

## 5 WAYS CLICKDIMENSIONS IS PERFECT FOR GROWING YOUR BLOG



When managing a blog and working to increase subscribers, email marketing doesn't seem to be the obvious tool to use; social media platforms seem to dominate the realm of blog and online magazine marketing. In reality, email marketing is an excellent strategy to keep in touch with and grow your audience. Here are five ways that ClickDimensions offers the perfect solution for growing a successful blog:

### (1) RSS + ClickDimensions

Our RSS Connector allows you to automatically send emails to marketing lists at set times straight from your blog! Combining RSS with ClickDimensions makes it easy for your readers to follow your blog and receive regular updates while allowing you to track opens and clicks, just as you would with other ClickDimensions emails.

### (2) Move Beyond Social Media with Email Subscription & Marketing Lists

Social media posts are designed to “blast” your entire base of followers, which is valuable but also limiting. If someone wants to manage the visibility of your updates, they usually only have two options: either follow or unfollow.

With Subscription Management options associated with email marketing, readers can adjust what email content they want to see. This gives readers control over their inbox while still receiving your content. This is a great practice for both the content producer and the recipient.

### (3) Web Tracking + Analytics = Leverage

With ClickDimensions, you can track who receives, opens and clicks through your sent emails, as well as what pages on your website they visit.

ClickDimensions delivers scoring tools and a means of identifying anonymous visitors.



ClickDimensions quantifies this data in order for you to see who visits your site, how long they stay, what pages they visit, and what content they interact with. This is extremely valuable information that influences major factors, such as advertising prices on your blog and relationships with sponsors. You can also use this feedback data to adjust the material both on your blog and within your email sends to determine what content is most effectively reaching your audience.

#### **(4) Exclusive Content Delivered as a Campaign**

Social media is a great way to engage with readers/followers, but email marketing can provide more in-depth exclusive content. A great example of this is Apartment Therapy's campaign "The Cure" for spring cleaning. A single post was advertised on the blog. Readers could sign up for the particular email campaign where they would receive emails for 30 days with exclusive content and features about deep cleaning and organization.

This is a perfect example of how to deliver exclusive content for those who "ask" for it. Had the contributors at Apartment Therapy tweeted or posted on Facebook for 30 days straight about spring cleaning, they might have lost dedicated readers or followers who were not interested in that particular campaign. Email marketing campaigns can be built and tracked within CRM using ClickDimensions. This is a great tool designed to reach niche readers as well as track the success of the campaign.

#### **(5) Social Link Integration**

Just because you are running a successful email marketing campaign doesn't mean you should completely ditch social media. Social media is essential for creating and maintaining a successful blog. With ClickDimensions, you can implement social links within your email sends, and track the clicks and shares within CRM. We provide multiple ways to create email templates, so your needs for customization are met.

Email marketing is a vital tool for blogging that offers benefits that social media does not cater to by design. With ClickDimensions integrated with Microsoft CRM, bloggers have access to much more content customization and the ability to track and grow their readership from the results of email marketing.

## Chapter Six

# SMS MARKETING

SMS messaging is a great marketing tool for getting in front of an increasingly mobile audience. Here are a few articles that provide some insights into SMS marketing, and will perhaps inspire you to integrate SMS into your next marketing campaign.

### ADD VALUE TO YOUR COMPANY USING SMS MARKETING IN 8 EASY STEPS

For SMS to be a worthwhile marketing tool, you need your SMS messages to be as effective as possible. With SMS messaging, success depends largely upon timing and content. Check out these quick tips to get the most out of your SMS marketing efforts.

#### 1. Clean it Up

Start by cleaning up your database. Get rid of any old numbers or numbers for people you have not been able to reach after a few attempts.



## **2. Double-check Recipients**

Be conscious of who your messages are going to. Try not to send multiple messages to a single person in one week. Also, do not send the same message to a single contact more than once.

## **3. Let Them Opt-Out**

Provide recipients with an opt-out option that is easy to use.

## **4. Personalize the Text**

Use their names or personal details to make the message seem less like a widespread sales message.

## **5. Timing is Everything**

Avoid sending messages to recipients during unavailable hours for their time zone. It is a good idea to break up your sends via time zone to avoid sending texts out in the middle of the night.

## **6. Keep Your Messages Short and Sweet**

You want your recipients to understand the point of the message and feel happy when they read it. Keep it under 160 characters. Avoid using all capital letters; it can come across as though you are yelling. Also, proofreading can make you or break you. Be sure to check for spelling and grammar errors before sending.

## **7. Call to Action**

Make sure to include a call to action in the text. They need to know what you want them to do next, whether it's asking them to come in to the store for a big sale, opt-in to an email marketing list or fill out a web form.

## **8. Review**

Measure the effectiveness of your message. How many responses did you get? How many opt-outs? What time of day got the best response? Take note of important findings so that you can make improvements on your next send!

## SEND A TEXT MESSAGE AUTOMATICALLY

Using Dynamics CRM and the ClickDimensions SMS messaging feature, you can remind customers of upcoming appointments or promotions by sending them a quick text message.

In this example, we will be reminding a client of an appointment on the day prior to the appointment date. We will use a workflow to send a text message one day before the appointment is scheduled to start. To begin, create a workflow (Settings > Processes > Workflows > New), and choose the entity you want to trigger the workflow to being. In our example, we'll select the appointment entity because we want the workflow to begin running as soon as we create an appointment record.

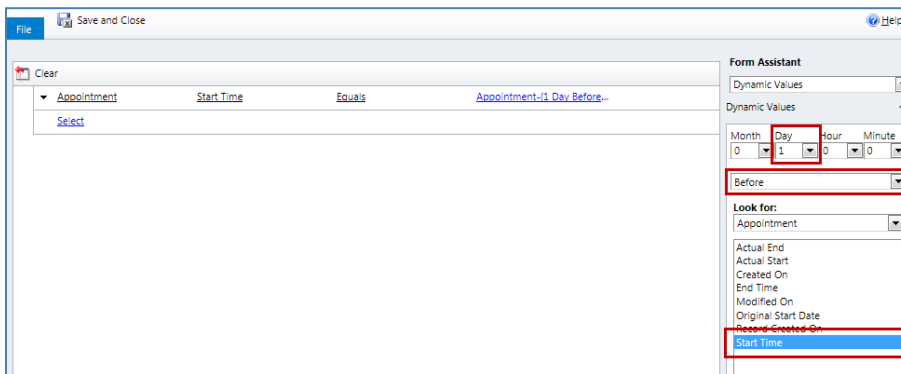
Here is what the finished workflow will look like:

The screenshot displays the Dynamics CRM Workflow Configuration window with the 'General' tab selected. The workflow is named 'Reminder SMS' and is configured to trigger on the 'Appointment' entity. The 'Available to Run' section shows 'As an on-demand process' selected. The 'Options for Automatic Processes' section shows 'Record is created' selected. The workflow steps are as follows:

- Wait until 1 day before**  
Wait until `Appointment:Start Time equals [ 1 Day Before Appointment:Start Time]`, then:  
Select this row and click Add Step.
- Create the Text Message and set properties**  
Create: `Text Message` [Set Properties]
- Send the Text Message**  
Change record status to: `Create the Text Message a` [Workflow]

We want the record to run whenever any user creates an Appointment record, so we set Scope to Organization and Start When to Record is Created.

Then insert a Wait Condition step to wait until the time you want the workflow to send the text message. In this example, that is when the Appointment Start Time is one day away.



Add a Create Record step to create a text message. Click the Set the Properties button and fill out the required fields and any additional fields you would like to fill.

A screenshot of the 'Create Text Message' form in ClickDimensions. The form is titled 'Process: Reminder SMS' and 'Create Text Message'. It has several sections: 'General' with fields for 'Subject' (Reminder of Appointment), 'To' ([Required Attendees(Appointment)]), 'From', 'Owner', 'Campaign', and 'Message' (Just a reminder of your appointment with ClickDimensions at [Start Time(Appointment)] tomorrow.). 'Regarding' section is empty. 'Status Reason' is set to 'Draft', 'Status Message' is empty, 'Bulk Text Message' is empty, 'Priority' is 'Normal', 'Start Date' is empty, and 'Due Date' is empty. There is an 'Additional Fields' section at the bottom.

The final step is required to tell ClickDimensions to send the text message. Add a Change Status step, and select Create The Text Message (i.e. what you named that step) and Workflow.

Make sure you have phone numbers in the mobile phone fields for everyone and that the settings are all correct. And that's it, you're done! Your text messages will be sent out automatically! You can of course send these messages via a workflow based off of another entity if you'd like.

## Chapter Seven

# CONTENT MARKETING & LEAD GENERATION

Content is king. You've likely heard this statement by now, but how do you create content that will promote your brand, establish your company as a thought leader and generate high quality leads for your sales team? Let this section be your guide.

## CREATING A CONTENT MARKETING CALENDAR

Content marketing is a great way to reach potential buyers and provide current customers with valuable information. Planning an entire year of content marketing campaigns can be an overwhelming task, however. To get started, follow these steps:

### Identify a goal

This is a simple but crucial first step. It's important to identify the reason for your campaign and to clearly define what it is you are trying to achieve. Are you trying to generate more leads? Generate awareness about a new product or service? Attract

| CONTENT MARKETING CALENDAR |           |          |       |           |     |      |           |        |           |           |          |          |
|----------------------------|-----------|----------|-------|-----------|-----|------|-----------|--------|-----------|-----------|----------|----------|
|                            | QUARTER 1 |          |       | QUARTER 2 |     |      | QUARTER 3 |        |           | QUARTER 4 |          |          |
|                            | January   | February | March | April     | May | June | July      | August | September | October   | November | December |
| Marketing                  |           |          |       |           |     |      |           |        |           |           |          |          |
| Water Events               |           |          |       |           |     |      |           |        |           |           |          |          |
| Successful                 |           |          |       |           |     |      |           |        |           |           |          |          |
| Marketing Content          |           |          |       |           |     |      |           |        |           |           |          |          |
| Distribution Channels      |           |          |       |           |     |      |           |        |           |           |          |          |
| Marketing Team             |           |          |       |           |     |      |           |        |           |           |          |          |
| Tools                      |           |          |       |           |     |      |           |        |           |           |          |          |
| Metrics                    |           |          |       |           |     |      |           |        |           |           |          |          |
| Notes                      |           |          |       |           |     |      |           |        |           |           |          |          |

To download our free Content Marketing Calendar template, [click here](#).

attendees to a conference or event? Remember to aim for a measurable goal, and make sure that success can be easily tracked and measured.

### Understand what strategies have been successful in the past

Spend some time looking back on your previous content marketing campaigns. What did and didn't work in previous years? Which types of content garnered the most attention from your customers? If a campaign was sluggish, could timing have been a factor? Were campaigns properly advertised? Learning from past experiences can help ensure future success.

### Decide on topics and timing

Now that you have defined specific goals and have an idea of what strategies have worked in the past, it's time to decide what content you are going to offer and when you will offer it. In order for your eBooks, webinars, blog posts and other

content to be enticing, provide valuable information that educates your buyers or solves their problem. Determine when you want to launch each content campaign – considering major events (like tradeshow or product releases), holidays and peak buying times. Use your content to generate awareness and drive traffic at the right times.

### Consider distribution

There are many outlets available to promote and distribute your marketing content – blogs, social media, email marketing, direct mail, pay-per-click advertising – the possibilities are endless. Decide which methods would be best for each of your content pieces. Often, you will want to promote your content through a variety of channels. For example, direct visitors to your content landing page through social media posts while also advertising on pay-per-click sites and highlighting the content in your weekly email newsletter.



## Create the plan

Outline the details of each campaign in a content marketing calendar. Include as much or as little detail you need. To help you get started, we've created a calendar template that can be [downloaded here](#).

## Execute

ClickDimensions is full of marketing automation tools to help you execute your content marketing campaigns! Build landing pages and web forms for visitors to download your eBooks or white papers. Send emails or SMS messages to alert your contacts and leads about new content as it becomes available. Integrate your webinars and events with CRM. And put your campaigns on auto-pilot with our new campaign automation builder.



*Read more about content marketing in our free eBook, [Hooked on Content](#).*

## FOUR QUALITIES OF SUCCESSFUL LANDING PAGES

Landing pages are simple, yet effective entities that help keep your marketing plans running smoothly. The purpose of a landing page is to hold a form, survey or subscription management page, or act as a sort of confirmation page if a visitor submits one of these web content records. A well-designed landing page can make all the difference between a confused or distracted potential customer and a prospect that's happily on-track for being qualified. Here are four qualities that successful landing pages should exhibit to hold an effective role in your marketing plan.

### 1. “Make it simple, but significant.” – Don Draper

Your landing page has a very specific job—it's designed to act as an extension of your website, not a fully-loaded web page. Adding too many additional elements or features to a landing page can be confusing or distracting to the visitor. The visitor is on this landing page for a reason, and we don't want them to leave too soon! Make the design of your page simple and to the point. Design your landing pages with the visitor in mind.

### 2. Choose for the User

A common landing page setup would present the visitor with a menu of options and let the visitor decide how they want to proceed. However, this can easily become a confusing or convoluted experience. Sometimes, the best option is to present the visitor with one choice. Direct the visitor to a specific landing page based on where they are coming from, or simplify the options on the landing page. Try to organize different campaigns that point visitors to customized landing pages.



### 3. Explain What Your Organization Does

You can tell visitors to “register now” and fill out a form, but be sure to indicate what the visitor is registering for and what they can expect when they submit the form, survey or subscription management page. Presume that these visitors know the absolute minimum about your organization; explain what you do, and why you’re the best choice for the visitor. Do not confuse this with explaining everything that your organization does, so be specific and direct.

### 4. Ensure Everything Works

This is a reminder to test your landing page with the visitor in mind. View and test your landing page in different browsers, on different devices and even on different networks. Make sure that all of your links direct the visitor accordingly. Keep the following questions in mind when testing your landing page:

- Does the auto response email send once the visitor fills out the landing page?
- Do other actions run correctly after the visitor submits their information?
- Does it look accurate?
- Does the data come into CRM correctly?
- Are the landing pages and web content records correct and uniform in every browser?

In short, try to anticipate the visitor experience as best as you can. These tips are sure to give your visitors a great browsing experience and keep their interest!

## CHECKLIST FOR LAUNCHING NEW CONTENT

When we produce a new piece of premium content for our content marketing program, a lot goes into launching that content. The reason we create original content like our [Idea eBook](#), [Training Resource Guide](#) and [Nurture Marketing eBook](#) is to generate leads as well as to reinforce our company as a thought leader in the world of marketing. To achieve these goals, the content needs to be broadly distributed and there are a number of channels to make that happen. Below is a checklist of all the items we produce to launch our content. Samples of each item follow.

**Collateral production:** This involves formatting and branding the content.

**Landing page:** Each content item is given its own page designed to optimize conversions. All ads will link back to this

page, and it will typically include a web form and email auto responder to send a link to the content item.

**Google image ads:** Google has standard sizes for the ads it can display on its network. You can see these ad specifications [here](#). We create image ads for use with our remarketing and keyword/topic/interest campaigns.

**Google and Bing text ads:** We run text ads on both Google and Bing, and we create different variations of ad text for each. Both Google and Bing will test our ad variations and will favor ones that receive the most conversions.

**LinkedIn ads:** LinkedIn allows targeting by group membership, so we take advantage of that ability to target people whose affiliation with a group implies their interest in a particular topic.

**Facebook ads:** Facebook knows almost everything about its users, so you can target with a lot of precision. With Facebook's [conversion tracking](#) (long a feature of Bing and Google, but not currently LinkedIn) you can easily measure what is working.

**Twitter promoted tweet:** With Twitter, you can promote a tweet, an account or a trend. We will tweet about our content and then promote the tweet.

**Newsletter header:** Our monthly newsletter header is always a prime spot to get clicks, so we use it to promote something every month.

**Circulation to VIPs:** We always reach out to specific bloggers and other influencers like Microsoft CRM MVPs to try and get some posts, tweets or retweets.



Collateral

+1 888.214.4228
ClickDimensions

## Grow Your Business with Nurture Marketing

*Convert leads, close sales, and build customer trust using marketing automation and Microsoft Dynamics CRM*

Nurture marketing. Lead nurturing. Drip marketing. You've heard the buzzwords, but what exactly are nurture programs, and – more importantly – how can they benefit your business? In this free eBook, find out how nurture marketing campaigns can help you:

- Educate prospects about your product or service
- Build rapport with buyers
- Establish trust and credibility with your brand
- Keep your organization top-of-mind
- Help overcome objections during the buying process
- Save valuable sales resources
- Close a higher percentage of leads

Combining marketing automation with Microsoft Dynamics CRM, nurture programs can help to close the gap between marketing and sales. **Download the free eBook today** to see real-world examples of successful nurture programs at each stage of the buying cycle.

### Download Now

Complete the form below to download the **FREE** eBook!

First Name \*

Last Name \*

Company \*

Email \*

☒ Sign up for the Marketing with MSCRM Newsletter

☒ Notify me of special events/webinars (a few times per year)





We never share your data. Read our [privacy policy](#).

Tap the lock icon or slide bar to right to unlock

**Get the eBook!**

ClickDimensions


Landing Page

|   |          |                      |
|---|----------|----------------------|
|  <p>nurture-300x600-1.jpg<br/>300 x 600<br/><a href="#">View full-sized image ad</a></p>   | Approved | Display Network only |
|  <p>nurture-300x250-1.jpg<br/>300 x 250<br/><a href="#">View full-sized image ad</a></p>   | Approved | Display Network only |
|  <p>nurture-728x90-1.jpg<br/>728 x 90<br/><a href="#">View full-sized image ad</a></p>     | Approved | Display Network only |
|  <p>nurture-160x600-1.jpg<br/>160 x 600<br/><a href="#">View full-sized image ad</a></p> | Approved | Display Network only |

Google image ads




Facebook ads




**Nurture Marketing w/MSCRM**  
Free Download: Grow Your Business with Nurture Marketing and Dynamics CRM

Go To URL: <http://www.clickdimensions.com/nur>



**Nurture Marketing eBook**  
Grow Your Business with Nurture Marketing and Dynamics CRM - Free Download


Go To URL: <http://www.clickdimensions.com/nur>



**Email / Nurture Marketing**  
New eBook -- Grow Your Business with Nurture Marketing. Download Now!

Go To URL: <http://www.clickdimensions.com/nur>

LinkedIn ads



**ClickDimensions** @ClickDimensions 12 Jan 2015

Grow Your Business with Nurture Marketing - Download the FREE eBook - [clickdimensions.com/nurturemarketi...](http://clickdimensions.com/nurturemarketi...)  
#emailmarketing #MSDynCRM #marketingautomation

Twitter promoted tweet





Click [here](#) if you are having trouble viewing this message.

Marketing with Microsoft Dynamics CRM

# Newsletter

.....  
January 2015



New from ClickDimensions...

## Grow Your Business with **Nurture Marketing**

**Download Now!**

We're starting 2015 with a bang! Our latest [quarterly release](#) will be available on January 15th, and we are excited to announce our latest eBook, [Grow Your Business with Nurture Marketing](#). This free eBook will help you convert leads, close sales and build customer trust through nurture marketing programs. [Download a copy today](#). Happy New Year and happy marketing!



