

CRM Built for Marketing

The Executive Guide to Selecting CRM that Meets Marketing Needs

Part 3 of the "CRM Built for Me" Series

Executive Summary

Marketing is usually the first touch-point a sales prospect has on the road to becoming a customer and is thus a critical part of any organization's customer relationship management (CRM) strategy. Marketing is also the source of the sales leads that drive a company's sales activities and pipeline. Accordingly, as companies embark on a CRM selection process, they should give special consideration to the needs of the marketing department, where CRM offers the potential to improve insight, productivity, and campaign returns.

How can a company ensure that the marketing department's needs are represented when choosing an enterprise-level CRM system? This white paper provides core principles companies can use to help them select a CRM system that each marketing team member feels was built just for them.

Why Marketing Departments Need CRM that's Built for Them

Customer relationship management projects are by definition cross-departmental. In fact, a fundamental component of CRM's value is its ability to break down the barriers and data silos between departments and develop a more holistic, integrated approach to front-office functions and processes. But the cross-departmental nature of CRM should not obscure the fact that there are multiple stakeholder groups in CRM initiatives, all of which will ultimately use the system in different ways and derive different kinds of value from its rich store of data and functionality. Understanding the unique demands of these different departments and user groups is essential to selecting a CRM system that truly satisfies the needs of all users, rather than meeting the requirements of some users while only superficially addressing those of others.

The undeniable appeal of CRM's ability to streamline and automate sales cycles and enable more efficient, higher-

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quality customer service can sometimes overshadow the marketing department's potential to derive compelling value from CRM. But there's no question that the right CRM system, implemented with a thorough understanding of marketing needs, offers the opportunity to radically improve marketing processes

and returns while decreasing costs, ultimately generating more sales leads—and thereby benefiting other departments as well.

This underscores the importance of understanding marketing users' specific requirements and challenges from the outset of a CRM initiative and considering these closely in defining the company's CRM strategy, selection criteria, and implementation plan.

The Marketing Factor

It's easy to forget just how much the marketing discipline has changed over the last ten to fifteen years. The channels have changed, with online channels overtaking traditional media such as print, television, and mail. The tools have changed, with increasing automation and technology focus forcing marketers to continually master new applications and skills. At the root of these changes is the fact that the audience has changed, with more tech-savvy and discriminating prospects and customers demanding increasingly diverse and personalized options for engaging with companies. And it's not just audience expectations of marketers that have changed, but corporate ones as well: marketers are held more accountable than ever before for their efforts and are expected to be

able to precisely track and demonstrate returns from every marketing investment they make.

What hasn't changed is the fundamental marketing goal of communicating and connecting with current and prospective customers: capturing their attention, piquing their interest, evoking their desire, and spurring them to action. But even here, the dynamics have changed: marketers have moved from the scattershot one-to-many approach of traditional mass-marketing to more targeted, personalized communications in an effort to catch the attention of increasingly bombarded prospects, and—whether marketers are ready for it or not—the one-way street of marketing messaging is becoming a two-way dialog with customers and prospects, thanks to social media and other feedback mechanisms.

All of these factors have combined to create a new marketing reality that is driven by—and heavily dependent on—data and technology. Whether they're planning, executing, or analyzing campaigns, marketers need in-depth data and flexible tools to help them do their jobs effectively and accountably. This is precisely why CRM can be such a vital part of ensuring marketing's success.

This begs the question: what does a marketing department need from a CRM solution? In short: they need a system that will give them the data, tools, and insight to perform in today's fast-paced, high-tech marketing world. Marketing specialists, program managers, and field marketers need to be able to understand and analyze their markets, segment and target specific groups, and run effective campaigns. Marketing managers and executives need to be able to monitor and track the results and return on investment from every individual marketing campaign, spot trends and issues, and close the loop on marketing's contribution to revenues. And both groups want to ensure that they are able to get the greatest possible returns from every marketing dollar spent.

At all levels of the marketing organization, marketers want a CRM system to empower them to act nimbly and insightfully in the face of change. The pace of marketing has never been faster, and an ever-expanding array of new mobile and social media channels is compelling marketers to continually rethink their channel mix and explore new messages, markets, and combinations thereof. In this environment, an inflexible CRM system can become an impediment to responsive and innovative marketing.

