Microsoft

Top Ways Marketing Can Help Sales Succeed

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Introduction

With increasing pressure on sales and marketing teams to get aligned, this document provides compelling reasons existing Dynamics 365 customers should add Dynamics 365 for Marketing to their customer engagement platform to accomplish that goal. This document addresses some of the key challenges facing sales and marketing, how Dynamics 365 for Marketing complements Dynamics 365 for Sales, and how they can work together with the same set of data and connected processes to accomplish important business outcomes.

Challenges with Sales and Marketing Coordination

Overview

For many years, siloed processes and systems have fractured sales and marketing. People in these teams still struggle to optimize sales and marketing performance.

There are many barriers facing sales and marketing:

- Poor quality of leads and no visibility about sales conversion
- Different understanding and definitions (e.g. what is a qualified lead?)
- Inconsistent views of leads and customer activity due to non-integrated technology
- Lack of shared understanding of the buyer's journey
- Conflicting or misaligned performance objectives (KPI's)
- Degree of control over the brand (content customization)

These barriers often limit marketing effectiveness or disrupt sales. Overcoming these and other barriers require a commitment to shared objectives for sales and marketing. This usually requires the commitment of sales and marketing leadership, mutual understanding of customer engagement objectives, common process definition, and integrated sales and marketing technology - tools that bridge sales and marketing to deliver a seamless experience for the customer.

By leveraging the Dynamics 365 platform, including Microsoft Common Data Services (CDS), marketing and sales teams share common data, a complete view of customers, connected processes, and Office 365 collaborations tools.

Dynamics 365 for Marketing

Microsoft Dynamics 365 for Marketing is a marketing automation solution designed for companies that need more than basic email marketing at the front end of their sales cycle to turn prospects into business relationships.

Dynamics 365 for Marketing can help growing businesses nurture more sales ready leads, align sales and marketing, make smarter decisions, and grow with an adaptable platform. By identifying web visitors, by tracking activities such as email opens, marketing page form submissions, and event registrations, Dynamics 365 for Marketing engages the digital customer, increasing the likelihood of successful lead capture. Dynamics 365 for Marketing offers a wealth of functionality to help sales and marketing target the right prospects, prioritize leads, automate handoff, and track progress through the buying journey with shared information and connected processes. Sales and marketing alignment focuses on communication, sharing resources, and connecting teams to close more deals. Utilizing both Dynamics 365 Sales and Dynamics 365 for Marketing applications built on the same platform can:

- Help securely manage and share a single (true) source of information about contacts, leads, and customers to understand how every interaction impacts results
- Use dynamic segmentation capability to target the right prospects
- Set up multiple lead scoring models to prioritize leads who are ready to buy across different customer segments
- Connect and automate sales and marketing processes with journeys to nurture, hand off, and track the progress of every lead
- Seamlessly use Office 365 tools to collaborate with colleagues, leads, and customers

Also, Dynamics 365 for Marketing enables important business moments such as product launches or market expansion, planning and execution of major events or tradeshows, coordination of rich content-based campaigns, or customer outreach through surveys. Below are some examples.

Business Expansion

For many companies, one of the most significant investments they will make is launching a new product or entering a new market. Nothing is more important to a successful launch than effective planning and consistent follow-up. With Dynamics 365 for Marketing, marketers maintain control over product launch campaign flow with Customer Journey and email and landing page content to ensure they are consistent with product messaging. With web tracking activity, Dynamics 365 for Marketing can trigger emails to web visitors who express interest in new products or services or who respond from a new market. Responsive emails invite prospects to landing page forms to register for product information updates or launch-related events. Dynamics 365 for Marketing enables sales and marketing to set up multiple lead scoring models to

automatically identify qualified leads in a timely manner. Through business process automation, those qualified leads are passed seamlessly to sales. The ability to quickly identify qualified buyers for a new product or within a new market is key for companies seeking returns for their launch efforts.