Newsletter header



## TRANSACTIONAL ADVERTISING: ELECTRONIC RECEIPTS AND LANDING PAGES



Nowadays many people prefer to receive receipts electronically instead of on paper. There is good reason for this: reduced paper and ink use, easy reproducibility, simplified recordkeeping, even the simplicity of hitting the “email me” button on a tablet-as-register. Web based businesses may send electronic receipts exclusively.

Retail software with electronic receipt functionality normally gives you the ability to customize the receipt’s content, providing an excellent opportunity to market to those with a proven interest in your products or services. Including information on a product or special offer puts that information in front of the customer’s eyes without the need to send a separate marketing email, thus generating additional traffic and sales that may not have been otherwise attainable.

ClickDimensions landing pages are especially useful for this kind of transactional advertising. A landing page serves as a goal-based web page that presents the viewer with information on a product, service or event. Embedding a form within the landing page can allow the viewer to make a purchase, register for an event or request additional information. Further, ClickDimensions and CRM give you the ability to see usage statistics and initiate sales and marketing processes based on viewer interaction with the landing page. Clearly, every opportunity to put a landing page in front of a potential or existing customer’s eyes should be seriously considered.

Here are some suggestions on how to make the most of your electronic receipts and landing pages:

**Use Link Text:** Use the “Embed as Link” URL from the landing page designer in your electronic receipt, but be sure to set link text so that the recipient sees something akin to “click here” instead of the full embed URL. Clean link text is more appealing than a full URL.

### **Embed a Form in the Landing Page:**

Your landing page gives the viewer all of the information they need to decide whether or not to make a purchase. Great! Make that decision easier by embedding a form as an iFrame or widget so that the returning customer can indicate interest directly on the landing page. You could even use this form to collect additional information on the customer that can help your marketing and sales teams be even more effective in the future!

**Form Actions:** You can set form actions to run automatically upon submission. Send a follow up email, notify a member of the sales or marketing team, notify an entire team, initiate a campaign response

or follow up task, add the interested party to a marketing list, or assign that respondent’s record to a team member. One or all of these can be set to run automatically as soon as the “Submit” button is clicked.

**Nurture Programs:** A nurture program can further automate marketing processes by scheduling a series of actions to be taken on the lead or contact that is run through the nurture. Send an email, wait a few days, check to see if the email was opened, notify a user and send a follow up email, run a CRM workflow, etc. You can even set branching paths so that the specific actions taken on a lead or contact depends on how they have interacted with your emails. Running someone through a nurture program is as simple as placing an “Add to Marketing List” action on your embedded form.

Transactional advertising is a great way to turn one sale into another and keep customers engaged with your business.

Unobtrusive marketing to existing customers, data collection, automated marketing processes, and sustained customer engagement... All of this just for including some marketing copy and a link on your electronic receipts!

# Chapter Eight

## SALES PROCESS & PERFORMANCE

It is hard to talk about marketing without touching on sales! In this section we've added some items for the salespeople and sales managers out there.

### KPIS, FORECASTING AND DASHBOARD IDEAS FOR SALES MANAGERS USING MICROSOFT CRM

If you are a sales manager using Microsoft CRM, you can set up dashboards to quickly view key performance indicators (KPIs) at a glance. This article will cover the general idea of how we have set up our dashboards to manage our software-as-a-service (SaaS) revenue stream. Since our sales metrics come mainly from CRM opportunity records, we will start by reviewing the fields we capture on our opportunity records. The screen shot below shows an example opportunity record.

OPPORTUNITY : INFORMATION ▾

\$7,500.00

# ACME Corp - Std/Annual

Potential Customer \*

Status \*

Open

Rating

Est. Revenue

Pipeline

Owner \*

Est. Close Date

## General

Topic \*

Potential Customer \*

ACME Corp - Std/Annual

ACME Corp

Source Campaign \*

Bing Ad

### Forecast Information

Revenue

Est. Revenue

Est. Close Date

Actual Revenue

User Provided

\$10,000.00

12/15/2015

--

Opportunity Type \*

Probability (%)

Weighted Revenue

Annualized Revenue

Currency \*

New Business

75

\$7,500.00

--

US Dollar

The key fields we are capturing on the opportunity record are:

## Estimated revenue

This is the conservative revenue amount for the opportunity.

## Estimated close date

Since our sales team is compensated on monthly revenue, we always use the last day of the month in which we are projecting the opportunity to close. And, if we're not really sure the deal will close in the current month, we refer to our rule of conservative forecasting: "when in doubt, push it out."

## **Probability**

The percent chance we believe the opportunity has to close. For simplicity, we use standard values of 25%, 50%, 75% and 100% in lieu of using sales stages. Sales stages are right for some businesses, but the combination of close date and probability is just right for us.

## **Opportunity type**

Since we are a SaaS business, we want to separate our revenue into new customer deals and renewals from customers that have been on board for more than 12 months. This is because, after the initial 12 months, customers are transitioned from a new business salesperson to a relationship manager.

## **Weighted revenue**

This is a custom field containing the estimated revenue multiplied by the probability. We use a [CRM workflow to automatically calculate weighted revenue](#).

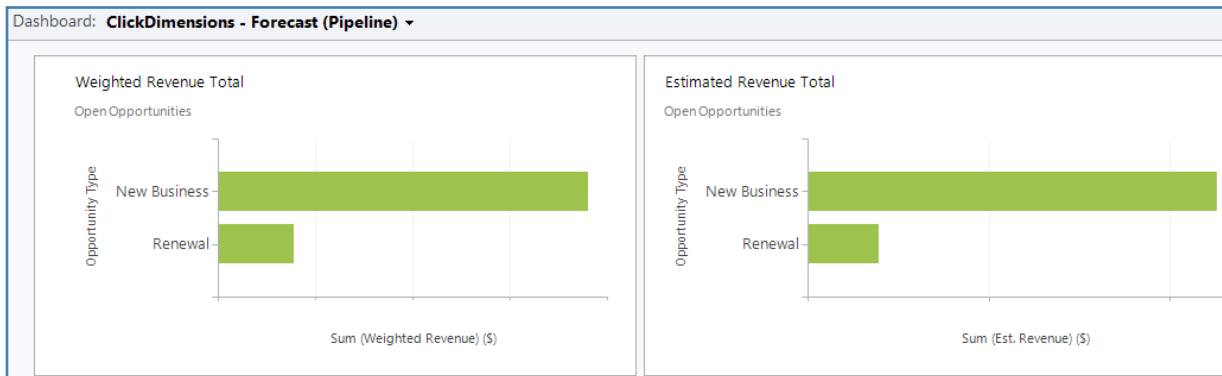
## **Actual revenue**

This is entered by our finance director when he closes an opportunity record. We make opportunity closing a process for the finance team so we can ensure that the amounts are correct for our dashboards and commission tracking.

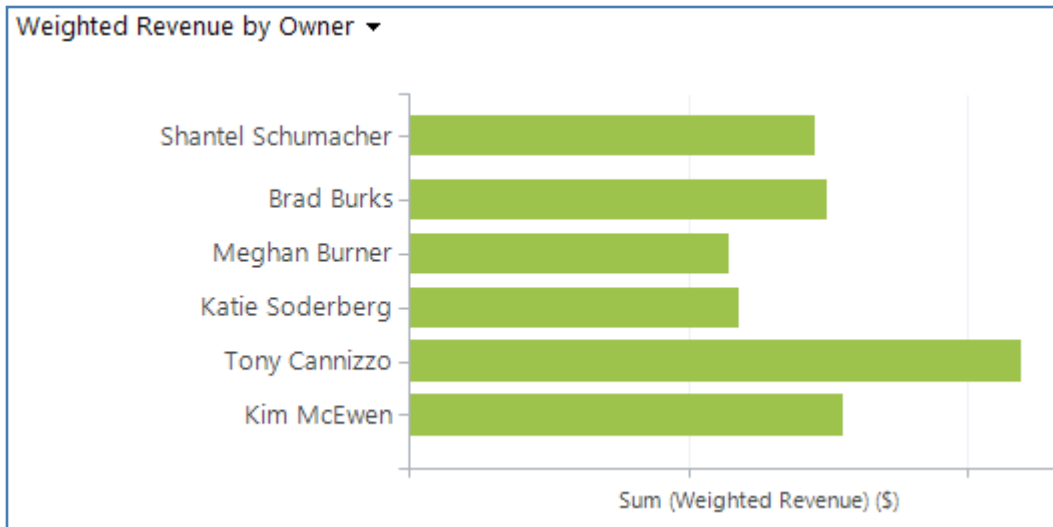
## **Annualized revenue**

We won't address annualized revenue in this article, but it allows us to look at the value of opportunities when you have a mix between annual, quarterly and monthly contracts.

Now let's talk about pipeline. By pipeline, we are referring to the total and weighted opportunity revenue amounts by sales rep, month and opportunity type (new business vs. renewal business). This is critically important! Here we are referring to opportunities in the open state. As you can see below, we have our dashboard set up to look at this by opportunity type. You must be able to see that you are adding new future deals into your pipeline as you close deals. Tracking your pipeline on a weekly basis will let you know whether you are replenishing the pipeline as you close deals. This can give you tremendous insight into which of your marketing initiatives are working and when you need to turn up the marketing spend.



What is shown above is simply a chart of weighted revenue next to a chart of estimated revenue with both charts being grouped by our opportunity type field. Along the same lines, we can add the same charts, but grouped by sales rep and month, to our dashboard.

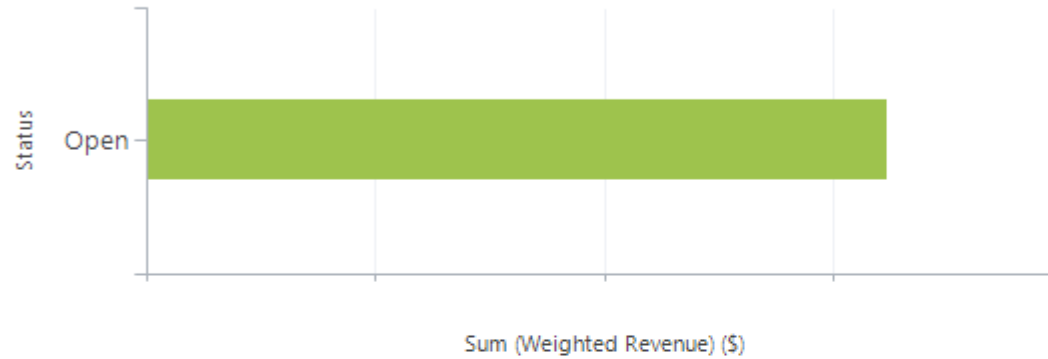


Since we forecast by month, we have a dashboard that shows what we have closed to date and what else we expect to close for the current month. Notice that you can look at the dashboard below and see the totals on the left and also see the amounts by rep on the right (the part that is cut off). With this one view, a sales manager can know where things stand and can see where each rep is contributing. Couple this with the overall view of the pipeline, and you will have a great snapshot of your revenue streams any time you need it. Have fun!



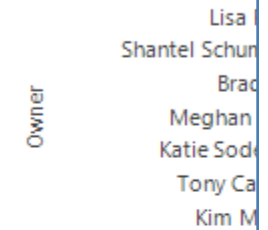
### Weighted Revenue by Status

Opportunities Closing This Month



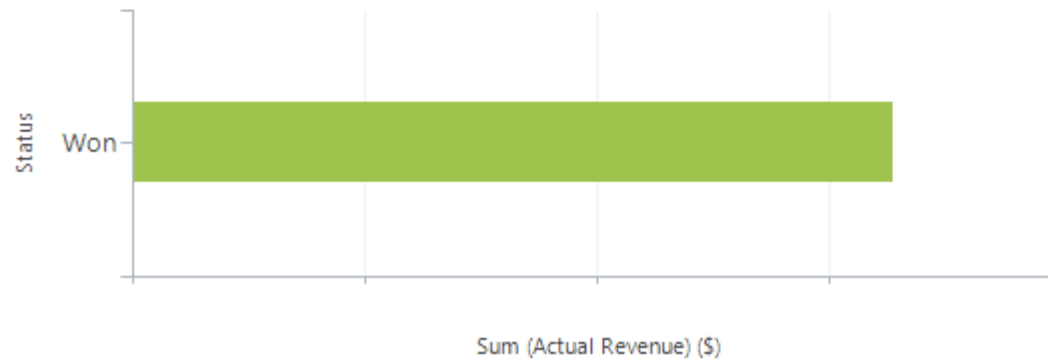
### Weighted Revenue by

Opportunities Closing Thi



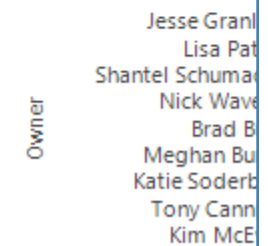
### Actual Revenue by Status

Won Opportunities - This Month

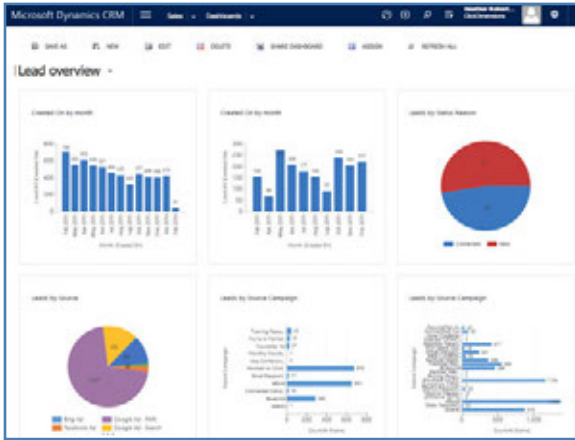


### Weighted Revenue by

Won Opportunities - This



## BUILDING DASHBOARDS TO SIMPLIFY THE PROCESS OF CAPTURING METRICS

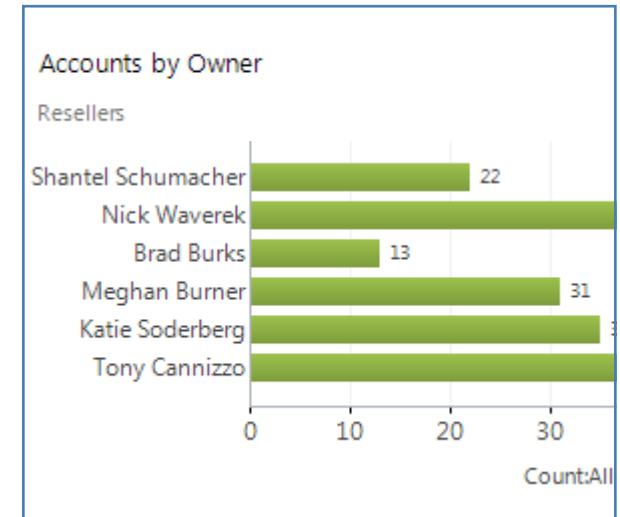


At ClickDimensions, we monitor a number of metrics that we like to record over time. During our weekly sales forecast call, we look at the number of customers we added, partners we signed, demos we did and more. With CRM, it is easy to build dashboards that calculate these metrics. Once you've built these dashboards, you can simply run them every time you want to capture the metrics. The metrics we capture on a weekly basis are:

- Current month's weighted revenue (overall and by salesperson)

- Total weighted and overall pipeline by salesperson
- Total weighted and overall pipeline by month
- Number of demos each salesperson has done in the current month ("demo" is a custom activity for each product demonstration we do)
- Number of current customers, partners and prospective partners
- Breakdown of partners by salesperson

To easily find the numbers, we built a couple of dashboards that pull it together. Below is a chart in our dashboard which quickly sums the number of partners by salesperson. For each metric we track, we can easily pull it from a different chart in a dashboard...




Because you can easily create a chart of anything you can count, sum or average in Microsoft CRM, you can combine these charts into dashboards and then record the metrics on a predetermined frequency so that you will be able to look back and see how metrics like your customer count or overall pipeline grew over time. By making it very easy to pull your metrics each week, you reduce the barrier to collecting this data, and you can begin to see meaningful trends.

## USING CRM WORKFLOW TO CALCULATE WEIGHTED REVENUE ON OPPORTUNITY RECORDS

Why doesn't Microsoft CRM have a weighted revenue field for opportunities? Heck, I don't know. It is hard to imagine many sales teams that don't use some sort of revenue weighting based on probability. But that is beside the point. Let's see how to make this happen with CRM workflow.

First, start by adding a custom field to your CRM opportunity records. Call it "Weighted Revenue" and make it a currency field. See below...

| Schema   |   |
|--|---|
| Display Name *   | <input type="text" value="Weighted Revenue"/>                         |
| Name *   | <input type="text" value="cdi_weightedrevenue"/>                      |
| Field Security   | <input type="radio"/> Enable <input checked="" type="radio"/> Disable |
| Auditing *   | <input checked="" type="radio"/> Enable <input type="radio"/> Disable |
|  This field will not be audited until you enable auditing on the entity. |   |
| Description  | <div></div>   |
| For information about how to interact with entities and fields programmatically, see the <a href="#">Microsoft Dynamics CRM SDK</a>                        |   |
| Type   |   |
| Type *   | <input type="text" value="Currency"/>                                 |
| Precision *  | <input type="text" value="Currency Precision"/>                       |
| Minimum Value *  | <input type="text" value="-1,000,000,000.0000"/>                      |

Add your new field to your opportunity record form(s)...

**Opportunity**  
**ACME Corp - Std/Annual**

|                    |                           |              |             |                 |
|--------------------|---------------------------|--------------|-------------|-----------------|
| Potential Customer | <a href="#">ACME Corp</a> | Rating       | Pipeline    | Owner           |
| Status             | Open                      | Est. Revenue | \$10,000.00 | Est. Close Date |

---

**General**

Topic\*

Potential Customer\* [ACME Corp](#)

Source Campaign\* [Bing Ad](#)

**Forecast Information**

Revenue ☐ System Calculated ☒ User Provided

Opportunity Type ☐ Renewal ☒ New

Est. Revenue

Probability (%)

Est. Close Date

**Weighted Revenue**

Actual Revenue

Annualized Revenue

Currency\* [US Dollar](#)

Now comes the fun part of building the workflow to automatically calculate the weighted revenue value. Weighted revenue will be equal to estimated revenue times probability. But, since the probability field is actually not a percentage, but an integer from 1–100, we will need to divide by 100 after we multiply estimated revenue times probability.

Our workflow will be based on the opportunity record estimated revenue or probability fields being updated.

General Administration Notes

▼ Hide Process Properties

Process Name \*

Activate As

Available to Run

☒ As an on-demand process

☐ As a child process

Entity

Category

Options for Automatic Processes

Scope

Start when:

☒ Record is created

☐ Record status changes

☐ Record is assigned

☒ Record fields change

Then we will have three steps in the workflow:

1. Set weighted revenue equal to estimated revenue
2. Multiply weighted revenue by probability
3. Multiply weighted revenue by .01 (this is the same as dividing by 100)

Add Step ▾ | Insert ▾ | Delete this step. ✕

● Set weighted revenue equal to estimated revenue

Update:

● Multiply weighted revenue by probability

Update:

● Multiply weighted revenue by .01

Update:


Step 1 looks like this...