Similarly, system flexibility is essential to ensuring that a CRM system mirrors the way marketers work—their processes, lead definitions, qualification criteria, and more—rather than arbitrarily forcing change, but to be of value, it must also help them do things better and more easily. In other words, marketers don't want a cookie-cutter system that forces them to change the way they do things without providing compelling improvements, and they don't want a system that feels like it's designed

for the sales or customer service team's benefit, but not their own. For a CRM solution to be embraced by users and produce real results, each member of the marketing team, from management on down, needs to see the CRM system as a solution that's built for them.

What Is "CRM Built for Me"?

For a company to derive full value from a CRM system, it needs to be used not just by the sales and customer service departments, but by the marketers who initiate

relationships with prospects in the first place and nurture these relationships throughout the customer lifecycle. Better marketing insight, targeting, and measurement results not only in lower costs, but also in more effective message development and a deeper, more satisfying, and more profitable relationship between a company and its customers.

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For marketers to feel that a CRM solution is "built for them," it needs to address tangible pain-points in their daily activities, rather than introduce new ones. These pain-points differ by role. Let's take a closer look.

Marketing Managers and Specialists: Help Me Reach My Targets

What do first-line marketing program managers, field marketers, and marketing specialists want? Ultimately, they want the ability to quickly and efficiently deliver qualified leads to their sales team that convert into highly profitable sales. To do this, they need to juggle multiple programs and campaigns that will appeal to their target markets. Their goal is to distribute accurate, timely, and highly relevant communications that will compel their audience to respond and to engage positively with the company. In short, they want to be able to generate a higher volume of sales leads without losing the personal touch that potential buyers expect from businesses these days.

But good marketers aren't satisfied with merely generating a greater number of leads: They want higher-quality leads, too. The salespeople they support need a healthy stream of qualified leads that fit the profile of prospects that have converted to buyers in the past. To accomplish this, marketers need tools that will give them the analytical data to understand who they need to target, to segment their markets effectively, and to evaluate leads rapidly, giving them the greatest return on investment for their time and marketing budget.

The web has given marketers an attractive channel for reaching their targets. Never has there been a more

efficient—and inexpensive—method for delivering a marketing message to a target audience. But in order to take full advantage of this channel, marketers need a CRM system that will help them identify their targets and quickly and effectively deliver relevant communications through electronic channels, generating leads that feed smoothly into the sales funnel. In short, marketers need a CRM system that was built for them—with their unique needs in mind.

The Solution? Marketing-Centric CRM

Is a marketer's wish for both higher-volume and higher-quality leads unrealistic? Not if the CRM system puts the right tools in their hands. With the right features to accelerate the process of creating and executing effective campaigns, as well as collecting, evaluating, and distributing leads, marketers can use a CRM system to streamline the entire marketing process.

First and foremost, a marketer must have a 360-degree view of the target market they're aiming for. Only with detailed customer and prospect data can the marketer effectively identify the profile of a promising sales lead and segment audiences by relevant common interests and attributes. Luckily, this is exactly what a good CRM system delivers: a holistic and comprehensive picture of prospects and customers that tracks every contact detail, preference, and interaction. But to be of true value, the CRM system must make this information easy to search, view, and access, empowering marketers to slice and dice their own data rather than rely on technical resources to do this for them.

A CRM system that exposes all prospect and customer data clearly and concisely on well-ordered, intuitive screens gives marketers a huge advantage, because it allows them to be predictive rather than reactive. If marketers can spot common themes, attributes, and behaviors, they can easily determine the attributes of their most profitable customers, resulting in better targeting of prospects.

And while some marketers require only simple segmentation, such as by industry or job title, others require a full spectrum of potential segmentation criteria—responses to past interactions, answers to specific qualification questions, products purchased, e-mails opened, and so on. CRM systems built for marketing should be capable of handling as precise or complex a segmentation query as the marketer requires. Marketers should be able to segment by any combination of data in the system, without being limited by the technology.

Of course, having richer recipient profiles and more segmentation options opens the door for more and better personalization, the heart of message relevance. All marketers know that the more relevant you can make a campaign to a buyer, the greater your chance of capturing their interest and winning their business. And with more

and more marketers using electronic channels, relevance has become increasingly critical to effective marketing, helping marketers cut through the “noise” and get their prospects’ attention. For this reason, CRM must give marketers an easy way to craft personalized marketing messages based on the contact details, preferences, and demographics available in the CRM data, and then deliver them reliably to recipients’ inboxes.

