2017 MARKETING WITH
MICROSOFT DYNAMICS 365/CRM

Idea eBook

ClickDimensions

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About this eBook

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

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

At the time of this publication, Microsoft has just released Dynamics 365 for Sales. Throughout this book, we reference Dynamics CRM; however, the same instructions and concepts apply to the new Dynamics 365.

We hope you enjoy this eBook and we welcome your feedback or questions. You can contact us at marketing@clickdimensions.com.

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

Chapter 1
Email Marketing

According to research firm MarketingSherpa, 72 percent of those surveyed named email as their preferred method of communication from businesses. And marketers love email as much as their customers and prospects, ranking email as the most effective tactic for awareness, acquisition, conversion and retention (Gigaom Research). In this chapter, we've included some of our favorite tips for ensuring email marketing success.

8 TIPS FOR IMPROVING EMAIL SUBJECT LINES

You never get a second chance to make a good first impression. It's as true in the inbox as it is in life. Subject lines can make or break an email campaign. No matter how valuable or important the content of an email, if your subject line fails to hook the recipient at a glance, your open rate – and therefore the success of your entire campaign – suffers.

So what's an email marketer to do? Here are eight helpful tips for improving your email subject lines and increasing opens:

1. Keep it short.

Email subject lines are such valuable real estate that you might be tempted to try and include every detail of your email message. Remember, however, that long subject lines will be truncated by email clients and that short subject lines are more eye-catching for recipients. Aim for 50 characters, or about five to seven words.

2. Utilize personalization.

Email subject lines such as “A special offer for Bill Burns” or “Sue, have you seen these deals?” are examples of incorporating personalization into email subject lines. While names are probably the most common use of subject line personalization, other demographic details about your recipients could work well too. For example, a subject line like “Check out these Atlanta restaurant deals” could be very effective at attracting inbox attention by communicating that the information is local to the recipient.

3. Don’t be too salesy.

Email is an incredibly effective sales tool, but you don’t want to sound too salesy right out of the gate. Phrases like “buy now” or words like “free” in your subject line can cause recipients to delete your message in seconds because it sounds too much like a sales pitch. In some cases, overly salesy words and phrases can even cause your message to be flagged as spam.

4. Include a deadline.

“Ends Thursday,” “Today only,” “Final chance” – language like this in an email subject line communicates scarcity. In our always-connected society, there’s a huge fear of missing out (FOMO), and incorporating deadlines into your email subject lines is a great way to tap into that mindset. Just make sure that it makes sense to do so in the context of your message; a “limited time offer” that never seems to end will only encourage distrust towards your brand.

5. Be negative.

People don’t want to do things wrong, and playing to those insecurities can be very effective in email subject lines. You can garner opens by conveying in your subject line that you’re going to explain what not to do, thus helping the recipient avoid potential embarrassment. Examples include “Do not do this on Twitter” or “The one thing B2B marketers shouldn’t say.”

6. Use numbered lists.

Numbered lists can be used effectively in email subject lines like “3 winning sales tactics you haven’t tried” or “Weeknight dinners: 5 easy recipes.” Lists are easy for our brains to process, which makes a subject line that incorporates them more appealing to the recipient and makes them stand out in the inbox.

7. Be on brand.
In every email you send, the subject should sound like it's coming from your brand. While humor, for example, is great and can help your message stand out in an increasingly crowded inbox, it can fall flat if it doesn't feel familiar coming from your organization. The same goes for other subject line tones and approaches. If your brand voice is more on the professional side, a casual subject line will seem out of place and off brand, especially to longtime customers and email subscribers.

8. Try split testing.
Sometimes the best way to improve email subject lines is to put them to the test in the inbox. Split testing, also known as A/B testing, through ClickDimensions allows you to do exactly that by sending two versions of your email with varying subject lines to determine which version gets the most opens when sent to a set number of your overall recipients. The winning version is then sent to the remainder of your full list, helping to remove some of the guesswork from subject line success.

And don't forget the preheader text. This text comes after your email's sender name and subject, and can help reinforce your subject and further encourage opens.

POWER UP YOUR EMAILS WITH PREHEADER TEXT

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

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

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

Be Aware of Character Display Limits

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

Desktop

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

Webmail

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

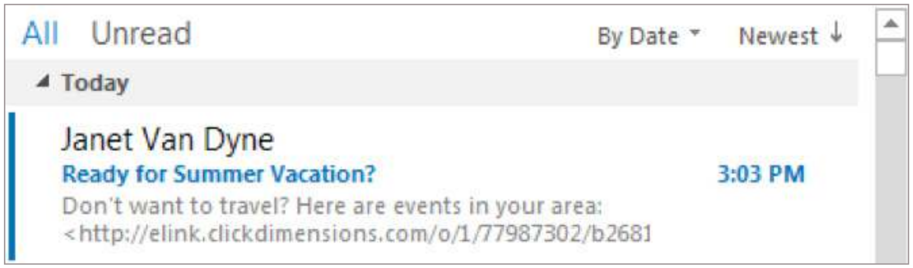
Mobile

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

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

Use the Preheader as an Extension of Your Subject

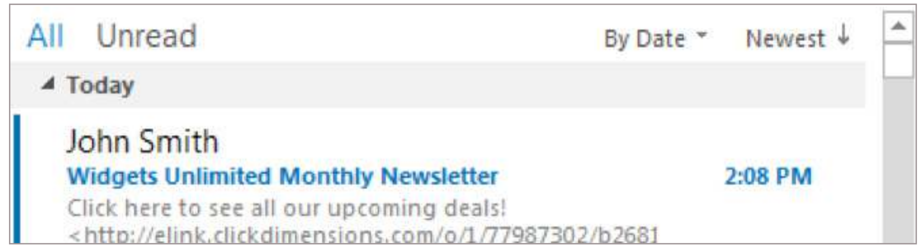
Rather than using your subject line and preheader text to convey separate pieces of information, you may get better results by using your preheader text to build upon the message in your subject. A good example would be the use of a question as your subject.



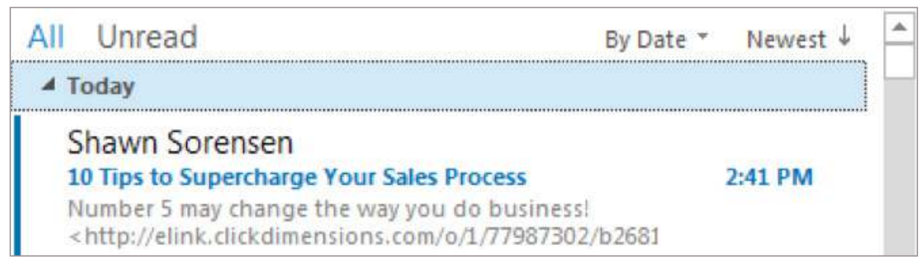
The preheader question is useful because it helps attract recipients by relating directly to the subject line. However, it is possible that the question may not be relevant for many of your recipients. In this case, the preheader text can be utilized to indicate to this second group of recipients why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

Include a Call-to-Action

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



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



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

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

4 EMAIL MARKETING TRENDS YOU SHOULD ADOPT

Email is a beloved communications channel for companies and their customers and prospects alike, but it's also changing with the times. If you're looking to spruce up your email campaigns and be more effective in your efforts, here are four email marketing trends to try:

1. Personalization.

Personalization has been a part of the savvy marketer's toolkit for a few years, but is now exploding in popularity due to customer and prospect demand. Email recipients today expect messages that feel like they were aimed directly at them, even if it is a bulk email. Using ClickDimensions, you can personalize emails with details like a recipient's name, the city where they live, the name of your event they just attended, their current number of customer loyalty points or a wide variety of other options. It's a quick and easy way to add a personal touch to your company's messages, and a great way to get started with adding personalized elements to your emails.

2. Dynamic content.

Dynamic content takes personalization to the next level, displaying different content for different individuals based on a field in the recipient's CRM contact record. So if your company does business internationally, for example, you could display one image for recipients in the United States and a different image for those in Japan, or change the language used in the email based on the recipient's location. You could also change the content based on the recipient's gender, industry or practically any other information you have available in CRM. We get a fair amount of questions about dynamic content at ClickDimensions, so we've featured a few posts about it on our blog, two of which you can read here and here.

3. Nurture campaigns.

If you're starting to sense a theme among these trends so far, it's that personal touches matter in email marketing today. Being in the right place at the right time has always been advantageous for businesses, and nurture marketing allows marketers to achieve exactly that. Automated nurture programs include decision points and actions based on how the recipient interacts with your message, allowing for a customized email experience. For example, if an individual shows interest in a particular product by clicking a link in an email, you could then send them on a path within a ClickDimensions campaign automation to receive additional emails about that product or related items. The result? According to Annuitas Group, nurtured leads make 47% larger purchases than non-nurtured leads.

4. Focus on content.

Email shows no signs of decreasing in quantity, but the quality of email messages is certainly increasing. With the sheer volume of emails that people receive today, businesses have to stand out from the crowded inbox to get recipients to take action. From the words in the subject line and the preheader text to the images and words chosen for the body of the email, marketers are now focusing on delivering high-quality email marketing content. They're accomplishing this with eye-catching images and GIFs and compelling copy that, while word count varies according to email type, is as concise as possible and broken into easily-digestible short text blocks – and you can too!

TIPS AND TRICKS FOR A SUCCESSFUL NEWSLETTER

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

1. Look at the big picture.

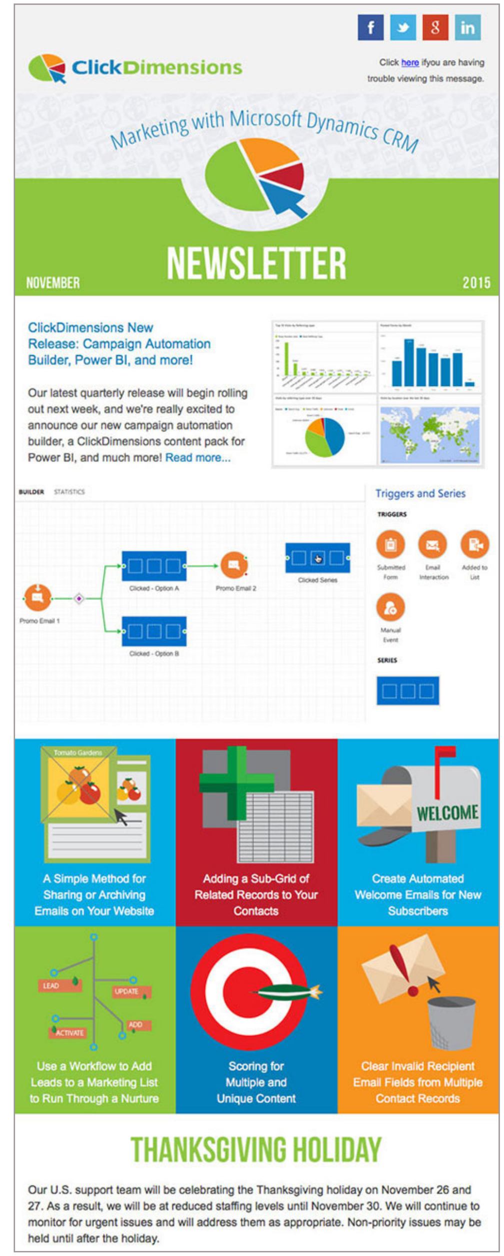
How often do you read emails? Think of all the times you received an email and immediately discarded it without opening or reading it. It probably takes you just a few seconds to scan an email and decide whether it's worth reading all the way through or simply clicking delete. Coupled with the fact that many people check their emails on mobile devices with smaller screens, it's easy to see why your emails should be easy to digest in both content and design. To accomplish that goal, it's important that your email is built on a solid foundation.

Don't:

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

Do:

- Place your logo and business name on your email's header. Let them know it's from you.



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

2. Hook them with a good subject line.

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

3. Actions speak louder.

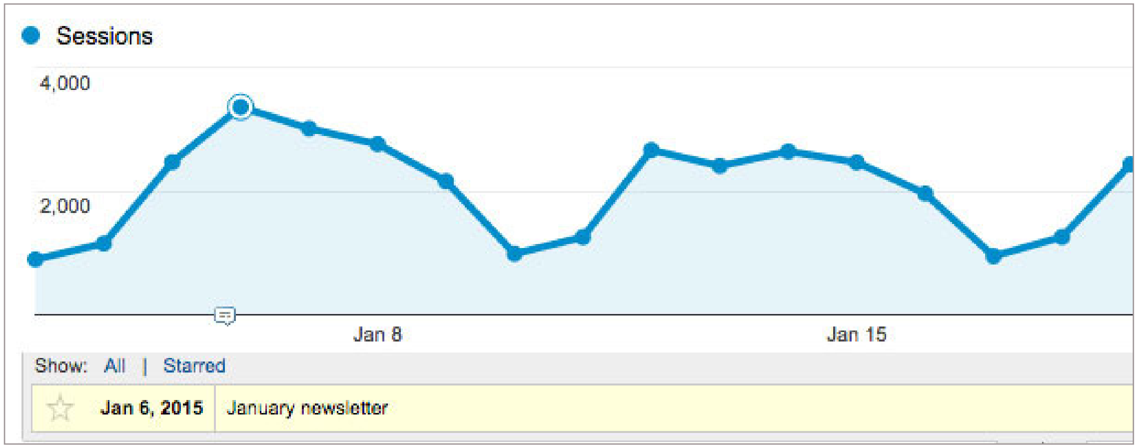
What do you want your readers to do? Fill out a form? Read your blog? Take a survey? Sign up for an event? Share your email on Facebook? Decide on your call to action for your email and make it easy for them to do it. Include action phrases that will get them engaged such as “Click here” or “Share this.”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

4. It's not [about] you, it's them.

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

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

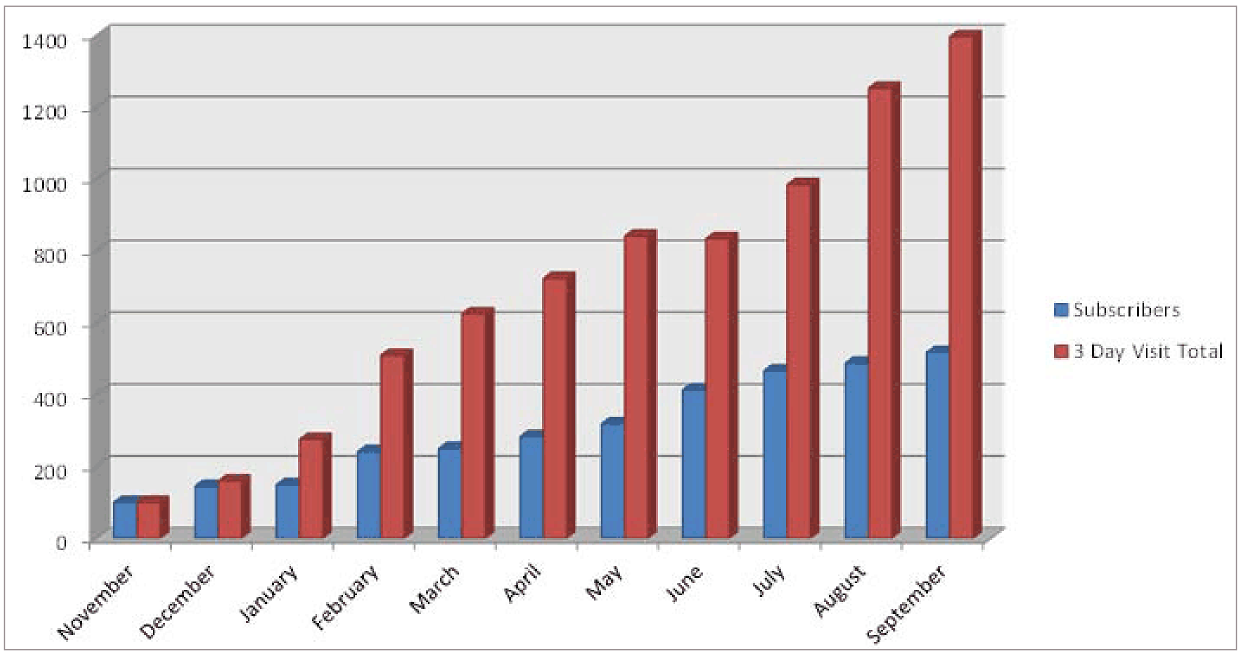
At ClickDimensions, we send a monthly newsletter to our subscription list. To analyze how the newsletter is being received, we look at a number of variables. Clicks, opens, unique opens and newsletter sign-ups are obvious measures. However, the number of visits the newsletter generates in the three-day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



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

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

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



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

6 STEPS TO CHECK PRIOR TO SENDING YOUR EMAIL

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

Proofread

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

Use clear From Name and From Email values

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

Have backup values for dynamic content

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

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

Check your links

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

Check your template on mobile devices

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

Check your subject line

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

EMAIL MARKETING MAKEOVER: 5 TIPS FOR REFRESHING YOUR CAMPAIGNS

Are your own mass emails making you yawn? Then imagine how your customers and leads must feel. Fortunately, reinvigorating your email marketing isn't as difficult as it may initially seem, and a few simple tweaks can often mean the difference between delete and delight from your recipients. Here are five of our favorite tips for refreshing email marketing efforts:

1. Send quality content.
Gone are the days of sending emails just to send them. Today, people expect messages that are tailored to who they are and what they want to hear from your company. There is a person on the other end of your email, not just a sales opportunity, and your emails should reflect that. Keep your messages short and to the point. Also, think about your message from your audience's perspective, and ask yourself what's in it for them. Whether it's a special discount, a link to download an eBook, or another offer or announcement, your emails should deliver genuine value to the person reading it.

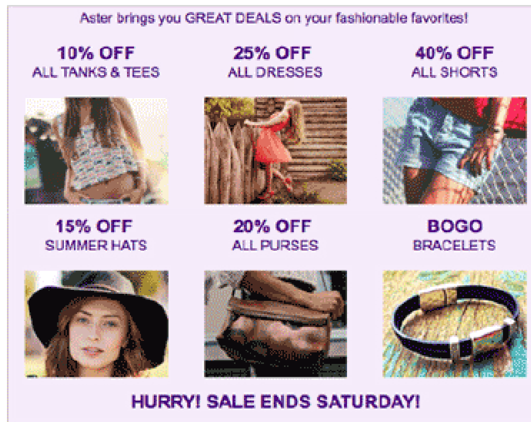
2. Change your design.
We all need a change of scenery from time to time, and your email subscribers are no exception. Something as simple as switching up fonts and colors, while still remaining within your brand's look and feel, can be the change you need to get your audience engaging with your emails again. A new layout can also be a refreshing change of pace, especially for longtime email subscribers. If you have been using a two column design, for example, try switching to a layout featuring a body section and a sidebar instead to see what results change can bring.

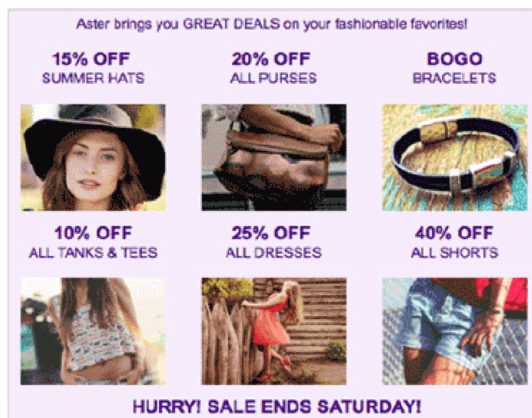
3. Get animated.

Love them or hate them, animated GIFs have established a strong presence in the online community. Before you dismiss GIFs as a social media gimmick, consider using them in email marketing campaigns. They are easy to load, easy to create, run automatically without requiring a play button and provide a little something extra that can help increase engagement. GIFs are perfect for explaining how something works or for drawing attention to an otherwise static image.

4. Utilize split testing.

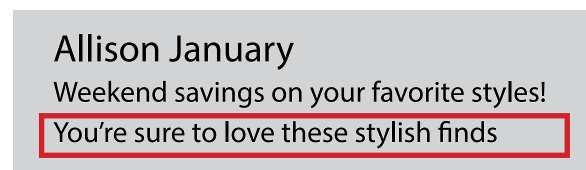
Split testing, or A/B testing, is a method of testing two versions of an email against one another to see which one performs better. You can use the results of these tests to improve future email marketing efforts and send emails that really resonate with your audience. What should you change in your email variations in a split test? Try using different subject lines, layouts, send times or content. Split testing can demonstrate how even small changes can have a big impact on opens, clicks and conversions. As you can see in the example emails for a department store below, they chose to split test based on the placement of various clothing items.





5. Optimize preheaders.

There are three things that recipients will see when your email hits their inbox: the sender name, the subject and the preheader, which can be seen outlined in red in the screenshot below. The subject line is what grabs your readers' attention, but as an extension of your subject line, the preheader can really help you increase opens and clicks. It's a great place to utilize personalization, as seeing their name in the preheader can help your subscribers hone in on your email, even in the most crowded inbox. Whether you go the personalization route or not, your preheader copy should always clearly and concisely convey the message in your email.