Process: Calculate Weighted Revenue

### Update Opportunity

**General**

Account ID:


Potential Customer:  

Source Campaign:  

**Recast Information**

Revenue: ☐ System Calculated ☐ User Provided

Revenue:

Close Date:  


Annual Revenue:

Opportunity Type: ☐ Renewal ☐ New Business

Probability (%):

Weighted Revenue:

Annualized Revenue:

Currency:  

**Form Assistant**

Dynamic Values

Dynamic Values

Operator: Set to

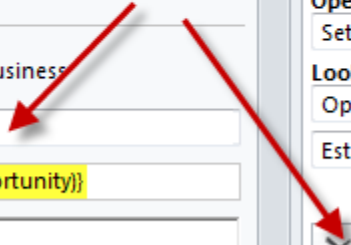
Look for: Opportunity

Est. Revenue

Add

X | ↑ ↓

Est. Revenue(Opportunity)



Now step 2...

Source Campaign

Opportunity Type ☐ Renewal ☐ New Business

Probability (%)

Weighted Revenue Multiply by {Probability(Opportunity)}

Annualized Revenue

Currency

**Form Assistant**

Dynamic Values

Dynamic Values

Operator: Multiply by

Look for: Opportunity

Probability

Add

X | ↑ ↓

Probability(Opportunity)

Admittedly, that is more work than you should have to do just to get weighted revenue on an opportunity record. But, you only have to do it once and then it will automatically calculate this value going forward. Keep in mind that, since workflow does not fire until a record is saved, you will not see the value update until a few seconds after you save the record and refresh the screen. It is possible to do this on the form with script, but this is the 'no coding' option. Have fun!

Finally, step 3...

Opportunity Type ☐ Renewal ☐ New Business

Probability (%)

Weighted Revenue Multiply by {0.01}

Annualized Revenue

Currency

Total Amount

**Form Assistant**

Operator: Multiply by

Look for: Opportunity

Probability

Add

X | ↑ ↓

Default value: 0.01

OK



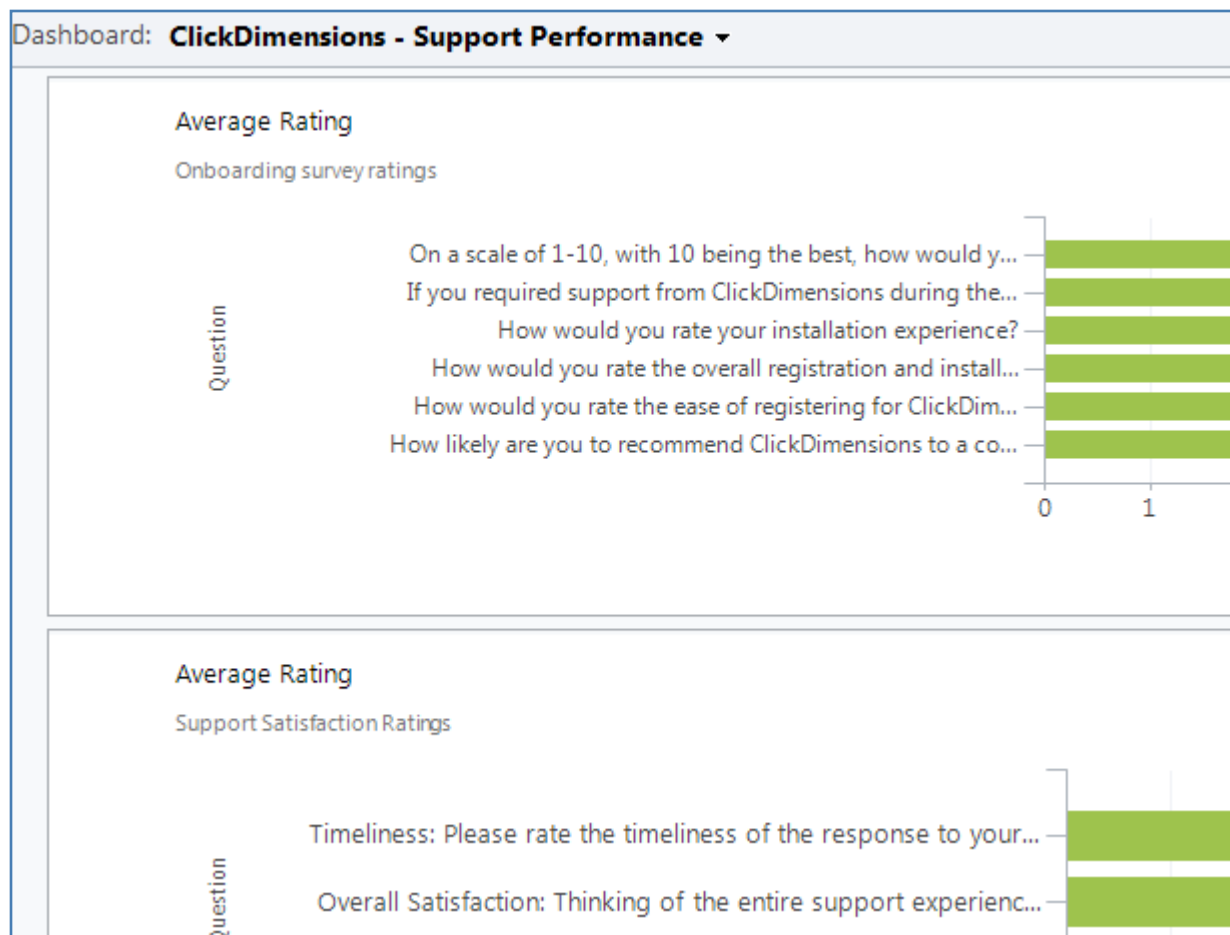
## Chapter Nine

# CUSTOMER SERVICE & SUPPORT

Since we included some content for salespeople, how about some ideas for service and support?

### GETTING REAL-TIME CUSTOMER SURVEY FEEDBACK (ALERTS) FROM CRM

At ClickDimensions, we have two key surveys we use to gauge customer feedback. The first is our support satisfaction survey that is sent after each and every technical support case. The second is our onboarding survey that is sent when a new customer has completed our onboarding process and training. Each of these surveys has rating questions, and we can see the average scores for these questions in a CRM dashboard we have created (see below).



While it is great to be able to see this information, we were looking for something more proactive. So, we created a workflow that fires when new survey answer records are created. The workflow alerts (via email) members of our leadership team any time a rating question has a perfect score of 10 or a score of six or below. Below is a look at a survey answer record.

SAVE
SAVE & CLOSE
NEW
DEACTIVATE
DELETE
ASSIGN
SHARE
...

SURVEY ANSWER : INFORMATION

## How would you rate the effectiveness of the person who led

### General

|                 |  |                   |            |
|-----------------|--|-------------------|------------|
| Question *      | How would you rate the effectiveness of the person who led the training today? |                   |            |
| Proposed Survey | ClickDimensions Academy Survey - Molly   | Anonymous Visitor | --         |
| Survey Question | Academy - Rate Presenter   | Account           | --         |
| Case            | --   | Contact           | Katerina G |
| Owner *         | # ClickDimensions (System Account)   | Lead              | --         |
| Created On      | 1/21/2016 9:51 AM  | Rating            | 10         |
| Value           | 10   |                   |            |

Here is a look at the workflow we created to notify us of the tens and the sixes or lower...

Is rating 6 or below?

If Survey Answer:Rating <= [6], then:

- Send e-mail: Create New Message [View properties](#)

Is rating a 10?

If Survey Answer:Rating equals [10], then:

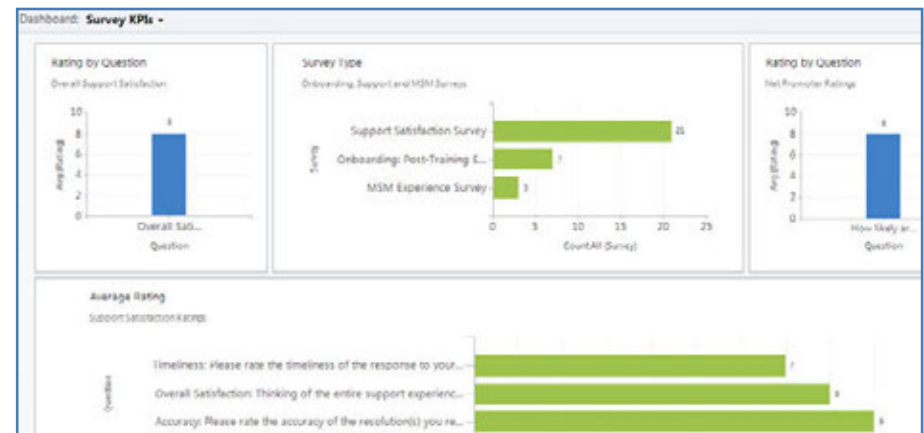
The workflow sends an email alert to key people in the organization. Now, when we get a great (10) or not so great (six or lower) rating on a survey question, we know immediately and can take the appropriate action. Happy marketing!

## MEASURE CUSTOMER SATISFACTION WITH SURVEYS AND A SURVEY KPI DASHBOARD

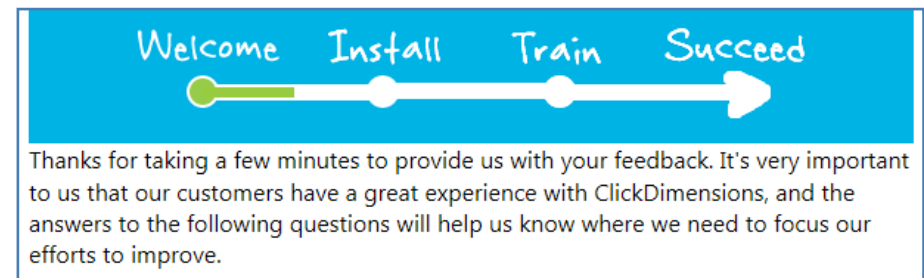
At ClickDimensions, we really care about the happiness of our customers. We care so much that we survey our customers regularly and expose the results of these surveys on a dashboard for all employees to see. We survey on three levels. Here they are from top to bottom:

- **Overall satisfaction with ClickDimensions:** We use the [Net Promoter Score](#) methodology to measure this by asking how likely a customer is to recommend us.
- **Satisfaction with our onboarding process:** We survey customers after the onboarding process to get their fresh reactions to how they felt we did.
- **Satisfaction with individual support and training interactions:** We send a survey at the completion of each case and training engagement.

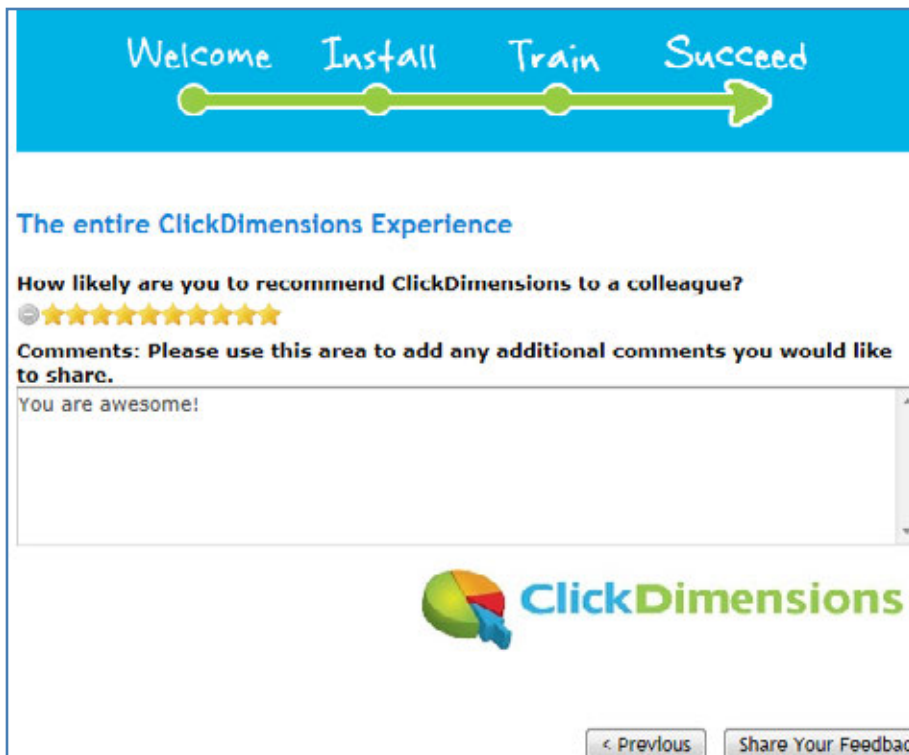
In each of our surveys, we ask the customer to rate us on various dimensions using a scale of one to 10. Because we are using the ClickDimensions survey tool, all data is captured inside CRM entities so we can build views, charts and dashboards with it. Bringing all this information together, we have built a dashboard that shows us overall customer satisfaction at a glance.



The data behind this survey is fed by several surveys. Below is our post-training onboarding survey where customers can tell us how we did in each phase of the on boarding process. Starting with the first page of the survey...



To the final page...



Welcome Install Train Succeed


**The entire ClickDimensions Experience**

How likely are you to recommend ClickDimensions to a colleague?

★★★★★★★★★★

Comments: Please use this area to add any additional comments you would like to share.

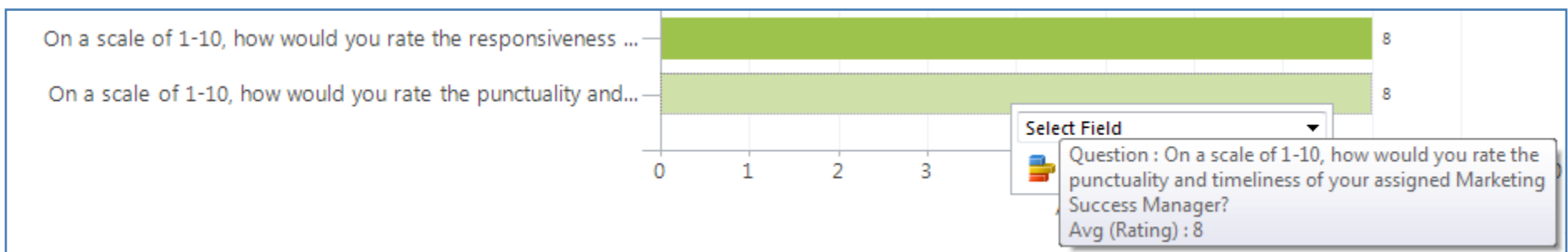
You are awesome!



< Previous Share Your Feedback

It is very helpful to look at our dashboard and see how we are doing in support, training, onboarding and overall satisfaction. The chart in the dashboard (below) shows that we're getting good reviews on the knowledge, responsiveness and timeliness of our Marketing Success Managers (trainers). Our dashboard has similar graphs for tech support, Net Promoter and overall satisfaction.

So, with Microsoft CRM and ClickDimensions, there is no reason to wonder what your customers think of you.



## SEE WHICH CUSTOMERS HAVE TAKEN ADVANTAGE OF YOUR TRAINING

At ClickDimensions, all of our customers and partners have unlimited access to our training classes, [ClickDimensions Academy](#). We deliver all of this training via GoToWebinar, which means we can take advantage of our [GoToWebinar integration](#).

We also like to periodically check in to see if our customers are taking advantage of our training. This helps us to know how engaged they are with our company and product, as well as if we should extend a new invitation to them to join our training. We also like to see who at a company has participated in training.

### Who has participated in training at a customer company?

ClickDimensions' GoToWebinar integration creates "Event Participation" records in CRM when someone registers for an event like our training. They're automatically linked to the contact (see right).

The screenshot displays the Microsoft Dynamics CRM interface for an "Event Participation" record. The record is titled "Dante" and is associated with the contact "Dante Porter". The record is categorized under "Event Participation : INFORMATION".

**General**

|                     |                                  |              |                                    |
|---------------------|----------------------------------|--------------|------------------------------------|
| First Name          | Dante                            | Owner        | # ClickDimensions (System Account) |
| Last Name           | Porter                           | Lead         | --                                 |
| Email Address       | dante.porter@clickdimensions.com | Contact      | Dante Porter                       |
| Registration Date   | 6/22/2015 3:59 PM                | Unsubscribed | No                                 |
| Registration Status | Missed                           | Industry     | --                                 |
| Approval Status     | Approved                         |              |                                    |
| Barcodes Statuses   | --                               |              |                                    |

**Attendance**

|                        |    |                          |   |
|------------------------|----|--------------------------|---|
| Join Time              | -- | Event                    | ClickDimensions Academy   CD201 Web Analytics and Web |
| Leave Time             | -- | In Session Duration (mi) | --  |
| Questions Asked by Att | -- |                          |   |

**Registration fields**

|                 |        |              |                  |
|-----------------|--------|--------------|------------------|
| Address         | --     | Phone        | --               |
| Zip/Postal Code | --     | Organization | Click Dimensions |
| City            | --     | Job Title    | --               |
| State/Province  | --     |              |                  |
| Status          | Active |              |                  |

After the webinar, the Event Participation record is updated to show whether the individual attended or not, and for how long:

|                        |                    |                          |  |
|------------------------|--------------------|--------------------------|--|
| Registration Date      | 6/10/2015 10:11 AM | Unsubscribed             | No                                     |
| Registration Status    | Attended           | Industry                 | --                                     |
| Approval Status        | Approved           |                          |  |
| Barcodes Statuses      | --                 |                          |  |
| <b>Attendance</b>      |                    |                          |  |
| Join Time              | 6/26/2015 4:03 PM  | Event                    | ClickDimensions Academy   CD201 Web An |
| Leave Time             | 6/26/2015 4:20 PM  | In Session Duration (mi) | 17 minutes                             |
| Questions Asked by Att | --                 |                          |  |

This is great if you are looking at individual contacts and want to see their training or attendance, but we like to also look at things from the account level in CRM. Unfortunately, CRM has a limitation where custom entities, like the Event Participation record, do not “roll up” to the account Level. So to overcome this, we have a workflow that creates a new connection record whenever someone has attended one of our Academy trainings:



**Available to Run**

☒ As an on-demand process

☐ As a child process

**Options for Automatic Processes**

Scope: Organization

☐ Record is created

☐ Record status changes

☐ Record is assigned

☒ Record fields change [View](#)

☐ Record is deleted

**When the Event Participation's status = Attended, this workflow is fired**

**If Registration Status = Attended and Contact contains data and has parent account**

If Event Participation:Registration Status equals [Attended] AND [Event Participation:Contact contains data AND [Contact (Contact):Parent Customer contains data]], then:

- **Create a Connection record to show that the Contact has received training (connected to Account)**  
Create: Connection [View properties](#)
- **End Successful**  
Stop workflow with status of: Succeeded

Otherwise:

- **Canceled**  
Stop workflow with status of: Canceled

**It creates a Connection record to link the Contact to the Account with the role of "Trainee"**

We show the connections on the account form so we can see at a glance who has been trained:

Account

Owner: Brad Burks

Assigned MSM

Onboarding Status

05-Training

**Training**

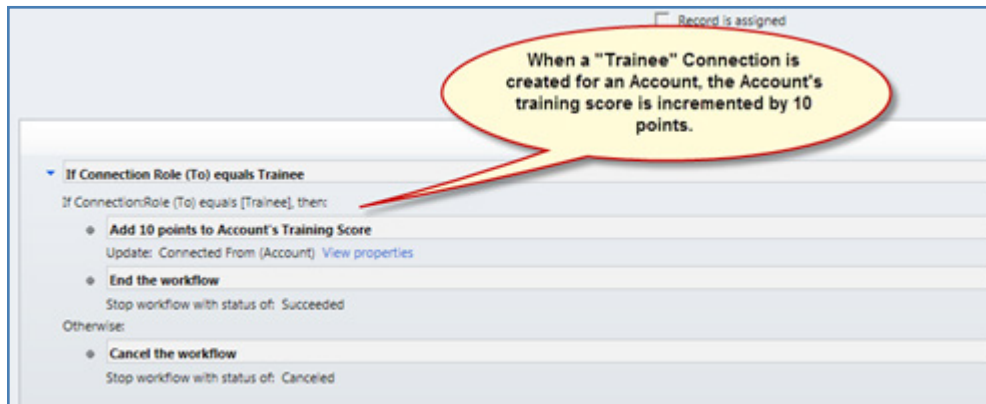
Onboarding Contacts and Trainees

| <input type="checkbox"/>            | Role (To) | Connection Name | Job Title (Conne... | Parent Customer (Co... | Business Phone (...) | E-mail (Connect... |
|-------------------------------------|-----------|-----------------|---------------------|------------------------|----------------------|--------------------|
| <input checked="" type="checkbox"/> | Trainee   | Kathryn         |                     |                        |                      | KathrynR@...       |

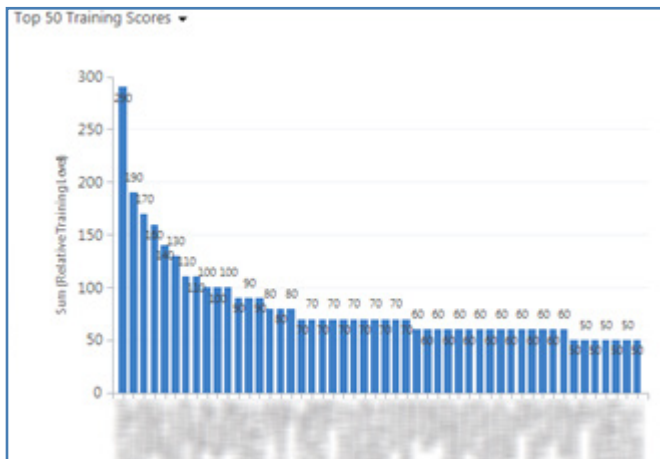
1 - 1 of 1 (0 selected)

Page 1

We also want to see this information in aggregate, so we can quickly identify customers who could benefit from some more training. We created another workflow rule that increments a score in a custom field on the account that we call "Relative Training Level:"



With all of this done, we can now work with views and charts to make it easy to see who is being trained and who isn't. This view of active customers shows the top 50 Training Scores. It's easy to see that some customers have done lots of training:



And here's how we find out who hasn't gotten trained. An Advanced Find for customers whose relative training score is less than or equal to 20. These folks should be invited to our ClickDimensions Academy!

FILE

ADVANCED FIND

Query

Saved Views

Results

New

Save

Save As

Edit Columns

Edit Properties

Clear

Group AND

Group OR

Details

Download Fetch XML

Show

View

Query

Debug

Look for:

Accounts

Use Saved View:

Relationship Type Equals

Customer - Active

Status Equals

Active

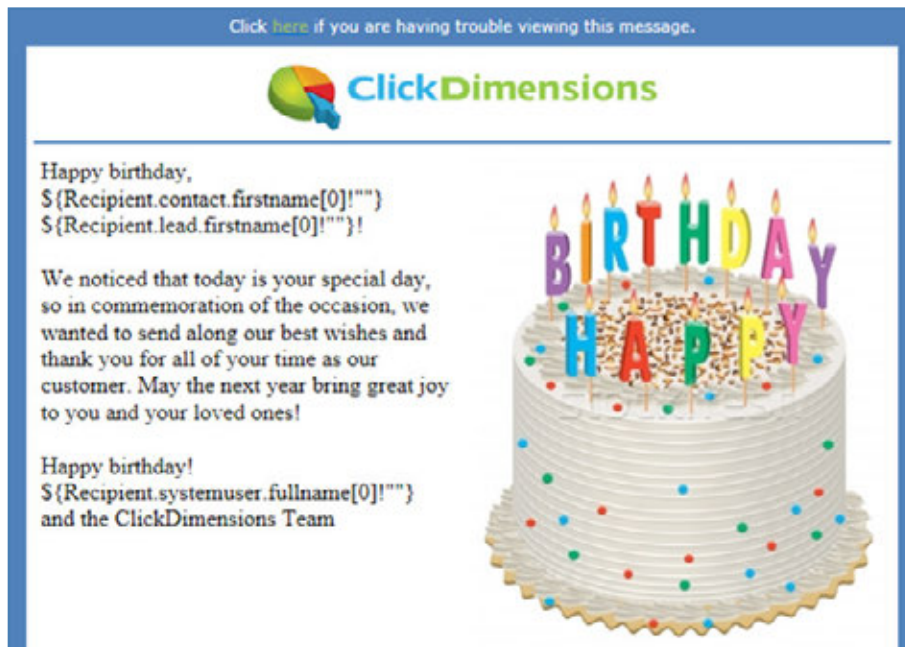
Relative Training Level Is Less Than or Equal To

20

## CREATING AUTOMATED AND PERSONALIZED BIRTHDAY EMAILS

Have you ever met somebody who doesn't like birthday greetings? In my experience, the simple gesture of acknowledging somebody's birthday almost always elicits a smile. Sending birthday greetings to your customers is an easy way to keep your company on their minds and promote a positive relationship.

ClickDimensions and CRM can be used to create personalized birthday email templates and automatically send them to your leads and/or contacts when their special day rolls around.



You can easily create a birthday template in one of our email template editors (the example template was created in the ClickDimensions Block editor) and set to populate dynamically with data from the recipient's record by using FreeMarker text. In the example, we've set the template to populate with the first name of the lead or contact recipient as well as the full name of the owner of their CRM record.

Once your template is created, the following workflow can be used to automatically send it out on the recipient's birthday (this workflow only works for contacts, but you can apply the same process in a workflow based on leads).

Keep in mind that this workflow will not change the day and month of a contact's birthday, but it will regularly update the year, so if you want to maintain the original value you should create a duplicate birthday field on your contact records to use with this workflow.

The workflow, which is set to run both as an on-demand process and a child process, goes through the following steps:

- Compare the execution time of the workflow to the date specified in the birthday field on the contact's record.
- If the execution time is before the birthday, then the workflow will timeout until the birthday rolls around.

- When it is the contact's birthday, the birthday email is sent out.
- The birthday field value will be incremented by a year.
- The workflow calls itself and begins again.
- If the execution time was after the contact's birthday instead of before it, then the birthday field value is incremented by a year and the workflow is called again.

To the right is the actual workflow:

This workflow will keep going every year until you decide to deactivate it. Once you are ready to use it, save and activate it, then set it to run on any contacts whose birthdays you would like to celebrate.

That's all there is to it! Now instead of spending a fortune on wrapping paper, you can use ClickDimensions and CRM to celebrate birthdays!

The screenshot shows the 'Administration' tab for a workflow named 'Birthday Card'. The 'Entity' is set to 'Contact' and the 'Category' is 'Workflow'. Under 'Available to Run', both 'As an on-demand process' and 'As a child process' are checked. The 'Options for Automatic Processes' section shows 'Scope' set to 'Organization' and several 'Start when' conditions, including 'Record is created', 'Record status changed', 'Record is assigned', 'Record fields changed', and 'Record is deleted'.

The workflow logic is as follows:

- check to see if contact's birthday is after the time the workflow starts**
  - If `Contact:Birthday > [Process-Execution Time]`, then:
    - wait until the contact's birthday**
      - Timeout until `Contact:Birthday` then
        - Send a birthday email**
          - Create: `Send ClickDimensions Email` [View properties](#)
        - increment contact's birthday by 1 year**
          - Update: `Contact` [View properties](#)
        - run workflow again**
          - Start child workflow: `Contact Birthday Card`
    - Otherwise, if `Contact:Birthday < [Process-Execution Time]`, then:
      - increment contact's birthday by 1 year**
        - Update: `Contact` [View properties](#)
      - run workflow again**
        - Start child workflow: `Contact Birthday Card`

## Chapter Ten

# MICROSOFT CRM FEATURES

Many books have been written on this topic, but here we will share a few things that we particularly like about using Microsoft Dynamics CRM.

## **AUTOMATICALLY CREATE AND UPDATE CONTACTS BASED ON A CUSTOM ENTITY**

When speaking with prospective customers, our sales team is often asked if it is possible to automatically create and update a contact record based on the information entered into a custom entity record.

For example, a university may have a custom parent entity that is used to store information about students' parents. On certain occasions, the university will want to send emails to these parents, and to do so they must have each parent's information stored in a lead, contact or account record. In this blog post, we'll outline how to set up a pair of workflows that will automatically create and update a contact record for each parent (or

any other custom entity) record so that emails can easily be sent out to these parents via the contact records at any time.

To automatically create a contact when a parent is created, and to keep this contact current with any updates to the information on the parent record, you will need two workflows: one that runs when a parent record is created and another that runs when a parent record is updated. We'll call these the "Create Contact" and "Update Contact" workflows, respectively. Both workflows should have parent as the primary entity and will need a scope that is appropriate to your CRM's structure. An organizational scope will allow the workflows to run on every parent record in your CRM, though you should check with your CRM admin if you are unsure of what the appropriate scope is for your organization.

Note that while the "Create contact from parent" workflow will always work, the "Update contact from parent" workflow will only work if the parent has a 1:1 or N:1 relationship with contacts. With any other kind of relationship, CRM's workflow functionality will not be able to access the existing contact via the parent.

## The Workflows

The "Create contact from parent" workflow should run when a parent record is created and have a Create Contact step that creates a contact record and uses the workflow's dynamic values to pull the desired information from the parent record into the contact record. Then, use an Update Record step to update the parent record's "contact" lookup field with the contact that was just created; this is crucial for the second workflow to function properly.



Here is an example of the overall “Create contact from parent” workflow:

The screenshot shows the configuration window for a workflow named "Create Contact from Parent". The window has a left sidebar with "Common" (Information, Audit History) and "Process Sessions" (Process Sessions) sections. The main area has tabs for "General", "Administration", and "Notes". Under "General", there are sections for "Hide Process Properties" (Process Name: "Create Contact from Parent", Activate As: "Process"), "Available to Run" (checkboxes for background, on-demand, and child processes), and "Workflow Job Retention" (checkbox for deleting completed jobs). On the right, there are fields for "Entity" (Parent), "Category" (Workflow), "Options for Automatic Processes" (Scope: Organization), and "Start when" (checkboxes for record creation, status changes, assignment, field changes, and deletion). At the bottom, there is a "Steps" section with two steps: "Create the Contact and pull information from the Parent." (Create: Contact, Set Properties) and "Update the Parent's 'Contact' field to associate the two records." (Update: Parent, Set Properties).

And here is an example of the properties for this workflow’s Create Contact step. Note the dynamic values pulling the email and business phone from the parent record:

The screenshot shows the configuration window for the "Create Contact" step of the "Create Contact from Parent" workflow. The window has a left sidebar with "Summary" and "CONTACT INFORMATION" sections. The "CONTACT INFORMATION" section contains fields for "Full Name", "Job Title", "Company Name", "E-mail" (with a dynamic value "{Email(Parent)}"), "E-mail Address 2", "Business Phone" (with a dynamic value "{Phone Number(Parent)}"), "Mobile Phone", "Are you under pressure?" (radio buttons for Yes and No), "Fax", and "Preferred Method of Contact" (dropdown menu). The "Summary" section contains a "Notes" field with the text "Notes are not available within a workflow". The "Form Assistant" section on the right contains a "Dynamic Values" dropdown, a "Look for:" dropdown (set to "Parent"), and an "Add" button. The "Default value:" field is empty.

And, finally, an example of the update parent step:

The screenshot shows a workflow editor for a process titled "Process: Create Contact from Parent". The current step is "Update Parent". On the left, there is a "General" tab with a list of fields: Name, Email, Phone Number, Address 1: Street Address, Address 1: City, Address 1: State, Address 1: Postal Code, Contact, and Owner. Each field has a corresponding input box. The "Contact" field is highlighted with a yellow box and contains the dynamic value "{Contact}Create the Contact and pull in". To the right of the fields is a large text area with the message "Notes are not available within a workflow". On the far right, there is a "Form Assistant" panel. It has a "Dynamic Values" dropdown menu. Below it, the "Operator" is set to "Set to". The "Look for:" dropdown is set to "Create the Contact and pull info". The "Contact" dropdown is set to "Contact". There is an "Add" button below these settings. At the bottom of the panel, there is a "Default value:" field and an "OK" button.

The “update contact from parent” workflow should run when a parent record’s fields change. You specify in the workflow which specific fields on the parent record will trigger the workflow when updated. This workflow should use an Update Record step to update the parent’s associated contact with the current info pulled from the parent record. You will need to be sure to use dynamic values to pull information into every important field that may have been updated. This way, no matter which field was updated, all of the current information is brought in.

Here is an example of the overall “Update contact from parent” workflow:

Process: Update Contact from Parent Working on

**Information**

Common  
 Information  
 Audit History  
 Process Sessions  
 Process Sessions

General Administration Notes

**Hide Process Properties**

Process Name: Update Contact from Parent  
 Activate As: Process

Entity: Parent  
 Category: Workflow

**Available to Run**

☒ Run this workflow in the background (recommended)  
☐ As an on-demand process  
☐ As a child process

**Workflow Job Retention**

☒ Automatically delete completed workflow jobs (to save disk space)

**Options for Automatic Processes**

Scope: Organization

Start when:  
☐ Record is created  
☐ Record status changes  
☐ Record is assigned  
☒ Record fields change Select  
☐ Record is deleted

Add Step | Insert | Delete this step.

Type a step description here.

Update: Contact Set Properties

And here is an example of the properties for this workflow's Update Record step:

Process: Update Contact from Parent

**Update Contact**

Summary

CONTACT INFORMATION

Full Name  
 Job Title  
 Company Name  
 E-mail  
 E-mail Address 2  
 Business Phone  
 Mobile Phone  
 Are you under pressure?  
 Fax  
 Preferred Method of Contact  
 Address  
 Office  
 Image

Notes are not available within a workflow

Company  
 Owner  
 Lead Source  
 Visitor Key  
 Radio Test  
 Case Title  
 Priority

Form Assistant

Dynamic Values  
 Dynamic Values  
 Operation  
 Set to  
 Look for  
 Parent  
 Address 1: Street Address  
 Add  
 Address 1: Street Address(Parent)  
 Default values  
 OK

The list of related records is not available when record from a process, add a Create Record step. Record it

Once you have activated these two workflows, any time a new parent (or any custom entity you have set this up with) is created, a contact will be created, associated to the parent, and filled with the desired information from the parent record. As existing parent records are updated, their contacts will automatically be updated with the current information.

If, after setting this up, you would like to send an email to all of the parent's contacts, all you need to do is create a marketing list and add every contact that has an associated parent record where email (or any other required field) contains data. You can of course get more specific with your filtering as necessary.

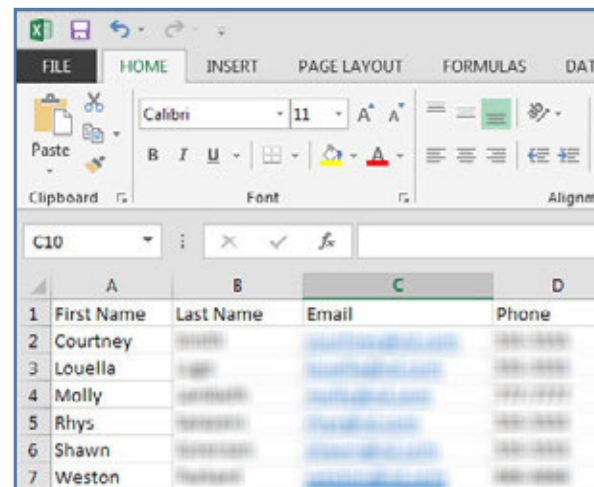
## IMPORT AN EXCEL SHEET INTO CRM AS A MARKETING LIST

There may be occasions when you want to send an email to a group of prospective customers, but you have their data stored in an Excel file and not in CRM. ClickDimensions emails can only be sent to recipients stored within your CRM, so you will have to import this data as leads (or contacts) then track down the records created and create a marketing list. How exactly is this done? The following steps describe using native Dynamics CRM functionality to turn an Excel list into a CRM marketing list.

### Creating a Marketing List from an Excel File

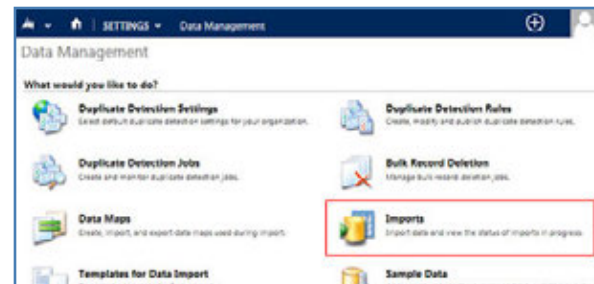
First, you will need to properly format your Excel file. To do this, include a header row at the top of the Excel sheet with column labels for all of the data you have in the file, such as first name, last name, and email address, then place the data for each person in their own row so that their data matches up with the labels in the header

row. Once the Excel sheet is good to go, save it as a .csv file.



|   | A          | B         | C                          | D            |
|---|------------|-----------|----------------------------|--------------|
| 1 | First Name | Last Name | Email                      | Phone        |
| 2 | Courtney   | Smith     | courtney.smith@contoso.com | 555-555-5555 |
| 3 | Louella    | White     | louella.white@contoso.com  | 555-555-5555 |
| 4 | Molly      | Green     | molly.green@contoso.com    | 555-555-5555 |
| 5 | Rhys       | Johnson   | rhys.johnson@contoso.com   | 555-555-5555 |
| 6 | Shawn      | Johnson   | shawn.johnson@contoso.com  | 555-555-5555 |
| 7 | Weston     | Johnson   | weston.johnson@contoso.com | 555-555-5555 |

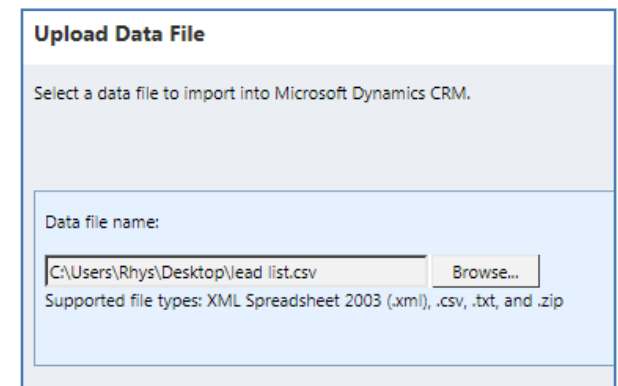
In your CRM environment, navigate to Settings > Data Management > Imports,



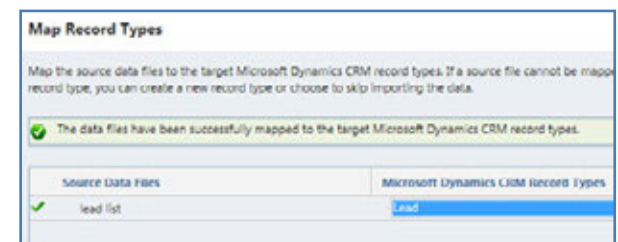
then click Import Data...