At the heart of today's data-driven, permission-based marketing is effective data management. Marketers need to know their audience, understand what kinds of messages

they want to receive and in what format, and easily identify and filter out stale or duplicate contacts and those who wish to unsubscribe. As most marketers know, however, this seemingly simple process of data and subscription management is in itself often a full-time job—and a big-time headache. A marketing-friendly

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CRM system provides tools that help minimize duplicate data, track and remove bounced e-mails, and automatically manage opt-ins and opt-outs, taking the pressure off marketers to perform this time-consuming data cleansing and management. In addition, a CRM system should enable contacts to easily manage their own profiles, subscriptions, and preferences, helping keep data clean and current without a marketer's intervention.

Ideally, marketing-centric CRM needs to help automate not only the creation and execution of marketing campaigns, but the follow-through as well—lead generation, qualification, and distribution. When leads come in, the CRM system should be able to use collected data to automatically qualify, rank, and sort them before they reach the sales force and route them according to desired criteria, eliminating time wasted on dead-end or incorrectly assigned leads.

Effective marketing and lead management addresses not only prospects who are ready to buy right away, but also those who aren't. While marketers don't want their salespeople to waste valuable selling time with prospects who aren't ready to engage, they don't want longer-term leads to fall through the cracks, either. When a colder or longer-term lead responds to a campaign, the system should be able to help distinguish these responses from hot leads and respond with a steady stream of relevant automated communications that cost-effectively nurture the lead until it is ready for more active engagement. Such features help marketers optimize sales-resource allocation while still ensuring every lead receives effective follow-through.

Effective marketing is creative, but also systematic. Once a marketing team finds a campaign style that resonates with their target audience, reusing the framework of that campaign in future promotions is an excellent way to

cut down on future effort while increasing the chance of campaign success. Good CRM systems provide a powerful engine that allows marketers to reuse successful campaigns, templates, and programs, easily re-launching and repurposing them for new audiences and contacts. CRM systems that provide template-driven automation features streamline the marketing process, thereby reducing costs while increasing campaign capacity and accelerating the speed at which polished campaigns can be developed and launched. Just as an architect creates a blueprint of a successful building project, a marketing manager should be able to set up a blueprint of a successful campaign, allowing his or her team to repeat the pattern of success for optimized productivity.

Marketers need to be experts at generating, qualifying, distributing, nurturing, and managing leads through to the sales team—and they are increasingly called upon to do all of this at a faster pace and with fewer resources. A CRM system with marketing-centric features gives marketing program managers, field marketers, and marketing specialists all the tools they need to quickly and effectively create campaigns and execute them with precision, thereby increasing productivity, refining targeting, reducing costs, and improving returns. The benefit to the sales force is more filtered, qualified, and properly routed leads that have a greater probability of converting into profitable sales. The benefit to marketers is the ability to market faster, smarter, and at a lower cost—making their jobs easier and more successful.

Marketing Directors and Executives: Give Me Insight

Smart marketing is equal parts art and science. Getting the most out of available time, budget, and resources is all about using automation and repeatable processes to streamline execution and other routine campaign components, freeing up more time to apply creativity where it counts. In addition to generating leads for the sales force, marketing directors must also optimize marketing expenditures, improve the customer experience, and strengthen brand awareness and equity in the minds of their target market. And they must do it all while keeping employee morale high, internal customers happy, and the entire department running smoothly. This has never been an easy task. To complicate matters, today's business environment has put a new keyword at the forefront of the marketing executive's mind: accountability.

ROI for corporate marketing initiatives has historically often been difficult to measure. Advertisements, sponsorships, and various other forms of promotion certainly increase brand recognition and often produce other tangible benefits and leads, but precise closed-loop tracking of results has for many marketing organizations been nearly impossible. Not only can these efforts be hard to quantify, but they also generally take a long time (sometimes years) before their effectiveness can accurately be assessed.

For today's marketing directors and executives, soft results and indefinite time horizons aren't good enough. Gone are the days when a marketer could spend significant portions of their budget on techniques that might not produce an immediate verifiable return. In this age of accountability, marketing teams must generate significant tangible results and prove the business value of every budget dollar they spend.