Organize Events

Many companies rely on in-person or webinar events to drive new leads or close deals. Dynamics 365 for Marketing enables marketers to manage events, such as tradeshows or sponsored events, from start to finish. With capabilities for event planning – sessions, speakers, budgets, and more – and invitation, registration, attendee tracking, and a fully functional event portal, Dynamics 365 for Marketing takes event management to a new level. With significant investments for personnel, sponsorship, travel, and logistics associated with events, companies need a single source of information for event coordination and for measuring event ROI. Unlike most marketing automation solutions, Dynamics 365 for Marketing connects the operational aspects of events with the data aspects of invitees, registrants, and attendees to create a turnkey solution for event management.

Similarly, Dynamics 365 for Marketing natively integrates with webinar provider ON24. This unique capability ensures attendee information is available for immediate post-webinar nurturing.
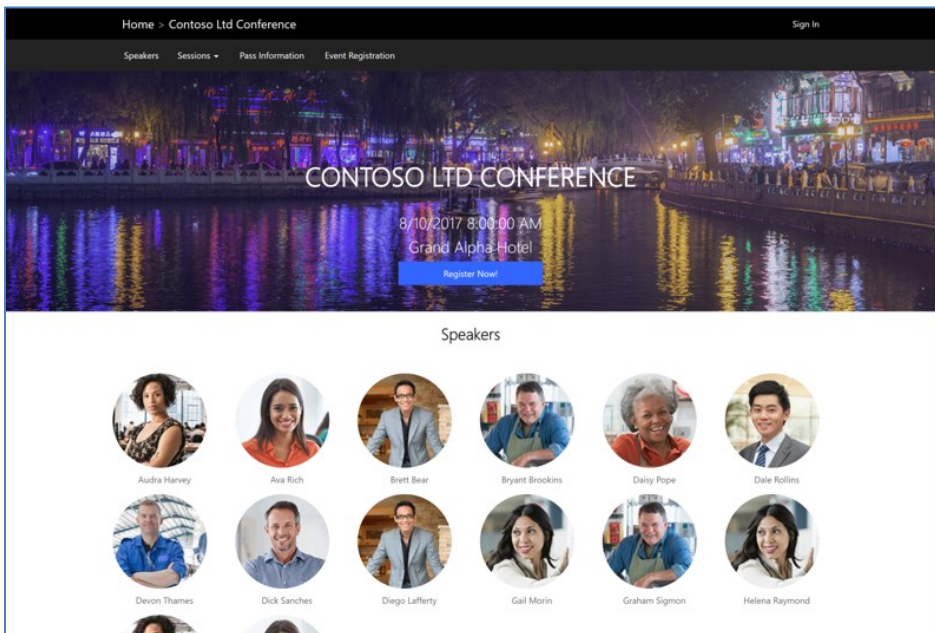
Manage Content-based Campaigns

Content, content, content is the new mantra for marketers. Prospects and customers want timely, relevant, and informative content about the products and services they are interested in. With Dynamics 365 for Marketing, access to content-based programs (e.g.

eBooks, whitepapers, videos) can be easily incorporated into Customer Journey. Using subscriptions centers, prospects and customers may opt in to the content they most desire. Customer Journey efficiently moves prospects through the campaign flow, capturing important prospect information and navigating prospects automatically to the content they desire. Today, it is no longer cost effective to send one-off emails to each prospect manually. Dynamics 365 for Marketing allows each prospect to pursue the journey they desire and do so in an automated fashion.

Survey Your Customers

Customizable surveys allow marketers to easily gain insights from prospects and customers about products, services, and engagement activities. With Dynamics 365 for Marketing, marketers can quickly create and run surveys to gain actionable insights to improve their customer experience or create compelling offers. Completely customizable and with links directly into the Dynamics 365 database, surveys allow sales and marketing to enrich their understanding of survey participants. With enriched contact records, sales and marketing can better segment their contacts to drive more personalized communications.

Benefits of Sales and Marketing Alignment

The benefits of sales and marketing alignment are many and powerful. With solid coordination, sales and marketing can target the right prospects, prioritize leads, automate lead handoff to sales, and increase customer engagement.