This will open a file select window where you will select your .csv file,

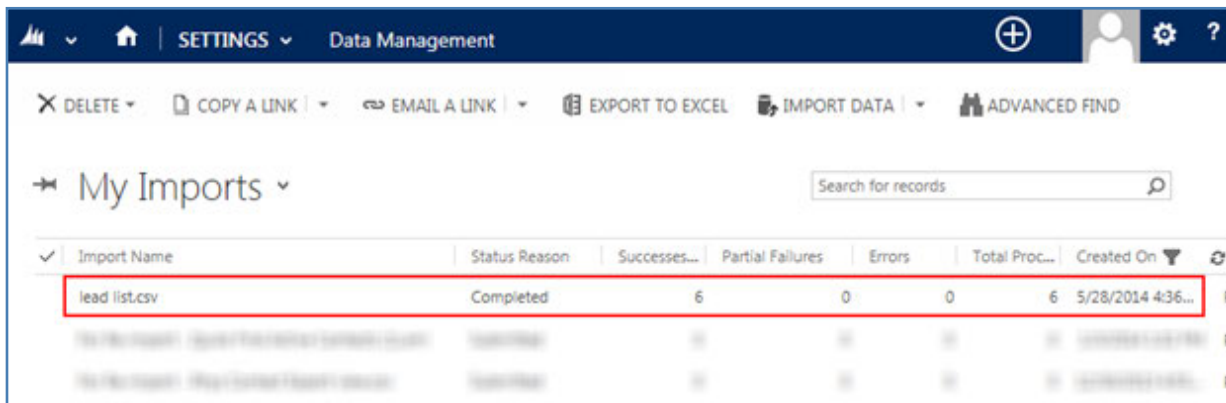


which will open an Import Wizard that will guide you through the process of successfully importing your data as leads.



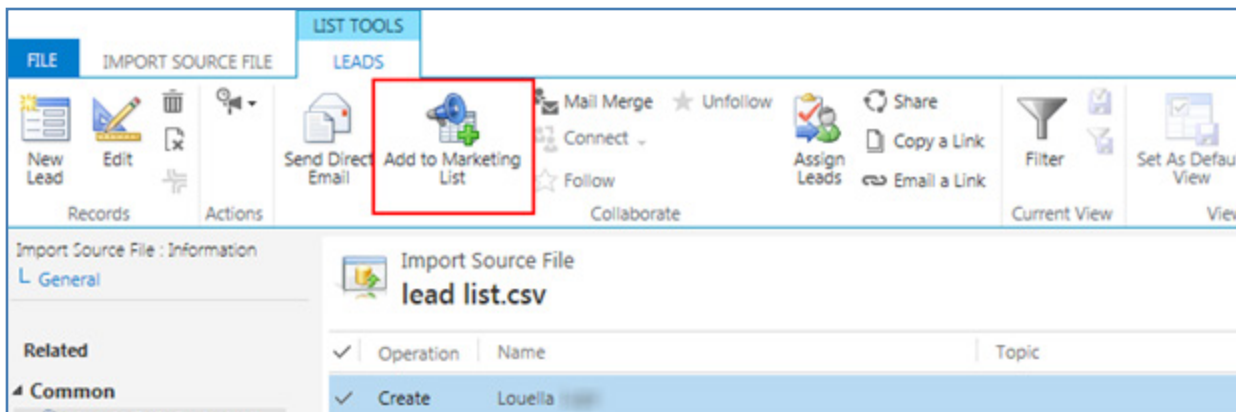
Once your new records have been created in CRM, navigate back to Settings > Data Management > Imports. This will bring up a list of all of your record import jobs.

Open the one with the same name as your .csv file, then click Leads Fully Imported.



| Import Name   | Status Reason | Successes... | Partial Failures | Errors | Total Proc... | Created On        |
|---------------|---------------|--------------|------------------|--------|---------------|-------------------|
| lead list.csv | Completed     | 6            | 0                | 0      | 6             | 5/28/2014 4:36... |
| ...           | ...           | ...          | ...              | ...    | ...           | ...               |
| ...           | ...           | ...          | ...              | ...    | ...           | ...               |

This will show you a list of all of the leads created from your .csv file. Select all of the records, then click the Add to Marketing List button and choose the marketing list to which you want to add the records.



**LIST TOOLS**

**FILE** **IMPORT SOURCE FILE** **LEADS**

New Lead Edit Send Direct Email **Add to Marketing List** Mail Merge Connect Follow Assign Leads Share Copy a Link Email a Link Filter Set As Default View

Import Source File : Information

**General**

Related

**Common**

Import Source File

**lead list.csv**

| Operation | Name    | Topic |
|-----------|---------|-------|
| Create    | Louella |       |

## PRE-POPULATE A FORM WITH DATA FROM THE RECIPIENT'S PARENT ACCOUNT

It has long been possible to streamline the form submission process for your customers by pre-populating forms sent out through ClickDimensions emails (if you are not familiar with this process, you can read about it [here](#) on our help site). This is great, but you can only populate data from the recipient's record. So what if you are sending out a form in which you need some data from the recipient's parent account as well? This can be accomplished using a pair of simple workflows.

### How do I get the parent account data onto the form?

In order to pre-populate the data from the parent account record, it will need to be stored somewhere on the contact record. You may or may not need to make some custom fields depending upon what data you want and how you are currently using your contact record. Once your record is ready to house the parent account data, you can add it to your contacts using the following workflow:

The screenshot shows the 'Administration' tab of a workflow configuration window. The 'Process Name' is 'Add account info to contact'. The 'Entity' is 'Contact' and the 'Category' is 'Workflow'. Under 'Available to Run', the option 'Run this workflow in the background (recommended)' is selected. Under 'Workflow Job Retention', the option 'Automatically delete completed workflow jobs (to save disk space)' is selected. In the 'Options for Automatic Processes' section, 'Record fields change' is selected. At the bottom, the 'Add Step' button is active, and the step 'Add data to contact from parent account record' is listed. The 'Update' field is set to 'Contact'.

The screenshot shows the 'Form Assistant' configuration window for the 'Update Contact' process. The 'General' tab is active, showing a list of fields: Salutation, First Name, Middle Name, Last Name, Job Title, Company Name, Premium Content, Business Phone, Mobile Phone, Home Phone, Facebook, Fax, Nickname, and Newsletter. The 'Company Name' field is highlighted with a yellow background. The 'Form Assistant' panel on the right shows 'Dynamic Values' and 'Operator' fields, with 'Look For' set to 'Contact'. The 'Add' button is at the bottom right.

The workflow is based on the Contact entity and is set to run when the Company Name field on the contact record is updated. Once the field is changed, the workflow will be triggered and



an Update Record step will run that will update the contact record by populating the fields for parent account data with the corresponding data from the parent account (note that the workflow can be set to run as an on-demand process to update contacts who already have a parent account specified on their record). Now that the data is on the contact, you can set it to pre-populate the form like you would any normal contact data, such as first name or email address.

### How do I get the parent account data back onto the account?

When your form is submitted, the updated parent account data will be mapped back to the contact record. In order to have this updated data mapped to the account record, use the following workflow:

The screenshot shows the 'General' tab of a workflow configuration window. The process name is 'Map data from contact back to account', the entity is 'Contact', and the category is 'Workflow'. The scope is set to 'Organization'. Under 'Available to Run', the option 'Run this workflow in the background (recommended)' is selected. Under 'Workflow Job Retention', 'Automatically delete completed workflow jobs (to save disk space)' is selected. In the 'Options for Automatic Processes' section, 'Record fields change' is checked. The workflow steps are: 'Check to see if the account fields on the contact were modified by the CD service user' (with condition 'Contact.Modified By equals (ClickDimensions Service), then:'), followed by 'update the parent account' (with update target 'Company Name (Account)').

The screenshot shows the 'Update Account' form. The process name is 'Map data from contact back to account'. The form fields are: 'Account Name' (pre-filled with '{Nickname(Contact)}'), 'Phone' (pre-filled with '{Business Phone(Contact)}'), 'Fax', 'Web Site', 'Parent Account' (with a search icon), 'Ticker Symbol', and 'E-mail'. A note on the right states 'Notes are not available within a workflow'.

This workflow is also based on the Contact entity, but it is set to run when one of the fields containing the parent account data is updated. This workflow starts with a Check Condition step that checks to see if the field was modified by the ClickDimensions service user (the specific name of the user will vary from customer to customer and will not necessarily match the name in the screenshot). This will indicate that the fields were updated by the form submission mapping data back to the contact. After this, the workflow runs an Update Record step that updates the parent account record with the updated data that is stored on the contact record.

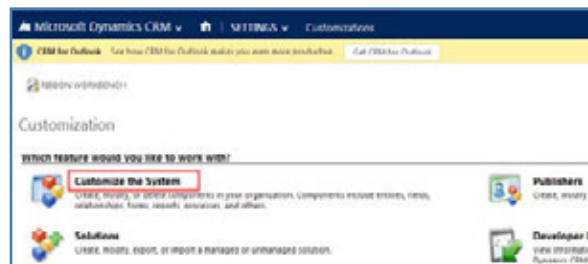
## VIEW NURTURES ON THE CONTACT OR LEAD RECORD IN CRM

By customizing CRM, users can view additional information directly on a lead or contact record via an iframe. In this example, we will add a list of the specific nurture programs a lead/contact has gone through by adding an iframe to the lead/contact record. While this is a very specific example, the same concept can be applied to a variety of scenarios.

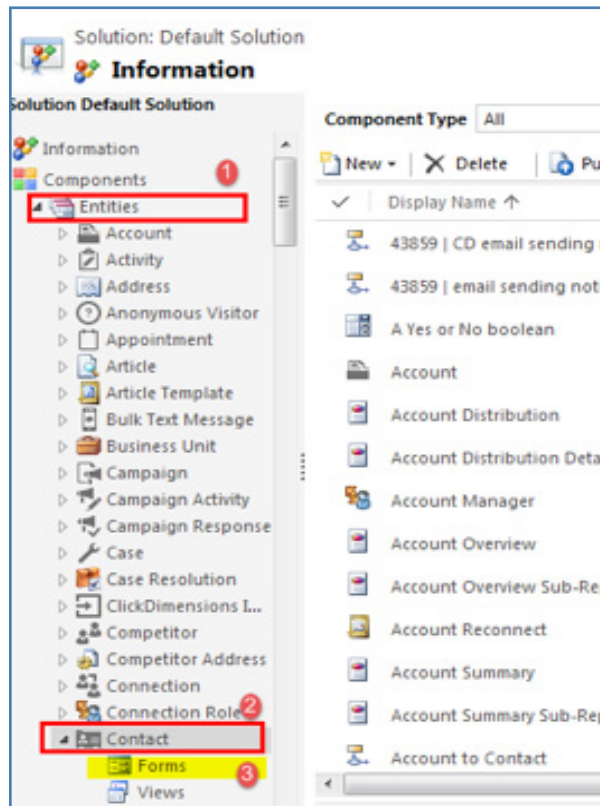
If you are not familiar with CRM customization, we suggest contacting your CRM partner to assist you. If you are comfortable making these changes, here's how it's done:

First, go to Settings > Customizations > Customize System.

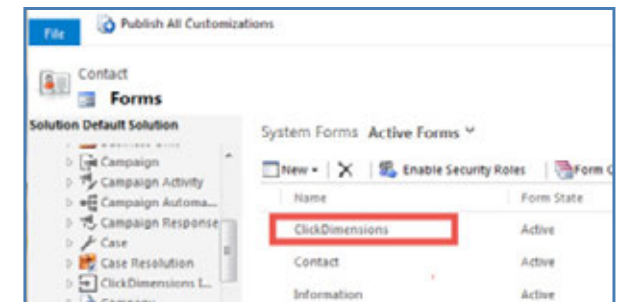
This will bring up your default solution.



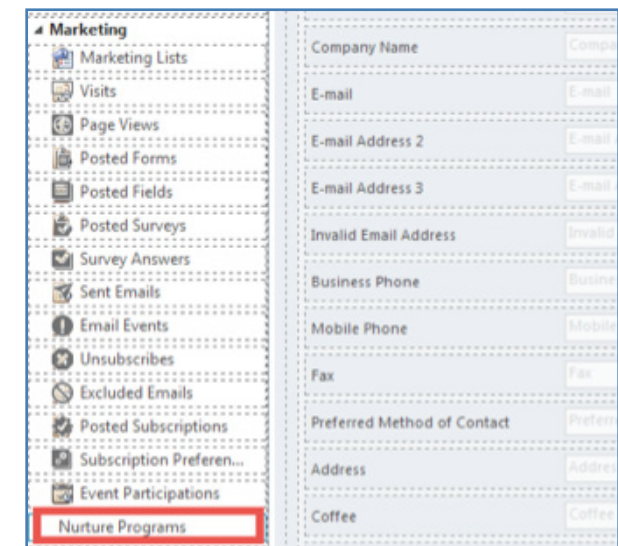
You will need to click Entities > Contact > Form. We are going to do the contact entity for this example, but you can follow this same process for the lead entity.



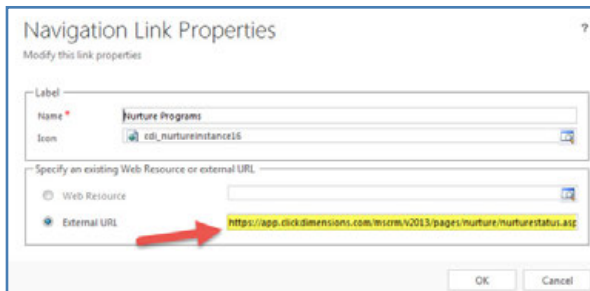
The first thing you need to do is get the external URL for your nurture programs that will be used for the iframe. You will need to go to the ClickDimensions contact form to access this.



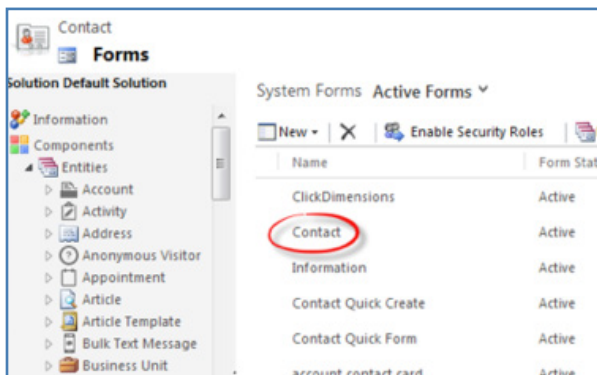
Next, double click the nurture program navigation button on the lower right hand side.



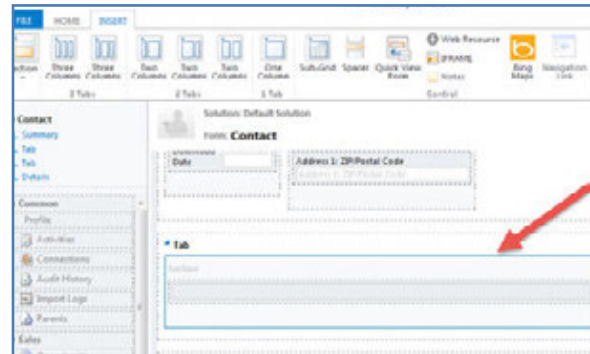
When the “Navigation Link Properties” window pops up, you will need to copy the whole external URL and store it in Notepad for later use.



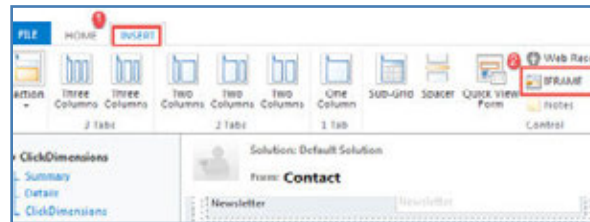
Once you have the URL, go back to the active forms view and access the form you need to customize. Select the form you are using to view your contacts in your CRM. If you are not sure which one it is, please contact your CRM admin.



Select the section and column you would like to add the iframe to, or you can add it to its own section by clicking Insert > Section > One Column. For this example, we added a new section.

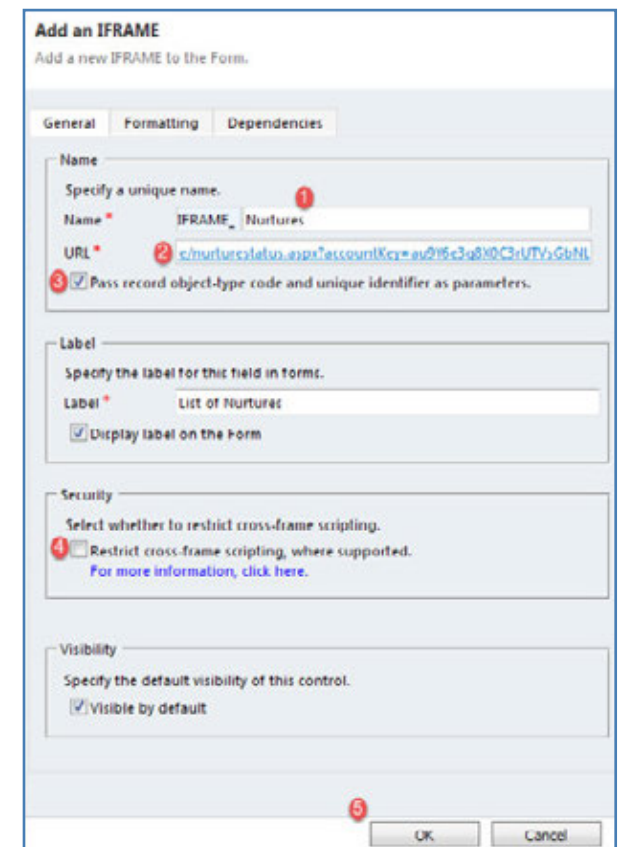


Now click insert > iframe.

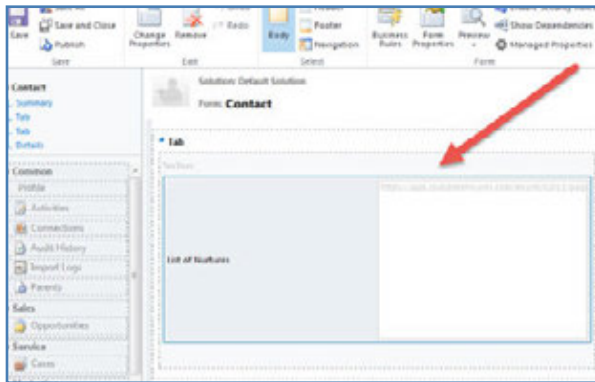


Once you click iframe, a new iframe properties window should pop up. If you do not see it, check your pop-up blocker.

