ClickDimensions

Grow Your Business with
Nurture Marketing

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

contents

Introduction

What is nurture marketing?

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 its simplest form, nurture or "drip" marketing is the process of sending a series of communications (typically emails) to a prospect over a period of time in order to drive sales or generate interest in your product. However, by using marketing automation to produce and execute your nurture campaigns, you can do so much more.

Automated nurture programs include decision points and actions based on how the recipient interacts with your message, allowing for a very customized experience. By tailoring your nurtures to a specific audience and sending your messages at the right time, a nurture program can build rapport with your customers, increase trust in your brand, save valuable sales resources, and convert a higher percentage of leads into paying customers.

While the ideas and concepts are still helpful even if you are not working with these platforms, all of the examples in this eBook were created using Microsoft Dynamics CRM and ClickDimensions marketing automation solution. If after reading this eBook, you would like more information about marketing automation for CRM, please visit www.clickdimensions.com or contact us at marketing@clickdimensions.com.

Goals

According to the Aberdeen Group, it takes, on average, 10 marketing-driven "touches" to convert a lead into a revenue-generating customer. That's a lot of work! Nurture programs automate the process of contacting these prospects, saving time and money.

Nurture programs bring value to both the marketing and sales teams, and can help to close the gap between marketing and sales. Marketing can construct a nurture campaign that includes the exact messaging that they want presented to the prospect or customer, and sales can determine the appropriate nurture in which to place a prospect based on their level of buying readiness.

Successful nurture programs will:

- 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

The key to nurture programs is repetition. The more touches your company makes with a buyer, the more mindshare it captures. When a prospect is looking for a product or service like yours, the credibility and trust that you have established with your brand by providing relevant, timely information is what will attract the buyer to your company.

50% **$33%**

Companies that excel at lead nurturing generate 50% more sales-ready leads at 33% lower cost. (Forrester Research)

Who should be nurtured?

Nurture programs can work at any level – prospects, leads and customers – so the first step when building a nurture campaign is to evaluate who you wish to reach and how to best reach them. Nurtures are not a one-size-fits-all solution; messages must be tailored to the target audience.

When creating a persona for your nurture campaign, consider these questions:

- Where is this person in the buying cycle?
- How aware are they of our products and services?
- What are their needs at this time?

For example, perhaps you want to target prospects that are in an awareness phase. They are either unaware of your company, or they know very little about it. They need basic information about your product or service and how it can meet their needs. Messaging for this audience will be very different than what would be sent to a qualified lead that is purchase-ready.

Helpful Hint

Examples of specific nurture programs for each stage in the buying cycle are detailed later in this eBook.

Ways to nurture

Any "touch" a company makes with an individual could be part of a nurture program:

- Email
- Direct Mail (postcard, letter, brochure)
- Social Media
- SMS/Text
- Phone/In Person

However, the real power behind nurture campaigns is found by implementing a marketing automation solution. Using marketing automation, a relevant stream of messages can be sent and a variety of automated actions can be triggered as the prospects begin to respond. A marketer can create a "path" for prospects to follow based on their interactions with the messages. As buyers become more interested in the product, they receive more customized information.

Lead scoring

Nurture campaigns are a great way to cultivate prospects into interested leads without committing valuable sales resources, but how do you know when a lead is ready to buy? Through marketing automation, lead scoring can help determine the level of interest a prospect has taken in an organization by measuring their interactions.

Using the lead score, a sales team can quickly and easily determine which leads to pursue. As individual visitor activity is tracked through interaction with emails and web pages, each visitor accumulates a score based on his or her email clicks, visits, page views and more. A marketer can determine which actions are most important by assigning them a higher score value. The higher the overall lead score, the more interested the prospect.

Lead scoring can work hand-in-hand with nurture programs. As the lead score is a good indicator of the prospect's stage in the buying cycle, salespeople can put prospects into specific nurture campaigns based on their interest level.
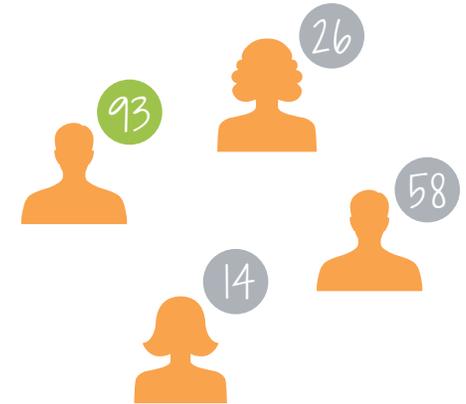
Best practices

The last thing a nurture program should do is drive prospects away with annoying emails. When creating a nurture campaign be mindful of:

Content. Create campaigns that contain information that prospects, leads or customers want to receive. Make sure that content is relevant to the audience.

Timing. Schedule messages appropriately based on the type of nurture. A nurture for sales-ready leads could have a shorter timeline than a nurture for "cold" leads that touches the prospect only a few times per year.

50% of qualified leads are not ready to purchase immediately (Gleanster Research)

Targeting and Personalization. One of the benefits of a nurture program is that messages can be customized based on the interactions a prospect has with the emails. Use this capability to its fullest extent with dynamic content and targeted messaging. Don't just create a series of generic emails that are sent over and over again, create personalized experiences.

Consistency. Nurture programs help to establish trust and credibility. Make sure that messages are consistent with and reinforce the company's brand.

Permission. Ensure that nurture emails don't violate spam rules. For example, the CAN-SPAM Act in the U.S. and CASL in Canada include specific guidance for giving email recipients the opportunity to opt-in or opt-out of receiving emails.

Tip! While consistency is important, every email should not be identical. Consider using different types of emails in nurture campaigns – perhaps some HTML emails with graphics that highlight an offer, and some plain text emails that look like personalized, one-on-one emails from a salesperson.

Great tips for marketing with Microsoft Dynamics CRM

John Gravely
Thursday, December 11, 2014 at 1:21 PM
To: Heather Wright

Click here if you are having trouble viewing this message.

ClickDimensions

Great tips for Marketing with Microsoft Dynamics CRM!

Heather,

If you want great articles, tools and tips on better marketing with Microsoft Dynamics CRM, then sign up for our Microsoft CRM Marketing newsletter. Delivered monthly, the newsletters contain all original content written specifically for marketers who are using Microsoft CRM.

Subscribe at www.clickdimensions.com/newsletter. We never share our data, and you can unsubscribe at any time.

And please don't hesitate to reach out to me if I can answer

SUBSCRIBE NOW!

Demo of ClickDimensions marketing automation for Microsoft CRM

John Gravely
Tuesday, December 9, 2014 at 1:41 PM
To: Heather Wright

Heather,

If you can spare 30 minutes, I'd love to schedule a personal demonstration of the ClickDimensions marketing automation solution for you and your team.

As the only marketing automation vendor that is 100% focused on Microsoft Dynamics CRM, ClickDimensions can help your organization generate more leads and more effectively prioritize and manage your lead pipeline using CRM. If you'd like to see how, watch our 7-minute video or contact me directly to arrange a convenient time for a demo.

As always, if you have any questions, please reply and I will be happy to help you.

Thank you,

John Gravely
ClickDimensions
john.gravely@clickdimensions.com
www.clickdimensions.com

Nurture marketing at each stage of the buying cycle

Through well-planned nurture campaigns, marketers are able to reach potential customers during each stage of the buying cycle – awareness, research, evaluation, purchase and retention. Let's take a look at each stage and see how nurture programs can impact sales.