Marketing executives must manage and monitor their teams as they create, communicate, and deliver value to prospects and customers. Achieving a clear, real-time picture of marketing effectiveness, however, can be difficult—especially with multiple campaigns going on across multiple channels at any given time. But this

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level of insight is absolutely necessary for a marketing leader to be able to optimize campaigns and manage team performance. Without it, marketing executives cannot calculate their business value

and are at risk of finding themselves in an uncomfortable position at the next stakeholder meeting. Consequently, what marketing directors and executives need from CRM is a system that delivers the visibility and insight to help them track, prove, and secure strong marketing returns.

The Solution? CRM Built for Marketing Management Insight

CRM that's truly built for marketing addresses the need for effective marketing management and results tracking. If the one-word mandate for today's marketing executive is accountability, the one-word answer is visibility. This demands metrics that the marketing executive can use to track all campaigns in real time and quickly and precisely determine their impact on the business. With a CRM system that provides the right data at the right time in the right format, marketing leaders can accomplish all the objectives the stakeholders require of them—both long-term and short-term.

Marketing directors understand that they can't control what they can't measure. Therefore, they need a complete and clear view of the marketing campaigns their teams are executing. To meet their needs, a CRM system must deliver meaningful metrics on open rates, click-throughs, bounced e-mails, leads, opportunities, and more, and it must enable them to generate instant reports and analyses. In this era of immediacy, marketers can't afford to wait until the end of a campaign to find out whether they're achieving the results they expected. They need to zero in on what is working and what isn't so they can make adjustments in real time. To meet this need, CRM systems must provide the ability to monitor results in real time to allow for fine-tuning—all while the campaign is still underway.

Systematizing marketing processes is another way that marketing executives can optimize performance and reduce costs. An effective CRM system can help in this regard by implementing streamlined workflows and templates, which help marketers create and execute campaigns that follow best practices more quickly. With the right CRM tools in place, marketers can gain complete visibility into the entire lead generation workflow: lead capture, qualification, nurturing, distribution, and progress through the sales cycle. CRM built for marketing leaders enables executives to monitor and report on these processes and continuously drive the organization toward more effective, efficient, and accountable marketing.

In addition to efficiency and effectiveness, CRM must also allow the executive to be as flexible and adaptable as possible. The speed at which a marketing executive can adapt to the ever-changing online environment will determine how effectively his or her campaigns improve the company's bottom line. CRM built for marketing leaders helps them tailor their marketing mix in the most efficient and confident way possible, driven by ROI hard data. This empowers executives to swiftly optimize the allocation of resources and fulfill their mandate to provide effective and accountable marketing to the enterprise.

Different Marketing Departments; Different Automation Needs

It goes without saying that different markets and industries require different marketing mixes, and it follows that there is no “one-size-fits-all” approach to marketing automation and CRM. For many enterprises, for example, permission-based e-mail marketing has become a core component of their programs. The high ROI and low cost makes e-mail too attractive a channel for marketers to ignore. The return has been so high, in fact, that some companies have adjusted their marketing mix to feature e-mail as the primary source of outbound marketing communications. For other marketing organizations, however, e-mail features as a less prominent (but by no means trivial) facet of their overall marketing efforts.

While almost all CRM vendors offer some marketing modules and commercial e-mail features as part of their CRM solutions, they are often a minor component of the CRM suite that is less functionally rich than the sales and service components—a weak afterthought, rather than a true solution built for marketers. This forces companies with more advanced marketing needs to purchase standalone best-of-breed marketing automation systems and then grapple with the challenges of integration or deal with data silos between the CRM and marketing automation systems. If a company sends a relatively low volume of e-mail as part of their marketing mix, on the other hand, a costly standalone system is not a justifiable expense, and they may be stuck with a CRM system that does

little to support their marketing efforts. In both of these cases—the company with simple e-mail marketing needs and the company with advanced multi-channel marketing automation requirements—the CRM vendor fails to provide a satisfactory solution for the marketing department.

The Solution? CRM Built for Choice

CRM built for marketing is CRM that meets marketers' needs—and these needs can differ significantly from one organization to the next. Accordingly, marketers need a CRM solution that gives them choice: the ability to match a CRM marketing component to their unique needs, whether these needs are light or heavy, simple or complex. CRM should give marketing teams the tools to support their campaigns, whether these are straight-forward e-mail campaigns or advanced multi-wave, multi-channel efforts. A choice of CRM marketing options gives marketers the ability to get the features they need, without either overpaying for features they won't use or having to seek standalone solutions from third parties that won't allow them to easily leverage the power of CRM as an integrated part of their marketing.