4 REASONS TO FALL IN LOVE WITH EMAIL A/B TESTING

Even when love is in the air, the idea of creating two versions of your next email blast or newsletter for A/B testing (also known as split testing) might not exactly have your heart aflutter. So we're here to show you four reasons why your marketing goals and email split testing are a perfect match.

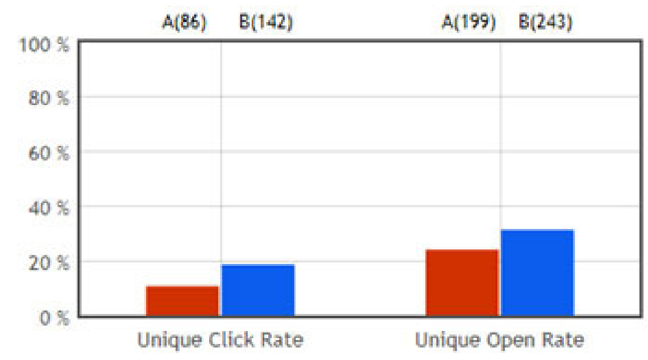
1. It isn't as complicated as it sounds.
While it is true that A/B testing involves creating two versions of an email, it doesn't mean making two entirely different versions. Common changes include email subject lines, sender email addresses and small tweaks to the content of the email, like using a different header image or breaking your copy into a bulleted list instead of a paragraph. From fonts to personalization, there are many other small changes you can make to realize the big benefits of split testing.

2. It allows you to test your theories.
Have you always thought that your email recipients would respond better to an email featuring pictures of real people in your company than one that uses stock photography? Or have you had a hunch that personalizing the subject line with the recipient's name would outperform an email with no personalization? Split testing lets you test those theories and many more, and get the results to either prove or disprove them.

3. It helps you better understand your audience.
Whether you're sending to customers, prospects or a mix of the two, A/B testing gives you a better idea of what your audience prefers. While you may feel like you already know your email recipients and their preferences like the back of your hand, how do you truly know until you test that understanding of their likes and dislikes? Through split testing, you could learn, for example, that while you have always sent emails with statements in the subject line, your audience actually responds better to subject lines that feature a question.

4. It can help you increase conversions.
Whether you want recipients to buy your products or services, read your blog article, register for a webinar or download your eBook, conversions are the ultimate goal of every email. While A/B testing isn't a magic bullet for increasing conversions, giving your audience what they really want and respond to in your emails can make a difference in your conversions. The secret is understanding that split testing email isn't a one-time practice; it's most successful when used as a process over time.

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



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

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

Content

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

Creative

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

Subject line

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

Sender

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

Call to action

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

5 TIPS FOR EFFECTIVE WELCOME EMAILS

Welcome! It's nice to see you! We're happy to have you here! Whether you are being greeted by an old friend or an establishment you frequent, sentiments like these make you feel at home, at ease and acknowledged.

The same goes for welcome emails. These email marketing messages are a great way to kick off a relationship with a new customer and can set the tone – for better or for worse – for the overall customer experience. Given their importance, here are some of our top tips for creating and sending effective welcome emails:

1. Mind the timing.
Imagine that you sign up for an online file sharing service, for example, and you don't receive a welcome email for two weeks. In the meantime, before receiving that email, you might assume that there was something wrong with your account or that the email got caught by a spam filter. That's because today's consumers expect welcome messages and they expect them promptly. While that timing may vary slightly depending on your industry, business and what actions your leads and customers have taken – signing up for emails versus making a purchase, for example – welcome messages should be sent anywhere from a few minutes to a few days after that action is taken. The ClickDimensions campaign automation builder is the perfect tool for automating welcome campaigns for your various audiences so your timing and messaging are always targeted and on-time.

2. Make it personal.

Did you know that, according to Aberdeen Group, personalized emails improve click-through rates by 14 percent and conversion rates by 10 percent? They are also a great way to welcome people to your organization. The example email below from a non-profit shows how they were able to create a customized email experience for new donors. Using dynamic content in ClickDimensions, the International Wildlife Conservancy added the donor's first name and the amount of their donation to their welcome email. These personal touches in welcome emails help organizations better connect with their audiences from the very start of their relationship.


Click here if you are having trouble viewing this message.

IWC International Wildlife Conservancy

Hi Hank,

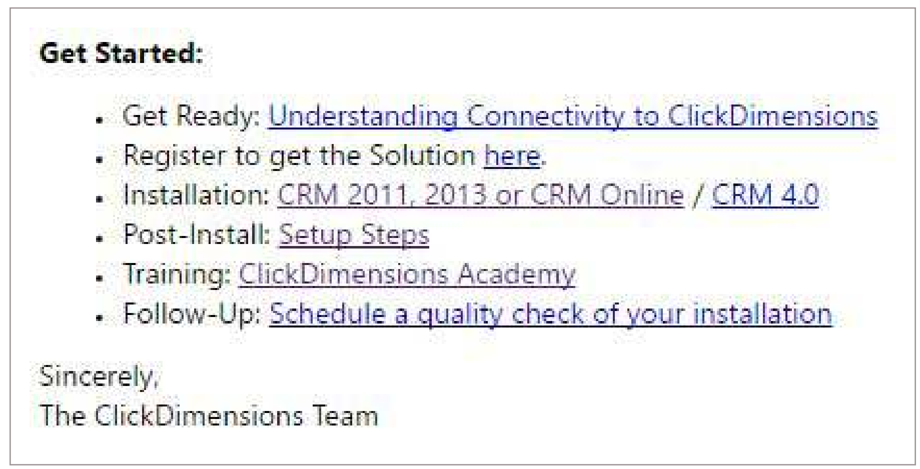
Thank you for joining the International Wildlife Conservancy! Your donation of $100 will greatly help us in our efforts to save critically endangered animal species around the globe.

When you select one of the animals below, we will direct your donation to the conservation of that species and send you an informative email series about that species.

Support the Mountain Gorilla | Support the Sumatran Tiger | Support the Leatherback Turtle

3. Help them get started.

Helping new customers get started with your product or service is an important function of a welcome email. This is especially true for technology companies, but can also work as a welcome email approach for many other industries. A professional association could send a welcome email that outlines member benefits and shows new members how to get started using these perks, for example. Here at ClickDimensions, our welcome email is packed with tips for getting started with our marketing automation solution. As you can see in the screenshot below, we provide a number of helpful links that walk new users through the set up process. That same email includes a getting started video and links for getting help for various questions or issues.


Get Started:

- Get Ready: Understanding Connectivity to ClickDimensions
- Register to get the Solution here.
- Installation: CRM 2011, 2013 or CRM Online / CRM 4.0
- Post-Install: Setup Steps
- Training: ClickDimensions Academy
- Follow-Up: Schedule a quality check of your installation

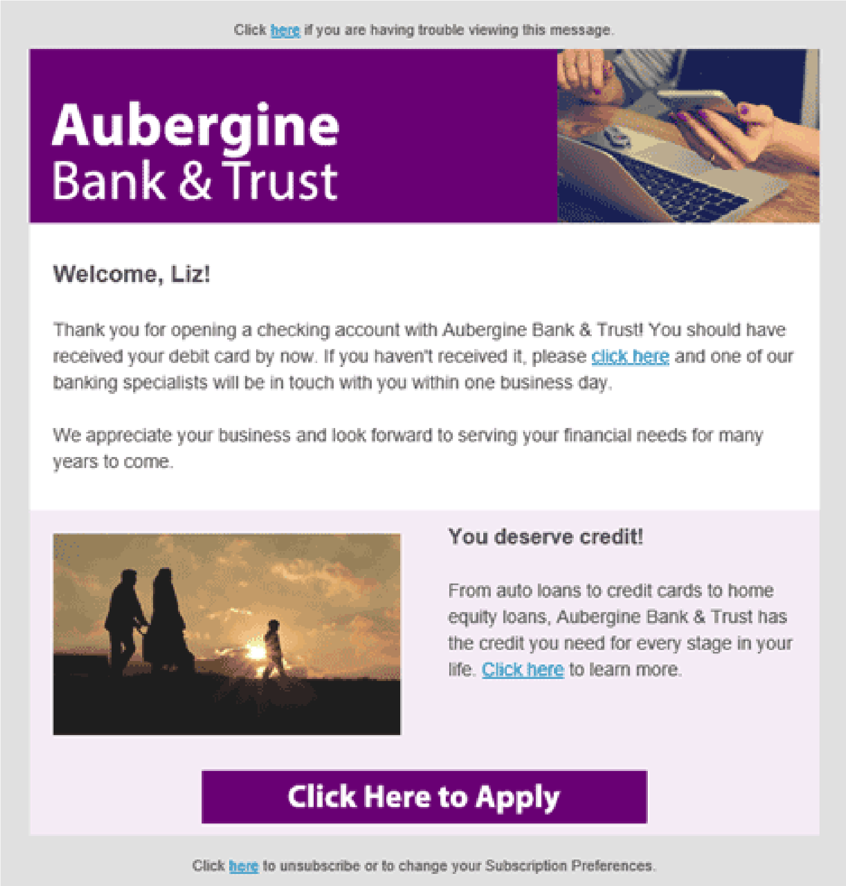
Sincerely,
The ClickDimensions Team

4. Consider discounts.

Special promotions and discounts are an effective welcome email strategy for securing additional purchases from new customers or converting new email subscribers into first-time customers. However, keep in mind that a welcome email isn't the place for a hard sell. The email should first and foremost include a message that welcomes and thanks recipients for signing up, making a purchase or another similar action. The discount should serve as the icing on the cake and a way to encourage additional customer engagement and purchases.

5. Showcase your offerings.

New customers or subscribers may not be fully aware of all that your company has to offer, but welcome emails can be used to effectively educate them about your full lineup of products or services. Like the discounts approach that we discussed above, be sure to still welcome recipients and try to be more informative than going for a hard sell. The example email for a financial institution to the right shows how they first welcome new checking account customers and then make these customers aware of credit products that the bank offers.



FINDING THE POTENTIAL OF AUTORESPONDER EMAILS

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

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

The Double Opt-In

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

Reward Loyalty

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

Send Thanks

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

Confirmations

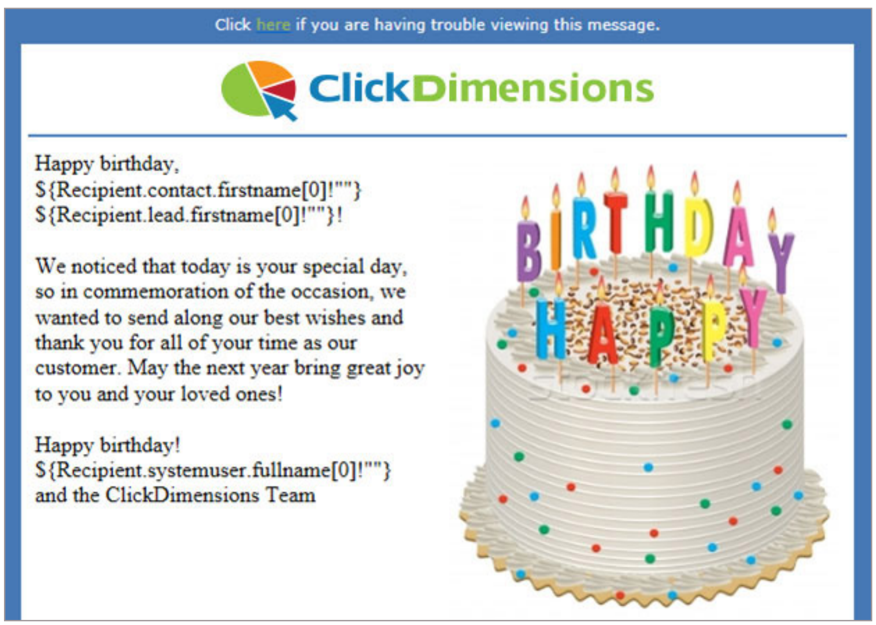
This is possibly the most standard use of an auto response email: confirm to the customer that you received their form, survey, subscription management page, etc. This lets the customer know that their submission was successful, and that they can expect you to contact them moving forward. We live in a digital age where we can expect a confirmation on orders, appointments, reservations, etc., so when a confirmation email is absent, it seems peculiar.

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

CREATING AUTOMATED AND PERSONALIZED BIRTHDAY EMAILS

Have you ever met somebody who doesn't like birthday greetings? In my experience, the simple gesture of acknowledging somebody's birthday almost always elicits a smile. Sending birthday greetings to your customers is an easy way to keep your company on their minds and promote a positive relationship.

ClickDimensions and CRM can be used to create personalized birthday email templates and automatically send them to your leads and/or contacts when their special day rolls around.



You can easily create a birthday template in one of our email template editors (the example template was created in the ClickDimensions Block editor) and set to populate dynamically with data from the recipient's record by using FreeMarker text. In the example, we've set the template to populate with the first name of the lead or contact recipient as well as the full name of the owner of their CRM record.

Once your template is created, the following workflow can be used to automatically send it out on the recipient's birthday (this workflow only works for contacts, but you can apply the same process in a workflow based on leads).

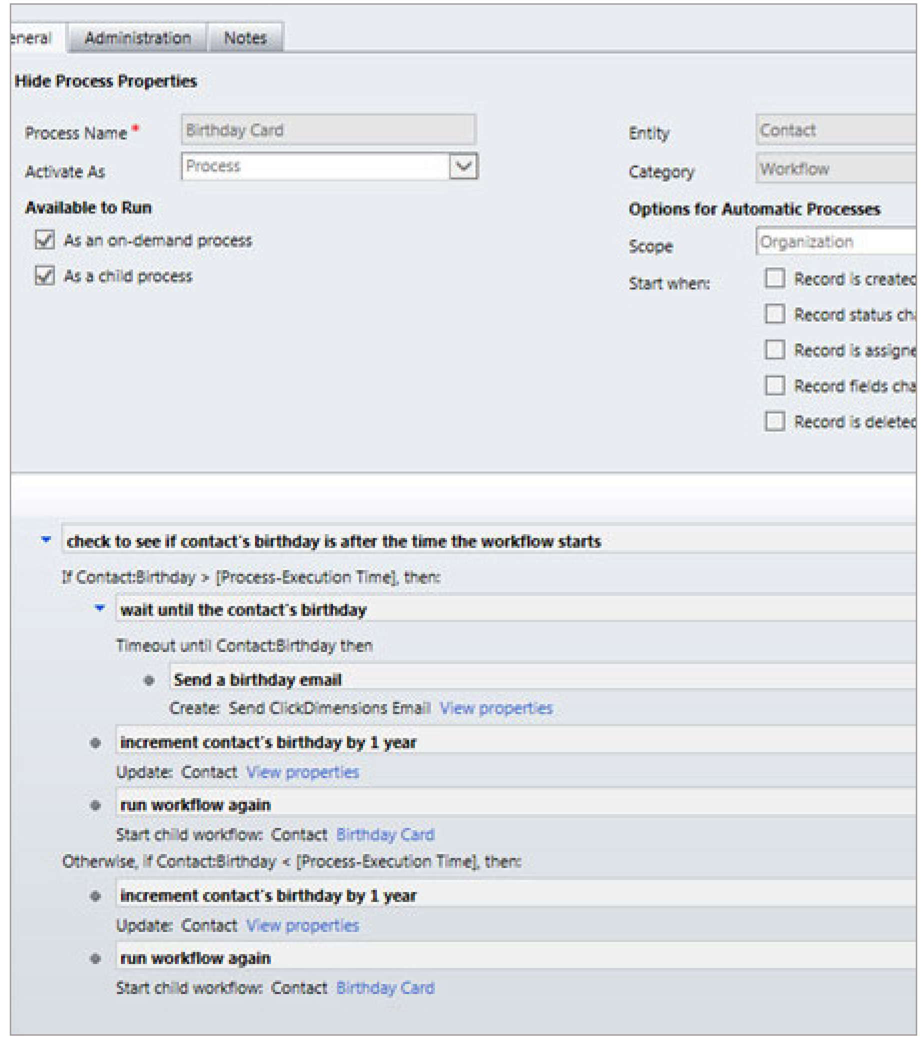
Keep in mind that this workflow will not change the day and month of a contact's birthday, but it will regularly update the year, so if you want to maintain the original value you should create a duplicate birthday field on your contact records to use with this workflow.

The workflow, which is set to run both as an on-demand process and a child process, goes through the following steps:

- Compare the execution time of the workflow to the date specified in the birthday field on the contact's record.
- If the execution time is before the birthday, then the workflow will timeout until the birthday rolls around.

- When it is the contact's birthday, the birthday email is sent out.
- The birthday field value will be incremented by a year.
- The workflow calls itself and begins again.
- If the execution time was after the contact's birthday instead of before it, then the birthday field value is incremented by a year and the workflow is called again.

To the right is the actual workflow:



This workflow will keep going every year until you decide to deactivate it. Once you are ready to use it, save and activate it, then set it to run on any contacts whose birthdays you would like to celebrate.

That's all there is to it! Now instead of spending a fortune on wrapping paper, you can use ClickDimensions and CRM to celebrate birthdays!

8 TYPES OF EMAIL CAMPAIGNS TO RUN THIS HOLIDAY SEASON

It may not be time to send holiday email marketing campaigns just yet, but it is always a great time to start thinking about planning them. While the specific emails will vary according to your audience and region, here are eight types of email campaigns to consider as you go about your merry way planning for this holiday season:

1. Thank you.
If your audience celebrates Thanksgiving, the holiday is a perfect time to send messages of thanks. This could be accomplished with a simple thank you email message to express gratitude for your customers and their loyalty, or you could use a more creative approach and link your email to a fun infographic about the holiday or a video that shows your team giving thanks.

2. Promotions.
Black Friday, Cyber Monday and the holiday season in general are filled with big sales. Whether you sell shoes, software or sinks, customers anticipate and expect discounts this time of year, even if your organization doesn't typically offer them. For better results, segment your marketing lists and your promotional emails based on what you know about your leads or customers and what they are most likely to respond to and purchase.

3. Season's greetings.
The actual phrasing you use will depend on your audience, but an email campaign to say "Happy Holidays," "Merry Christmas," "Happy Hanukkah" or other festive greetings can be an effective way to connect with your audience. This kind of campaign is typically reserved for customers, but may be appropriate for leads as well. Just make sure that you tailor the message to the audience and that you don't also try to actively sell to your recipients at the same time you are sending them warm wishes for the holidays.

4. Giveaways.
It could be a year's worth of your services, some of your premium products or even something unrelated to what your company sells, just make sure that your giveaway is enticing to your email recipients. Also, consider starting the contest towards the beginning of the holiday season so you can build goodwill and brand awareness early on in the season. You can also promote the giveaway on your website and social media to build your email lists for other holiday promotions, and others throughout the year.

5. Charitable causes.
Giving is a big part of the holiday season, which makes it a great time to connect

one or more of your organization's favorite charitable causes with an email campaign. Within the email, you could introduce the work that the non-profit does and the relationship that your company has with that organization. In lieu of a traditional holiday gift, some companies now choose to make a donation to a charity on behalf of their customers, so you could communicate that donation here or even give your email recipients a chance to vote on which of a list of charities they would like that donation to go to.

6. Social engagement.

The holidays and hashtags go hand in hand, and a hashtag contest is a perfect fit with this time of year. While you will certainly want to promote such a contest on your organization's Twitter or Instagram pages, email can be an effective way to spread greater awareness of the contest and also help generate new social media followers. And from showing off the greatest gifts to talking about favorite holiday traditions and everything in between, hashtag contests offer a lot of options to engage with your audiences and be a part of the holiday spirit.

7. Gift guides.

As you likely know all too well, holiday gift buying can be challenging. Make it easier on your customers by creating email gift guides. If your company offers a wide variety of products or services, you could create a series of guides aimed at different gift recipients your audience is likely to encounter – moms, for example, or outdoor enthusiasts. This can be an effective way to increase sales of key products. Even if your organization's offerings don't lend themselves to a gift guide, you could still compile an email gift guide of products and services from other companies as a fun and helpful campaign for your leads and customers.

8. New Year's resolutions.

The start of a new year brings with it the possibilities of new goals and new accomplishments in the year ahead, and for many people, New Year's resolutions. Tie your organization into these resolutions with an email campaign that is sent either just before or just after January 1. Businesses such as fitness centers and financial institutions have more obvious ties to common New Year's resolutions, but many other kinds of organizations can send these kinds of campaigns. Consider and convey how your products or services help people save time, be more productive, be healthier, make better financial decisions, worry less or just generally lead better lives.