Buying Cycle

01 Awareness
02 Research
03 Evaluation
04 Purchase
05 Retention

Once a lead has been captured, the first "awareness" nurture campaign should contain messaging that provides an introduction to the company and its offerings. This is not the phase for high-pressure sales tactics; merely begin a dialog with the prospect. Introduce them to products or services, provide links to blog articles, or offer to send them a brochure for more information.

Stage I: Awareness

In this first stage, customers are just realizing that they have a business need. They are unsure of which products or services will help them solve their problems. It is important in this phase to make prospects aware of your brand and stay top-of-mind so that when they decide to move forward with a purchase, your company is on their radar.

Use social media, online advertising, the company website, or other marketing channels to capture the attention of new leads. Whether through a contact form, newsletter sign-up, or eBook landing page, provide a method for prospects to provide their contact information and opt-in to receiving emails.

Using the ClickDimensions marketing automation solution with Dynamics CRM, lead records can be created in CRM each time a new visitor submits their information through a web form.

Helpful Hint

Stage 2: Research

Forrester suggests that today's buyers are anywhere from two-thirds to 90 percent of the way through the buying process before they reach out to a vendor. So what are they doing during that time? Research. This is the phase where customers are shopping around. They are learning what is necessary to solve their business problem and investigating potential solutions.

Customers typically spend the greatest amount of time in this phase, so a "research" nurture may have a longer timeline than others. In this nurture, send email messages that feature content that will educate customers about how the product or service can solve their business problem. Invite them to attend a webinar, provide a link to download an eBook, or direct them to an overview video. By providing the information they need, your organization becomes a trusted resource.

Stage 3: Evaluation

In this stage, the rubber meets the road. Customers have narrowed down their decision to a few options, and they are evaluating possible vendors. At this point, it is important to build credibility and trust with the customer and overcome any objections – why should they go with your product or service over the competition?

The emails in an "evaluation" nurture should contain information that will help solidify the product or service as the best solution. Include links to case studies or white papers, offer to schedule a live demo, or provide testimonials from other customers.

If it hasn't already happened, customers should be introduced to a salesperson at this stage. You may also wish to include direct contacts (via phone calls or onsite visits) into your nurture programs. In the nurture, an action can trigger a CRM workflow that creates a phone call activity for the salesperson, letting them know it's time to follow-up with the lead.

For more information about creating compelling content, download our ebook, *Hooked on Content: Developing a Successful Content Marketing Strategy with Microsoft Dynamics CRM.*

Stage 4: Purchase

During this stage, customers are making a final purchasing decision. Email messages in the "purchase" nurture will have strong calls to action and could include buying incentives such as free trials, coupons or limited-time offers.

And don't forget about service after the sale. A "post-purchase" nurture campaign could be used for implementation and onboarding. Sending regular emails to new customers about a product or service ensures that they have a successful transition.

47%

Nurtured leads make 47% larger purchases than non-nurtured leads.
(Annuitas Group)

Stage 5: Retention/Loyalty

You successfully manage customer accounts in CRM, but are you communicating with your contacts on a consistent basis? Marketing automation is not just for marketing! Nurture programs are a great way to keep current customers engaged with your company and brand. Create a "retention" nurture to send subscription renewal reminders. Or use a "loyalty" nurture to educate customers about new features, provide them with valuable content, or invite them to webinars and events.

Tip!

In the examples above, separate nurture programs were created for each stage in the buying cycle. However, you could also transition from one stage to another within the same nurture campaign. For example, start with messaging that raises awareness of your brand, and then transition into providing educational content as time progresses and the prospect enters the research phase.

This nurture program is used when a lead provides their information at a trade show booth (via badge scan, business card drop, etc.).

If the individual did not have an existing lead or contact record in CRM, they are considered a new prospect. The individual is added to the nurture, which sends a series of emails introducing the prospect to the company's products and services.

The nurture responds to the recipient's interactions (clicking links in the emails) by providing more detailed information and alerting a salesperson as the prospect shows interest.

The first email references the trade show visit

If the prospect shows interest in the first 2 emails, the salesperson is notified

The nurture could continue with additional emails at any point in the tree

If no interest is shown, the lead is removed from the nurture marketing list

Dynamic content from CRM is used to address and sign the email

Thank you for stopping by our booth

Bob Smith
Thursday, December 11, 2014 at 1:19 PM
To: Carla Turner (cturner@acme.com)

Carla,

It was nice to meet you at the Motors and Widgets Trade Show last week. I hope that you enjoyed the conference and found it worth your time.

If you have any questions about Wilson Widgets and how we can streamline your production line, please give us a call at 800.555.1234 or visit our website at www.widgets4u.com.

Best regards,

Bob Smith
Sales Representative
Wilson Widgets

Nurture Tasks Panel

Save | Run | Pause | Resume | Cancel

NURTURE TASKS
- Send Email
- Wait
- Has prospect clicked link?
- Has prospect opened email?
- Assign
- Notify user
- Notify team
- Add to list
- Remove from list
- Run CRM Workflows

Workflow

Start
- Send Email (If you enjoyed the white paper, watch our video)
- Wait: 2 Days
- Has prospect clicked link?
  - Yes
    - Send Email (Free eBook: Human Resources for the Small Business)
    - Wait: 2 Days
    - Has prospect clicked link?
      - Yes
        - Send Email (Have HR questions? Attend our weekly webinar)
        - Wait: 2 Days
        - Has prospect clicked link?
        - End Branch
      - No
        - Wait: 1 Month
        - Send Email (Have HR questions? Attend our weekly webinar)
        - Has prospect clicked link?
        - End Branch
    - End Branch
  - No
    - Wait: 2 Weeks
    - Send Email (Free eBook: Human Resources for the Small Business)
    - Wait: 2 Days
    - Has prospect clicked link?
      - Yes
        - Send Email (Have HR questions? Attend our weekly webinar)
        - Wait: 2 Days
        - Has prospect clicked link?
        - End Branch
      - No
        - Wait: 6 Weeks
        - Send Email (Have HR questions? Attend our weekly webinar)
        - Has prospect clicked link?
        - End Branch
    - End Branch
- End

Annotations (left/center, handwritten)

The first email is an Invitation to watch a video on the same topic as the white paper

If the prospect clicks a link, the next email is sent after only 2 days

If the prospect does not click a link, the same message is sent, but at a slower pace

Right Column

A lead or contact is placed on this nurture program once they have shown an interest in the company's products or services. In this example, the nurture is triggered by downloading a white paper. The nurture sends a series of emails that provide the prospect with tools to educate her about the product (video, eBook and webinar).

If the prospect does not interact with the emails, the nurture will continue to send messages at a slow pace. However, if the prospect interacts with an email -- indicating interest -- the subsequent messages are delivered more quickly.

Email Preview

MESSAGE

Delete | Reply | Reply All | Forward | Meeting | Attachment | Move | Junk | Rules | Read/Unread | Categorize | Follow Up

Free eBook: Human Resources for the Small Business

Allison Johnson
Thursday, December 11, 2014 at 1:19 PM
To: Rhonda Caswell (rcas13@hrcompany.com)

EBOOK FREE DOWNLOAD

Rhonda,

I thought you might be interested in our latest eBook, "Human Resources for the Small Business." The book offers tips and tricks for managing HR topics in a small business setting. If you have any questions about the book, or would like to discuss how HR Plus can help your business, please do not hesitate to contact me.