CRM that offers products to meet the needs of different marketer profiles also offers a clear upgrade path. Moderate e-mail marketers who find themselves with increasingly sophisticated and complex needs over time can upgrade to a more advanced solution if desired. Such flexible CRM options allow marketers to be more creative, innovative, and profitable without their tools dictating how they promote their products and generate their leads.

Companies should examine their own marketing strategies and needs to decide which profile they fit into before embarking on a search for the right CRM solution. Depending on which strategies and touch-points apply, some marketing features and benefits will be more critical than others and thus drive the choice of solution. In all cases, the CRM buyer should keep in mind that choosing a CRM system is not only about cost and features, but about finding the right fit for their business. Keeping marketing's needs in mind helps a CRM initiative become not just a sales or service tool, but also a concrete investment in marketing's ability to generate revenue.

Core Principles for Marketing-Focused CRM

We have examined some of the features and abilities a CRM system should deliver to meet the needs of the marketing department. All members of the marketing team, from management on down, must be able to accomplish their tasks quickly and efficiently to meet the mandate of producing a greater return on the enterprise marketing budget. But finding the right CRM system for your marketing team is not about having a checklist of features; it's

about understanding the fundamental attributes that make a system more useful for marketing.

The keys to selecting CRM that will work for your marketing team can be boiled down to a couple of core principles. Keeping these in mind when evaluating a CRM system can help a company increase its chances of acquiring the solution that's right for them.

Need to Know What Marketing Teams Want? Ask Them!

Obvious as it seems, a lot of CRM projects fail to adequately investigate the needs of marketing users before embarking on a CRM selection process. Far too often, a list of "standard CRM features" or set of presumptions about marketing needs is used to guide evaluation criteria. To select a CRM system that truly meets marketing needs, a company should listen to the marketing users who will use the technology every day. It is crucial to understand how they are spending their time and how a CRM system could help them spend that time more effectively.

Ideally, a CRM selection committee should have solid representation from the marketing department. A focus group made up of a variety of marketing users—specialists, managers, and executive directors—should have a say in the criteria used to evaluate the system. This will not only help ensure the right system is selected, but also obtain early buy-in and understanding from different parts of the marketing team. These individuals can later become the key influencers who evangelize the new system to their peers, avoiding the sentiment that a CRM system is being "imposed" on the department by IT or management.

Beyond helping the company make a better CRM selection and obtain user buy-in, involving the marketing team in the evaluation process may actually save the company money. By talking to marketing users about what's most important and helpful to them in a CRM system, the company may learn that certain cutting-edge features, or even fairly standard ones, are not as important or applicable to them as they first imagined. This can help the company avoid the mistake mentioned above—paying a big price for bells and whistles it doesn't need.

Marketing Is Not a Cookie-Cutter Process—Your CRM Shouldn't Be Either

No two companies are alike. A company's marketing process depends on its methodology, the kinds of products or services it sells, the length and complexity of the sales cycle, and the company culture—just to name a few among myriad factors. For many companies, their unique and creative marketing processes and approach constitute a differentiator and a competitive advantage. For companies looking to become more customer-driven, this is especially true: the lead-generation process is the first and most critical part of the customer experi-

ence—the one that makes the prospect decide whether to become a customer in the first place. It must be methodical, consistent, and a reflection of the superior customer experience the company desires to project.

Accordingly, a CRM system has to be a solution that enhances, facilitates, and embeds the company's marketing process, rather than dictating it. It needs to have the flexibility to cost-effectively model your company's unique practices, templates, and workflows to solidify, rather than neutralize, your company's brand identity and competitive advantage.

Pivotal CRM: CRM Built For You

Pivotal CRM is the system of choice for companies seeking customer relationship management software that can fully and cost-effectively satisfy all their users' expectations. Built with the user experience in mind, Pivotal CRM offers unparalleled flexibility and customizability, enabling companies to tailor the system precisely to the needs of their distinct user groups, including the marketing team.