MAINTAINING A CLEAN MARKETING LIST

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

Build your list up from scratch
Include only email addresses that have been freely given for the purpose of receiving marketing communications. If someone has taken the initiative to give you an email address because they are interested in what your business has to offer, it is unlikely that they will provide an invalid address or view your messages as spam. However, if you use an email list that was compiled for another purpose, it is likely that a significant portion of the members of that list will have no interest in your messages, resulting in higher numbers of spam complaints and bounces. Purchased lists are even worse; nobody on such a list is expecting to receive your messages. In fact, purchased marketing lists are in violation of the ClickDimensions Terms of Use.

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

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

Remove fake, invalid and "spam trap" email addresses

Keeping up with the excluded emails and email events is a good way to catch fake or misspelled email addresses; particularly Invalid Recipient type Email Events. "Spam trap" email addresses are valid email addresses that are created for the sole purpose of luring spam. While most often hidden from view so as to only wind up on marketing lists compiled with an automated email address harvester (thus ensuring that all of the emails received are unsolicited), it is not unheard of for someone to submit a "spam trap" email address maliciously. Some examples of "spam trap" addresses include nospam@somewhere.com, abuse@antispam.net, postmaster@somedomain.com, etc. While there is no catch-all for identifying these kinds of addresses, it is always good to keep an eye out any time you look through your marketing lists.

Remove role accounts

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

Prompt customers to update information and give subscription options

It is a good idea to prompt your customers to update their personal information and subscription preferences as often as possible. If customers are aware that they have the option to stop receiving your messages and are consistently presented with the opportunity to provide a new email address, it is likely that each person on your marketing list has given you a current email address and is on that list because they have chosen to be. This can be as simple as including a link to a form or subscription management page in your marketing emails and receipts.

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

10 WAYS TO GROW EMAIL MARKETING LISTS

Here's a statistic that might cause email marketers to lose sleep at night: according to MarketingSherpa, the average email database will degrade by an astonishing average of 22.5 percent every year. To combat that decline and its impacts, companies – even those with the most engaged and loyal subscribers – must constantly focus on building their email lists.

At ClickDimensions, we get a lot of mileage and new names on our lists from our content marketing efforts such as eBooks and webinars. If you're looking for other ways to build your email marketing lists, here are 10 ideas to get you started:

1. Social sharing buttons. Use social sharing buttons in your email messages to encourage your existing subscribers to share your content with their social networks.

2. Contests. Host a contest or giveaway that you promote on your website and social media accounts, and ask for email addresses as part of the entry process.

3. Web sign up forms. Placing easy-to-find email sign-up boxes around your website can help tremendously with list building.

4. Subscription management. Not only is subscription management great for retaining subscribers, showing individuals that they have options in the communications they receive can help encourage new subscribers too.

5. Online ads. Use online ads to promote email newsletters or other content, and collect email addresses via a landing page.

6. In person. If your business has a physical location, provide an email sign-up sheet or ask customers for email addresses at check out. In-person events are also a great place to request email addresses from attendees.

7. Exclusive offers. Create exclusive offers just for your email subscribers, and tell your audiences about this perk on your website, social media and other communications channels.

8. Facebook call to action. Use a newsletter sign up call to action on your company's Facebook page to create an opportunity to connect with that audience via email.

9. QR codes. Place QR codes that link to an email sign up landing page on printed marketing materials.

10. Email signature. Encourage everyone in your organization to include a link to your newsletter sign up form in their email signatures.

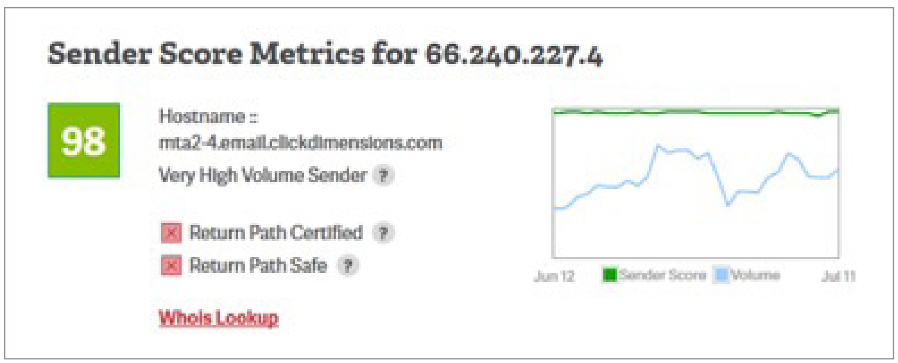
No matter how you entice individuals to give you their email address, the key is to ensure that your lists are permission-based. Permission-based marketing means that the individuals that you're marketing to have directly granted your organization permission to do so. In email marketing, this means that they have "opted in" to be on your list. This opt-in can be in the form of a subscription sign-up form on your website, a paper form at your place of business, or even a conversation you have in person or on the telephone with someone. Giving a recipient an opportunity to unsubscribe or opt-out is important, but your marketing is not permission-based if you didn't first get their consent.

And remember to always avoid purchased lists. It may be tempting to purchase a list of email addresses from a third-party; however, most of these lists are not reliable, and the recipients on the list have not opted-in to receive your emails. Third-party lists are often purposely seeded by ISPs with fake email addresses whose only purpose is to catch spammers. Third-party lists also frequently contain out-of-date email addresses that will cause your bounce rate to go up. Purchasing lists is such a bad practice that ClickDimensions does not permit the use of third-party lists at all, whether purchased, rented or borrowed.

EMAIL DELIVERABILITY: WHAT IS SENDER REPUTATION?

Sender reputation is a term frequently used in email marketing. At a high level, this term refers to the measurement of your email sending practices and how trustworthy your IPs and domains are deemed by ISPs and spam filters. Much like a credit score, there are many factors that are considered in a sender reputation and it takes time to build. You can look up the Sender Score of an IP or domain at [Senderscore.org](). Sender Score is a proprietary algorithm created by Return Path and it, in general, translates to the sender reputation. The higher your Sender Score, the more likely your emails will be delivered to the inbox.

Here you can see an example of the Sender Score for one of ClickDimensions' IPs:



The factors that go into your sender reputation are the same measurements that ISPs use to determine if your email is legitimate. Each ISP/spam filter has their own algorithm for determining whether the email is wanted by their users, so even if your Sender Score is high, there may be other reasons that are unique to the ISP/spam filter that cause emails to be filtered or rejected.

Following email marketing best practices is the best way to ensure a good reputation and a high Sender Score. There are three primary best practices that will have the most impact and three secondary best practices that will also help with your email deliverability (but the primary best practices should be in place first).

Primary Best Practices:

1. Make sure your sending domain infrastructure is in place.

- Use a registered domain that is consistent with your brand.
- The SPF record should include the ClickDimensions domain, if you are a ClickDimensions customer, and be free of errors.
- If you are a ClickDimensions customer, the DKIM record will be set up on the ClickDimensions side. You don't need to set it up.

2. Practice good list management.

- Permission is key. Make sure all of your contacts and leads have opted in to receive your communications.
- Validate the email addresses that you collect using a double or confirmed opt-in.
- These actions will reduce invalid addresses, complaints and blacklists, all which have a major negative affect on reputation and deliverability.

3. Be compliant.

- Compliance goes hand in hand with permission marketing, but you must also honor unsubscribes.
- The recipients' country denotes which regulations need to be followed.
- Review the guidelines for where your customers are located: US (CAN-SPAM), Canada (CASL), EU (EU Directive/ PECR).

Secondary Best Practices:

1. Send consistently.

- A consistent send frequency will help with sender recognition and may catch an old email address before it's converted to a spam trap.

2. Send solid content.

- Include a text version of your email.
- Test for HTML errors and broken links before sending.
- Avoid spammy words in subject line such as "free," "guarantee" and "help."
- Make sure your email is mobile friendly.

3. Keep engagement in mind.

- Unengaged recipients are more likely to generate a spam complaint or turn into a spam trap.
- Some domains use engagement in their spam filter algorithms. If you send to a lot of addresses that never open or click, it could be hurting your reputation.

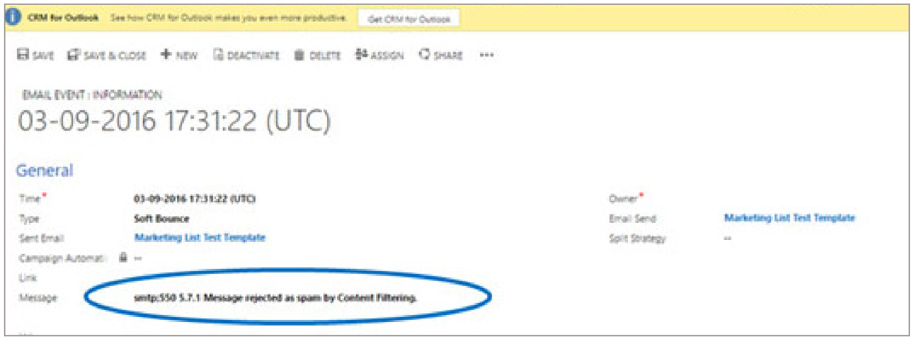
Remember, it's much easier to establish a good sender reputation than it is to fix a bad one!

WHY DO EMAILS BOUNCE? (AND WHAT YOU CAN DO ABOUT IT)

When an email is sent, it passes through multiple servers before reaching its destination. If there is an issue along the way and the email cannot be delivered, a bounce message is returned to the originating server. There are two main types of bounces: hard (permanent) and soft (temporary). A soft bounce that is not resolved can indicate a more permanent issue, which is why ClickDimensions' Service Protection will exclude an email address after four bounces in three months.

The SMTP error codes that are returned in the bounce message can help you pinpoint the reason for a bounce (you can look them up at BetterBounces.net). Anything in the 400 range is usually considered a soft bounce and anything in the 500 range is considered a hard bounce (but not always). Outside of the SMTP error codes, the standards really start to diminish. Bounce messages are customizable at the email server and vary greatly. Typically, you need to consider the SMTP error code and any text that is returned to determine the cause.

The bounce message content can be seen in the Message field of an email event in ClickDimensions. The email events that indicate a bounce are "Soft bounce," "Invalid recipient" and "DNS failure."



So what can you do with all of these bounce messages? If you are experiencing high bounce rates, it's helpful to review the bounce messages to determine what's happening.

Hard Bounces

Hard bounces indicate an invalid email address. The email address most likely has been abandoned or was submitted incorrectly. These email addresses will be excluded from future sends automatically.

Some examples of messages for hard bounces:

- `smtp;550 5.4.1 - Recipient address rejected: Access denied`
- `smtp;5.1.1 - Bad destination email address`
- `smtp;554 5.1.2 - Domain relaying denied`

Soft Bounces

Soft bounces provide more information and indicate an issue that can be resolved. Below are some examples of different types of soft bounces and how to resolve them.

Incorrect syntax:

- `smtp;550 5.2.1 - Suppressed using "suppressed domain" suppression list`
- `smtp;501 5.5.2 - RCPT TO syntax error - invalid syntax`

Any email that bounced using the suppressed domain list has either a typo in the domain part (think gmial.com) or is a known invalid domain that should not be used (test.com). If the email bounced with an invalid syntax, it has formatting issues. Some common syntax issues include missing the "@" sign, missing the domain extension (.com), having a space or using a comma instead of a period. These errors can be manually corrected.

SPF issue with the sending domain:

- `smtp;553 - SPF (Sender Policy Framework) domain authentication 553-fail`
- `smtp;550 - Message rejected because SPF check failed`

You'll want to check your SPF record (you can do that here) and, if you're a ClickDimensions customer, make updates to ensure that customers.clickdimensions.com is included and that the SPF record is passing.

Spam issues with the content or IP:

- `smtp;550 5.7.1 - Message rejected as spam by content filtering`
- `Status = 5.0.0 (undefined status) | Diag = smtp;550 - Denied by policy`
- `smtp;553 - Sorry, your IP address has been blacklisted`

If you get messages like these, the IPs that you are sending from may be temporarily blacklisted (we monitor our IPs daily and work with the major blacklists to remove listings if they occur), there may be something in your email content that is triggering a spam filter or the receiving mail server has a policy in place that your mail does not meet.

Soft bounce issues on the receiver side:

- `Status = 4.0.0 (transient failure: all sources at per-source limit)`
- `smtp;554 5.4.14 - Hop count exceeded - possible mail loop`

There isn't anything you can do about these issues on the receiving side, unfortunately. It may be a temporary technical issue on their end that gets resolved.

Bounces are a great way for senders to identify email issues. Bounced emails should be under 5% of the total emails sent and anything over 10% is a red flag that should be investigated.

A CLOSER LOOK AT SPF RECORDS

In a nutshell, SPF (Sender Policy Framework) is an authenticating process that identifies which mail servers can send emails on behalf of your domain. This prevents email spoofing (spammers sending messages with forged sender addresses) by providing a way for receiving mail exchangers to check that incoming mail from one domain comes from a host authorized by another domain. If you are a ClickDimensions user, this means that when your SPF record includes an entry for ClickDimensions, we can send emails on your behalf.

For example, emails from our fictitious organization, Tomato Gardens (tomatogardens.org), would be addressed as coming from joe@tomatogardens.org. On the back end of the email sending process, mail servers see that ClickDimensions is authorized to send emails on Joe's behalf because of the SPF record. Without a properly configured SPF record, his emails may be flagged as spam to both internal and external recipients.

Breaking down an SPF record

An example of an SPF record might read like this:

```
v=spf1 include:spf.protection.outlook.com include:customers.
clickdimensions.com ~all
```

How do I include ClickDimensions in my SPF record?

To include ClickDimensions mail servers in your SPF, you add the following statement to your SPF record at your domain's DNS host:

```
include:customers.clickdimensions.com
```

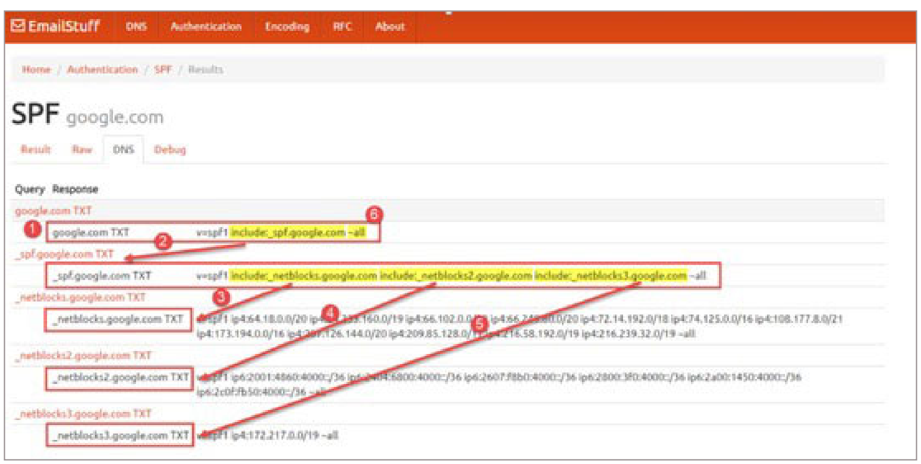
Determining if an SPF record has been set up

There are a number of online tools that allow you to check if your domain has an SPF record set up. These tools usually check if the SPF record is configured correctly as well. Some of our favorite tools to use when troubleshooting these types of issues include:

- http://www.kitterman.com/spf/validate.html
- http://mxtoolbox.com/spf.aspx
- http://emailstuff.org/spf

A personal favorite is emailstuff.org, as its SPF checker goes into great detail to provide all the lookup entries in an SPF record. SPF records can only have up to 10 lookups – anything more will cause a permanent failure with an error message that might say "PermError SPF Permanent Error: Too many DNS lookups."

Below is an example of what an SPF record check might look like. In this example, we used emailstuff.org's SPF validation tool to check Google's SPF record.



Every line of red text in the SPF check is a separate DNS lookup.

1. Google's SPF record.
2. The entry has an include statement for _spf.google.com, which in turn has additional lookups (_netblocks.google.com, _netblocks2.google.com, and _netblocks3.google.com).
3. **3, 4 and 5.** Each "include:" record can be broken down into a separate lookup. In this case, each additional lookup is checking the IP address of the sending server.
6. Google's SPF record uses "~all" to validate; this means that mail will still be allowed to pass without an exact match.

The "include," "a," "mx," "ptr," and "exists" mechanisms, as well as the "redirect" modifier in an SPF record all constitute a lookup. Other mechanisms such as "all," "ip4," and "ip6" do not count as lookups.

In addition, some senders use "include:" records that in turn use additional "include:" records – all of these lookups compound and might eventually cause the permanent error of having too many DNS lookups. This is why ClickDimensions uses a specific SPF entry (include:customers.clickdimensions.com) instead of our domain (include:clickdimensions.com).

There are different types of authorization that you can publish for your SPF record, as outlined in the chart below. In addition to adding ClickDimensions to your SPF record, we also recommending authenticating with "~all".

Statement	Result	Meaning
?all	neutral	The address doesn't pass or fail. In many cases, mail servers will allow mail.
+all	pass	The address passed the test; allow all mail.
~all	soft fail	The address failed the test, but the result is not definitive; accept and tag any non-compliant mail.
-all	(hard) fail	The address failed the test; reject any email that doesn't comply.

Do I have to publish an SPF record?

No. We don't require you to publish an SPF record in order to send emails and there are no mechanisms in place that would prevent you from sending ClickDimensions emails without it. However, this is a best practice method that we *highly recommend* because it will help improve email deliveries both to internal contacts and to your external audiences.

SPAMASSASSIN REPORT – FOLLOW THE RULES!

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

Spam Assassin Report

Is Spam: False

Spam Score: 4.7

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

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

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

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

MIME_HTML_ONLY:
Problem: There is no text version.

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

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

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

HTML_IMAGE_ONLY_08 or HTML_IMAGE_RATIO_08:
(Note: the number (08) may be different depending on the ratio)

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

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

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

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

Note: There are a couple of others in the screenshot above that are a result of this same issue – DKIM_ADSP_CUSTOM_MED and NML_ADSP_CUSTOM_MED

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

VIDEO SUPPORT IN EMAIL

While it is possible to add videos into an email, there is very little support for displaying videos in email clients. Apple Mail supports most video embedding options, current versions of Outlook do not support anything, and other email clients generally fall somewhere in between.

In general, GIFs are your safest bet for displaying animated content in an email; other options will likely not display for your recipients. If you need to have a video in your email, a better option may be to insert a screenshot of the video and have it link to a video hosted on your website or another site, like YouTube.

The table to the right provides a breakdown of which video formats are currently supported in different desktop, web and mobile email clients.

Email Client	Flash	Windows Media	QuickTime	Java Applet	Emb MPEG	Animated GIF	HTML5
Desktop							
Apple Mail	✓	✓	✓			✓	✓
Lotus Notes 6.5				✓		✓	
Lotus Notes 7				✓		✓	
Lotus Notes 8+						✓	
Outlook 2003					✓	✓	
Outlook 2007+							
Thunderbird						✓	
Windows Mail						✓	
Web-based							
AOL						✓	
Gmail						✓	
MobileMe						✓	
Outlook.com						✓	
Yahoo!						✓	
Mobile							
BlackBerry						✓	
Android						✓	
iPhone						✓	✓
Windows Mobile 5							
Windows Mobile 6						✓	

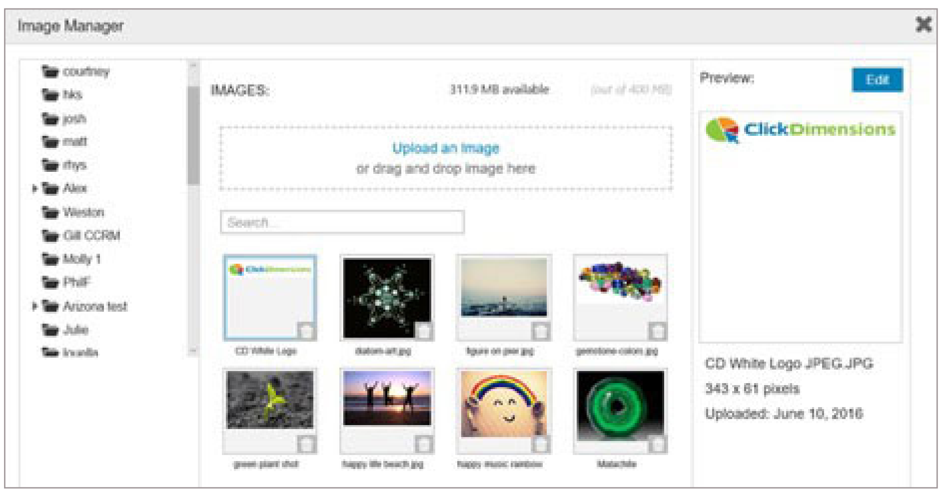
TECHNICAL CONSIDERATIONS WHEN USING GIFS IN EMAILS

Using animated GIFs in your email marketing is an effective way to create more interesting and engaging email messages, but it's important to keep a few technical details in mind.

When creating GIFs, file size is very important because many recipients may be opening your emails on mobile devices, and the larger the file size, the more time and data it will take for them to see your message. Given these factors, we will be focusing primarily on minimizing file size in the points below.