Best regards,

Allison Johnson
HR Plus
800.555.1234

Provides information to educate the prospect

## Evaluation Nurture Campaign
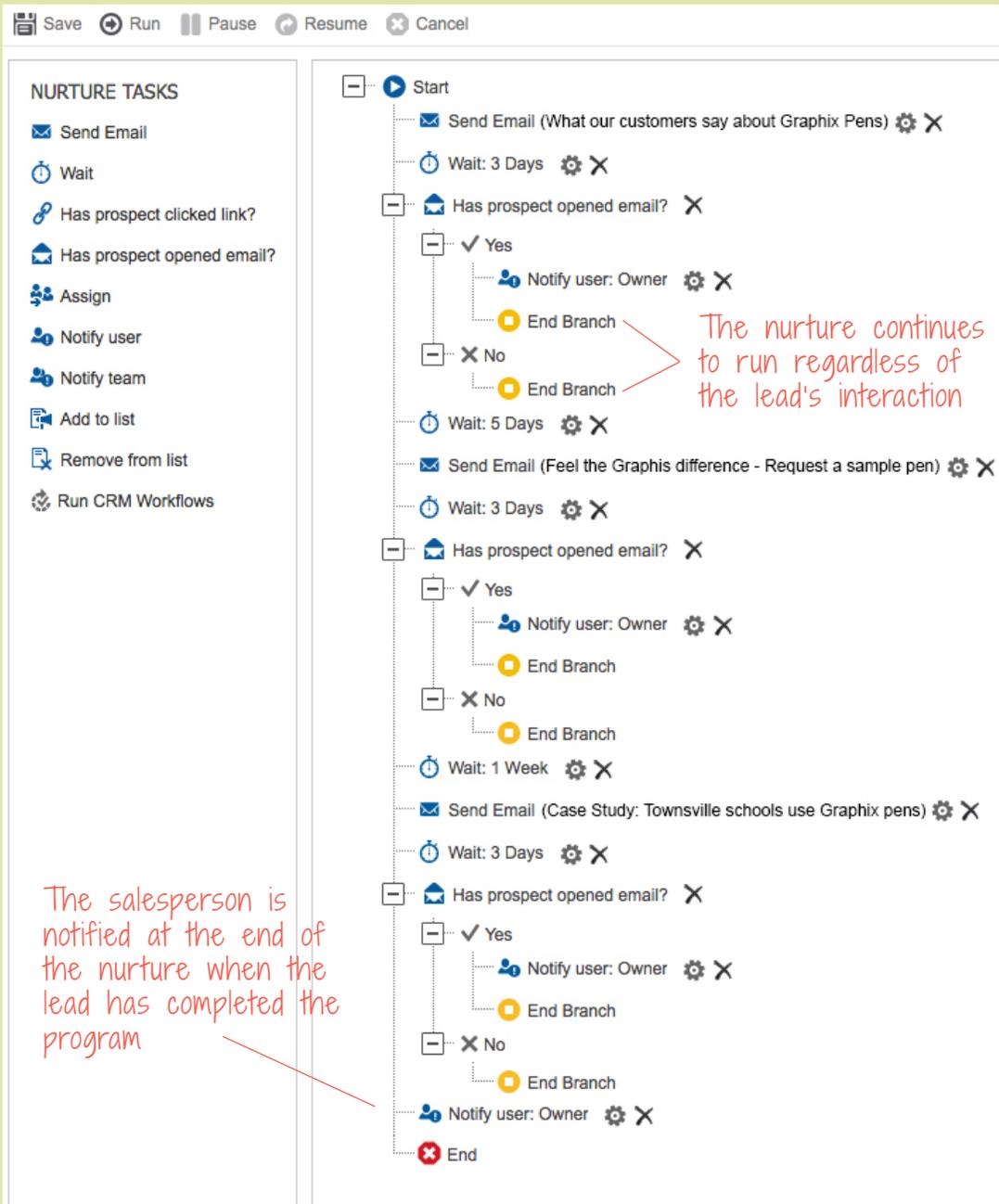
This program nurtures qualified leads that the salesperson is actively working. The nurture saves the salesperson time and effort by automatically sending a "touch" to the lead every few days.

The nurture notifies the salesperson when a lead interacts with an email; however, the program keeps running until the salesperson actively removes the lead from the nurture. This provides the salesperson with control over whether to stop the nurture and contact the lead directly, or continue to send the lead emails via the nurture program.

The nurture continues to run regardless of the lead's interaction

The salesperson is notified at the end of the nurture when the lead has completed the program
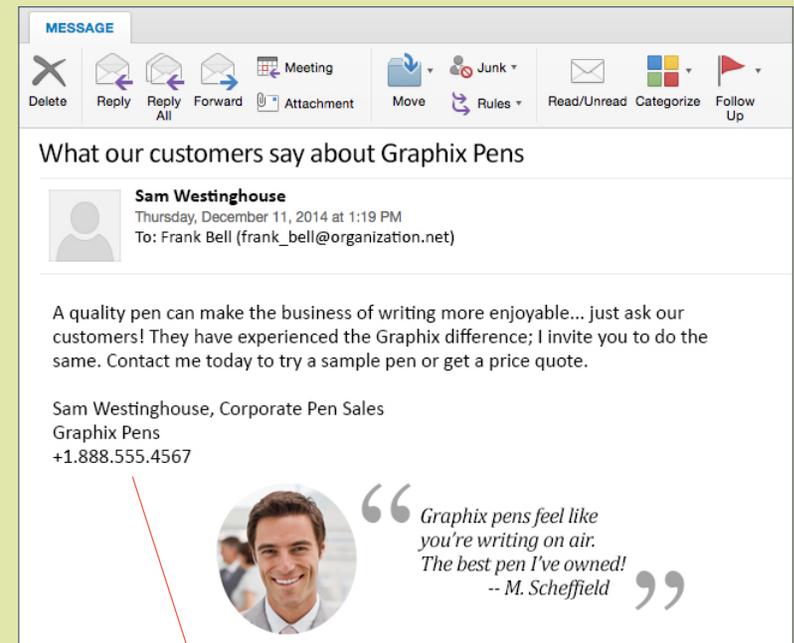
Regular communications are sent to the lead, without taking valuable time from the salesperson
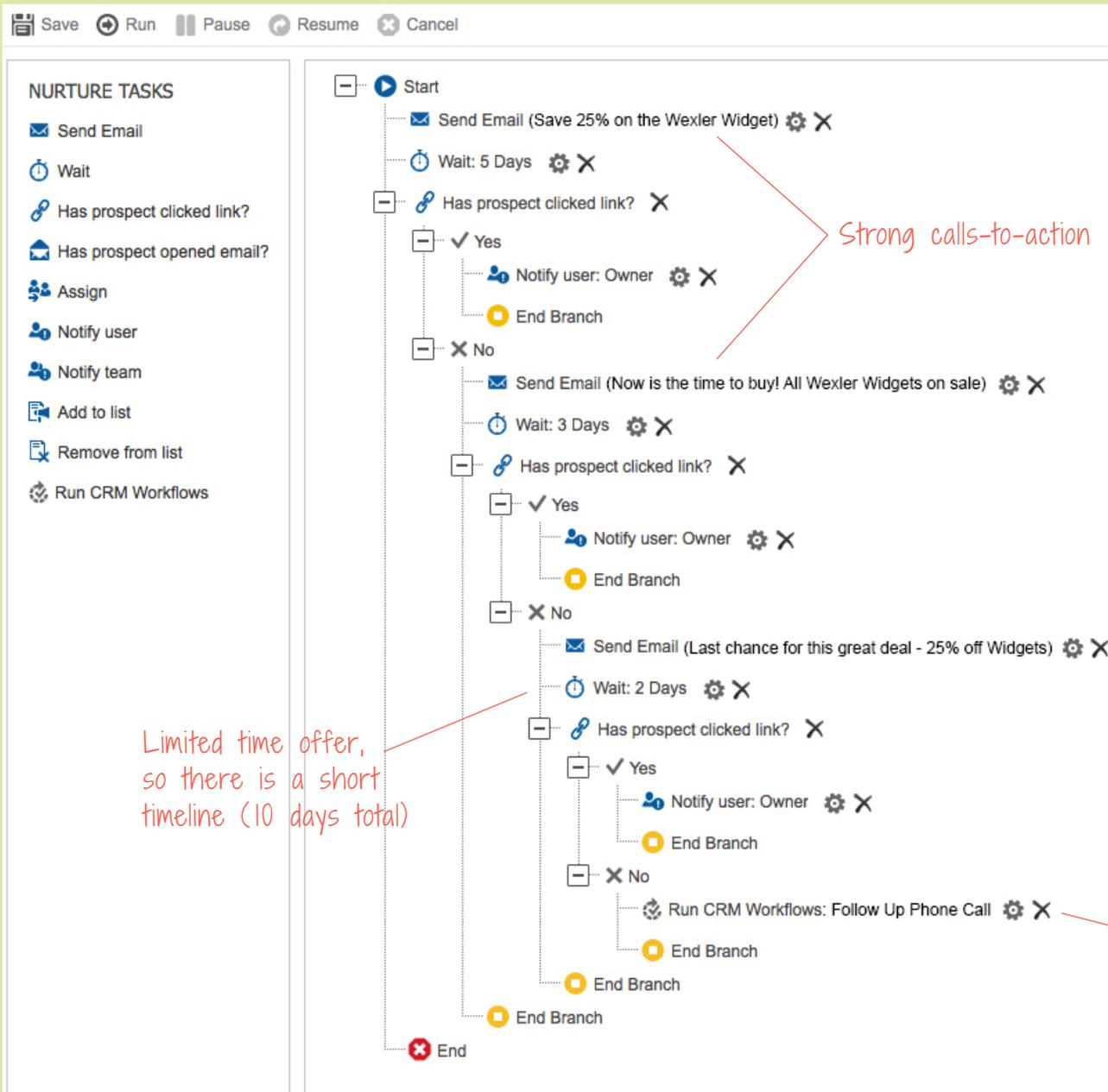
This nurture program is used to entice buyers to make a purchase by sending them a series of discounts and offers. The emails stop when the recipient clicks a link in the email to complete the sale.