With a clean, Microsoft-style interface, Pivotal CRM is a familiar and intuitive system for end users accustomed to using other popular Microsoft products, reducing the learning curve and increasing the speed of user adoption even for non-technical users. A personalizable dashboard allows the user to create a "home base" that is truly a personal hub, integrating pre-built, custom, or third-party SharePoint Web Parts to combine their favorite data feeds and applications with personal shortcuts and information

such as lead generation metrics, upcoming marketing campaigns and events, to-do lists, e-mail, and their Outlook calendar. This dashboard becomes marketing users' "one-stop shop" for customer, prospect, and campaign information, as well as daily activity management.

Pivotal CRM's powerful querying capabilities make it easy for marketers to find and assemble the information they need—quickly

Pivotal CRM's role- and task-based navigation enables marketing users to beeline immediately to the tools that are most relevant to them, bypassing those they don't use and simplifying their experience. Different role-based pages can be created for any position, enabling the company to offer not just a "Marketing" CRM area, but "Marketing Management" area as well, further tailoring and streamlining the user experience. Each area can have custom lists of role-specific links, tools, and reports for quick access, saving users time finding the information and tools they need most. Unused areas can be hidden to further simplify the interface, and custom rule-based security ensures users only see the information and tools they need to access.

Built on the Microsoft .NET Framework, Pivotal CRM seamlessly integrates with the programs that form the backbone of marketing team members' daily activities:

Microsoft Outlook, SharePoint, and the Office suite. The applications are so closely integrated with Pivotal CRM that they function as though embedded within the system, meaning that marketing users don't need to switch back and forth between applications; they need never leave the CRM system to create e-mails, schedule meetings, create documents and spreadsheets, and more, making the CRM system their number-one resource and tool. Similarly, information in Pivotal CRM can be seamlessly looked up and used within Microsoft Office, Outlook, and SharePoint, so it need only be entered once to be used across multiple applications. This makes mail merges, for example, a breeze for marketing users to perform.

Pivotal CRM's powerful querying capabilities make it easy for marketers to find and assemble the information they need—quickly. Queries can reference multiple tables in a single search, making complex searches and segmentation simple and enabling creation of sophisticated target lists in seconds. For example, users can easily call up lists of customers in a specific account manager's region who have bought a certain product to generate a target list for cross-selling—and then perform a mail-merge to instantly generate marketing e-mails, letters, or faxes to the list, within seconds! All search results can be exported into Microsoft Excel in a click, making it easy to work with data and create charts and graphs.

Pivotal CRM makes it easy for marketing managers to take full advantage of the rich data within their CRM system, using it to generate high-quality leads and track them through the sales cycle to prove marketing's invaluable impact on revenues.

Flexible Options to Meet Your Marketing Needs

As outlined above, marketing organizations differ in the depth and complexity of marketing functionality they need from a CRM solution. Recognizing this, CDC Software offers companies a choice of marketing components to complete their CRM suite.

Pivotal eMarketing: A User-Friendly Embedded E-mail Marketing Tool

Pivotal eMarketing offers an easy-to-use e-mail marketing solution embedded right within Pivotal CRM that lets you segment your audience, send electronic communications, and analyze the success of your campaigns, all within the CRM system. Marketers can save time and resources by using Pivotal eMarketing to schedule and automate e-mails and re-run past campaigns automatically to new contacts.

Pivotal eMarketing offers powerful e-mail marketing capabilities at a low cost. Marketers can use the Pivotal CRM Static List feature or search capabilities to create precisely segmented lists for e-mail delivery based on customer demographics and opt-out information, then use Pivotal eMarketing to execute HTML and text e-mail

campaigns featuring personalized, relevant content for each recipient—all using a simple guided process that any non-technical marketing user can follow. Sender names, recipient names, and other content can be personalized to ensure message relevance, and templates can be created and reused to produce attractive e-mails and ensure branding consistency.

Pivotal eMarketing allows campaigns to be launched immediately or scheduled to launch at a specific date and time, and it enables marketers to easily see campaign results. Users can see individual details for each contact,

such as how many campaigns a contact has received, their e-marketing preferences, and their opt-out status. They can also see aggregate results for a full campaign, including read e-mails, click-through tracking results, and bounce-back errors.

Marketing is a critical part of your enterprise relationship management strategy, and thus deserves special consideration in CRM selection

Furthermore, using Pivotal eMarketing, marketers can track their campaigns' revenue contributions within their Pivotal CRM system, measuring pipeline and sales impact from e-mail marketing projects.