1. Keep in mind the maximum file size.

If you are a ClickDimensions customer, your GIF will need to be uploaded into the ClickDimensions image manager, which allows for a maximum image size of 500 KB. This is a sufficient size for accomplishing a lot with GIFs, but means you may have difficulty uploading very large or lengthy GIFs.



2. Focus on what's important.

Focus on animating the key elements of your GIF that help convey your message, and forego animating less relevant or necessary elements. The more moving parts in your GIF, the larger the file size will be.

3. Be aware of the GIF's dimensions.

As the width and height of your GIF increases, so does the file size. Try to constrain yourself to smaller dimensions initially or consider cropping out any non-essential parts of the GIF to keep the file size small.

4. Be aware of the GIF's duration.

More frames means a larger file size, so forego any frames that are not essential. For example, removing every third frame from an imported video GIF would allow you to decrease the file size by a third, but still maintain enough continuity to easily read the movement.

5. Consider your color palette and depth.

The more colors there are in an animated GIF, the larger the file size will be. If you are making a GIF of something like an app, clip art or primarily text, this will likely not be much of a concern. If you are making a GIF of a photo or clip from a video, you may want to consider changing the color depth. This reduces the number of possible colors that can be used, which reduces the file size while still maintaining the same content.

4 bits (16 colors)

8 bits (256 colors)

6. Outlook doesn't support GIFs.

While most email clients will play GIFs without issue, Outlook will only show the first frame as a static image. If you will be emailing recipients who use Outlook, make sure that the first frame of your GIF can effectively convey your message on its own.

DESIGNING EMAILS FOR OUTLOOK

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

Coding Practices; Tables vs Divs

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

Applying CSS

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

Accepting the Limitations

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

The Good News

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

THE POWER OF PLAIN TEXT EMAILS

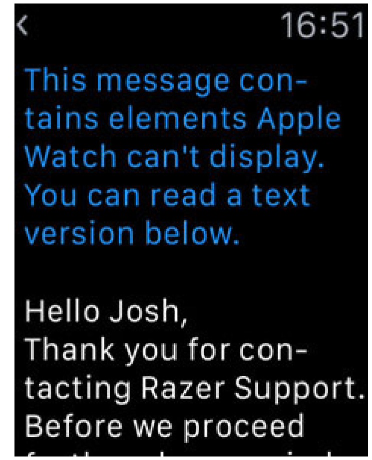
So, you've poured some serious time and effort into coding the perfect email template. Your fonts are just right, the spacing has been laid out to perfection and you've resized all your images to be exactly the same height. Before you hit send, add one extra step to your to-do list: create a plain text version of your email.

Plain text emails are exactly what they sound like – they're literally just text. There are no frills, no fun colors and no GIFs. It may sound like you're taking a step back into email's early days, but with the increasing popularity of smart watches and shrinking phone screens (looking at you here, Apple), devices that only render text are making a resurgence in the marketplace.

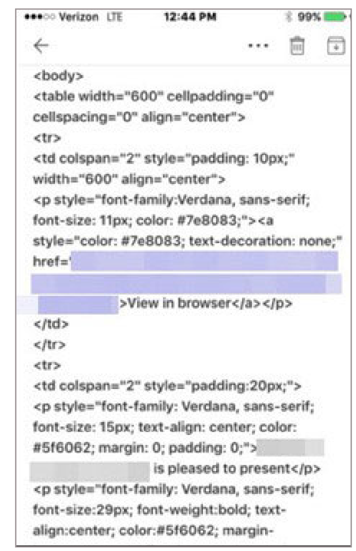
And if that's not enough to convince you, here are three more reasons to include a plain text version of your email:

1. Decrease your spam score.
If you only have an HTML version of your template, you're going to set off alarm bells for many email clients and spam filters. Having a matching plain text version to correspond with your body copy is a simple way to get around this problem. You can review your spam score before and after implementing a text version of your email using the test feature in a ClickDimensions email send.

2. Give yourself a back up.
Some email clients will provide an option for users to automatically display the plain text version of an email, and some devices simply don't render HTML well. Keep in mind that not everyone will have their set up configured the same way you do. Make sure that you are able to reach all of your contacts, regardless of their preferences.



3. Avoid the dreaded raw code rendering.
In the scenarios mentioned above, sometimes your email may come through as blank. Other times, your raw code will be presented, which could inadvertently lead a recipient to think the email was spam. A plain text version of your email keeps your contacts informed and your bounce rates low.



So now that you're convinced that you need a plain text version of your email, here are a few tips and best practices for making the most of it:

1. Auto-generate.
Make this process quick and easy. Using ClickDimensions' email editors, you can generate a text version of your email with just one click.

2. Make it easy to scan.
Include a clear call to action and space out your links. People should know where to click and not have any trouble doing so. Symbols and bulleted lists are great for laying out easy-to-read emails.