If the prospect does not interact with the emails, the last step in the nurture is a CRM workflow that creates a task for the salesperson to follow-up with a phone call.

Strong calls-to-action

Limited time offer, so there is a short timeline (10 days total)
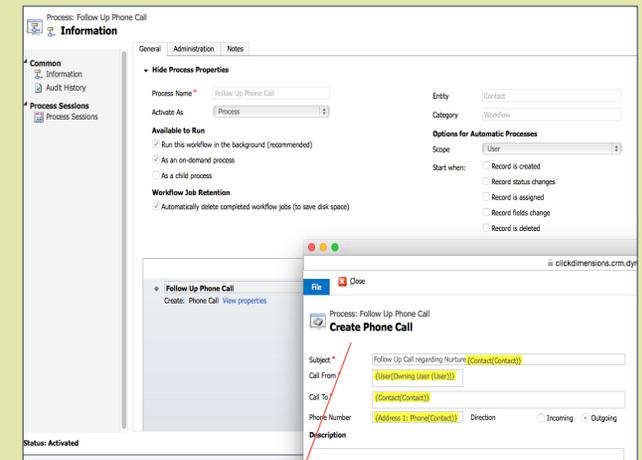
CRM workflow is triggered by the nurture to create a follow-up task
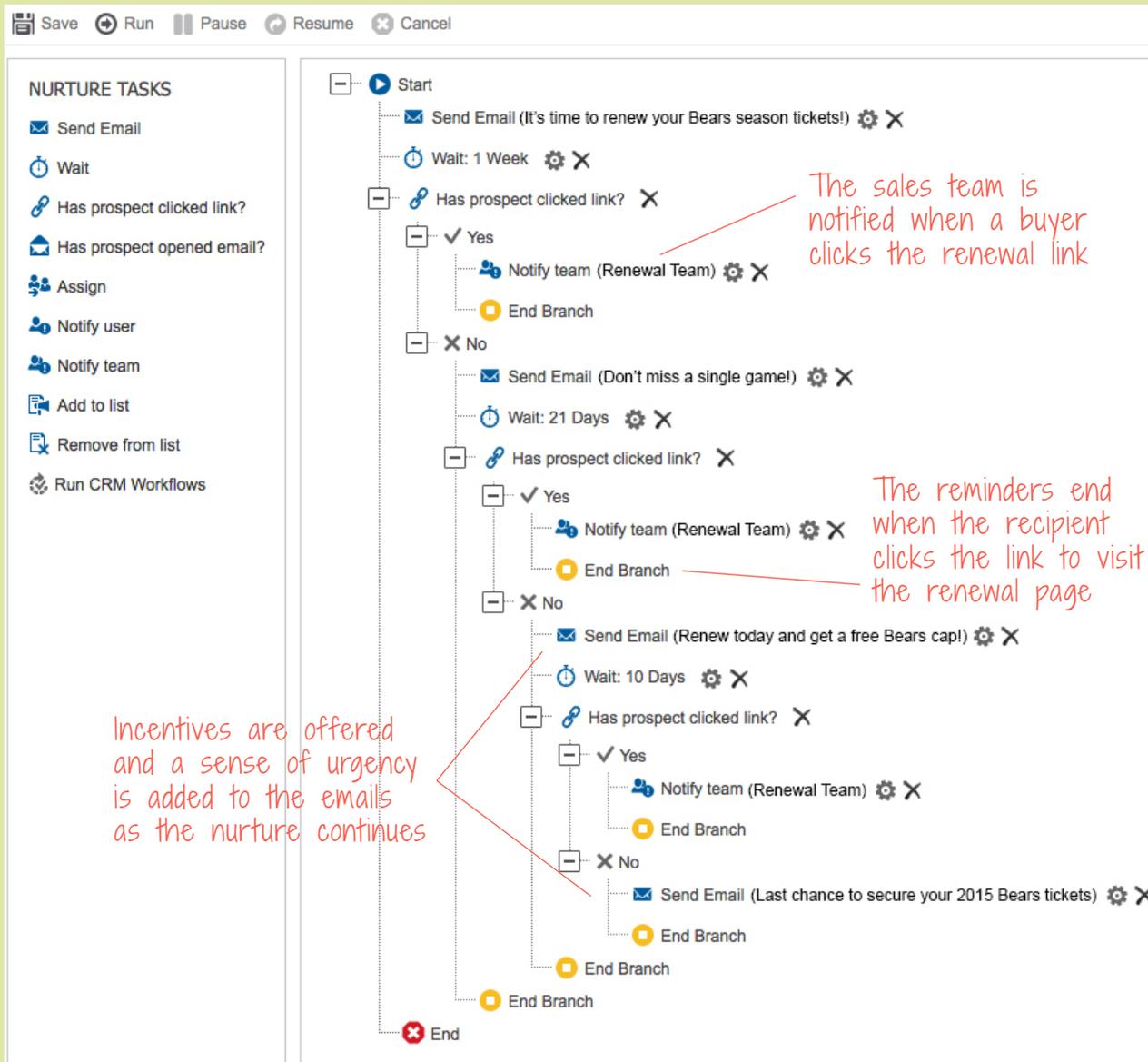
This retention/loyalty nurture is used to encourage season ticket holders to renew their seats for the upcoming season.