CDC MarketFirst: Sophisticated Marketing Automation for Advanced Marketing Needs

While Pivotal eMarketing enables a marketer to run traditional one-dimensional e-mail marketing campaigns, CDC MarketFirst offers a full marketing automation and lead management solution that empowers marketers to conduct even the most complex multi-channel marketing campaigns, integrating marketing e-mail with print advertising, multimedia, direct mail, and more.

Marketers can achieve higher response rates and better lead quality with precisely targeted campaigns based on data captured at every point of interaction. CDC MarketFirst provides marketers with a premier marketing automation and lead management system that enables them to effectively manage sophisticated multi-wave, multi-channel, multi-lingual marketing programs, event marketing, and surveying.

With CDC MarketFirst, marketing departments can systematize marketing processes and create sophisticated results-oriented campaigns that span multiple channels, such as direct mail, e-mail, and print advertising. Not only this, but marketers can measure marketing performance with precision and certainty. Integrated with Pivotal CRM, CDC MarketFirst gives companies the power to track leads through the full sales cycle to prove business value.

With CDC MarketFirst, you can run fully automated marketing campaigns that adapt themselves to your target market, increasing relevance with every prospect touch. You can also design your campaigns to “react” to

your targets—sending specific communications based on triggers such as website visits, survey responses, and life events. You can fine-tune CDC MarketFirst to trigger automatic, pre-programmed campaigns when a target indicates, through a specific campaign response or action, that they are at the right stage. This ensures that you'll reach your targets with the right message at the right time for them—not just when you decide to launch a campaign. Plus it requires no additional effort for the marketing or sales team—it perpetually “runs itself!”

Because the ability to measure effectiveness is so important to today's marketers, CDC MarketFirst was built with accountability in mind. CDC MarketFirst allows you to prove true business value by providing metrics to track, analyze, and improve marketing performance. For example, you can test campaigns on sample lists before widespread launch to determine effectiveness and refine messaging. You'll be able to monitor campaign responses as they are being executed, as well as track click-throughs, open rates, leads generated, and lead quality. When CDC MarketFirst is integrated with Pivotal CRM, you can also track leads through the sales process to determine whether they result in new business, quantifying direct impact on revenues. With CDC MarketFirst, you'll not only be able to improve ROI, you'll be able to prove it to any stakeholder at any time.

Conclusion: CRM Can Be the Secret to Marketing Success

Marketing is almost always the first contact a prospect or customer will ever have with your company. Because first impressions are the most lasting ones, marketing is a critical part of your enterprise relationship management strategy, and thus deserves special consideration when selecting a CRM system. With the right CRM system, a marketing team can gain greater insight into its customer and prospect bases, refine targeting and segmentation, improve message relevance, and automate campaigns to improve consistency, productivity, reach, and capacity. Furthermore, as measurement and accountability have become such fundamental parts of marketing over recent years, a company's CRM system can become the essential tool for tracking campaign success and linking it back to sales and revenues, paving the way for solid ROI calculation and continuous improvement.

Since no two companies or marketing teams are the same, there's no single “one-size-fits-all” CRM solution that is an equally appropriate choice for all organizations. What's most important is to understand the value a marketing team can derive from CRM and the necessity of taking the time to understand the features and fit that will work best for your marketers and executives.

By paying special attention to selecting a CRM system that offers strong marketing tools that fit your users' needs, you can confidently select and implement a CRM solution that every marketing user feels is built just for them.

The “CRM Built for Me” Series

The “CRM Built for Me” Series addresses the critical importance of customization, configuration, and personalization to the success of any company’s customer relationship management strategy. CRM is first and foremost about creating a customer-centric organization, but the best CRM projects deliver both customer satisfaction and employee enablement. CRM needs and usage vary across departments, but to deliver full value and a truly holistic client view, users across sales, marketing, and customer service—as well as the back-end IT team implementing and maintaining the system—must all be equally well-served by the CRM solution. The white papers, demos, and other components of the “CRM Built for Me” Series reveal why flexible CRM that is tailored to the needs of the company, the department, and the individual user deliver superior results.

Experience CRM That’s Built for You

To learn more about how Pivotal CRM can meet your organization’s unique needs, call us at +1-877-PIVOTAL or visit us at www.PivotalCRM.com.