3. Link to your HTML version.
By including the link to view the HTML version of your email, your recipient knows that an email is rendering as plain text is because of their settings, not any lack of effort on your part. Any interested readers can then go on to view the full message you intended them to receive, if they have the capability.

```
Greetings from Holmes and Watson
Suzannah Howell - 12:01 pm
to sherlockholmes29601
View this entire message [http://elink.clickdimensions.com/m/1/77987302/b10316-1ac63b55-29b8-490c-8fcb-29e1af693828/1/2/a61ed652-c630-4685-94c0-148523391ee1]
-------------------------------------------------------------


==========================
From the Desk of Sherlock Holmes
==========================

*** Please be advised that our headquarters have moved.
We are now officially located at 221 B Baker Street, London. ***


=======================
Request Our Detective Services
=======================
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MEASURING ENGAGEMENT FOR EMAIL MARKETING

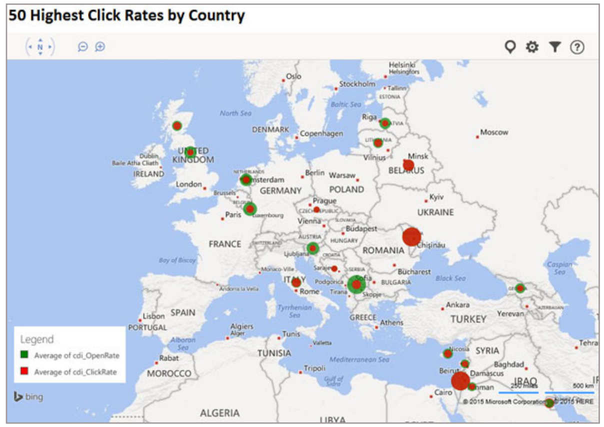
As a marketer, it's important to understand the level of engagement your audience has with your email.

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

Measuring engagement provides a few key benefits:

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

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



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

Where is Open and Click activity recorded?

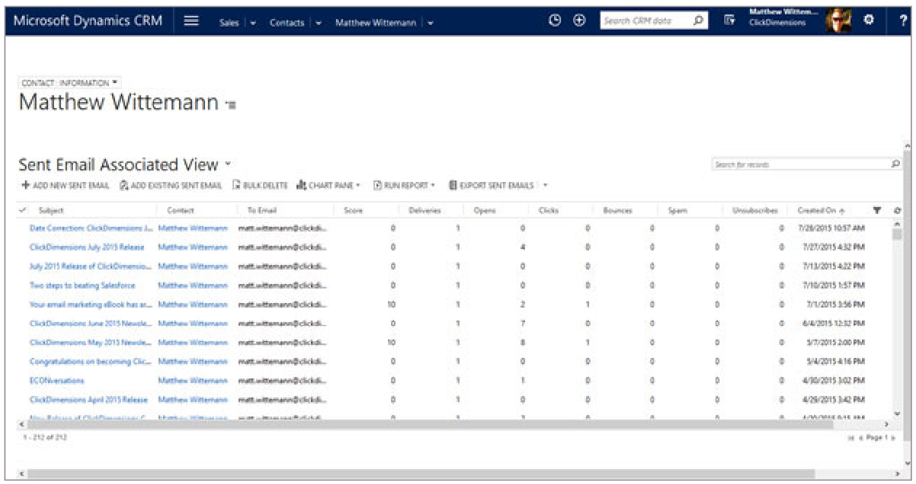
First, let's take a look at where you can find open and click data for the recipients of your emails. If you are using ClickDimensions for your email marketing,

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

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

Let’s take a look at my Contact record.

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



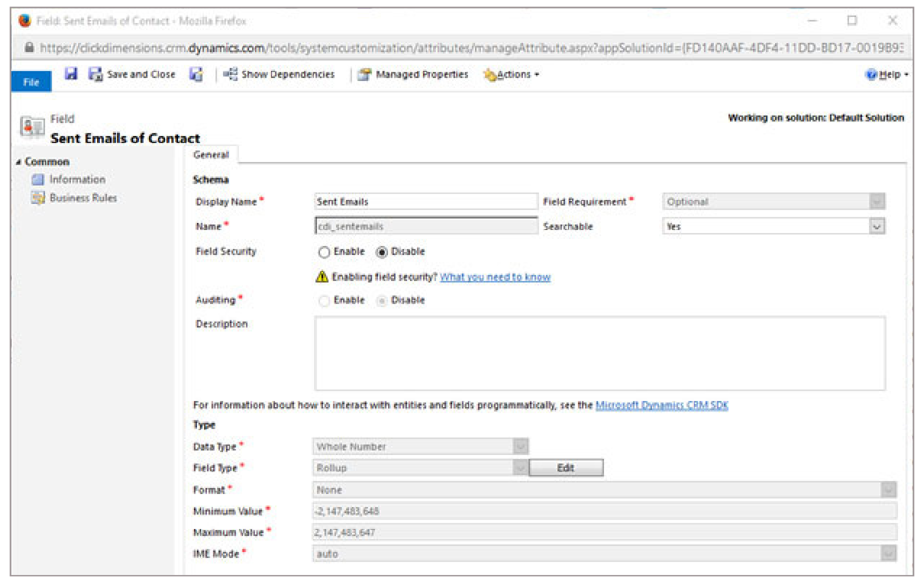
This is great information to have if I want to drill into each Contact. But let’s take this data a step further in our analysis.

Rollup Fields

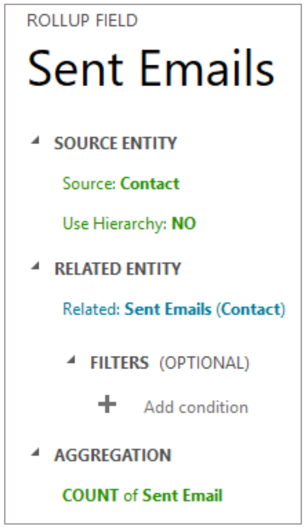
CRM 2015 introduced the concept of a “rollup field.” This is a custom field you can add to the Contact record in CRM and use it to rollup the values from records related to the Contact.

I have added three rollup fields to the Contact entity:

- Sent Emails
- Opened Emails
- Clicked Emails



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



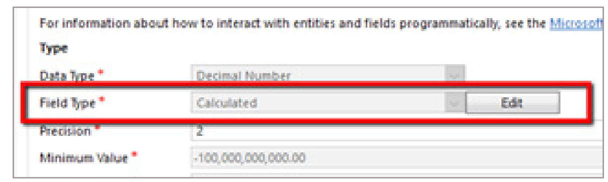
I did something similar to create rollup fields for the Opened Emails and Clicked Emails. However, in these fields, I am only interested in counting them if they have opened or clicked. I am not summing up the total number of opens or clicks – in other words, if the recipient opened the email five times, I am only counting it once. This is a decision I made on how I want to calculate engagement. My end goal is that I want to see the percentage of emails that I send that are getting opened or clicked at least once by a contact. I could sum the numbers if, for example, I wanted to measure and compare Contacts to see who is the most active "clicker," but in this case, I am just counting if they have at least opened the email once or clicked on one link. Here's how I did that:

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

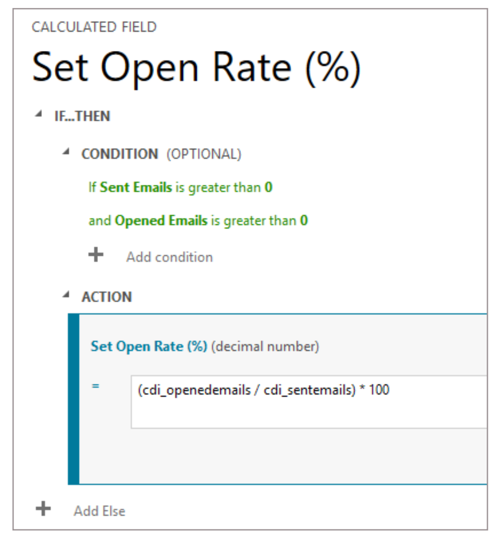
Calculated Fields

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

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



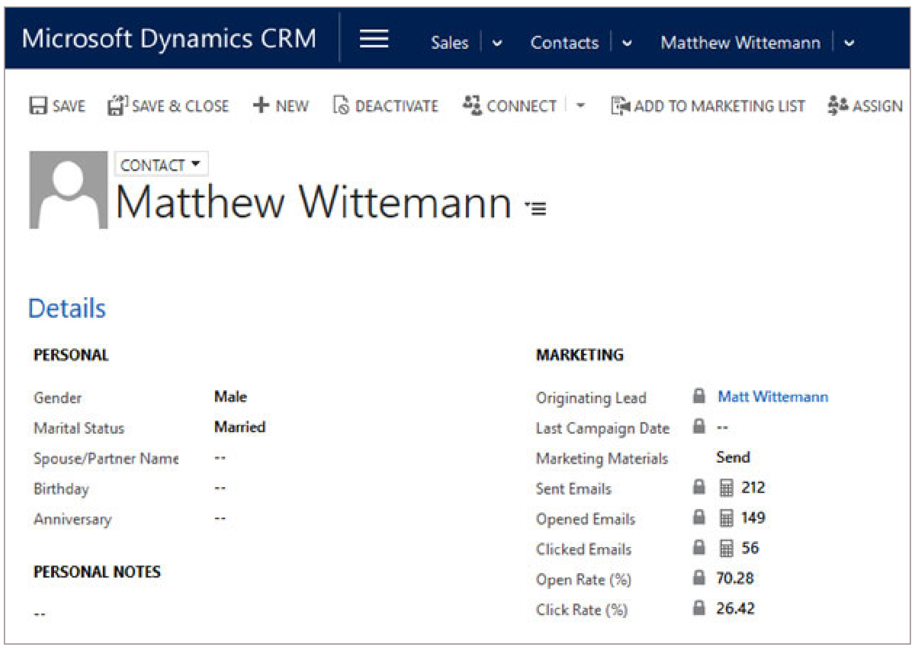
Here's the calculation I'm making in this field:



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

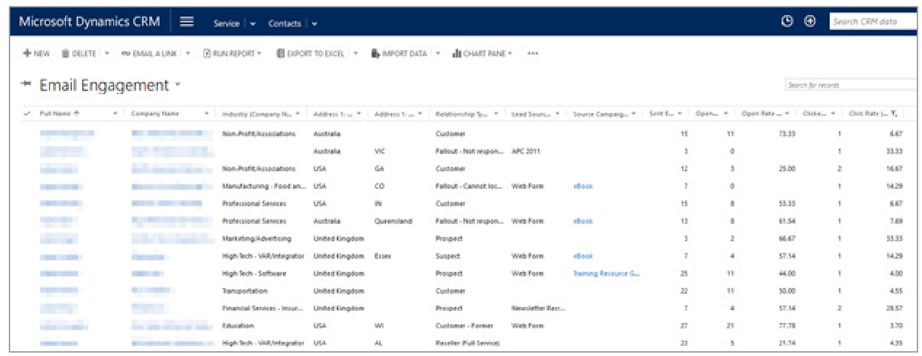
Adding the fields to the form

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

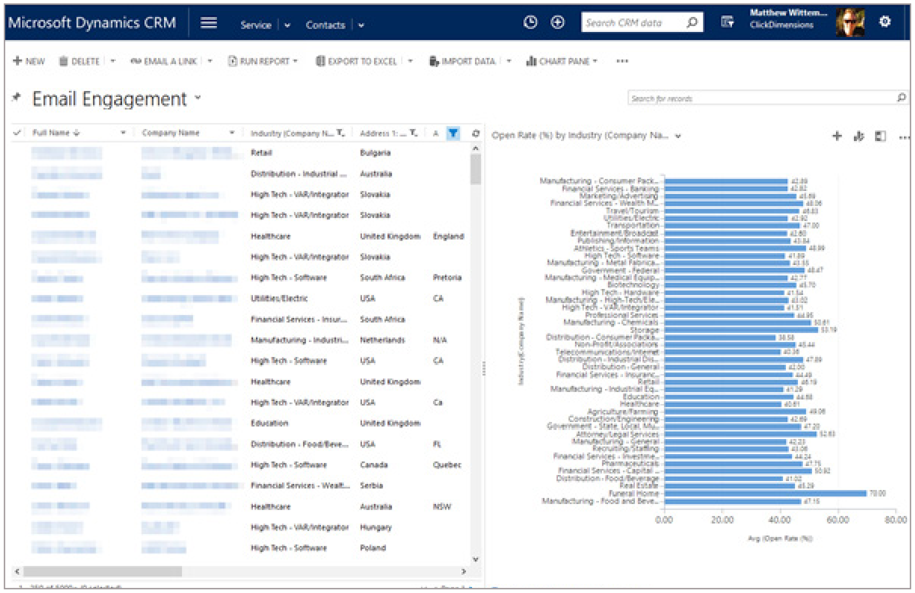


Adding the new fields to a view

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



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

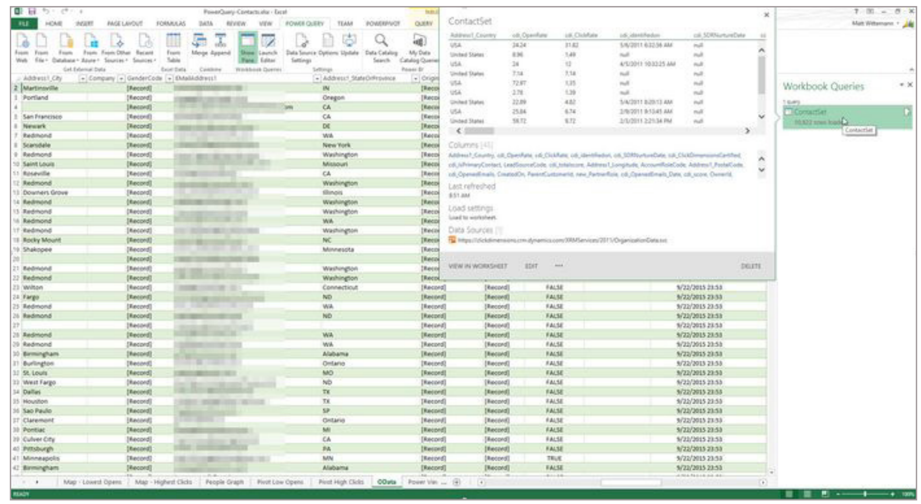


From this chart, I can see that we've got our best readership engagement in the "Funeral Home" industry! Who knew? That's an interesting insight. Maybe we can do some more targeted marketing to that industry and develop some content that would be of interest to them.

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

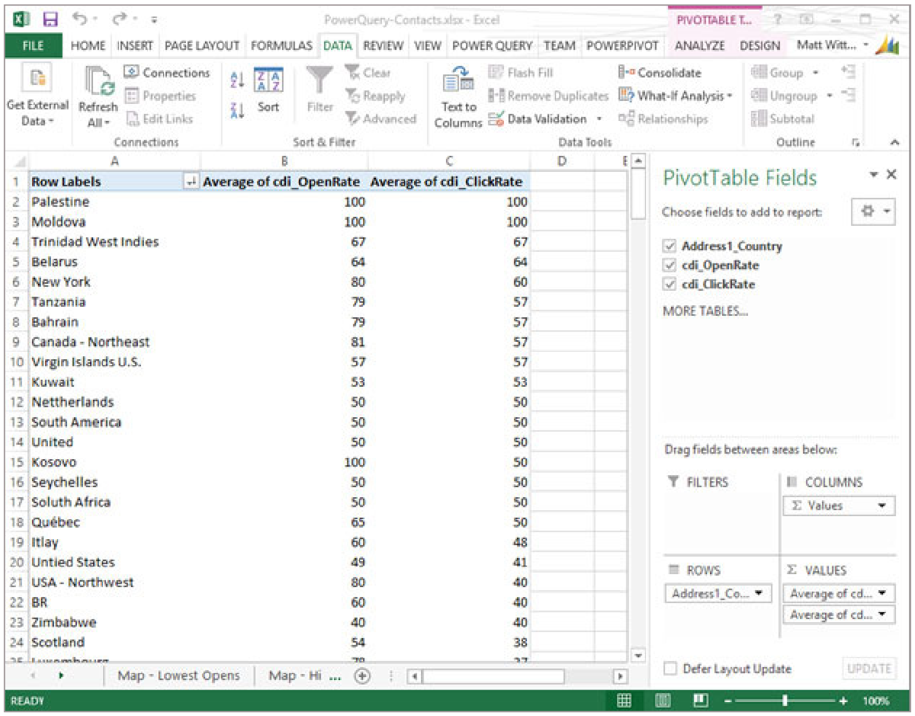
Excel: The best BI tool

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

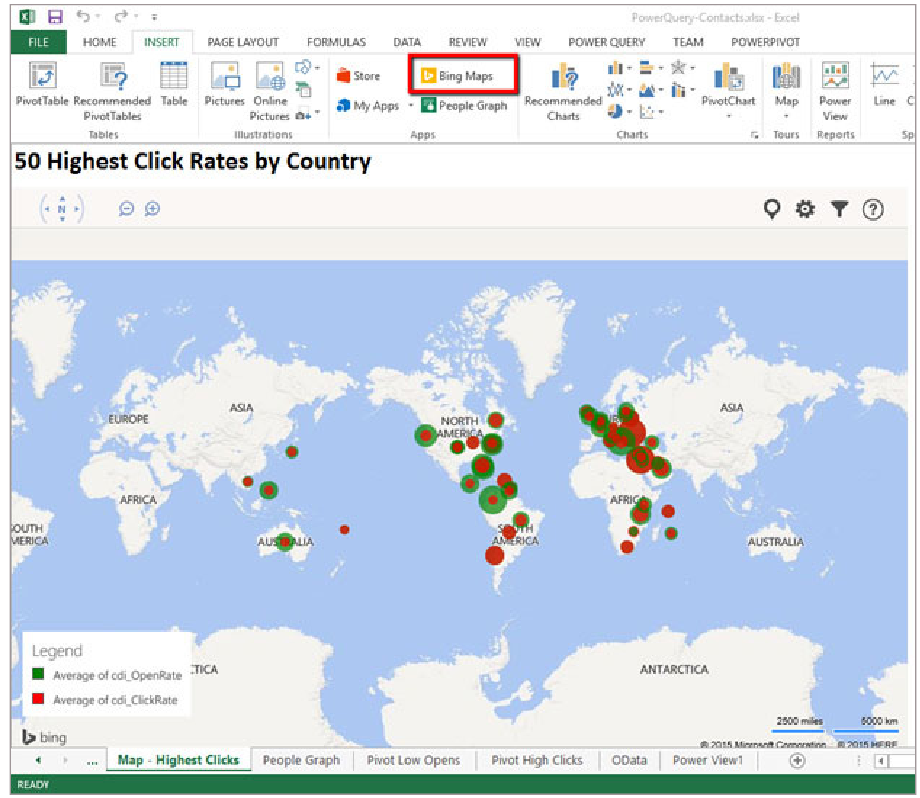


Getting your data into Excel is the first step, and from there, you can do all sorts of great things. I've dropped a few columns into a Pivot Table to group open and click rates by country:

Pivot Tables from Power Query Data

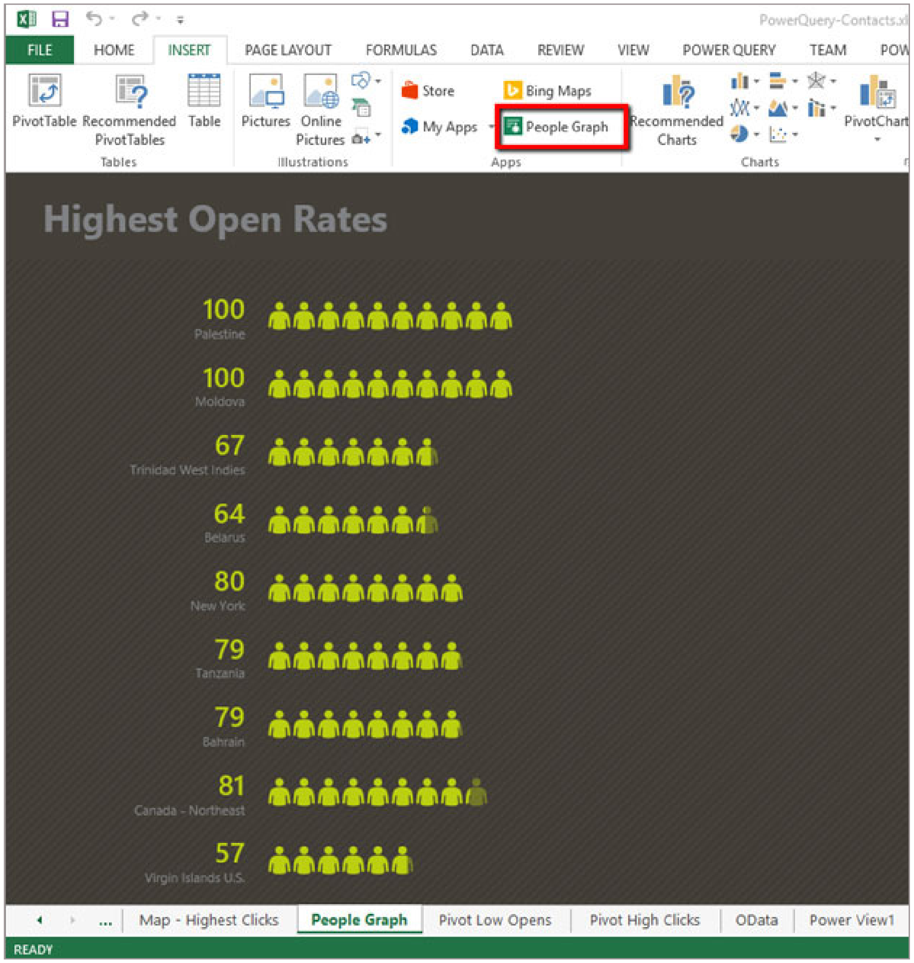


Bing Maps in Excel from Pivot Table Data



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

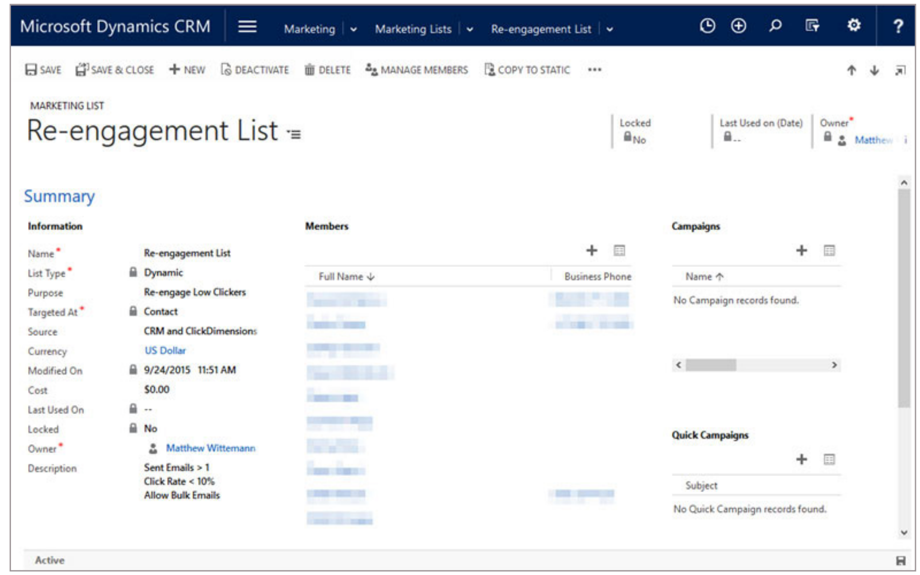
People Graphs in Excel from Pivot Table Data



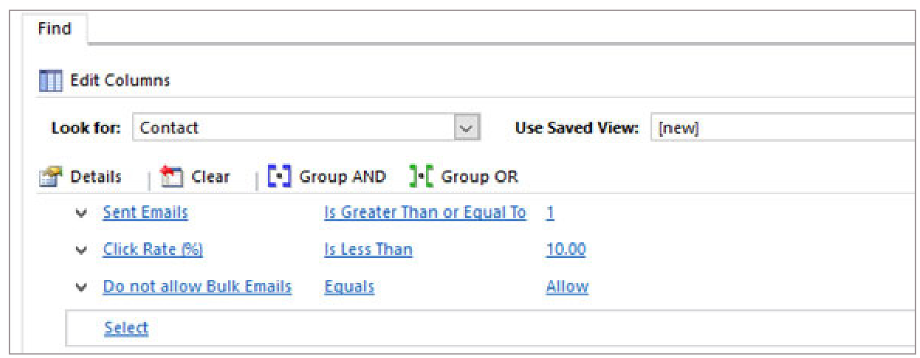
Re-engagement

This also opens up new possibilities for a re-engagement campaign. In addition to slicing and dicing our engagement by industry, region or relationship type, we can plan to target individuals who have not opened or clicked at high levels. Maybe there is something we can do to re-capture their interest.

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



The criteria I've used are as follows:



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

Tips for re-engagement

1. Clean up your lists
   - Measuring engagement is the first step. Some parts of your audience may no longer be appropriate targets of your marketing (aged out, not reachable, inactive for years, etc.).
   - Don't re-engage with really old inactives – they'll drive up your rate of spam complaints.
2. Experiment
   - Which campaigns have the highest engagement rates and why?
   - How can you replicate this success?
3. Be persistent
   - Re-engagement often takes more than one email. Successful re-engagement campaigns are often a series of emails.
4. Give your audience a reason to re-engage
   - What's in it for them? (Special offers, new products/services)
   - Give prominence to your call to action.

Some questions about measuring engagement in this manner

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

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

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

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

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

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

HOW TO RE-ENGAGE CUSTOMERS AND PROSPECTS WITH EMAIL MARKETING

Here's a hard truth about email marketing: even the most engaged and loyal subscribers can lose interest in your messages over time. New email subscribers love every message you send, but over time that interest fades. Before you know it, a formerly engaged subscriber barely blinks before deleting your emails.

So what's a marketer to do? Rekindling the relationship won't be possible for every subscriber, but you can win some back with re-engagement campaigns. These campaigns are the perfect opportunity to show disengaged subscribers why they fell in love with your brand and wanted to receive your emails in the first place.

Why Re-engage

There are a few compelling reasons to implement email re-engagement campaigns. The one that probably most readily comes to mind is re-engaging inactive subscribers to increase your sales or conversions. You want that once loyal customer to start buying your product or services again, or that prospect to download another white paper or register for more webinars. However, there's another great reason to engage inactive subscribers – inbox placement. Email providers, such as Gmail and Yahoo!, examine how their users interact with your emails and deliver your messages accordingly. With spam definitions being less content-focused than they once were, too many unengaged subscribers could put your message in danger of being flagged as spam.

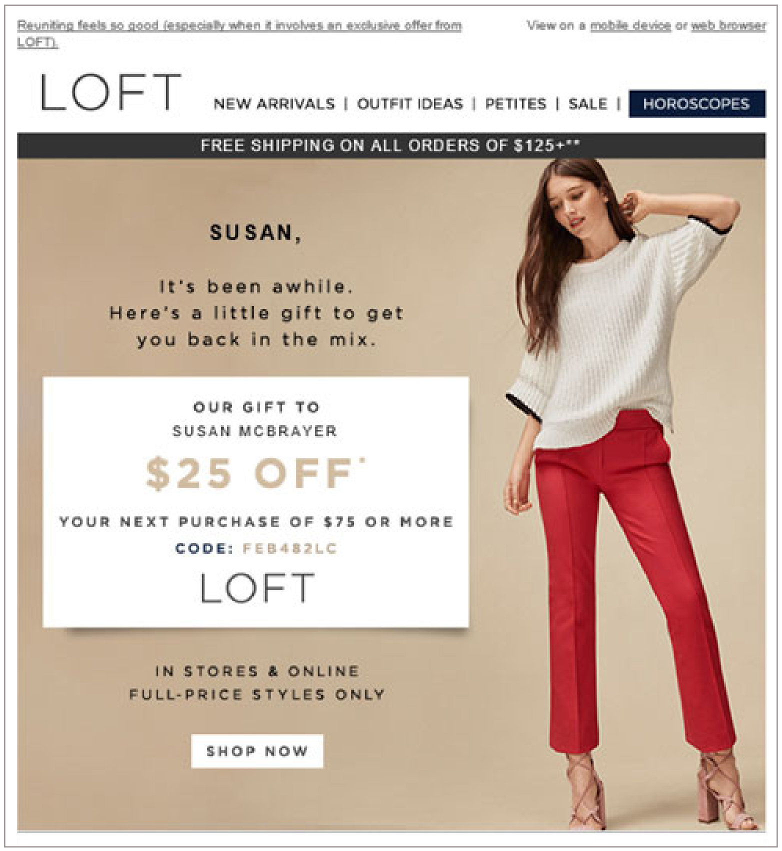
Who to Re-engage

Depending on your industry, the length of your company's average sales cycle, how often you send emails and a host of other factors, the definition of what constitutes an inactive subscriber will be unique to your company. For some, 90 days will be the benchmark, while a year will be the right length of time for others. Rather than making a best guess, take a look at your email statistics to get a more accurate understanding of the average time between when someone subscribes and when they stop engaging.

Once you have determined how your company defines inactivity, start your re-engagement campaign just before that timeframe. So if your established timeframe is one year, for example, aim to start re-engaging at nine months, so you can reach these inactive subscribers before they're too far gone. If you use ClickDimensions, our campaign automation feature is a great tool to use to set up and automate campaigns like this.

How to Re-engage

Re-engagement campaigns can come in many different forms, but they should in some way communicate the message that you recognize they haven't interacted with your company's email in some time and that you want them back as an engaged subscriber. The email example below shows one common re-engagement strategy – offering an exclusive discount for inactive subscribers.



Offering inactive subscribers a free gift with purchase is also commonly used in re-engagement campaigns. Short surveys can be another method used to re-engage email recipients, and can also be used to give you insights into why subscribers became inactive in the first place. You can sweeten the deal and encourage survey participation by offering a discount to recipients who complete the survey or entering them into a drawing for a special giveaway.

When to Call it Quits

Sometimes people enter a new phase in life that causes them to lose interest in your message. For example, a parent whose baby has grown into a toddler may not be interested in emails from a baby products company anymore, though they were once very engaged with those messages. Other times, people no longer use the email address that you have on file. And still other times, subscribers have been inactive with your emails for so long that a re-engagement message simply has no impact on them.

Whatever the reason, as we mentioned at the beginning of this blog post, re-engaging every subscriber won't be possible. The good news, from a Return Path study, is that 45 percent of those who received re-engagement emails opened subsequent messages, even though only 24 percent had opened the initial re-engagement email.

What about those that don't take the re-engagement bait? Use it as an opportunity to remove people from your email lists, thus improving your list hygiene and email deliverability.

OOPS! HOW TO DEAL WITH EMAIL MISTAKES

Everyone makes mistakes – it's a fact of life. With email marketing, those mistakes might seem harder to rectify or hide because the threshold for errors is fairly low. But fear not. It's not the end of the world, and you can recover from the mistake. Here's what to do in the event of an email marketing gaffe:

Step 1: Assess the situation quickly

Common email marketing mistakes include broken links, incorrect subject lines, technical difficulties (for example, an email had a link to your website but the website was experiencing issues with the host), sending the incorrect version of an email or even sending to the wrong list.

Once you identify your mistake, try to ward off knee-jerk reactions to immediately send a follow-up email to correct the previous email. When mistakes happen, you want to respond quickly, but it's also important to be thoughtful about how you're going to fix the issue. Sure, in the short term, it might seem better to immediately correct the mistake, but in the long run, it's better to assess the problem and determine if and how the issue is detrimental for your company. Ask yourself these questions:

1. Could the mistake cause a significant loss in revenue?
2. Is your brand's reputation damaged?
3. Are your subscribers offended or confused by the error?

If you said "Yes" to any of these questions, be ready to come up with a response. What if you said "No" to these questions? Keep reading.

Step 2. Respond

Once you have determined the cause of the issue, it's time to come up with a plan on how to address your recipients. Some tips to keep in mind when sending a follow-up email:

1. **Be swift.** A quick (but well thought out) follow up can catch your readers before they even get to the first email. The longer you wait, the more damage can be done.
2. **Be clear.** Your readers will likely want to know why they're receiving another email so soon. Make your intentions clear in your subject line and pre-header so your email's purpose is as transparent as possible. Subject lines with "Oops," "Correction" and "We Apologize" are attention grabbers.
3. **Own up to your mistake**. A quick apology goes a long way. It doesn't need to be long; in fact, the longer your apology is, the more it may highlight the fact that a mistake was made in the first place.

4. **Stay true to your image.** Your apology should maintain your company's brand. Humor is usually appreciated, but if it doesn't fit in with your image, then it shouldn't be forced.
5. **Offer an incentive.** If your email is promoting a product or service, consider providing a limited time offer as part of your apology. This can even drive up your open rates and web traffic.

Note: Depending on the nature of the mistake, you might choose to skip this step entirely. Sometimes, pointing out that you made a mistake might be a mistake in itself, since you're highlighting something that might have otherwise gone unnoticed. And sending another email so quickly after your first one could generate unsubscribes or customer complaints. However, you should exercise caution when not responding, and it should only be reserved for the most minor mistakes (a missing punctuation mark, a misspelled word or another small typo, for example).

Step 3. Measure the impact

ClickDimensions offers tools that allow you to follow and assess your email's success through email send and email event records. And you can use this opportunity to measure the impact of an email marketing mistake. Is the click rate greater or less than your average email send? Are there more unsubscribes? What about social shares and linking? Metrics of subsequent email sends should be looked at as well so you can see if those statistics were affected by a previous email. Not only does analyzing your email allow you to understand the impact of your actions, it may also be an indicator of whether your readers are truly paying attention to your emails.

Step 4. Quality control

"Oops! I did it again!" should not be something that you're saying (or singing) often in regards to email marketing mistakes. To help you avoid future mistakes, make a checklist of everything that should be scrutinized before each deployment such as checking personalization fields, reviewing subject lines, testing links and, of course, proofreading everything.

EMAIL MARKETING ETIQUETTE

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

Permission-based Email Marketing

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

Quality Content

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

Respond to Replies

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

Consistency

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

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

UNDERSTAND EMAIL STATISTICS: DELIVERIES

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

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

Sent

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

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

Active Email Events

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

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

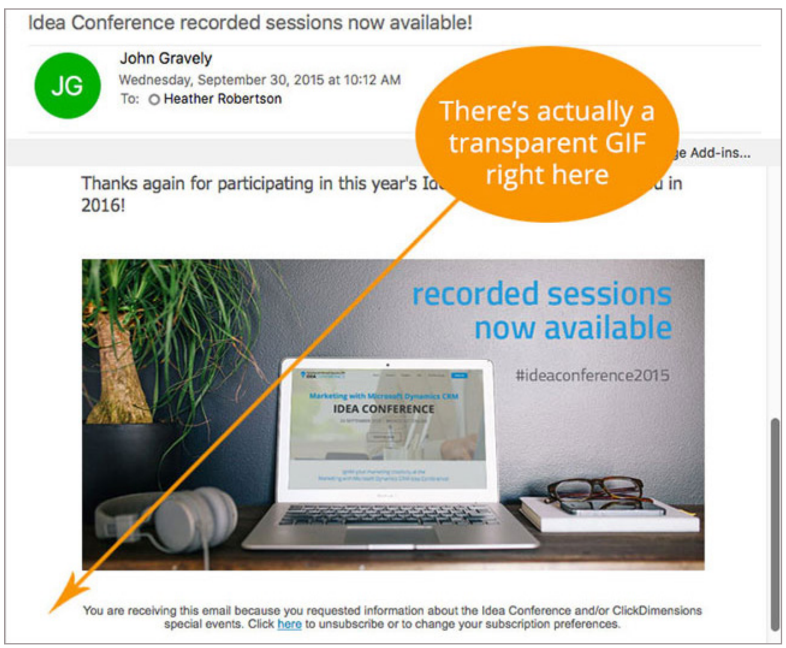
Below, we see that the recipient's mail server told us the message was delivered, and a few seconds later it said that the email couldn't be delivered because the email address was invalid. A situation like this is an exception rather than the rule, but it happens frequently enough that it's helpful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

UNDERSTAND EMAIL STATISTICS: OPENS

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

How Opens Are Counted

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



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

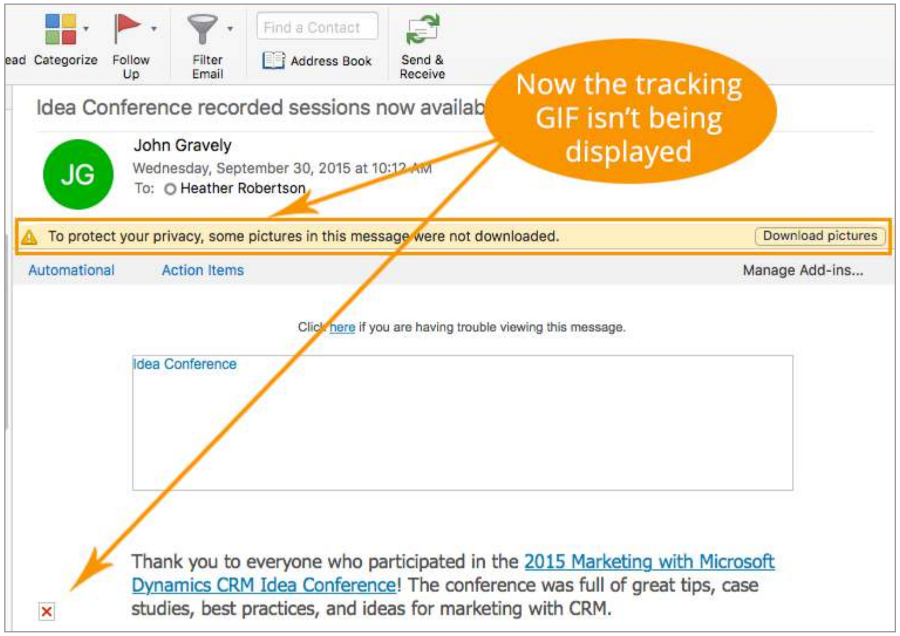
So, for example, if the GIF is hosted at http://files.mycompany.com/tracking.gif, we'll add a unique ID for each and every email recipient to the end of the address in the email's HTML. Now the URL for the tracking GIF might look like this: http://files.mycompany.com/tracking.gif?_id=1234567890. (This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

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

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

Simple, right?

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



Most email applications today block the display of images by default.

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

The recipient would need to click Outlook's informational message to download all the pictures for the email, including your tracking GIF. In some email applications, if the user adds the sender to the "Safe Sender" list or whitelist, then images will always be displayed automatically in emails from that sender.

An email can be forwarded.

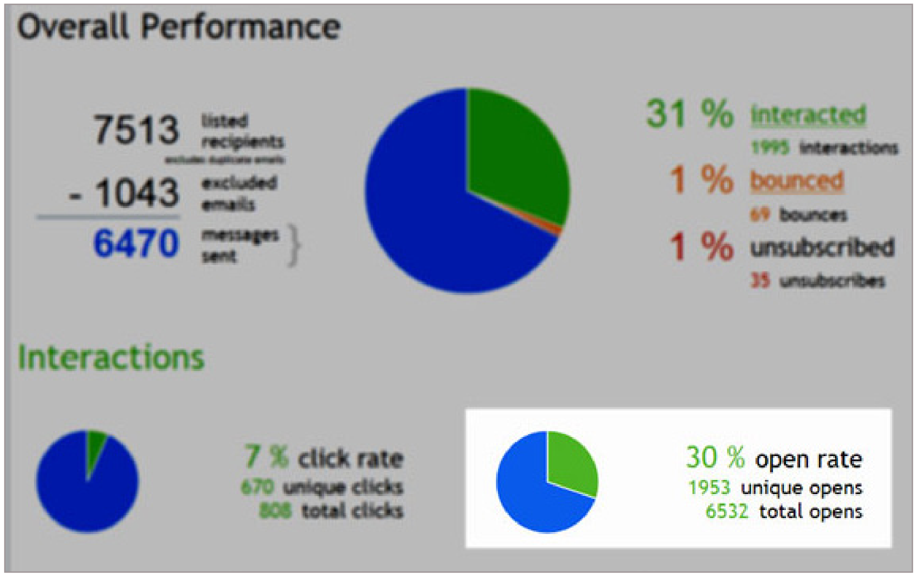
So what would happen if I received the email above, didn't tell Outlook to download all the pictures, and forwarded it to my mom (who is still using Outlook 2000 on Windows ME)? Well, in that case, the tracking GIF would be downloaded because her outdated system doesn't block tracking images automatically, and the pictures would be displayed for my mom. But the unique ID that was appended to the tracking image is still correlated to me. So our system would think that I opened that email.

Some people don't clean out their inboxes.

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

So what's the takeaway here?

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



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

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

UNDERSTAND EMAIL STATISTICS: CLICKS

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

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

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

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

So, how are clicks recorded? When you send an email through ClickDimensions, our service looks through the email’s HTML and converts any links it finds into trackable links. For example, in the email below, the template had a link to http://www.clickdimensions.com. When the email was sent through our system, we converted it to a much longer link. Now, when the recipient clicks the link, their browser will actually first go to http://elink.clickdimensions.com before being rapidly redirected to the website the marketer put in the email.

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

Chapter 2
Nurture Marketing

Access to information has changed the way that consumers interact with businesses, which has in turn changed the way that organizations market to their prospects and customers. Marketers must now focus on getting the right message to the right person at the right time, rather than using a one-size-fits-all approach. The articles in this section can show you how through nurture marketing and campaign automation.

7 REASONS WHY YOU SHOULD NURTURE LEADS

First, the bad news: According to MarketingSherpa, 79 percent of marketing leads never convert to customers. The good news is that there is something you can do about that poor performance. It's lead nurturing, and if you're a ClickDimensions customer, it's easy to set up lead nurturing campaigns – or any other kind of marketing campaigns – with our campaign automation builder.

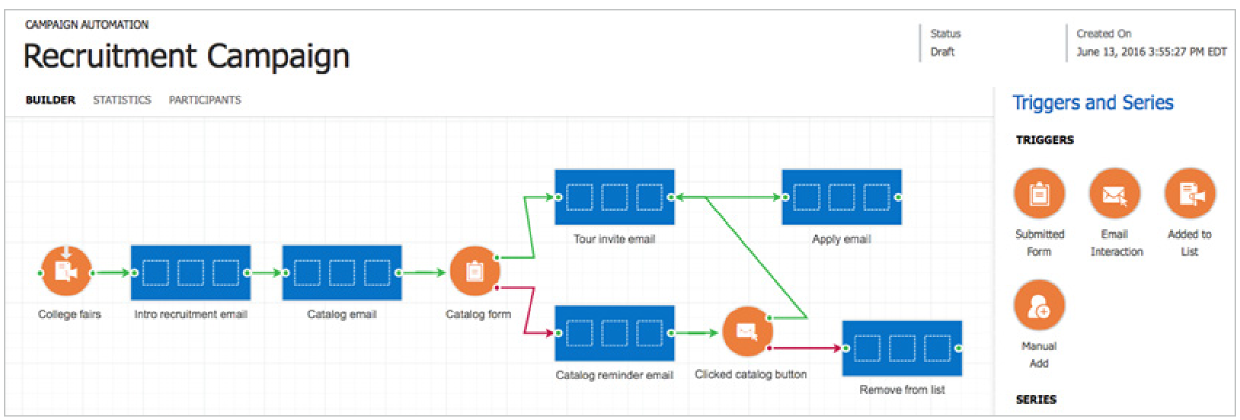
Here are seven reasons why you should get started nurturing leads today:

1. Keep your organization top of mind.

A Gleanster Research study reveals that 50 percent of leads are qualified, but not ready to buy. So what happens to those leads in the meantime? Too often, they fall off of a company's radar and, in turn, the company falls off of the customer's radar too. Lead nurturing campaigns are an effective way to keep your company top of mind as an individual progresses from prospect to customer.

2. Educate leads about your products and services.

According to Forrester Research, 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. Once they have made contact with your organization, assist in their research efforts by adding them to a lead nurturing campaign that will educate them about your products and services, or even your industry and broader trends that may impact their purchasing decision. In the example campaign automation below, we see how a college or university might choose to educate prospective students about their institution through informative emails, a catalog download and an invitation to attend a campus tour.



3. Save valuable sales resources.

Sales teams are so focused on the here and now (and rightly so) that they don't often have time to think about or court leads that aren't ready to buy right away. Using lead nurturing campaign automations, you can free up your sales team to focus on the hottest and most immediate deals at hand, while still building a pipeline for the future.

4. Help overcome objections during the buying process.

"It's too expensive." "Now isn't the right time." "I don't really have a need for this product." You have heard all of these objections, and many more, before – or at least your sales team has. You can make it easier for sales to close deals when leads are sales-ready by addressing these objections and overcoming them in the content you send within lead nurturing campaigns.

5. Learn more about your leads.

Adding leads to a campaign automation is a great way to find out more about what interests them. As they interact with the messages within a campaign automation, leads will follow specific paths within that automation. This personalizes their experience while also showing you what interests them the most. Do they click on links for certain products or services? Have they downloaded content about a particular topic? This can refine your understanding of who they are, what they want and how best to sell to them.

6. Increase trust in your brand.

Campaign automations help you maintain consistent communication with your prospects, which in turn increases their familiarity with your brand and can help foster trust. You can further build this trust with lead nurturing campaigns that deliver content that speaks to their pain points, answers their questions and demonstrates your organization's position as an industry leader.

7. Bridging the sales and marketing gap.

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

6 WAYS YOUR CAMPAIGN AUTOMATIONS CAN SCARE AWAY YOUR LEADS AND CUSTOMERS

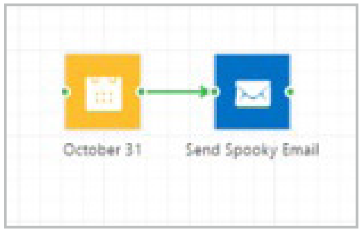
What was that? Did you hear something? Was it the bogeyman or another creature that goes bump in the night? In actuality, it was the sound of your customers or leads fleeing from your campaign automations, also known as nurture or drip marketing. But never fear, we're here to show you how to turn that around. Here are six ways your campaign automations might be scaring your leads and customers, and how you can take your automated campaigns from frightful to delightful:

1. Content issues.

Within your campaign automations, are you sending the same content to leads and customers alike or sending messages that don't provide a benefit to the recipients? If so, you might be spooking your audience. Campaign automations should contain information that will be of value to your leads or customers. Also, make sure that the content in every nurturing email is extremely relevant to those receiving it. While a piece of content can easily work for leads and customers, be sure to personalize the messages that promote that content so they address each audience individually.

2. Bad timing.

If you aren't putting any thought into the timing of your campaign automations, they aren't likely to be well-received by your leads and customers. Schedule messages appropriately based on the type of campaign automation. A campaign for sales-ready leads, for example, would likely have a shorter timeline than one for inactive leads that touches prospects only a few times per year. Regardless of the type of campaign, wait and date timers (as seen below) within the ClickDimensions campaign automation builder can help you schedule everything perfectly.



3. No consistency.

Nurture programs can help establish trust between a consumer and company while also building that company's credibility. However, inconsistency in your messaging is a quick way to put an end to that benefit. For example, if your brand's voice is very professional and the messages in your campaign automation have a more humorous tone, this can be very off-putting to your recipients because it's unexpected and doesn't feel authentic. Take the time to make sure that all of your nurture marketing messages are consistent with and reinforce the company's brand.

4. Lack of targeting and personalization.
One of the many benefits of a campaign automation is that messages can be customized based on the interactions a prospect has with the emails. Failing to use this aspect of the ClickDimensions campaign automation builder not only doesn't use this tool to its fullest, it also isn't as effective with leads and customers. Don't just develop and send a series of generic emails that are sent over and over again; create personalized experiences.

5. Lack of permission.
Permission-based marketing means that the individuals that you are marketing to have directly granted your organization permission to do so. Ensure that nurture emails – and every email you send, for that matter – don't violate spam rules. Failure to engage in permission-based marketing may not only alienate your message's recipients, it can also cause you to run afoul of the law. For example, the CAN-SPAM Act in the United States and CASL in Canada include specific guidance for giving email recipients the opportunity to opt in or opt out of receiving emails.

6. Not utilizing data.
Data in CRM can be extremely helpful 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 intelligence feature, you can gain even more knowledge about customers and prospects. What ads are people clicking on to get to your website? On which pages do they spend the most time? Knowing what content your audience is most interested in can help target the messaging in your campaign automations.

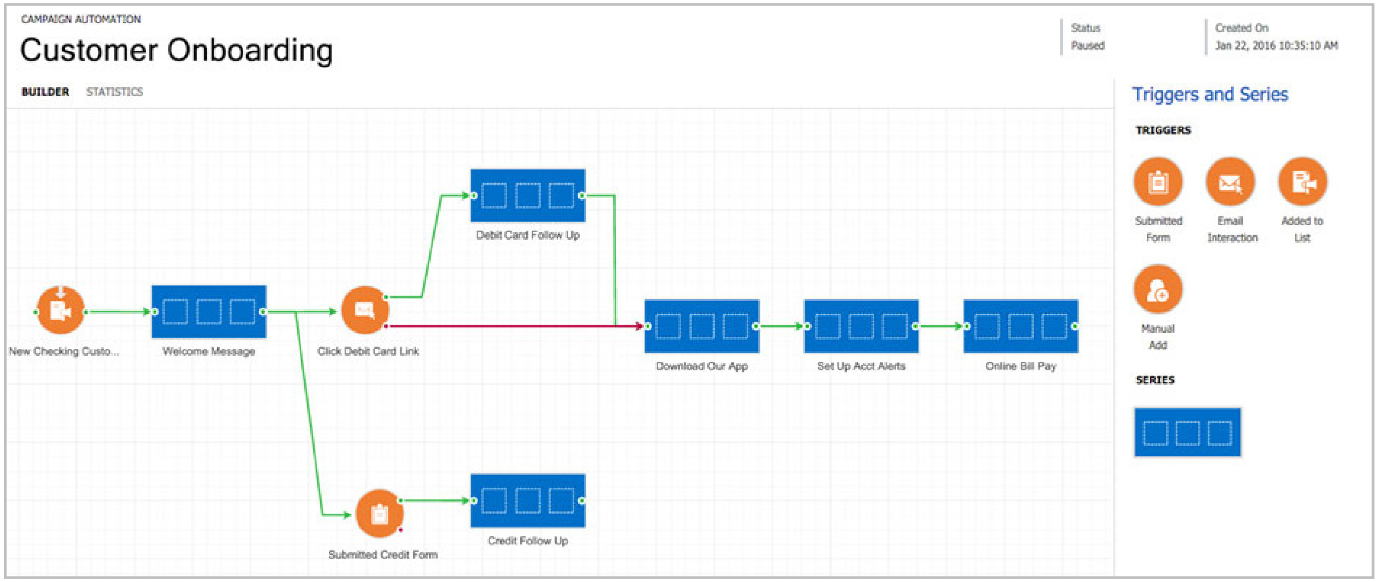
5 CHALLENGES OVERCOME BY USING CAMPAIGN AUTOMATION

Life is full of challenges. Fortunately, life is also now full of technologies that can often help us overcome problems and make our lives a little easier. Campaign automation, also known as nurture marketing or drip marketing, is one such technology. By helping you send the right communications at the right time, here are five challenges campaign automation can help marketers, salespeople, customer service personnel and entire organizations overcome:

1. Not enough time in the day.
You get to work with the best laid plans for what you're going to cross off your to-do list that day, only to get sidetracked by fires that need to be put out, meetings that run too long and routine emails that need to be sent. While campaign automation can't help you with those long meetings (sorry) or unexpected projects, it is perfect for reducing the time spent creating, scheduling and sending many types of emails. For example, rather than individually scheduling service appointment reminders every three months, an equipment manufacturer could create a campaign automation to send these reminders automatically and on time. That means less time devoted to routine tasks and more time devoted to marketing, selling or engaging customers.

2. Neglected leads.
Much as we would like for every lead to be sales-ready, that just isn't the case. In fact, according to Aberdeen Group, it takes an average of 10 marketing-driven "touches" to progress a lead from the top of the funnel to revenue generating. The challenge here is that sales teams need to devote much of their energy to closing the deals that are ready to close now, which means those that aren't ready to buy often don't get the attention they need to stay interested in your company. Automated lead nurturing campaigns allow you to keep leads warm and keep your company top of mind until these individuals are ready to buy. You can also use the messaging in a lead nurturing campaign automation to overcome common sales objections and educate prospects about your product, service or industry.

3. Lack of a customer onboarding process.
You never get a second chance to make a good first impression on a new customer. If that current first impression leaves new customers unsure of next steps or how to use your product or service, campaign automation can help your organization overcome that challenge. Using campaign automation, you can send new customers a series of messages regarding training opportunities or other helpful information they will want to know as a new customer, and even discover which new customers may need additional personal attention based on their interactions with messages. In the example campaign automation below, we can see how a financial institution might use an automated customer onboarding campaign to introduce customers to their account and even provide them with a special credit offer.



4. Low customer retention.

According to Forrester Research, it costs five times more to acquire a new customer than to keep an existing one. That means low customer retention is a challenge that it pays to overcome. An automated customer retention campaign helps customers stay connected with your organization and builds trust with your brand. The messaging, structure and timing within this campaign automation will vary greatly according to your industry. For example, an organization that relies on annual renewals may only run this nurture campaign yearly, while a business that sells to customers throughout the year may rely on retention campaigns more frequently to keep customers happy.

5. Generic messaging.

One size fits all messaging is no longer an effective marketing approach. Consumers today expect customized messages from the brands they interact and do business with, and campaign automation can help organizations meet those expectations. Not only are they segmented to suit a particular audience, these automated campaigns respond to the recipients' actions, thus creating a more personalized experience. For example, if a prospect that you're nurturing within a campaign automation does not click a certain link in an email, you might send them a follow up email. On the other hand, if they do click on that link, you might send them a different email or even notify a salesperson to call the individual.

TIPS FOR CREATING LEAD NURTURING CONTENT

Using ClickDimensions' campaign automation tool, you can easily create an automated lead nurturing campaign that sends a series of relevant and timely messages to your prospects over time. But what should you send in those messages?

Content isn't one size fits all, so the content you send should suit the individual receiving it and where he or she is in the buying cycle. Leads will fall into one of three phases within the buying cycle: awareness, research or decision.

In the awareness 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.

The research stage of the buying cycle is where people spend most of their time. This is the phase where consumers are shopping around. They are learning what is necessary to solve their problem and investigating potential solutions. Educational content is essential in this phase in order to move individuals to the next phase in the buying cycle.

In the third stage of the buying cycle, known as the evaluation stage, the rubber meets the road. Prospects 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 company over the competition?

While these three phases vary in terms of the kinds of content that are appropriate for nurturing campaigns, the content that you create for leads in all of these phases should share a few common traits:

1. Creating value.
Take a quality over quantity approach and create lead nurturing campaign automations that contain information that will be of value to your leads. Make sure that the content in every nurturing email is extremely relevant to the audience and speaks to their needs at that moment in time.

2. Boosting your brand.
Leads are just getting to know your brand, so make sure that the impression you leave on them is a good one. The content you send in any lead nurturing campaign should increase brand awareness while also establishing your organization as a thought leader in your industry. This is your chance to establish that your company aims to be helpful to its customers and meet their needs in every interaction.

3. Building trust.
Sending prospects high-quality, relevant content is a great way to build their trust and position your organization more as an advisor and less as one that is only out to make a sale. This trust is not only effective at moving leads through the buying cycle, it also builds the foundation for customer loyalty in the future.

CREATING A CAMPAIGN AUTOMATION TO WELCOME NEW EMAIL SUBSCRIBERS

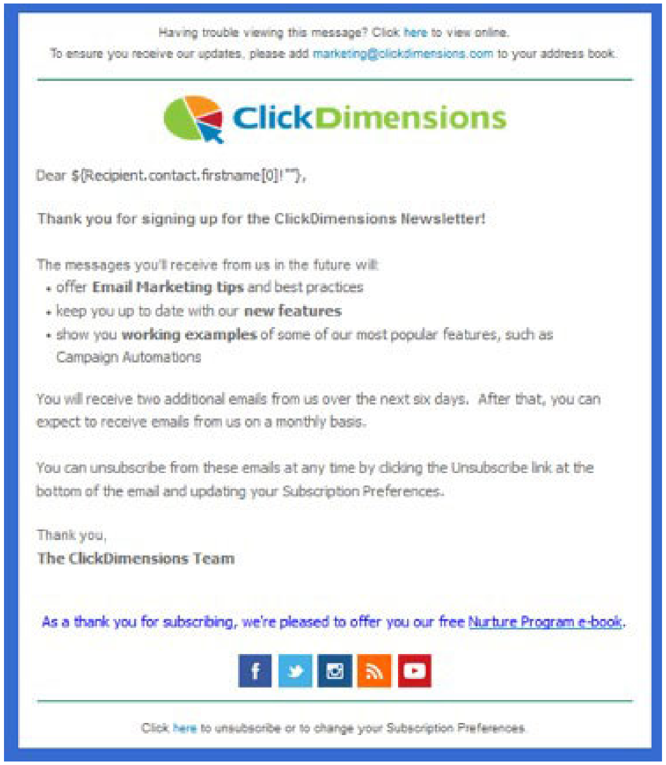
Wouldn't you love to create a campaign automation for welcoming new email subscribers and building your organization's relationship with them with little to no effort from you (once the campaign is set up, of course)? Here are some examples of emails that you could include in your welcome campaign automation, or nurture campaign, aimed at those new subscribers:

Email 1: Welcome Contacts and Fulfill Offers

The first email you send out should be your welcome email. This is a crucial piece of your campaign automation. The goal of this first email is to make sure your contacts feel important and included. With this email, you need to make sure you are reaffirming their decision to be part of your mailing list, and also fulfilling any offers you made in exchange for a sign up, such as a link to an eBook or some discounted merchandise. It is important that your contacts do not have to wait around for this email. You will want to schedule this first email to send immediately after someone joins your list.

Here are a few things you will want to include in your first email:

1. Thank them for signing up.
2. Let them know how often they will be receiving emails from you. For example: "You will receive three more emails from us over the next six days. After that, you can expect to receive emails from us on a monthly basis with information regarding special discounts."
3. Give instructions on how they can unsubscribe from future mailings.
4. Provide them with any incentives you offered for signing up, as well as links to other helpful information, such as your website.


Having trouble viewing this message? Click here to view online.
To ensure you receive our updates, please add marketing@clickdimensions.com to your address book.

ClickDimensions

Dear ${Recipient.contact.firstname[0]!""},

Thank you for signing up for the ClickDimensions Newsletter!

The messages you'll receive from us in the future will:
- offer **Email Marketing tips** and best practices
- keep you up to date with our **new features**
- show you **working examples** of some of our most popular features, such as Campaign Automations

You will receive two additional emails from us over the next six days. After that, you can expect to receive emails from us on a monthly basis.

You can unsubscribe from these emails at any time by clicking the Unsubscribe link at the bottom of the email and updating your Subscription Preferences.

Thank you,
The ClickDimensions Team

As a thank you for subscribing, we're pleased to offer you our free Nurture Program e-book.

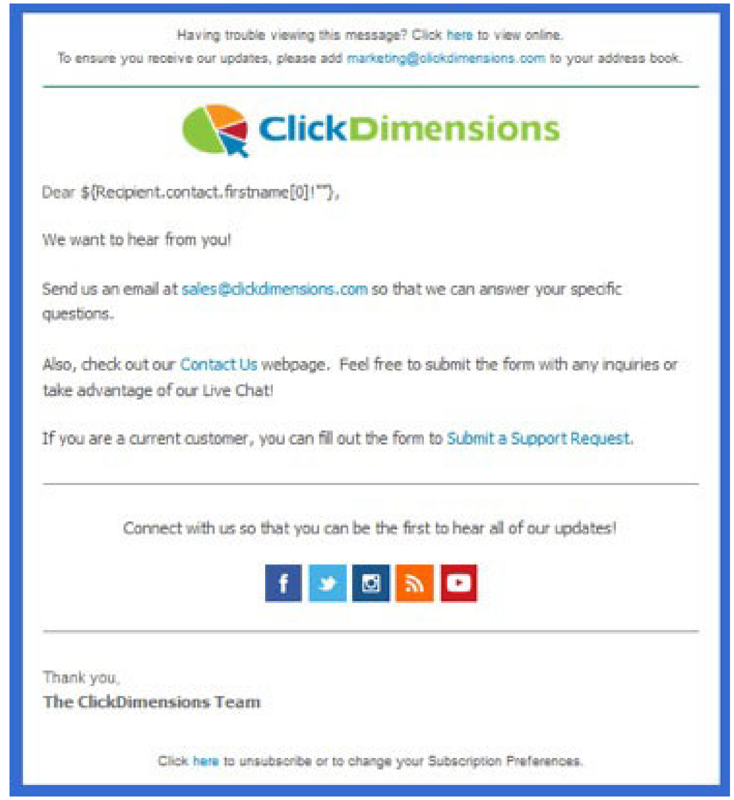
Click here to unsubscribe or to change your Subscription Preferences.

Try not to add too much information into your first email of the series. Too much content leads to ineffective messaging. This is why it is important to include multiple mailings in your welcome series. It also helps to get your brand in front of your contacts multiple times at the all-important beginning of your relationship with them.

Email 2: Give Contacts a Way to Contact You

Your second email should offer your new contacts a way to stay in touch with your business. Be sure to give them information regarding how they can contact you if they have questions. This could be a link to the Contact Us page on your website, a phone number they can call for assistance or an email address they can send questions and comments to. Be sure that you also include how your contacts can connect to you via social media. Insert your social links and any other information they may need regarding your social channels.

Send this second email out about two days after they have received the first welcome email. This ensures that your brand is fresh on their mind, but you are not overwhelming them with daily emails.



Having trouble viewing this message? Click here to view online.
To ensure you receive our updates, please add marketing@clickdimensions.com to your address book.

ClickDimensions

Dear ${Recipient.contact.firstname[0]!""},

We want to hear from you!

Send us an email at sales@clickdimensions.com so that we can answer your specific questions.

Also, check out our Contact Us webpage. Feel free to submit the form with any inquiries or take advantage of our Live Chat!

If you are a current customer, you can fill out the form to Submit a Support Request.

Connect with us so that you can be the first to hear all of our updates!

Thank you,
The ClickDimensions Team

Click here to unsubscribe or to change your Subscription Preferences.

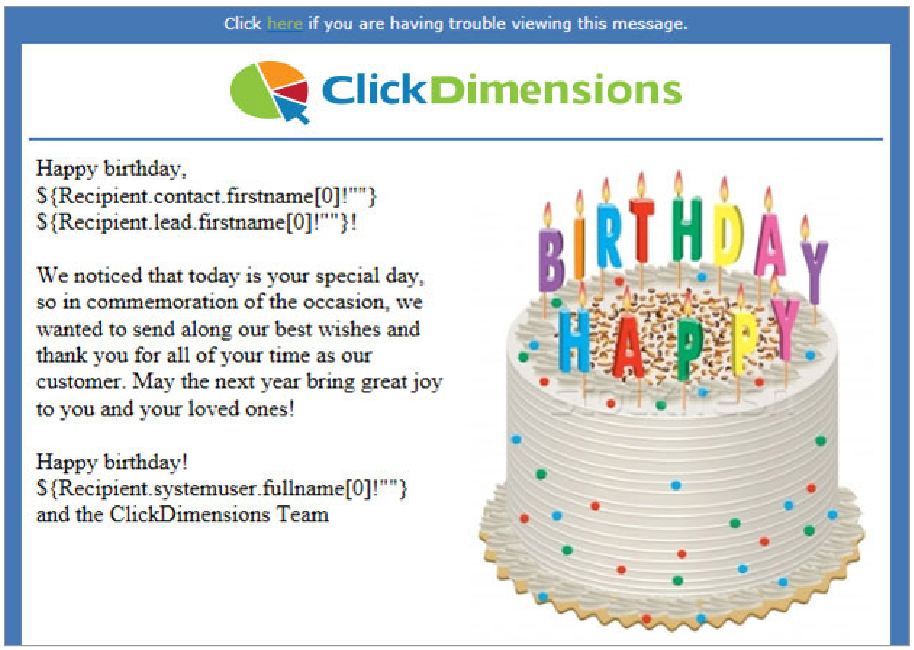
Email 3: Gather Customer Information

Use your third email to get to know your new contacts. You can use a ClickDimensions form to gather information such as their phone number, company name, location and other pertinent details that you may not have gathered when they subscribed to your list, which you can then store in CRM.

Send this email out three to five days after your second email was received.

Here are a few examples of things you can include in your third email:

- *"We would love to learn more about you! Please take a few minutes to tell us about yourself so that we can better tailor our emails to you."* Be sure to provide a link to a form, as we mentioned above.
- You could also use this as a chance to gather your new contacts' birthdays so that you can set up automated and personalized birthday emails like this one:



Be sure that each of your welcome series emails provides your new contacts with something of value. Set up your campaign automation to trigger the first email send as soon as someone signs up to be added to your mailing list. This is a great way to begin building a strong relationship with your new subscribers.

Ready to learn more about automating campaigns for leads and customers alike? Take a look at our eBook, [The Campaign Automation Playbook: Scoring Big with Customer and Lead Nurturing in Microsoft Dynamics CRM](#).

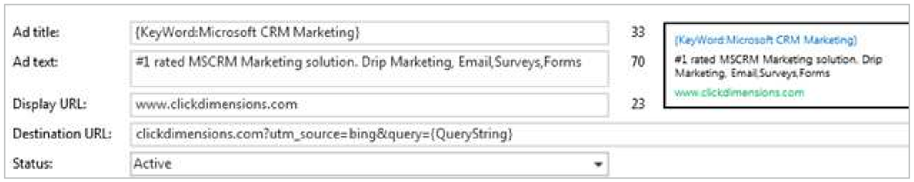
Chapter 3
Online Advertising

Combine the lead-generating and awareness-building power of online advertising with integration to your CRM, and you can refine your message, ensure it is reaching the right people and understand how to most effectively allocate your budget to broadcast the message. The following articles discuss using online advertising in conjunction with your CRM.

GAINING MORE INTELLIGENCE FROM PAID SEARCH CLICKS THROUGH URL TAGGING

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

This destination URL can be appended with special parameters that tell Google or Bing to send you back additional information about each click. Below you can see an example of one of our Bing ads.



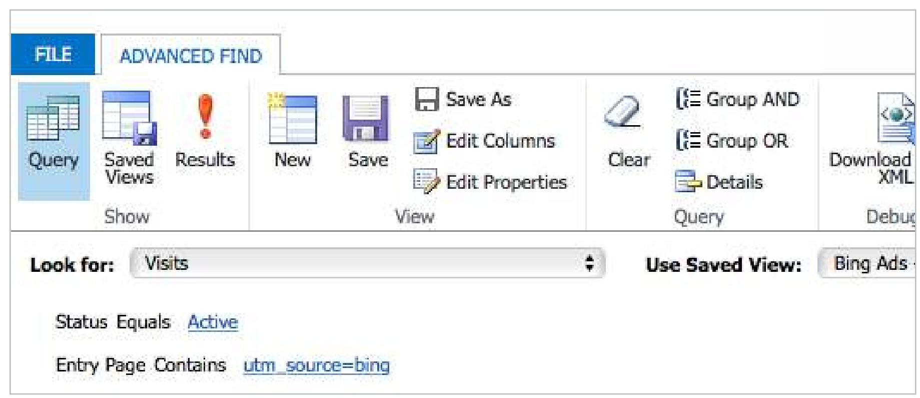