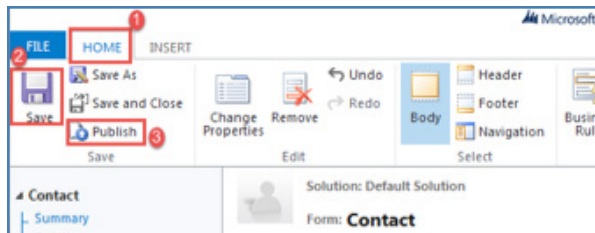
1. Name the iframe
2. Paste the nurture URL you have stored in Notepad
3. Check the “Pass Record object-type code and unique identifier as parameters” box
4. Uncheck “Restrict cross-frame scripting, where supported” box
5. Click OK



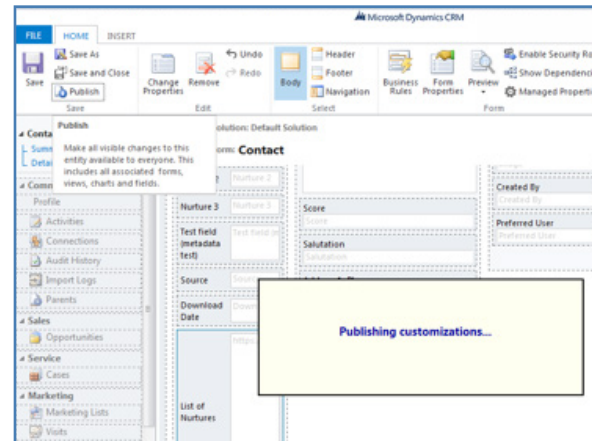
Now you can see the iframe on the contact form.



Next click Home > Save > Publish.

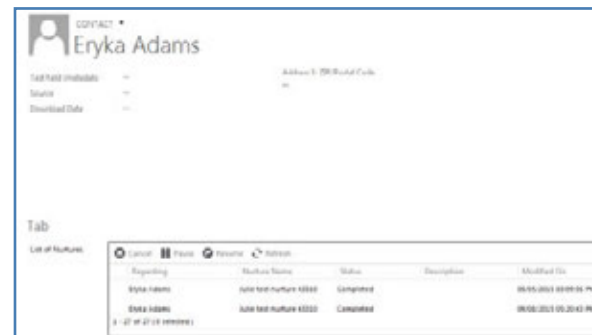


You should get this screen:



Once “Publishing Customizations” disappears, you are done and can exit all windows.

Now let’s take a look at the contact in CRM. Scroll down on the contact record to now see every nurture involving this contact.



These steps can be repeated on the lead entity as well. Adding this iframe can make working in CRM a lot easier for your users who are not familiar with CRM navigation or those who do not have security permissions to view nurtures. If you have any more in depth questions about this topic beyond what is covered here, please contact your CRM partner.



# CREATE A MARKETING LIST FROM AN IMPORTED LIST OF EVENT ATTENDEES-WITHOUT CREATING DUPLICATES

Here is a common scenario that many marketers face: You collect names and email addresses of people who have visited your booth at a trade show, or who have attended a live, in-person event. Some of these people may already be in your CRM as a Lead, and some are new Leads, but you want to get them into a CRM marketing list so you can follow up with them. You don't want to have to manually add them one by one, and there's no easy way to check your list to see which ones are already in your CRM. And you don't want to create duplicates of the Lead records if they are already in CRM.

|    | A          | B                    | C                      | D             | E | F | G | H |
|----|------------|----------------------|------------------------|---------------|---|---|---|---|
| 1  | First Name | Last Name            | Email                  | Topic         |   |   |   |   |
| 2  | Susanna    | Stubberod (sample)   | someone12@example.com  | Visited Booth |   |   |   |   |
| 3  | Nancy      | Anderson (sample)    | someone13@example.com  | Visited Booth |   |   |   |   |
| 4  | Maria      | Campbell (sample)    | someone14@example.com  | Visited Booth |   |   |   |   |
| 5  | Peter      | Houston (sample)     | someone15@example.com  | Visited Booth |   |   |   |   |
| 6  | Ivan       | Komashinsky (sample) | someone16@example.com  | Visited Booth |   |   |   |   |
| 7  | Lidman     | Anna (sample)        | someone17@example.com  | Visited Booth |   |   |   |   |
| 8  | Robin      | Counts (sample)      | someone18@example.com  | Visited Booth |   |   |   |   |
| 9  | Counts     | Vong (sample)        | someone19@example.com  | Visited Booth |   |   |   |   |
| 10 | Debra      | Garcia (sample)      | someone110@example.com | Visited Booth |   |   |   |   |
| 11 | Yvonne     | McKay (sample)       | someone11@example.com  | Visited Booth |   |   |   |   |
| 12 | Louis      | Armstrong            | louis@contoso.com      | Visited Booth |   |   |   |   |
| 13 | Duke       | Ellington            | duke@contoso.com       | Visited Booth |   |   |   |   |
| 14 | Miles      | Davis                | miles@contoso.com      | Visited Booth |   |   |   |   |
| 15 | Charlie    | Parker               | bird@contoso.com       | Visited Booth |   |   |   |   |
| 16 | John       | Coltrane             | john@contoso.com       | Visited Booth |   |   |   |   |
| 17 | Thelonius  | Monk                 | monk@contoso.com       | Visited Booth |   |   |   |   |
| 18 | Charles    | Mingus               | charles@contoso.com    | Visited Booth |   |   |   |   |

The people highlighted in yellow are already in my CRM. The others are not.

1. Create a temporary entity to hold your list. We have called ours "Imported Prospect". To this entity, I have added three fields:

- First Name (text)
- Last Name (text)
- Email Address (lookup to Lead entity - TIP: this is the important one!)

+ NEW [DEACTIVATE] [DELETE] [ASSIGN] [SHARE] [EMAIL A LINK] [RUN WORKFLOW] ...

**IMPORTED PROSPECT: INFORMATION**

## Visited Booth

**General**

Name \* Visited Booth

First Name Susanna

Last Name Stubberod (sample)

Email Address Susanna.Stubberod (sample)

Owner \* Matt Witemann

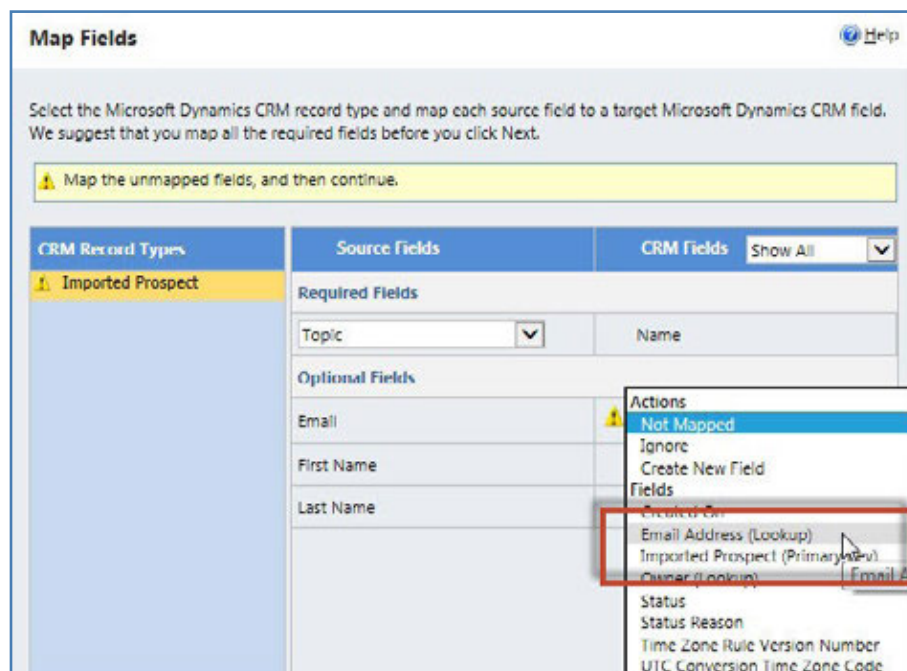
First Name and Last Name are simple Text fields. "Email Address" is a lookup to the Lead entity.

2. If you have collected the list of people who have visited your booth or attended your live event in a spreadsheet, save it as a CSV file.

This is a difficult scenario to address with CRM's Data Import tools. But here is one trick to getting this done in a matter of minutes.

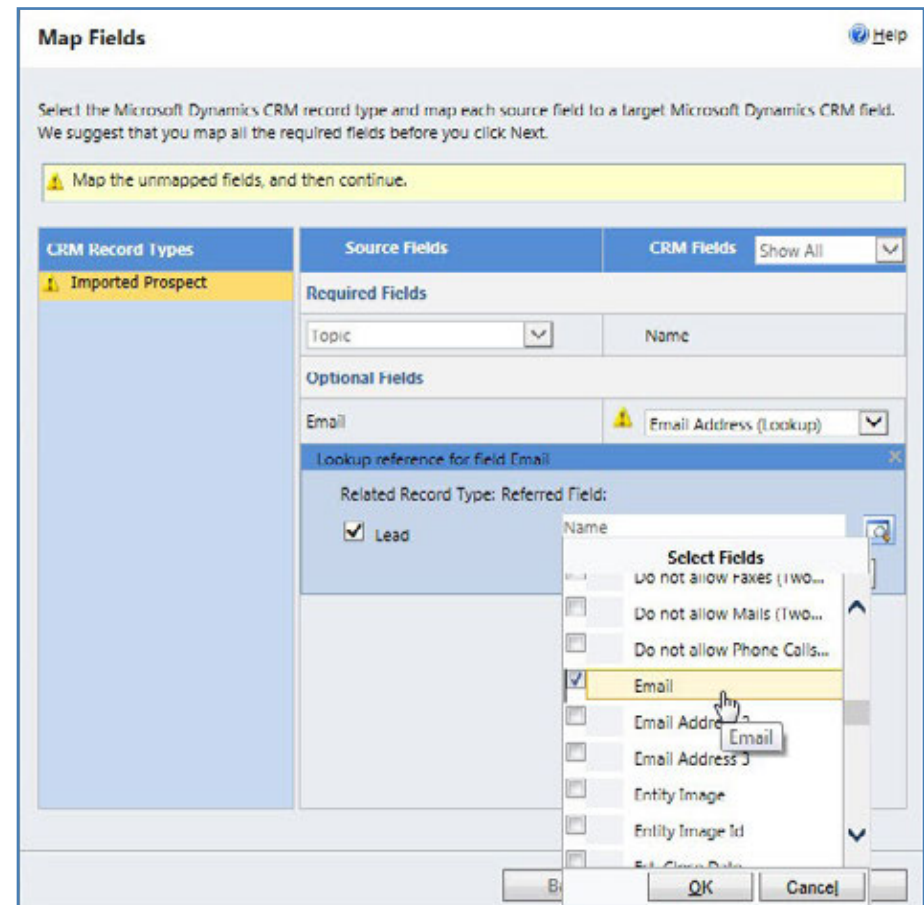
3. Use the CRM Data Import Wizard to import your CSV file to the “Imported Prospect” entity. The trick here is that you will map the Email Address field to the Lead lookup:

a. Map your CSV file to your new entity “Imported Prospect”. Map the “Email” field to your custom lookup field that links to the Lead:

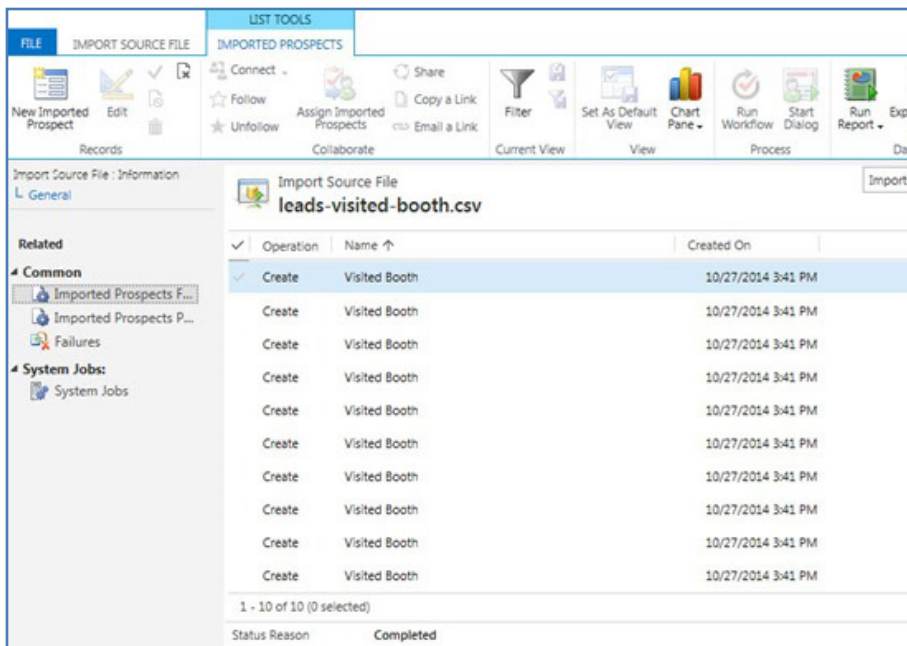


b. Map the “Topic” field from your CSV to the “Name” field on the “Imported Prospect” record, and map the First Name and Last Name fields to “First Name” and “Last Name”. Then, map the

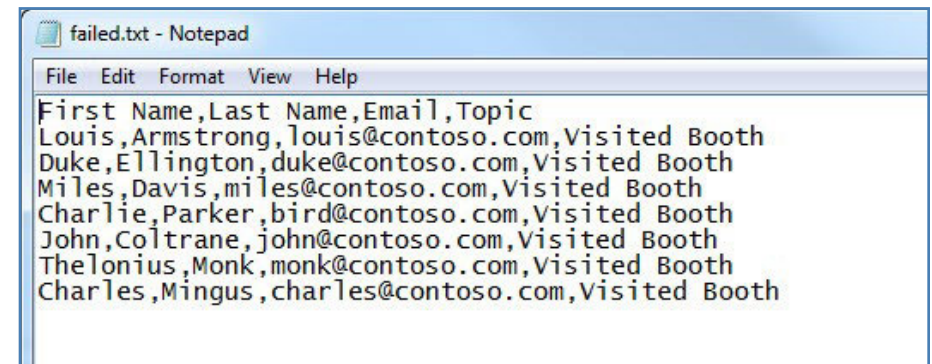
“Email” to your “Email Address (lookup)” field, which is the lookup that links the record to the Lead:



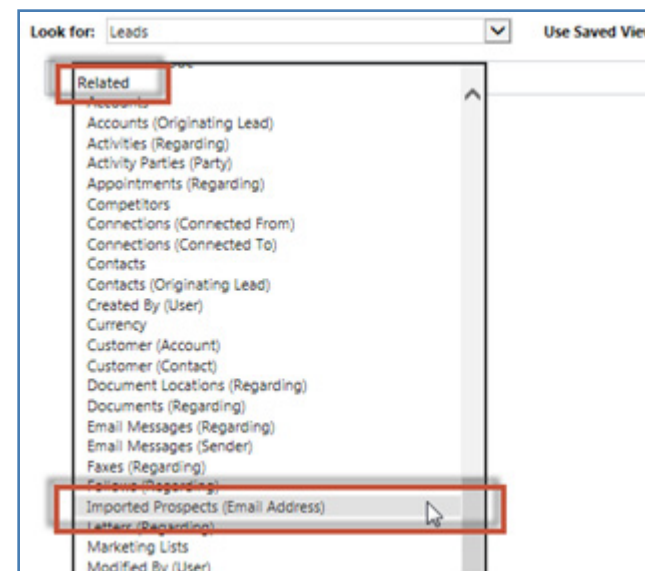
4. Run the import. This will result in new “Imported Prospect” records being created only for those records that already have a “Lead” in CRM:



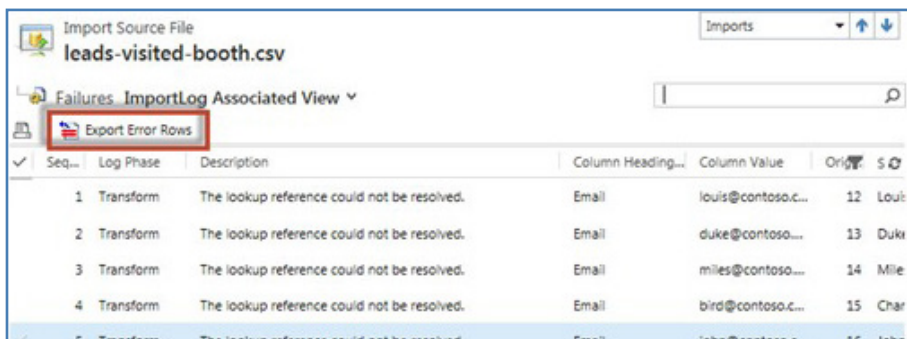
6. Exporting the failures gives you a .txt file (We will come back to this at the end):



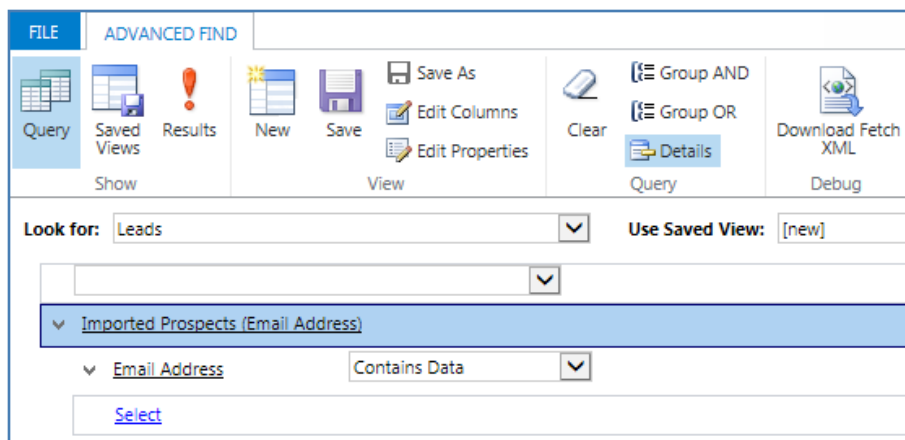
7. Use Advanced Find to locate Leads who have a related "Imported Prospect" record and add them to your marketing list:



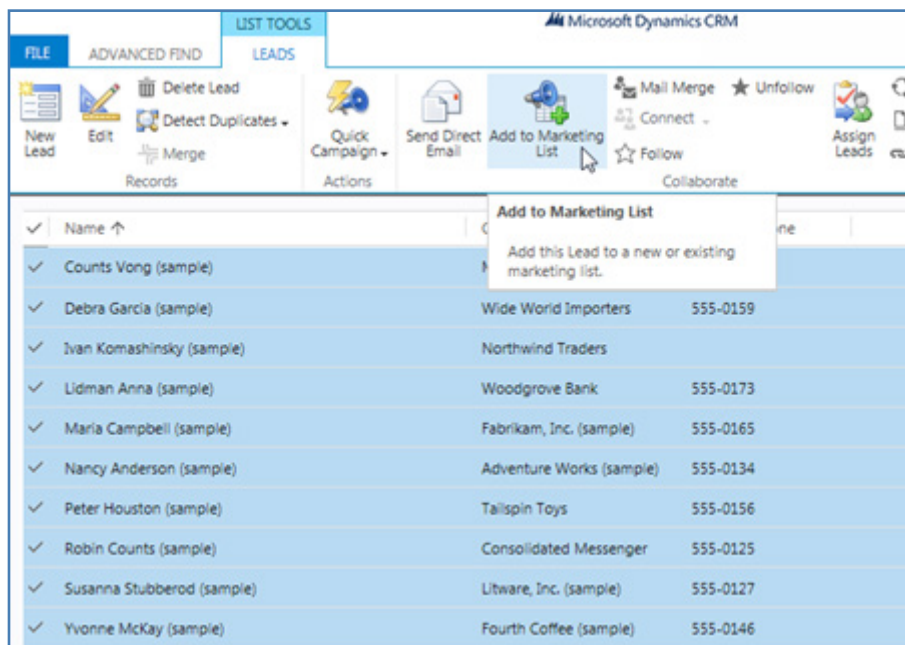
5. On the "Import" record, click on "Failures" – you can export the failed records into a .txt file. These are people who visited your booth, but who were not in CRM already as Leads. We will come back to this list at the end:



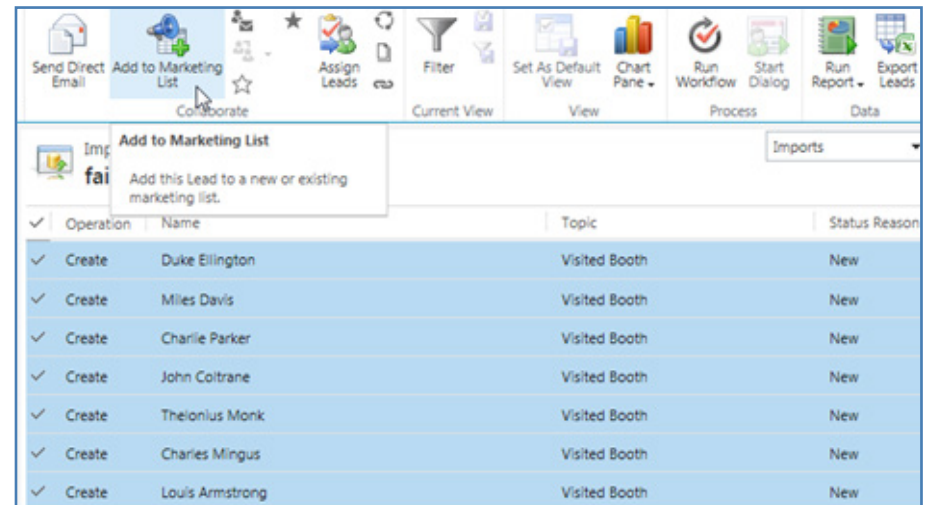




Here are my Leads that got an associated “Imported Prospect” record created from my first import:



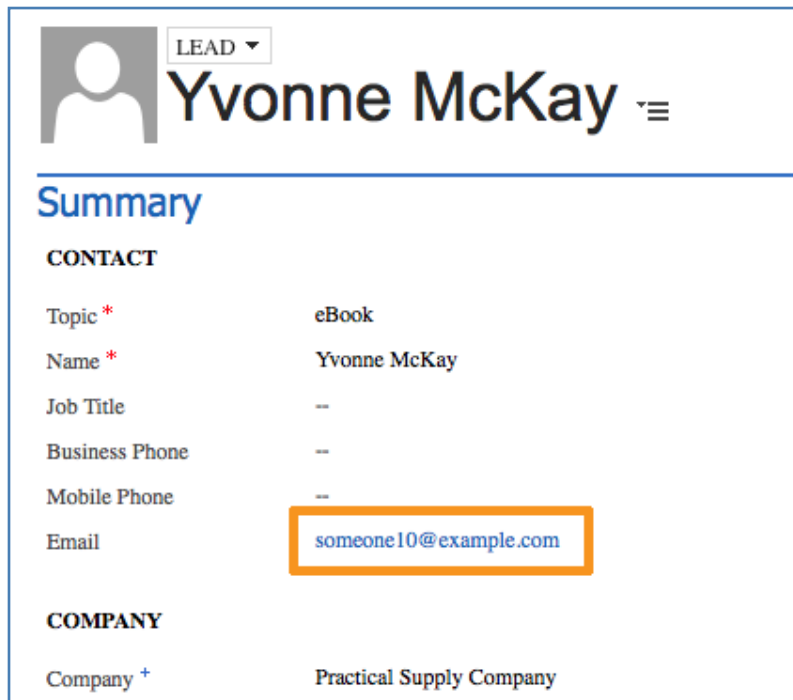
8. Next, import the failed.txt file directly to the “Leads” entity (not to your custom entity). From the “Import” record, you can add the new Leads directly to the marketing list:



Now my marketing list contains both the Leads who were already in CRM but who got a new “Imported Prospect” record imported and associated with them, as well as the Leads who really are new and hadn’t been in CRM previously.

## MAKE FIELDS SEARCHABLE IN MICROSOFT CRM AND FIND DATA MORE EASILY

Because we know marketers are very dependent on CRM data, here's a tip on how to make sure you can find the data you're looking for in CRM. Have you ever tried to search on a field in CRM only to find no records? But, at the same time, you know what you are searching for exists? The reason you can't find what you are looking for is that not all fields in CRM are searchable by default. To make a field searchable you need to add it as a "find column" to the entity's Quick Find View.



**LEAD** ▼

**Yvonne McKay** ⌵

### Summary

**CONTACT**

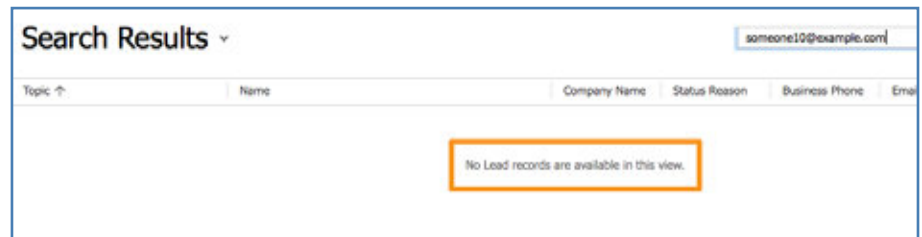
|                |                       |
|----------------|-----------------------|
| Topic *        | eBook                 |
| Name *         | Yvonne McKay          |
| Job Title      | ---                   |
| Business Phone | ---                   |
| Mobile Phone   | ---                   |
| Email          | someone10@example.com |

**COMPANY**

|           |                          |
|-----------|--------------------------|
| Company + | Practical Supply Company |
|-----------|--------------------------|

Here's a great example. In a version of Microsoft CRM online where no customization has occurred, I can see that the lead pictured to the left has the email address someone10@example.com.

However, when I enter that value into the lead search box and press enter, I get the message that nothing is found. Why?

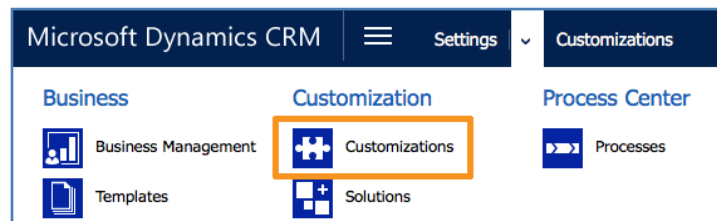


**Search Results** ▼

someone10@example.com

| Topic ↑                                     | Name | Company Name | Status Reason | Business Phone | Email |
|---|------|--------------|---------------|----------------|-------|
| No Lead records are available in this view. |      |              |               |                |       |

The reason that nothing is found is that the email field is not searchable. To make it searchable, go to the Customizations option on the navigation ribbon.



Microsoft Dynamics CRM

Settings ▼

Customizations

**Business**

- Business Management
- Templates

**Customization**

- Customizations
- Solutions

**Process Center**

- Processes

This will launch the customization screen where you can then choose the "Views" option under the lead entity...

File Publish All Customizations

## Lead Views

**Solution Default Solution**

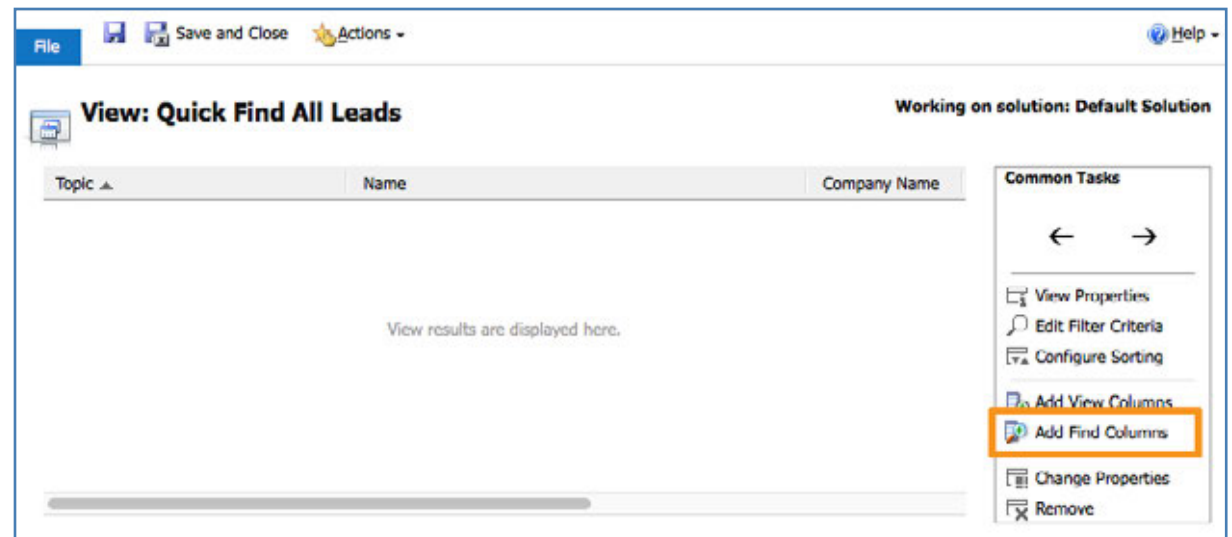
- Invoice Product
- IP Organization
- Knowledge Base Re...
- Lead
  - Forms
  - Views**
  - Charts
  - Fields
  - Keys
  - 1:N Relationships
  - N:1 Relationships
  - N:N Relationships
  - Messages
  - Business Rules
- Lead Address
- Letter
- Mail Merge Template
- Mailbox
- Marketing List
- Melissa Data Addre...
- MG Migration
- Note
- Nurture Program
- Opportunity
- Opportunity Close
- Opportunity Product
- Opportunity Relatio...
- Option Mapping
- Order
- Order Close
- Order Product
- Organization

**View:** All Active Views

New X More Actions ▾

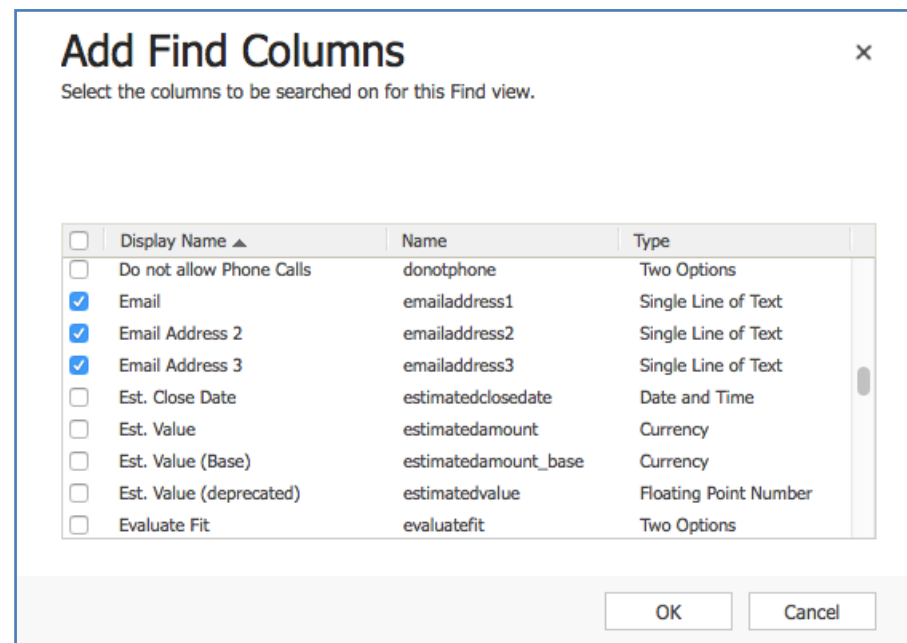
| Name ↑                              | Type                | State   | Customizable |
|-------------------------------------|---------------------|---------|--------------|
| Closed Leads                        | Public View         | Managed | True         |
| Lead Advanced Find View             | Advanced Find View  | Managed | True         |
| Lead Associated View                | Associated View     | Managed | True         |
| Lead BulkOperation View             | Associated View     | Managed | True         |
| Lead List Member View               | Associated View     | Managed | True         |
| Lead Lookup View                    | Lookup View         | Managed | True         |
| Leads Being Followed                | Public View         | Managed | True         |
| Leads I Follow                      | Public View         | Managed | True         |
| Leads Opened Last Week              | Public View         | Managed | True         |
| Leads Opened This Week              | Public View         | Managed | True         |
| Leads: Influenced Deals That We Won | Public View         | Managed | True         |
| Leads: No campaign Activities Sent  | Public View         | Managed | True         |
| Leads: Older Than 6 Months          | Public View         | Managed | True         |
| My Connections                      | Public View         | Managed | True         |
| My Open Leads                       | Default Public View | Managed | True         |
| Open Leads                          | Public View         | Managed | True         |
| Quick Find All Leads                | Quick Find View     | Managed | True         |

Open the view whose type is “Quick Find View” and select the “Add Find Columns” option...



Then simply put a check mark next to the email field so you can now search on it. Publish your customization for it to take effect.

Happy searching!



## ADVANCED FIND: SOME COMMON NEEDS

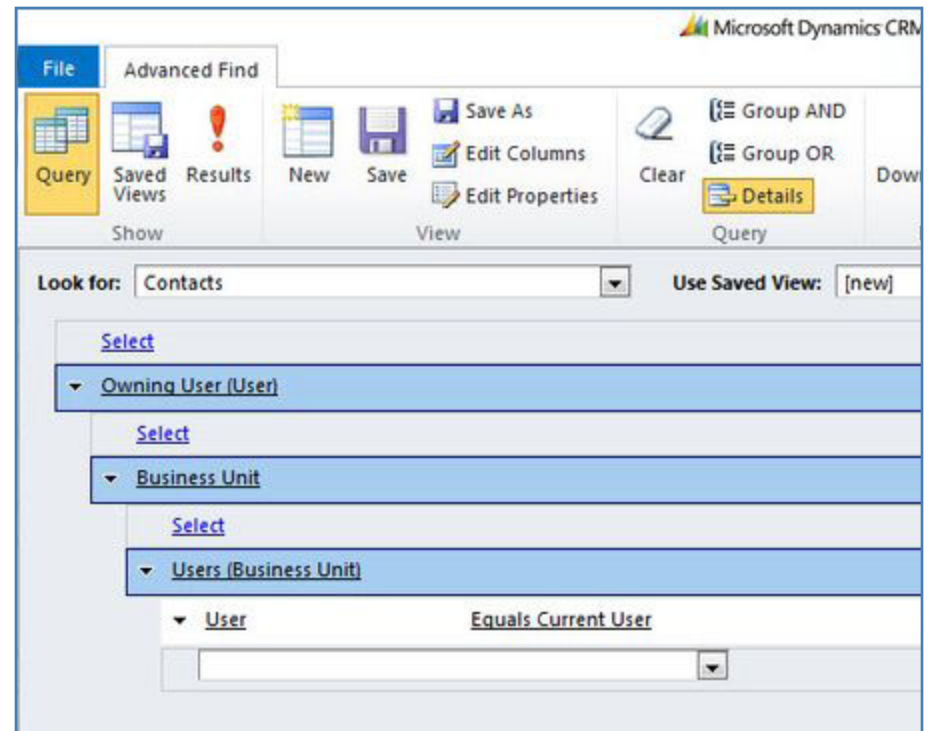
Microsoft Dynamics CRM's Advanced Find feature is a powerful tool for searching and sorting through the data a records in your CRM. On a basic level, all you have to do is specify some criteria and run the Advanced Find query to return all of the records that meet those criteria. However, things can get a bit tricky when it comes to the Advanced Find tool's specific requirements and limitations, and what seem like basic tasks end up being more complicated than expected. This blog post outlines queries and workarounds for three such needs:

- Creating a View that shows records in the current User's Business Unit.
- Return parent records that have multiple specific child records of the same Entity type.
- Generate a list of records that fail to meet specific criteria.

### Creating a View that References the Current User

Many businesses have CRM set up so that Users are in Business Units with other Users with whom they share records; for example, Contacts. While each User can easily see their own records in the My Contacts view, it would be beneficial to give them an easy way to view all Contacts owned by any User in the same Business Unit.

This can be accomplished by creating an Advanced Find that returns all Contacts with an Owner who is in a Business Unit that contains the User who is currently running the Advanced Find. This is how this looks in Advanced Find:

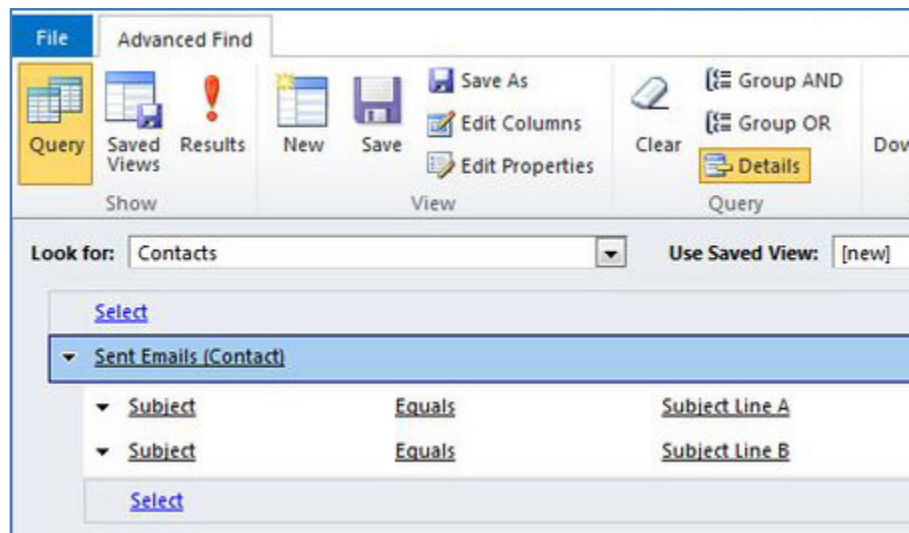


Now all you need to do is save this as a View and each User can easily view every Contact in their own Business Unit.