There is a single call to action in the emails -- a link to a renewal landing page. After each email, the nurture checks to see if the recipient has clicked the link to the renewal page. If not, the nurture continues to send reminder emails.

The workflow diagram contains:

NURTURE TASKS
- Send Email
- Wait
- Has prospect clicked link?
- Has prospect opened email?
- Assign
- Notify user
- Notify team
- Add to list
- Remove from list
- Run CRM Workflows

Workflow:
- Start
- Send Email (It's time to renew your Bears season tickets!)
- Wait: 1 Week
- Has prospect clicked link?
  - Yes
    - Notify team (Renewal Team)
    - End Branch
  - No
    - Send Email (Don't miss a single game!)
    - Wait: 21 Days
    - Has prospect clicked link?
      - Yes
        - Notify team (Renewal Team)
        - End Branch
      - No
        - Send Email (Renew today and get a free Bears cap!)
        - Wait: 10 Days
        - Has prospect clicked link?
          - Yes
            - Notify team (Renewal Team)
            - End Branch
          - No
            - Send Email (Last chance to secure your 2015 Bears tickets)
            - End Branch
        - End Branch
    - End Branch
- End

The sales team is notified when a buyer clicks the renewal link

The reminders end when the recipient clicks the link to visit the renewal page

Incentives are offered and a sense of urgency is added to the emails as the nurture continues

Email (Outlook message):
Renew today and get a free Bears cap!
Boomtown Bears
Thursday, December 11, 2014 at 1:19 PM
To: Steve Cole (steve.cole@mail.com)

Renew your season tickets by August 1 and get a free Bears cap!
Don't lose your season tickets:
Section 214, Row 3, Seats 15 & 16
The time to renew is now! And if you order by August 1st, we'll send you a bears cap!
Click here to order

The seat location is stored in CRM. The email is customized for each recipient using dynamic content

Measuring Success

Tracking and evaluating nurtures

One of the most important steps in implementing a nurture campaign is tracking the results and measuring its success. Especially if you have never used nurture marketing campaigns, it's critical to find out how they are affecting lead conversions and overall sales.

47%

of B2B marketers say they either close fewer than 4% of all marketing-generated leads, or they don't even know this metric. (Forrester Research)

Reporting in CRM

Using ClickDimensions marketing automation tools combined with CRM makes reporting easy. All marketing data – email deliveries, opens, clicks, etc. – is stored within Dynamics CRM so the information can be used to generate dashboards and reports. For example, here at ClickDimensions, we created a dashboard that displays monthly email statistics for each of our content marketing nurtures. We are able to see at a glance how each nurture is performing.

It is also important to find out what is working and what is not working within each nurture. Analyze the individual emails being sent out as part of the nurture program to see how successfully they reach the audience. In the report to the right, we are comparing emails sent from our eBook nurture to see how prospects are responding to each message.

One of the interesting things we learned from this report is that our text-only emails are getting a better click/open rate than
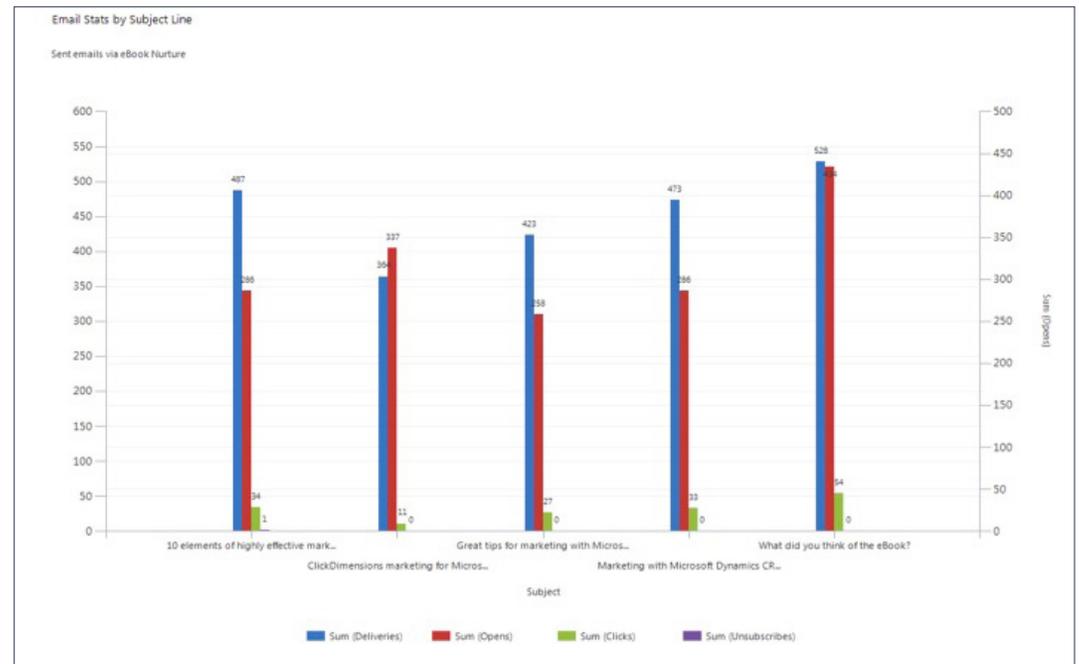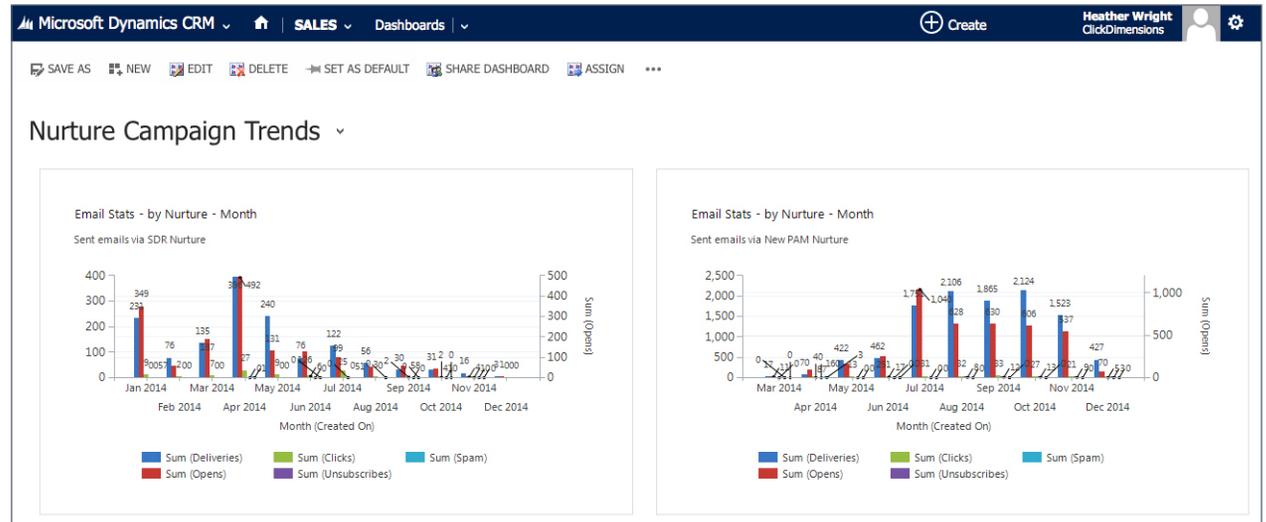
the more graphical, HTML-based emails. This leads us to believe – at least for this nurture – that prospects respond better to more personal emails that appear as if they are coming directly from the salesperson.