Coordinated Customer Engagement

Nothing is more frustrating to a prospect or customer than receiving redundant or poorly timed communications from a company. Sales and marketing must have a mutual understanding of the buyer journey and how those journeys may differ for different segments and/or personas. With Customer Journey, Dynamics 365 for Marketing allows marketers to build highly customized nurture programs that transcend web, email, social, events, and more in a fully automated framework. With out-of-the-box Customer Journey templates, it is a breeze to quickly execute a new campaign. For sales, significant benefits accrue through the real-time visibility to prospect activities. Knowing what emails were opened and when prospects visited key landing pages are foundational to timely and relevant customer engagement.
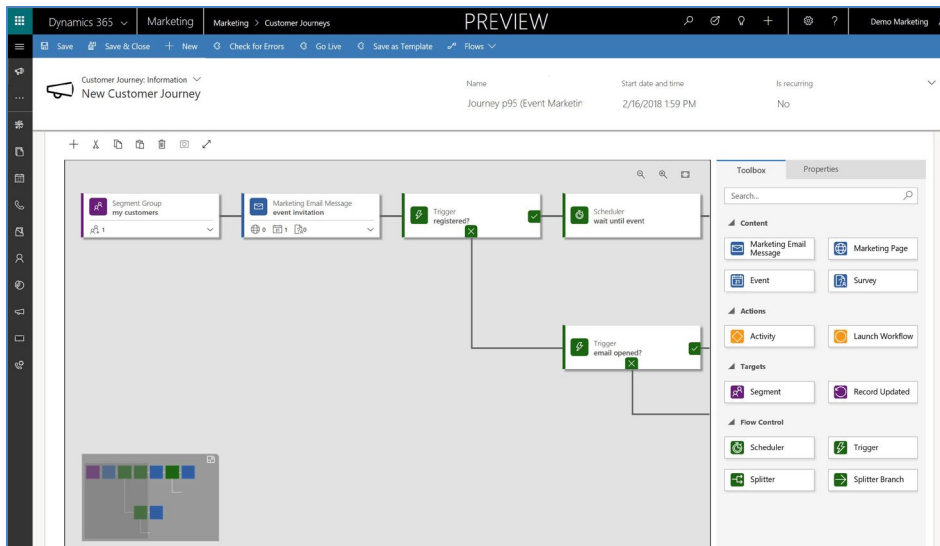
Better Targeting and Lead Prioritization

It is no longer acceptable to do "batch and blast" marketing. Prospects and customers tire from being pummeled with generic, unrequested emails. The penalty for this activity is often a blanket unsubscribe and lost opportunity for the company. With new regulations afoot, companies can suffer significant financial penalties for careless marketing.

With Dynamics 365, marketers now can derive a detailed understanding of their contacts across many dimensions, both demographic and behavioral. It's only by having an integrated view of the prospect's marketing activities (web, email, social, ads) and sales activities (events, calls, meetings) that marketers can deliver valuable insights to sales and use those insights to nurture prospects and customers with tailored and dynamic content.

Dynamics 365 for Marketing's powerful segmentation capability allows marketers to filter and target contact based on any attribute or behavior associated with that contact. Coupled with dynamic contact, marketers may target even more focused segments with personalized content. And as different segments behave in different ways, sales and marketing can team up to apply multiple lead scoring models to prioritize leads who are ready to buy.
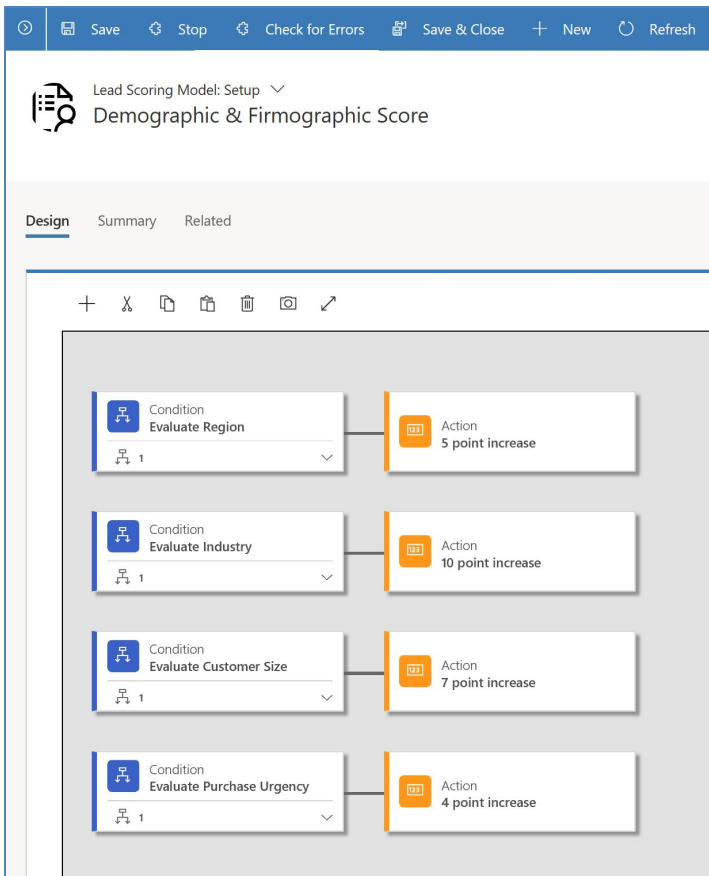
More Leads and Marketing Attributed Revenue