```
clickdimensions.com?utm_source=bing&query={QueryString}
```

Notice that the destination URL is clickdimensions.com/tour/email-marketing.asp, but that is followed by a question mark and then a series of parameters. For example, the first parameter is utm_source which is set to Bing. In this case, we are setting Bing as an absolute value because clicks on this ad are always coming from Bing Search Advertising. However, the second parameter in the URL, query is set to {QueryString}, which, as indicated by the curly brackets, represents a dynamic value which Bing will pass back to us in the URL when the click is made. For this parameter, Bing will pass back the actual keywords that the visitor typed into the search engine. Bing parameters are explained in detail at https://advertise.bingads.microsoft.com/en-us/blog/post/march-2016/new-tracking-parameters-for-urls-in-bing-ads.

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

```
http://clickdimensions.com/?utm_
source=bing&query=microsoft%20dynamics%20crm
```

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



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


Visits from Google Ads - Last 3...

IP Organization	Lead	Contact	Keywords
Comcast Cable			microsoft dynamics crm
Grupo ICE			jobs dynamics marketing
Internet Solutions	Lona .		how customizable is Dynamic CRM

We've also created a workflow that emails us with information from any new visits that came from paid search. This produces emails like the one you see below. These emails are helpful to our Sales Development Representatives who are responsible for finding new leads for the sales team. The emails help them uncover organizations that might be early in the discovery process. The sooner we can reach organizations that are searching on solutions like ours, the sooner we can begin to influence the buying process.


From: Click System
To: John Gravely
Cc:
Subject: Bing ad visit: QUIZNOS United States CLK:0005759

IP Organization: QUIZNOS

Lead/Contact/AV: QUIZNOS - QUIZNOS

Keywords: microsoft dynamics crm **Referring host:** search.yahoo.com

Entry page: http://clickdimensions.com/?utm_source=bing&utm_term=13076214204&query=m 20crm&match=e&AdId=1346933377&BidMatchType=bb

Location: United States

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

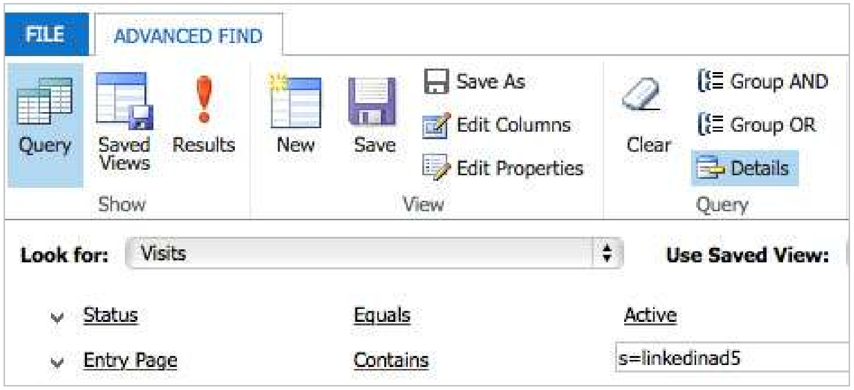
MONITOR THE EFFECTIVENESS OF PAID SEARCH WITH A SEARCH MARKETING DASHBOARD

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

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

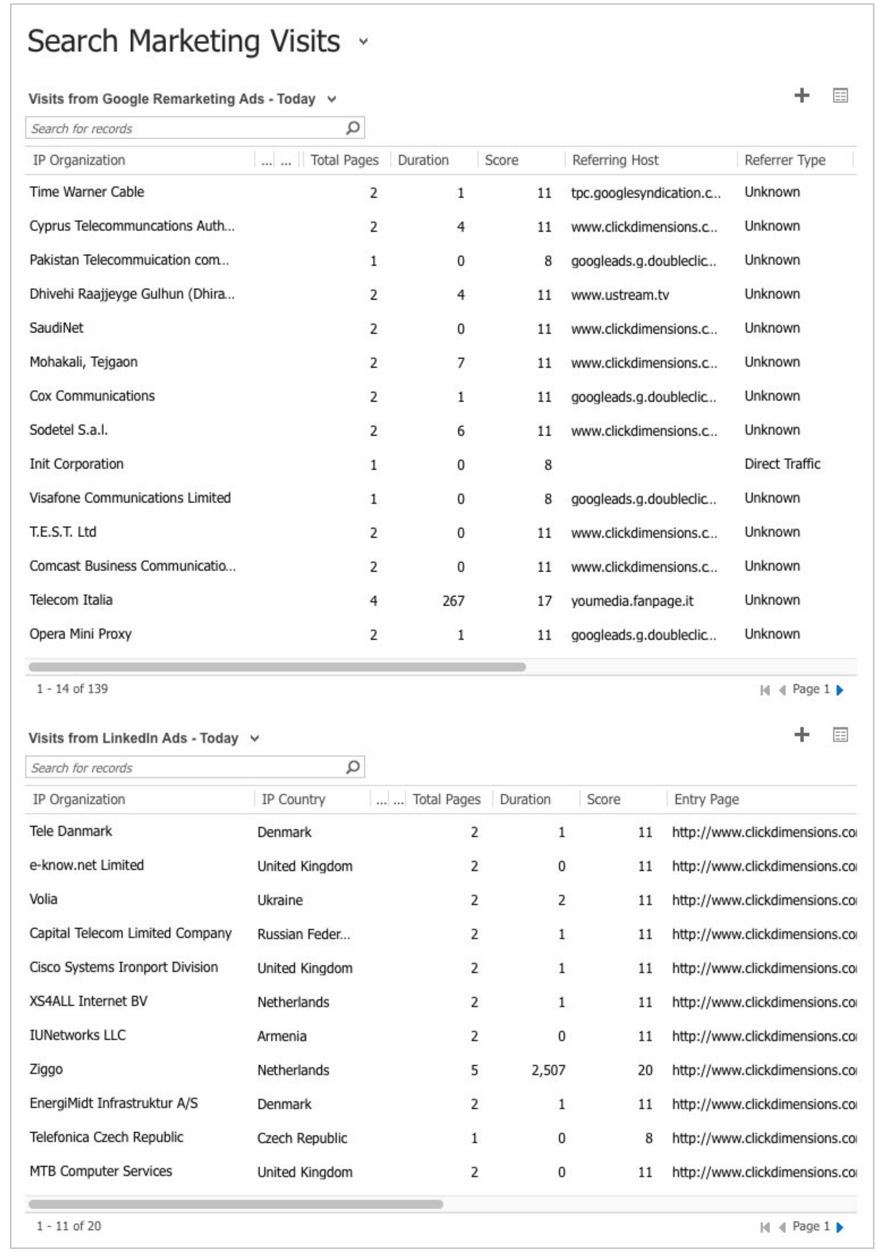
When you place an online ad, you have the opportunity to specify the URL that the visitor will be directed to when he/she clicks on the ad. LinkedIn refers to this as the "go to URL," while other platforms call it the "destination URL." You can make this URL unique by adding a parameter to the end of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

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



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

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



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

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Visits from LinkedIn Ads - Today

Search for records

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

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USE GOOGLE ADWORDS CONVERSION TRACKING WITH CLICKDIMENSIONS WEB FORMS

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

EXAMPLE

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

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

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

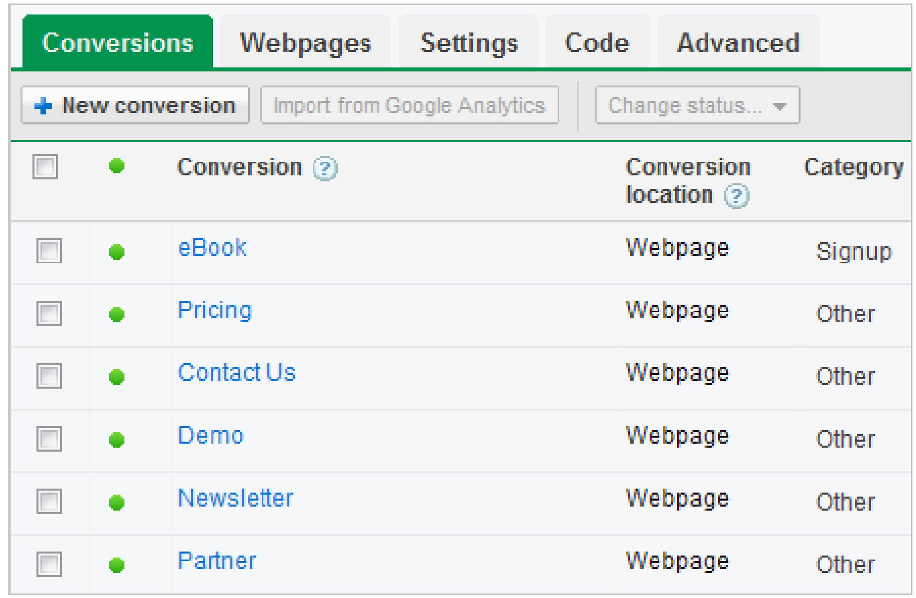
So that makes sense, right? Conversion tracking lets you see which ads, keywords and campaigns are bringing in the visitors that actually convert. In the case of a ClickDimensions web form, the conversion is when the visitor completes the form.

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

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

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

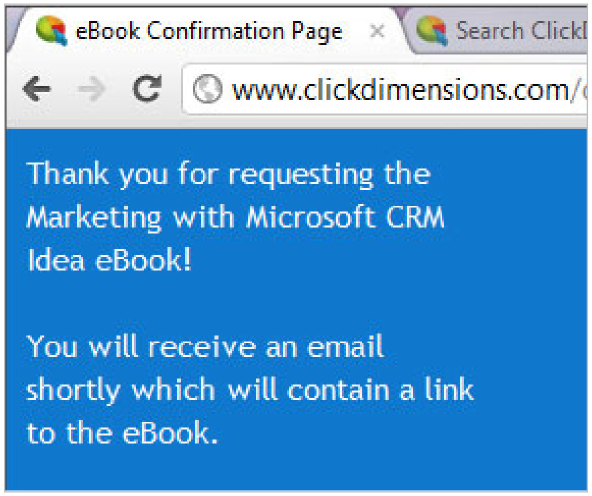
Step 1 – Follow this article to set up your conversions in Google AdWords. You can see below that our conversions match the forms on our website.



Conversion	Conversion location	Category
eBook	Webpage	Signup
Pricing	Webpage	Other
Contact Us	Webpage	Other
Demo	Webpage	Other
Newsletter	Webpage	Other
Partner	Webpage	Other

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

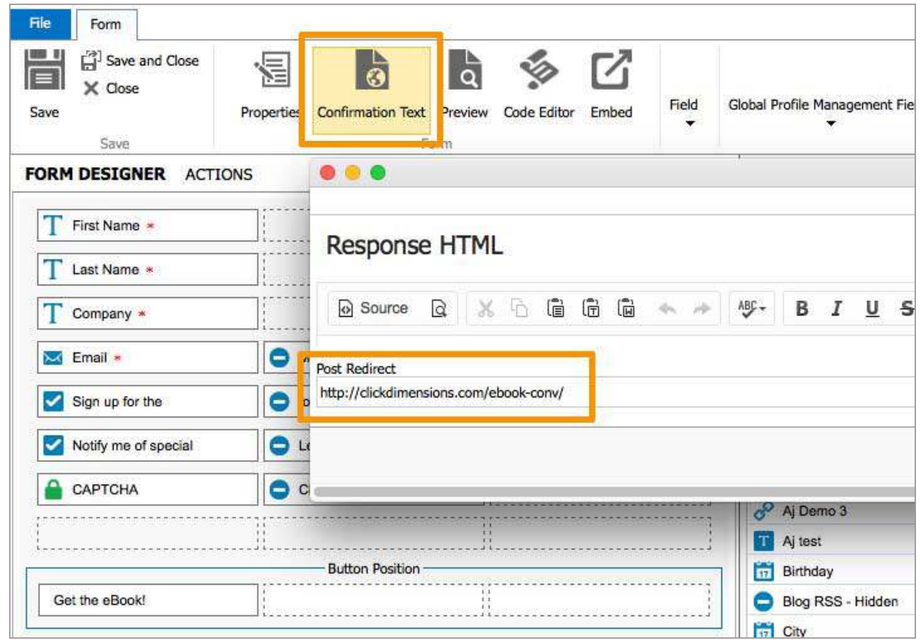
When viewed in a web browser, these pages will look fairly plain since their purpose is simply to replace the space where your web form appeared.



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