Don't be afraid to make changes to your nurtures "mid-stream." If you find that a particular email is performing poorly, pause the nurture and change your message. Small tweaks along the way could result in large dividends.

Measuring Return

It's important to measure the effectiveness of nurture campaigns to determine if they are having a positive effect on your marketing efforts. In CRM, there are many ways to accomplish this task, but for our eBook nurture, we decided to add a custom checkbox field to track all contacts that had been nurtured. The field is checked using CRM workflow when an individual is added to the nurture.
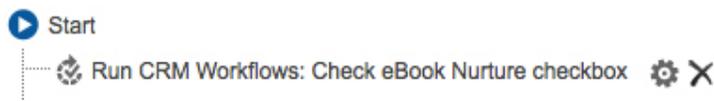
Now, using this field, we can run queries to see not only how many leads or contacts have been nurtured during any given time period, but also how many opportunities were created where a lead had been nurtured, and how many new accounts include nurtured contacts.
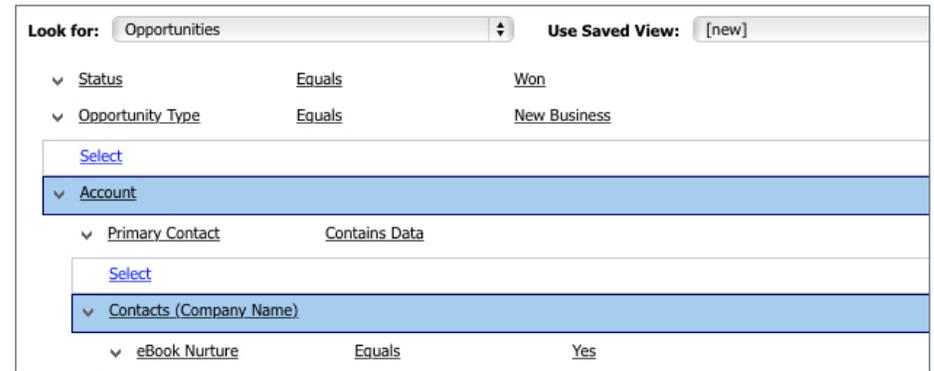
Comparing the results to a similar group of leads that had not been nurtured, we can measure the effectiveness of the nurture program. For example, during the same time period:

	Prospects (Leads)	Qualified Leads (Opportunities)	Lead Conversion Rate
Without nurturing	312	19	6.1%
With nurturing	352	33	9.4%

This same comparison can be made with closed business:

	Qualified Leads (Opportunities)	Won Opportunities	Close Rate
Without nurturing	19	4	21%
With nurturing	33	11	33%

Adding a nurture program should require very little – if any – additional spending on lead generation, so, for the nearly the same budget, you are now converting more leads and closing more sales!

Data-driven nurtures

Data stored in CRM can also be used when creating nurture programs. Statistics such as industry and company size for business-to-business campaigns, or age, gender or location for business-to-consumer, can help tailor the message to a particular audience.

Using ClickDimensions web tracking data, you can gain even more knowledge about prospects. What ads are people clicking on to get to your website? On what pages do they spend the most time? Knowing which content your prospects are most interested in can help to target the message in nurture campaign emails.

Mine an existing CRM database to drive sales. Consider creating a marketing list of current customers that have not purchased your latest product. Nurture this list with a campaign that introduces and upsells them on the new solution. Nurture programs are a low cost, low effort approach that could mean generating revenue that would otherwise go untapped.

Tip! Don't forget to look at data from another angle – reviewing lost opportunities can provide good insight into the needs of prospects. What were the buyer hesitations or objections? Overcome these objections in your nurtures, especially during the evaluation stage of the sales cycle.

Case Studies

Nurture marketing at ClickDimensions

The ClickDimensions marketing automation solution for Microsoft Dynamics CRM includes a nurture builder that is embedded directly inside CRM. This allows you to easily add existing CRM leads and contacts into a nurture program, notify salespeople when a lead or contact takes an action, and measure the results of your nurture campaigns using CRM dashboards and reports. The ClickDimensions drag-and-drop builder includes a variety of nurture actions such as sending an email, checking email opens/clicks, waiting a period of time before the next action begins, adding/removing individuals from CRM marketing lists, and much more.
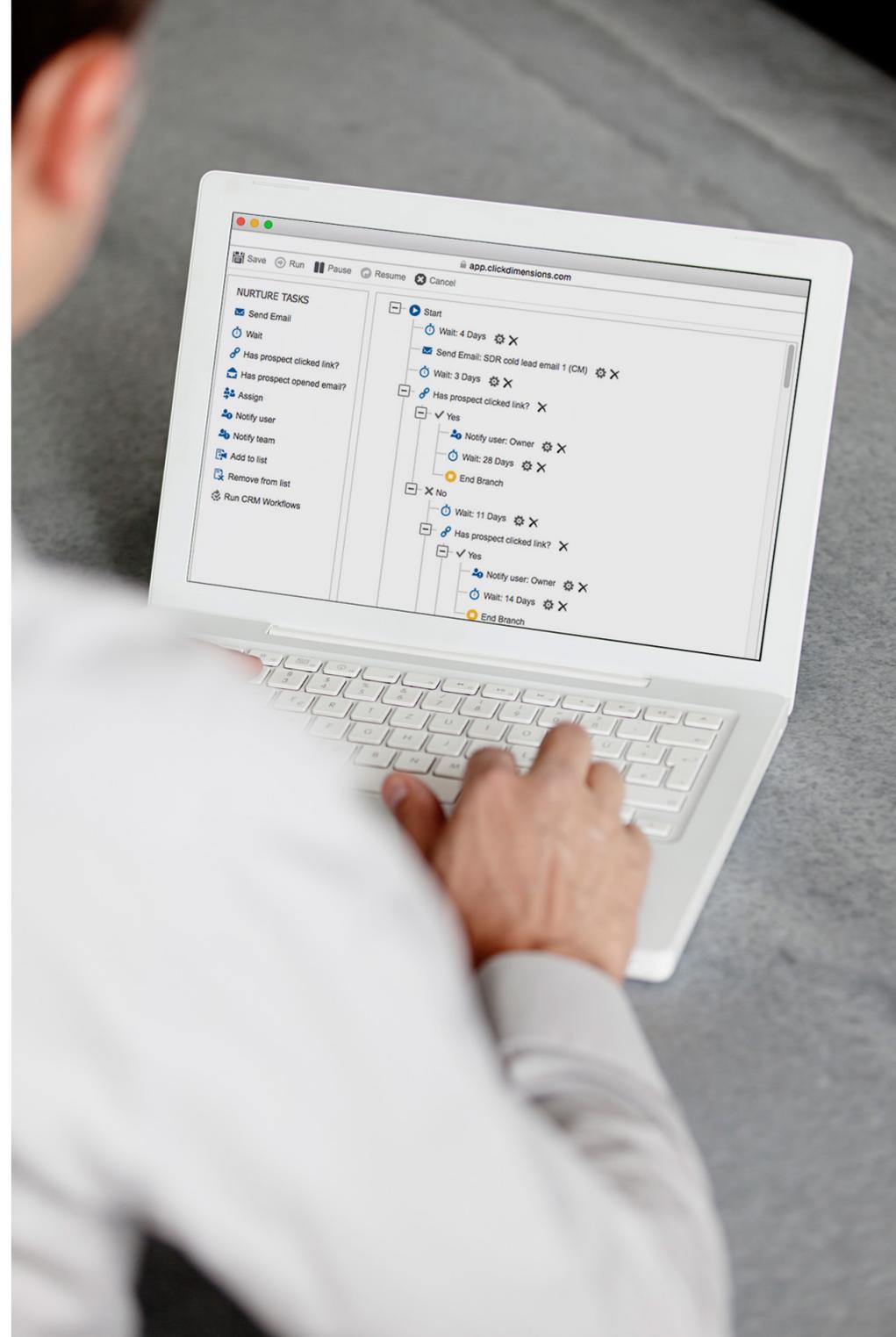
As a marketing automation company, we are often asked how we use our own tools to market our solution. Below are two examples of how we use nurture campaigns internally.