## Parent Records with Multiple Specific Child Records of Matching Entity Type

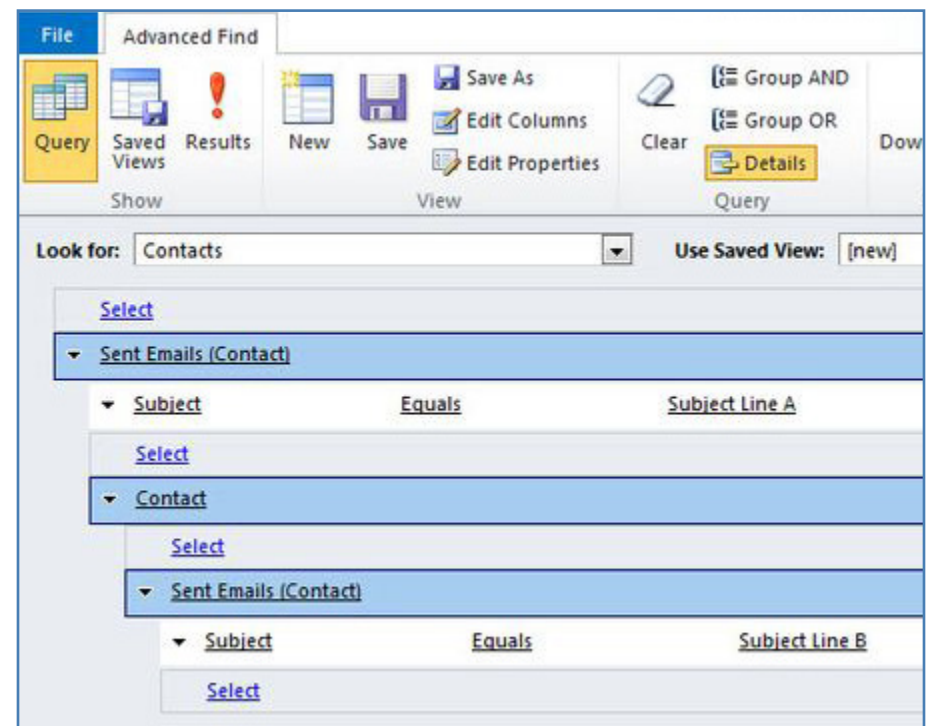
Another common need that businesses have is return parent records that have multiple different child records of the same entity type. For example, you may need to see a list of every Contact who been sent both Email A and Email B. One common misconception here is that you could simply search for all Contacts that have a related Sent Email, as shown below:



However, this is actually searching for Contacts who have a related Sent Email record where the Subject is both "Subject Line A" and "Subject Line B." This is clearly impossible, as the Subject field cannot contain both simultaneously. Instead, you can accomplish this by creating an Advanced Find that searches

for Contacts with a related Sent Email where Subject equals "Subject Line A," then reaching back to the associated Contact and searching for a related Sent Email where Subject equals "Subject Line B." You can continue looping back to that owning Contact to specify all of your necessary criteria.

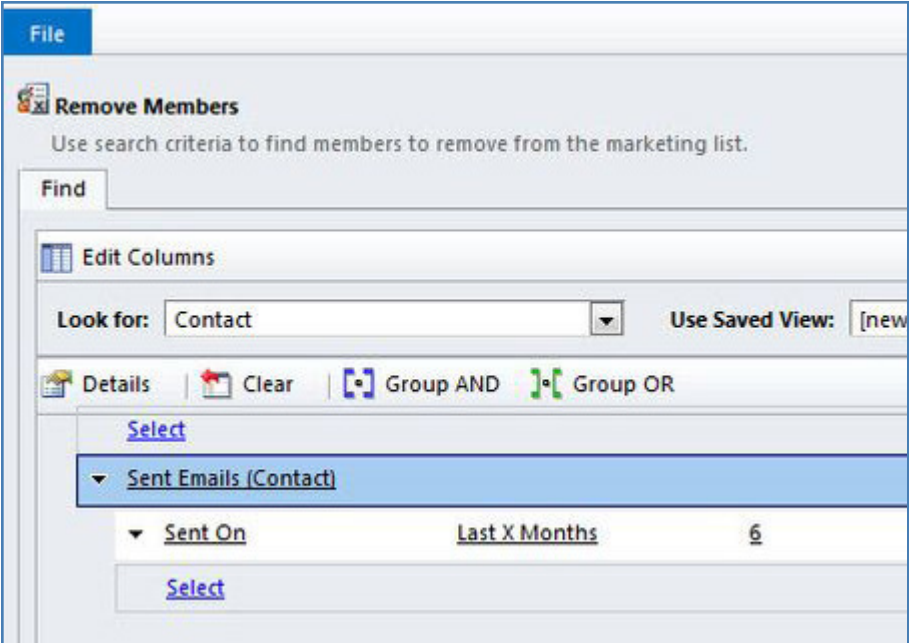
The query looks like this in the Advanced Find:



## Return Records that Fail to Meet Criteria

One very common need is the ability to generate a list of records that fail to meet certain criteria, or that do not have a certain related record. For example, every Contact who has not been sent any emails in the last six months. Unfortunately, CRM does not allow you to simply run an Advanced Find for all Contacts who do not have a Sent Email record any time in the last six months.

The workaround for this is to generate a static Marketing List containing all potentially relevant Contacts, and then remove every Contact who has a related Sent Email from any time in the last six months, thus generating a Marketing List containing every Contact who has not been sent an email in the last six months. Assuming you have already populated your static Marketing List with the full list of potentially relevant Contacts, you would run the following “Remove Members” query:



The screenshot shows the 'Remove Members' dialog box in a CRM system. The 'Find' tab is selected. The 'Look for:' dropdown is set to 'Contact'. The 'Use Saved View:' dropdown is set to '[new]'. The 'Details' button is highlighted. The 'Clear' button is next to it. The 'Group AND' and 'Group OR' buttons are also visible. Below these, the 'Select' button is highlighted. The 'Sent Emails (Contact)' dropdown is expanded, showing 'Sent On' with a value of 'Last X Months' and a value of '6'. The 'Select' button is highlighted below the dropdown.

After removing every Contact who meets this criteria, you will be left with a static Marketing List containing every Contact who has not been sent an email in the last six months.



# Chapter Eleven

## BRANDING

For good measure, we've included a few articles related to branding and how to make sure you're positioning the right message in the marketplace.

### WHAT THE 7 MINUTE WORKOUT CAN TEACH US ABOUT PRODUCT PACKAGING

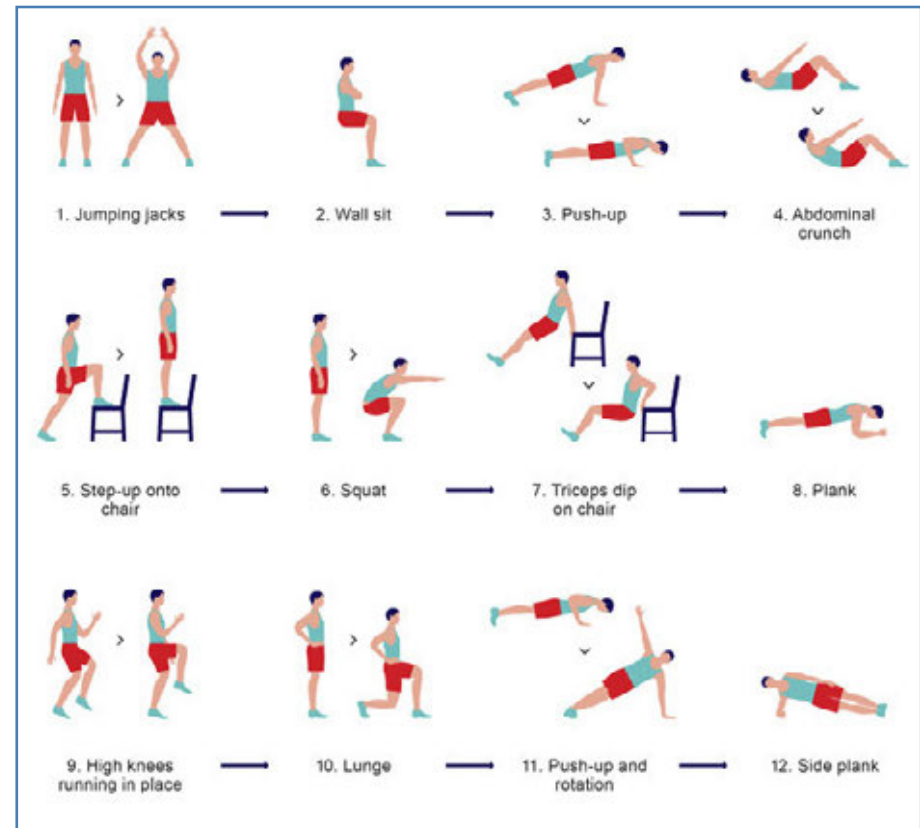
Have you heard of this thing, the [7 minute workout](#)? Maybe not, but you already know what it's made up of: jumping jacks, push-ups, sit ups and other basic exercises. The thing is that someone (not sure who) combined these exercises we all have known about for years into a routine called the "7 minute workout." While there is debate as to the effectiveness of this workout, there is no debate that it has inspired a number of [smartphone apps](#), dedicated [websites](#), [blog posts](#), [articles](#), [research papers](#) and [YouTube training videos](#). The workout is very simple and requires nothing but a chair, so the barriers to trying it are very low.



As a marketer, this concept really makes you stop and think about product packaging. What products, features, offerings, etc. might any of our businesses possess that, when packaged and presented in the right way, will create a valuable new offering? As a software company, this makes us think about industry-specific solutions, modular feature subsets or simplified product versions. Companies like [Zendesk](#) have taken features that theoretically exist in popular CRM systems and bested them by focusing on a single area (customer service) and doing it much better, but also marketing it much better. The customer begins to see this new offering as “best of breed” and is attracted to it when perhaps similar features exist in a software solution he or she has already purchased. Here at ClickDimensions, we use Zendesk ([learn how](#)) despite the fact that customer service features already exist for free for us in our CRM system.

For something that is completely the opposite of the 7 minute workout, consider [Gigi's](#). They specialize in cupcakes, which is yet another thing that has been in existence for years. However, the updated packaging and positioning make us consider that perhaps we should have cupcakes instead of a regular cake for our birthdays or wedding receptions.

What can you position differently to make a revenue impact to your business?




## IF YOU CAN'T FIX IT, FEATURE IT! THOUGHTS ON POSITIONING

The year is 1962, and Avis Rent A Car is in trouble. The company hadn't made a profit in 13 years, and, although they were technically second in the US rental car market, with only 11% market share, they were well behind market leader Hertz. Clearly, there were business issues that needed to be fixed to improve their situation, but what about positioning? Even if they did improve their product, how were they going to convince their prospects and customers?


Well, Avis pulled out a trick that every marketer should have in their bag. **If you can't fix it, feature it.** There are times when, instead of making excuses, you are better off to embrace the situation and use it to your advantage. This is exactly what Avis did. After hiring a new CEO that worked hard to fix their product problem, Avis embarked on a marketing campaign that is now legendary. They embraced their #2 status by proudly featuring it

**Avis is only No.2.  
But we don't  
want your sympathy.**



Have we been crying too much? Have we overplayed the underdog?  
We didn't think so till David Biener, 11 years old, sent us 35¢, saying, "It may help you buy another Plymouth."  
That was an eye-opener.  
So now we'd like to correct the false impression we've made.  
We don't want you to rent Avis cars because you feel sorry for us. All we want is a chance to prove that a No.2 can be just as good as a No.1. Or even better. Because we have to try harder.  
Maybe we ought to eliminate the negative and accentuate the positive.  
Instead of saying "We're only No.2 in rent a cars," we could say "We're the second largest in the world!"

**No.2ism.  
The Avis Manifesto.**




We are in the rent a car business, playing second fiddle to a giant.  
Above all, we've had to learn how to stay alive.  
In the struggle, we've also learned the basic difference between the No.1's and No.2's of the world.  
The No.1 attitude is: "Don't do the wrong thing. Don't make mistakes and you'll be O.K."  
The No.2 attitude is: "Do the right thing. Look for new ways. Try harder."  
No.2ism is the Avis doctrine. And it works.  
The Avis customer rents a clean, new Plymouth, with wipers wiping, ashtrays empty, gas tank full, from an Avis girl with smile firmly in place.  
And Avis itself has come out of the red into the black.  
Avis didn't invent No.2ism. Anyone is free to use it.  
No.2's of the world, arise!

in advertisements along with a new tag line: **"We try harder."** In addition to the external campaign, Avis launched an internal campaign involving management visits to all Avis branches to emphasize the importance of the "we try harder" tag line.

Avis's campaign and supporting maniacal focus on customer service changed everything. By 1966, Avis had a 35% market share and was profitable. They featured their #2 position proudly and consumers identified with their underdog status. They backed up their "we try harder" slogan by truly trying harder. The result was a huge success for Avis and a rethinking of product positioning for marketers from that day forward.

**Avis is only No.2  
in rent a cars.  
So why go with us?**



We try harder.  
(When you're not the biggest,  
you have to.)

We just can't afford dirty ash-  
trays. Or half-empty gas tanks. Or  
worn wipers. Or unwashed cars.  
Or low tires. Or anything less than  
seat-adjusters that adjust. Heaters that heat. Defrost-  
ers that defrost.

Obviously, the thing we try hardest for is just to be  
nice. To start you out right with a new car, like a lively,  
super-torque Ford, and a pleasant smile. To know, say,  
where you get a good pastrami sandwich in Duluth.

Why?  
Because we can't afford to take you for granted.  
Go with us next time.  
The line at our counter is shorter.

**If you find a  
cigarette butt in an  
Avis car, complain.  
It's for our own good.**



We need your help to get ahead.  
Avis is only No.2 in rent a cars. So we have to  
try harder.

Even if it's only a marked-up map in the glove  
compartment or you waited longer than you  
felt you should, please don't shrug it off.

Bug us.  
Our people will understand. They've been briefed.  
They know we can't afford to hand you anything less  
than a new car like a lively, super-torque Ford. And it's  
got to be immaculate, inside and out.

Otherwise, make a noise.  
A Mr. Meadow of New York did.  
He searched and came up with a gum wrapper.



## DON'T RISK YOUR BRAND BY TRICKING YOUR CUSTOMERS AND PROSPECTS WITH DECEPTIVE WEB TRACKING TECHNIQUES

We know first-hand that it is very helpful that marketing automation solutions can give companies insight into their customers' and prospects' interactions with their emails and websites. But when do you cross the line between gaining sales advantage and invading individuals' right to privacy? This post will tell you about how some sites may be tracking you even if you have taken the steps necessary to avoid tracking. It will also help you answer the question as to what you consider to be right and wrong when it comes to web tracking.

### Transparency and Disclosure

We think it all comes down to transparency and disclosure. In other words, whatever you decide to do in terms of tracking, be clear about it so those who it makes uncomfortable can decide whether to visit your site and those who visit your site will understand how they are being

tracked and what will happen to any data they provide. Your privacy policy should disclose the tracking techniques you use, how to avoid being tracked and what you will do with the data you collect. In building trust with prospects and customers, there should be no deception or surprises.

If you read the ClickDimensions [privacy policy](#), you will see that we very clearly state how our web tracking works. We also educate visitors on how to avoid our web tracking as well as how we use the information we gather. Further, our privacy policy also includes a helpful [white paper](#) we have created to inform consumers about the various ways web tracking can be done. When you read our privacy policy and white paper, you will see that the tracking techniques used by the ClickDimensions solution employ only browser tracking techniques that many

web browser users are aware of and that can be managed directly within the web browser.

### Flash Tracking

In our [privacy white paper](#), we discuss how it is possible to hide tracking information about a web visitor in their computer's Adobe Flash player. The concept is simple; most computers have the Flash player installed, the Flash player has a storage area (called Local Shared Objects - meant for things like volume preferences) and most people are not aware that data can be stored there. This means that sites can hide data about you in the Flash player and you most likely will not know it is there or how to remove it. Sites sometimes do this so that they can rebuild your browser cookies when you decide to delete them to avoid tracking. The technique is called "re-spawning" and, unless it is done with explicit consent, is a gross invasion of

your right to privacy. ClickDimensions and the mega vendors in the marketing automation space (Eloqua, Marketo, Pardot, etc.) do not hide tracking data about you in your Flash player. The brands we serve more often than not disclose their tracking techniques in their privacy policies and would not want to write a privacy policy that admits to this type of tracking. Further, the Adobe terms of service explicitly prohibit the use of the Flash player for web tracking in this manner.

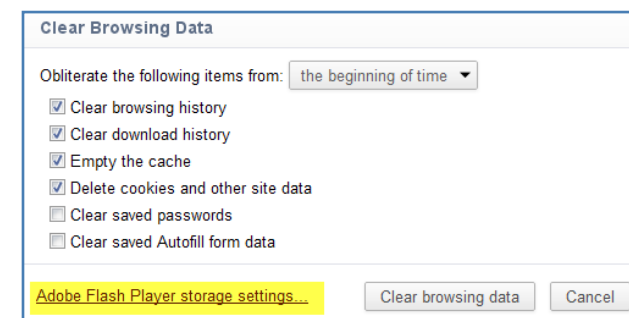
Flash tracking is sometimes used by login sites that contain a clear “remember me” link and disclose the use of Flash tracking in their privacy policy. A site using Flash tracking in this way can make the argument that they have gained your explicit consent to remember you by asking you to click the “remember me” link which ideally would be near a link to their privacy policy. However, for a non-login site to store tracking information about you outside the browser and not disclose it

creates a brand/perception risk that is not acceptable.

If you are curious about which sites/vendors are storing data about you in your Flash player, you can access your Flash player storage area by visiting this URL: [http://www.macromedia.com/support/documentation/en/flashplayer/help/settings\\_manager07.html](http://www.macromedia.com/support/documentation/en/flashplayer/help/settings_manager07.html). Keep in mind that some of the names you see have disclosed their user of Flash tracking, others are simply using it for its intended purpose (i.e. volume and other preferences) and still others are just using it to trick you. If you use the Google Chrome browser, you may have even noticed that they include a link to the Flash player storage area on their browsing data screen. Google recognized that the Flash storage is being used for tracking and is making its users aware of this.

## Conclusions

Ask yourself a few questions. Would your website visitors expect you to hide data



about them outside the browser when they visit your site? Would you feel comfortable disclosing the use of Flash tracking in your website privacy policy? How do you think your visitors would feel if they read this post and then realized that your site has been tracking them in ways they were not aware were possible?

Organizations that care about the perception of their brand in the market will disclose everything they are doing with customer and prospect data and will not engage in techniques that could be seen as deceptive. Organizations that actively seek to trick their visitors, or do so by not educating themselves on the technologies employed by their vendors, are at risk of losing the trust of their customers and prospects.

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And don’t miss the [Marketing with Microsoft Dynamics CRM Idea Conference](#). This annual online conference features ideas, case studies and best practices for marketing with Microsoft CRM presented by marketing leaders and CRM experts.

“After learning how to efficiently use ClickDimensions, I was able to increase my sales by over 30% the first two months.

ABBY HANSON, SALES MANAGER  
SWI





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