Now more than ever, expectations are high for marketing to deliver more and better leads. And in turn, sales is under greater pressure to convert those leads into revenue. Companies may vary in how they attribute revenue, but systems and data exist now to track a lead from an anonymous web visitor all the way through to sale or revenue conversion.

Dynamics 365 for Marketing uses sophisticated web tracking to identify anonymous visitors and continues to track those visitors until they become known by way of a marketing page form submission. Once known, all the anonymous activity is attached to the contact record to present a complete picture of contact engagement history.

As the contact progresses through Customer Journey, all activities are tracked and made available to sales and marketing. As the prospect becomes a lead, and the lead a customer, it is now easy to see all the steps taken that ultimately lead to revenue. For sales, this new visibility identifies which activities are moving the needle and creating sales-qualified leads.
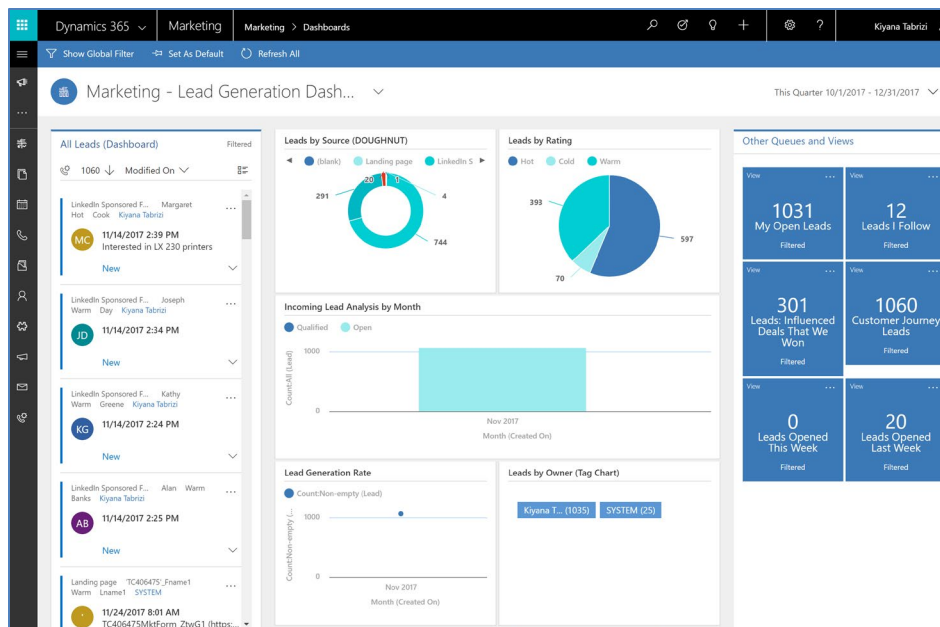
Summary

As companies increase their investments to further improve customer engagement, the time has come for sales and marketing to become fully aligned. Whether these investments are new product or market launches, content-driven campaigns, in-person events or webinars, or customer surveys, sales and marketing teams need a collaborative suite to manage the customer journey. Together with Dynamics 365 for Sales, Dynamics 365 for Marketing offers significant value to an organization, increasing the ability to engage customers and optimize the buying process. Dynamics 365 for Marketing enables marketers to nurture more sales-ready leads, align sales and marketing, make smarter decisions, and grow with an adaptable platform.

Try Dynamics 365 for Marketing

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