Case Study I: Content Marketing

Situation:

At ClickDimensions, we use content marketing to generate inbound leads. We offer premium content items such as eBooks and webinars in exchange for visitors' contact information.

For each eBook, we create a landing page that has a web form where a visitor submits basic information – name, company and email – and then receives a link to download the eBook. As visitors submit their information, ClickDimensions creates a lead record in Dynamics CRM for each new individual (lead records are not created for existing contacts that download the book).

Since the visitor has downloaded a content item that relates to marketing with Microsoft CRM, we assume that they have at least some interest in the topic. However, we don't know the prospect's knowledge of our solution or where they are in the buying cycle.

With hundreds of content download leads coming in every month, it would be very expensive to hire enough sales people to give each lead individual attention. And since many of the leads are in the early awareness or research phases, much of the sales team's time would be spent educating prospects that are a long way from being ready to buy.

Solution:

To conserve sales costs and help educate our prospects, we created nurture campaigns for our eBooks. Each of our eBook nurtures evaluates the prospect's level of interest and keeps them engaged with our content and brand.

For example, each year we release an eBook called the *Marketing with Microsoft*

Learn more
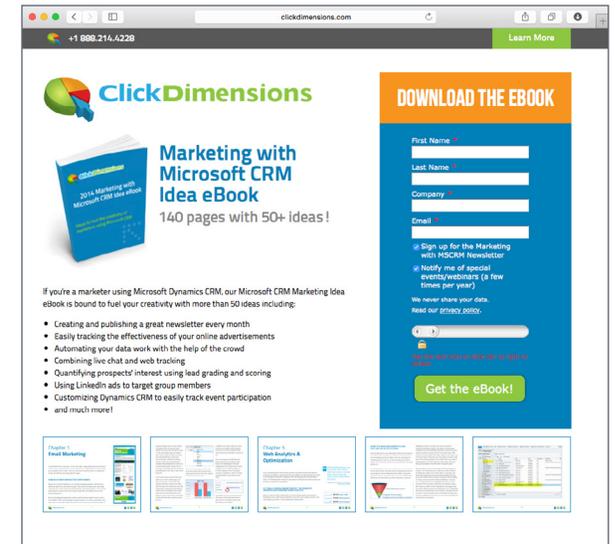
For more information about creating nurtures with ClickDimensions, visit help.clickdimensions.com/category/nurturemarketing/
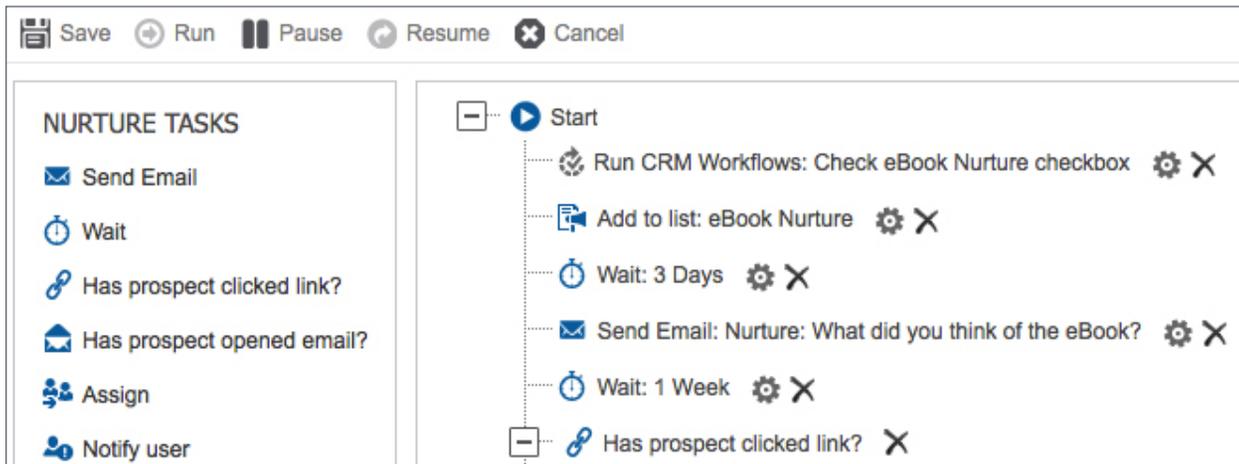
CRM Idea eBook. When someone enters his or her information to download the book, that person is immediately put on a nurture campaign. The nurture program will wait a few days, and then send the prospect an email with the subject line, "What did you think of the eBook?" This email casually "checks in" with the prospect and invites them to contact us if they are interested in receiving more information about marketing with CRM and/or ClickDimensions. The email is personalized and addressed from a salesperson within our company.
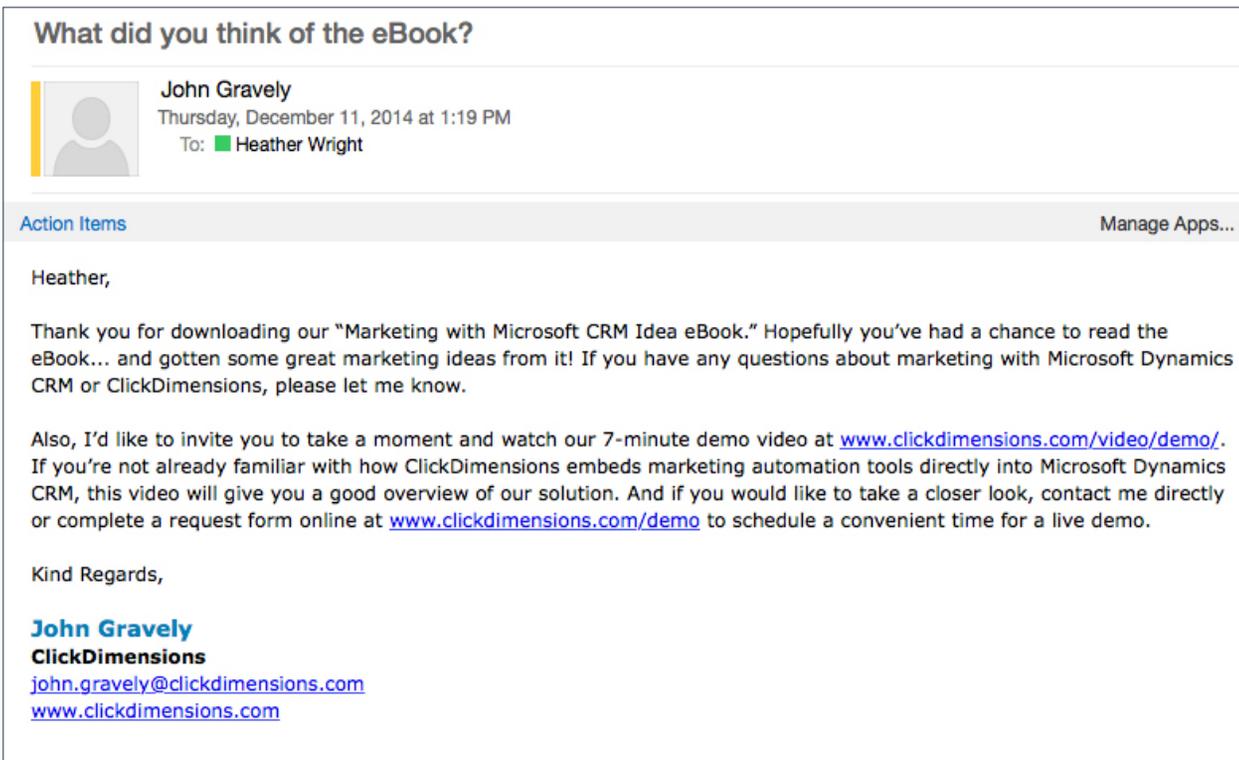
This first email helps to gauge the prospect's level of interest. If they take action by clicking a link within the email, the nurture program will notify the salesperson. The salesperson can then decide whether to contact the prospect immediately, or let them continue on this or another nurture. Often, the salesperson will make this decision based on the prospect's lead score.

If the prospect does not interact with our first message, he or she will continue through the nurture program where, over

the course of about 6 weeks, they receive a series of emails with a variety of calls to action:

- Download another content item/ eBook
- Attend our weekly webinar
- Subscribe to our monthly newsletter
- Schedule a demo of ClickDimensions

In each of these emails, we offer something (webinar, eBook, newsletter, demo) that educates the prospect about how ClickDimensions can help their marketing efforts using Microsoft Dynamics CRM. We are consistent with our message, and we send the emails over a timeframe that is frequent enough to keep ClickDimensions top-of-mind with the prospect, but not so frequent that our emails are considered spam.

After each email is sent, the nurture program checks to see if a link has been clicked, and notifies the salesperson when there is interaction by the prospect. Should the prospect reach the end of the nurture without taking any action, he or she is added to a marketing list of non-responsive leads. These cold leads are often placed on another nurture with a longer timeframe that helps to maintain awareness of our brand even if they are not currently interested in our solution.

Result:

We have been publishing an annual *Marketing with Microsoft CRM Idea eBook* for several years; however, 2014 was the first year that we implemented the eBook-specific nurture campaign. Looking at won opportunities, we experienced a 44% growth in revenue from eBook leads after implementing the nurture campaign. Our prospects are becoming more engaged, and our leads are better qualified by the time they reach a salesperson.

Actual Revenue by Year - Column

Won Opportunities from ALL eBook Leads

44% Increase!
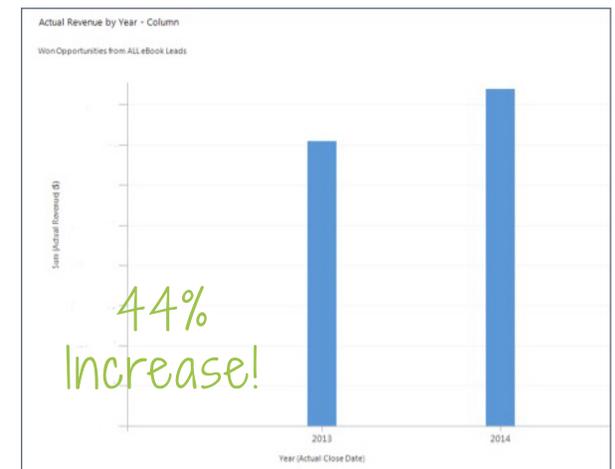
Case Study 2:
Customer Onboarding

Situation:

ClickDimensions account managers are responsible for managing our current customers, including ensuring that they are satisfied with our solution and renew our service each year. After the initial sale, account managers take over from the salesperson and introduce new customers to ClickDimensions – everything from how to get help, what services are available to them, and where they can find training.

The account management team had a series of touch points that they made while onboarding a new customer, from sending a welcome email to checking in with the customer after 30 days. While it was a good process, it required a lot of effort on the part of the account managers. And since the process was completed manually, account managers often fell behind in communicating with their customers, not sending emails as frequently as planned.

Solution:

At ClickDimensions, we believe that marketing automation tools – thoughtfully implemented – can improve many business functions, even beyond the marketing department. With this approach in mind, our account management team decided to use nurture campaigns to automate the customer onboarding process.

The nurture program is triggered when an opportunity is closed in CRM – indicating that a sale has been completed and a new customer needs to be brought onboard. The nurture immediately sends a welcome email to the customer and begins a series of workflows that create follow-up tasks and phone calls for the account manager to complete.

The onboarding nurture sends out a dozen emails over the course of the first 30 days after the new customer signs up. Emails are timed to be relevant as the customer continues to learn and use ClickDimensions, and the emails are structured so that the customer will see a progression as they move through each step of the process.

Result:

Now that customer onboarding is completely automated, the account managers are able to maximize their time and focus on customer satisfaction instead of sending countless emails. They are also confident that all customers are receiving the same onboarding information; no one slips through the cracks.

Not only is the onboarding process now automated, but also the account managers are able to evaluate its performance. They monitor customer interaction with the nurture emails – deliveries, opens and clicks – to measure the effectiveness of each email. The nurture program also allows account managers to view an

individual customer's progress through the nurture, giving them helpful insight when speaking with the contact.

Most importantly, the onboarding process is now scalable; it does not require any additional account management resources when new customers are added. This process can also be replicated in a variety of ways across the organization. A similar nurture could be created, for example, when onboarding vendors or partners, saving valuable time and money in multiple departments.

Nurture Instance History
Presented by ClickDimensions Timeline.

Nurture Started
September 30, 2014 at 02:33 PM

Send Email
✉ September 30, 2014 at 02:33 PM

From Name: ClickDimensions
From Address: success@clickdimensions.com
Send from Owner: False
Template: 📝 Onboarding Template: 1 Welcome

Run CRM Workflows
September 30, 2014 at 02:34 PM

Workflows:
Set Account OnBoarding Status to "Onboarding Started"

Waited 1 day
September 30, 2014 at 02:34 PM

Send Email
✉ October 01, 2014 at 02:35 PM

From Name: ClickDimensions
From Address: success@clickdimensions.com
Send from Owner: False
Template: 📝 Onboarding Template: 2 Training

Run CRM Workflows
October 01, 2014 at 02:35 PM

Conclusion

Grow your business with nurture marketing

Nurture marketing through marketing automation allows organizations to inform and educate prospects, effectively qualify leads, and develop trusting relationships with their customers. Nurture programs can provide a uniquely customized experience for the buyer, without requiring time and attention from the sales team.

The success of any nurture campaign is relevance. The timing, messaging, email frequency, and calls to action must vary based on the needs and readiness of the audience. Through specific, targeted nurture campaigns, marketers can improve conversion rates and produce better-qualified leads, ultimately resulting in increased sales and revenue.

About ClickDimensions

ClickDimensions is the top-rated, award-winning, Microsoft-certified email marketing and marketing automation solution for Microsoft Dynamics CRM. ClickDimensions can streamline your marketing program by gaining insights about your leads and contacts, resulting in reduced costs and increased revenue. Providing email marketing, web tracking, lead scoring, nurture marketing, social discovery, campaign tracking and web forms and surveys, ClickDimensions allows organizations to discover who is interested in their products, quantify their level of interest and take the appropriate actions.

For more information about ClickDimensions, visit www.clickdimensions.com, read our blog at blog.clickdimensions.com or follow us on Twitter at @ClickDimensions.