```
<!-- Google Code for eBook Download Conversion Page
<script type="text/javascript">
/* <![CDATA[ */
var google_conversion_id = 1001784531;
var google_conversion_language = "en";
var google_conversion_format = "2";
```

Step 3 – Go to the confirmation text area of your ClickDimensions web form to redirect the form to your new confirmation page once the form is submitted. This will replace the space where your form appeared with your new page when the form is submitted.



That's it. You now have the insight to more effectively evaluate your Google ads and see which keywords, ads and campaigns are bringing conversions.

SEE GOOGLE ADWORDS DATA INSIDE GOOGLE ANALYTICS BY LINKING YOUR ACCOUNTS

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

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

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

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

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

By the way, if you are wondering what the plus signs (+) are doing in front of the key word terms, think of them as "lock" icons. By adding them, we are ensuring that those words, or their close cousins, must be included in the visitor's search query (i.e. what the visitor searched on) in order to trigger our ad to be shown. This is called the "modified broad match" option. Without these "locks," a visitor could have searched on "crm email" and potentially triggered our ad. Since the term "crm email" is way too broad for our tastes, we do not want to spend money on those clicks.

TRACKING CONVERSIONS FOR FACEBOOK ADS

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

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

When we launched our [Campaign Automation Playbook](), we had to create a landing page to which all our ads can link. This landing page (screen shot above) includes a ClickDimensions web form that, when submitted, redirects the visitor to a confirmation page.

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

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

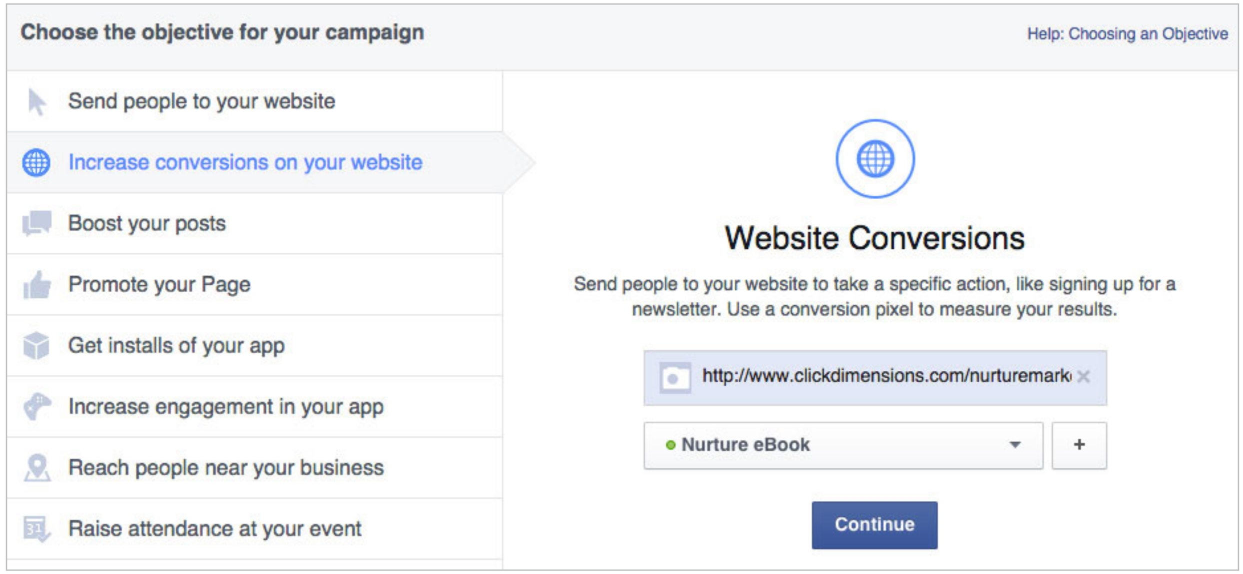

Configure Conversion Pixel Code

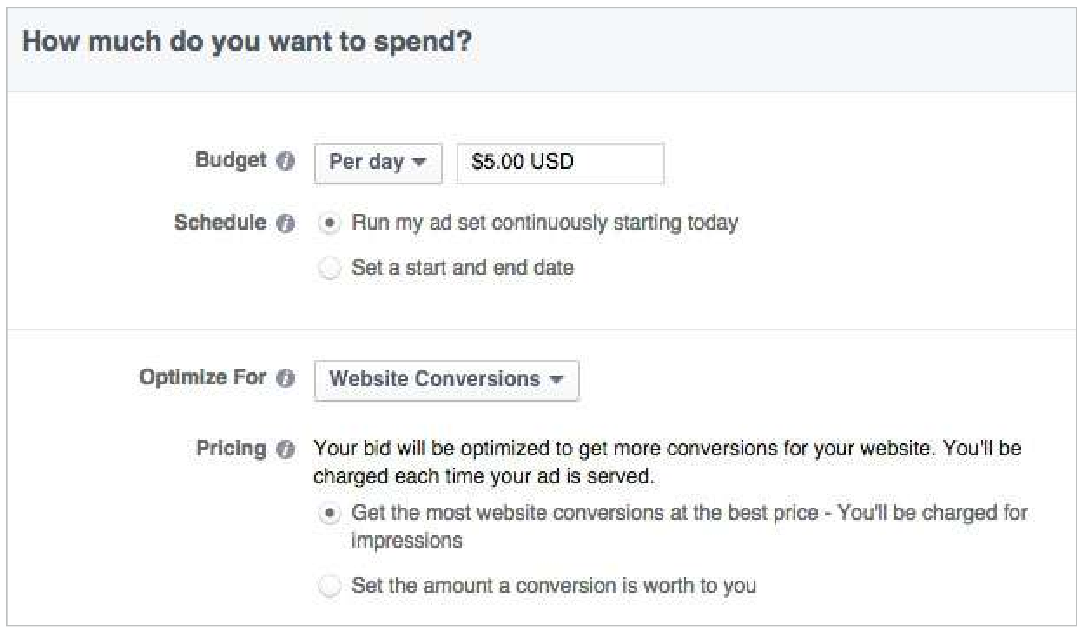
Copy the code below and paste it between <head> and </head> in the page of the website where you want to track conversions.

```
<script type="text/javascript">
var fb_param = {};
fb_param.pixel_id =
fb_param.value = '0.00';
(function(){
  var fpw = document.createElement('script');
  fpw.async = true;
  fpw.src = '//connect.facebook.net/en_US/fp.js';
  var ref = document.getElementsByTagName('script')[0];
  ref.parentNode.insertBefore(fpw, ref);
})();
</script>
<noscript><img height="1" width="1" alt="" style="display:none"
src="https://www.facebook.com/offsite_event.php?
id=6007048096254&amp;value=0" /></noscript>
```

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

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





ENHANCE TARGETING OPTIONS FOR YOUR TWITTER ADS

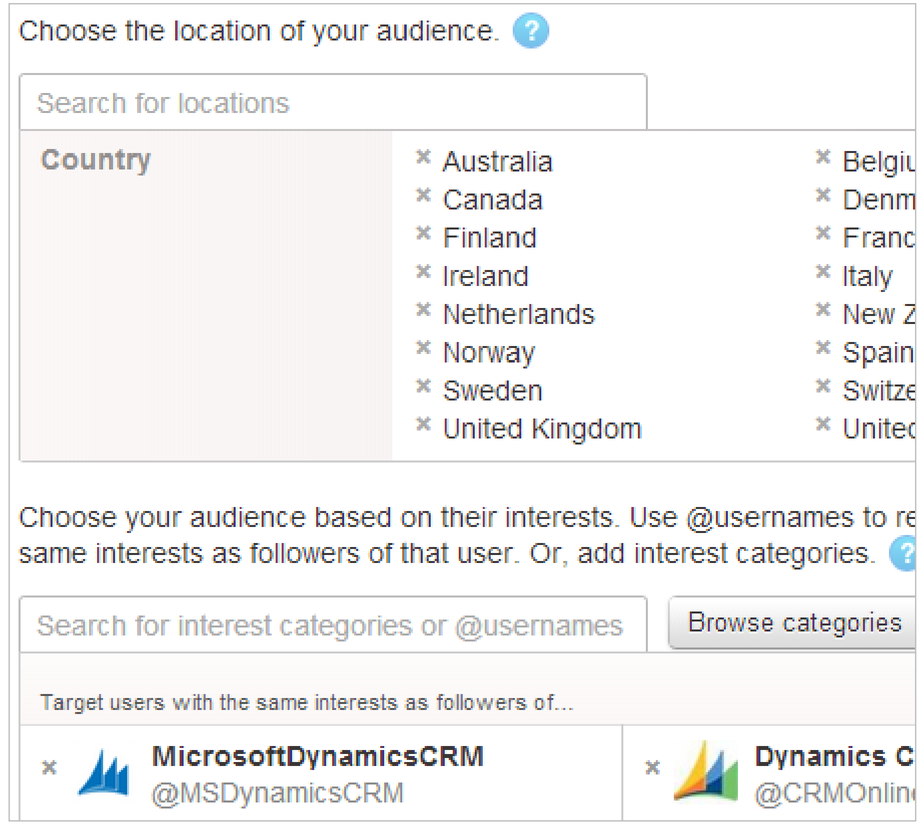
Here at ClickDimensions, we advertise on Google, Facebook, LinkedIn, Bing and Twitter along with some niche blogs and sites. It has been interesting to see these platforms develop; mainly in terms of the targeting options and analytics they provide.

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

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

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

Targeting options also include device type (i.e. desktop/laptop, iOS) and user gender. With your targeting in place, you can create new tweets to promote or you can select existing tweets or have twitter automatically select your most engaging tweets. Since our goal at ClickDimensions is to achieve conversions on our website, we have chosen to promote tweets about our premium content items listed at http://www.clickdimensions.com/resources/ebooks/.



Twitter's targeting options for geography and interests

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

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

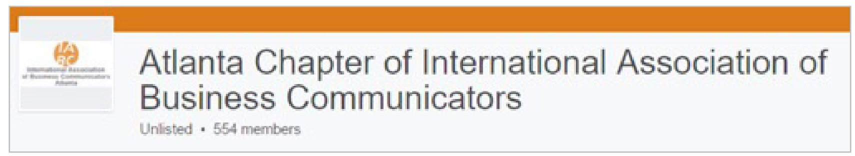
HOW CHANGES TO LINKEDIN GROUPS IMPACT AD AND SPONSORED UPDATE TARGETING

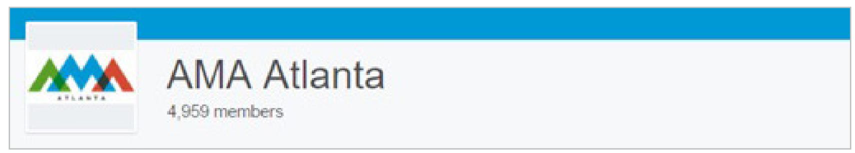
Change is inevitable. Anyone who has used social media for any length of time knows that statement to be very true. So when LinkedIn announced changes to LinkedIn Groups in late 2015, it didn't come as an incredible surprise to the platform's estimated 400 million users, and even went unnoticed by many.

LinkedIn rolled out a few additional changes to groups in 2016, but in essence all of the changes are aimed at providing a more engaging, less spammy experience for group users. For example, group conversations now won't be visible to non-members on the group's home page and the promotions tab has been eliminated from every group. Group conversations can now also include photos and you have the ability to tag other group members when you want them to join in on the conversation.

Sounds great, right? Well, yes and no. While overall this new set of LinkedIn Groups features seems to be a step in a positive direction, there is one change that poses a problem for both LinkedIn members and those that advertise on the site.

Group owners now have the option to make a group Standard or Unlisted. Standard Groups can be found by anyone searching LinkedIn, while Unlisted Groups are not searchable and only the group owner can invite others to join. These screen shots show how you will see the two types of groups for those you are a member of already:





This means that Unlisted Groups are now much harder to gain access to, and that they cannot be a target audience for sponsored updates or advertisements. Group targeting has always been a great way to avoid trying to figure out all of the potential job titles of those you want to advertise to, or to target individuals that may be attending an association's big event. So what's an advertiser to do?

Targeting Standard Groups is still an option, and you may be able to reach the same or a similar audience with a little creativity. If a national group that you want to target with your ad or sponsored update is Unlisted, look to see if there are local chapters that may have Standard Groups that you can combine in your ad targeting. Similarly, using our Atlanta Chapter of International Association of Business Communicators example above, we can see that the local group is Unlisted. However, a quick search reveals that the national organization is still a Standard Group. So, you could target the national group and specify Atlanta as your target location. Searching for new groups that have similar members to those you have traditionally targeted may also be a viable option.

While we anticipate that more groups will go the Unlisted Groups route as awareness of the option spreads, the workaround suggestions above are worth a try in situations where group targeting makes the most sense for your LinkedIn advertising.

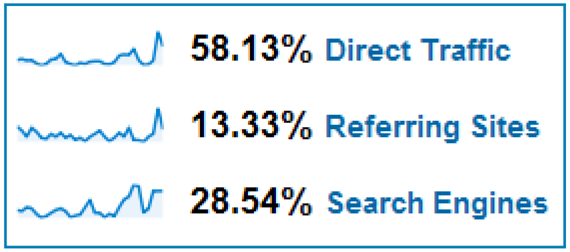
Chapter 4
Web Analytics & Optimization

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

> *With ClickDimensions, I just love the fact that I know where my leads are coming from, I know when they came in, and I know what's been done.*
>
> GIANMARCO SALZANO, VICE PRESIDENT
> REPORTING CENTRAL

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

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



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

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

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

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

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

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

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

QUANTIFY YOUR PROSPECTS' INTEREST: LEAD GRADING AND SCORING

Terminology Check

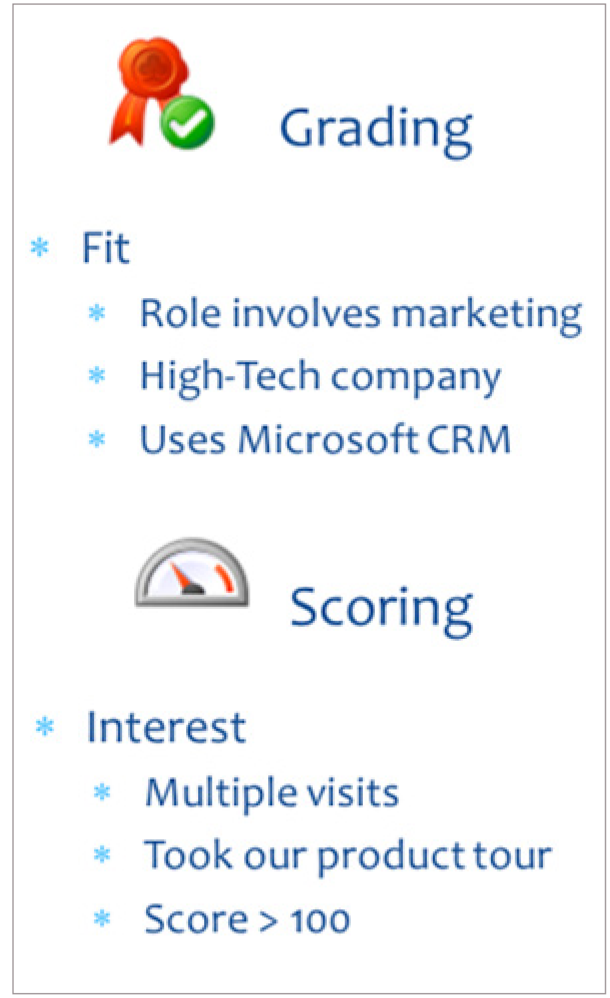
The term "lead scoring" in the marketing automation space can be a bit confusing for CRM users. This is because CRM systems like Microsoft Dynamics CRM have records for individuals named leads and contacts. For the purposes of this article, we will just talk about scoring, and it will refer to any individual.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

Scoring

Scoring specifically refers to the interest level of the individual (i.e. lead, contact or anonymous visitor). This is because the score is calculated based on email clicks, web form submissions, visits, page views, link clicks and file downloads. The more someone clicks on your emails and visits your site, the more interested they probably are. However, their level of interest doesn't mean they are a good prospect. That is where grading comes in.

Grading

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



advanced find tool can be a great way to pull out which leads/contacts fit your criteria. Sort by score (i.e. interest) and you've got a nice prioritized list.

How we use our scoring

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

Summarizing interest at the organization level

If you are part of a B2B company, which most CRM users are, then you might be asking yourself if you should look at the score at the overall organization level. Well, we do. Since our solution also scores anonymous visitors, and since we correlate all visits (anonymous and identified) at the organization level (i.e. at the IP address level), we can often see a bigger picture of interest being generated from a single organization. For example, there may be five different people interacting with us (i.e. with our emails, website and blog) from one organization, but we will see that activity grouped in a single place (on our IP Organization records). So, we can sell with confidence knowing the overall organization is clearly interested. This is informative and encouraging. We are no longer flying blind wondering who is interested, what they are interested in and how interested they may be.

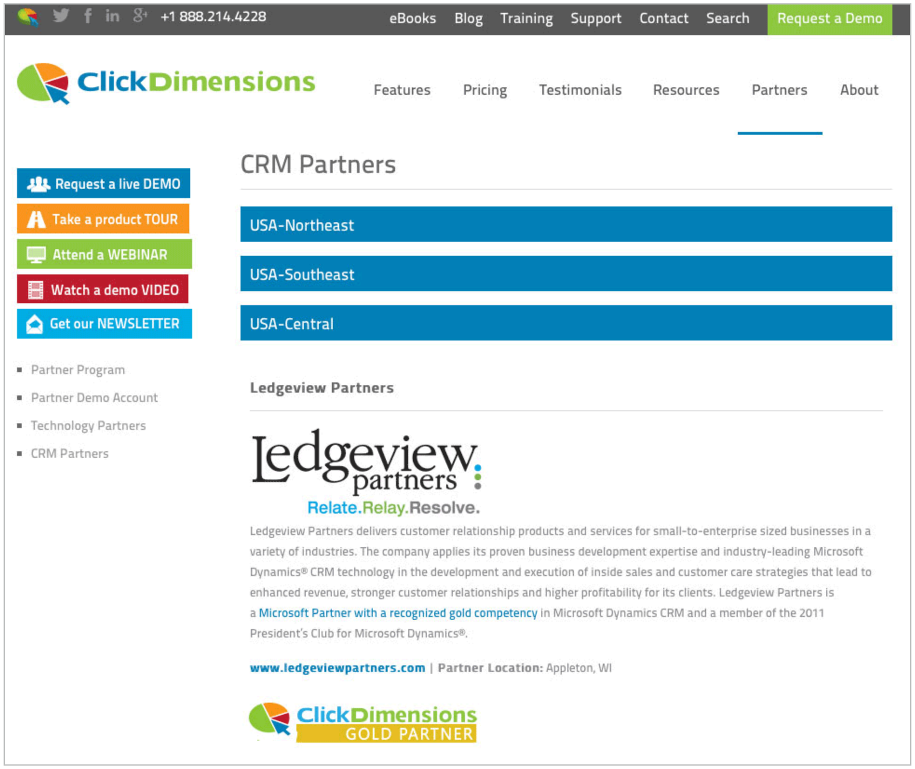
> *With ClickDimensions, we are significantly reducing the amount of time it's taking to get leads from our website into our sales funnel if they are sales-ready.*
>
> PATRICIA MEJIA, VP OF MARKETING
> SITEWORX

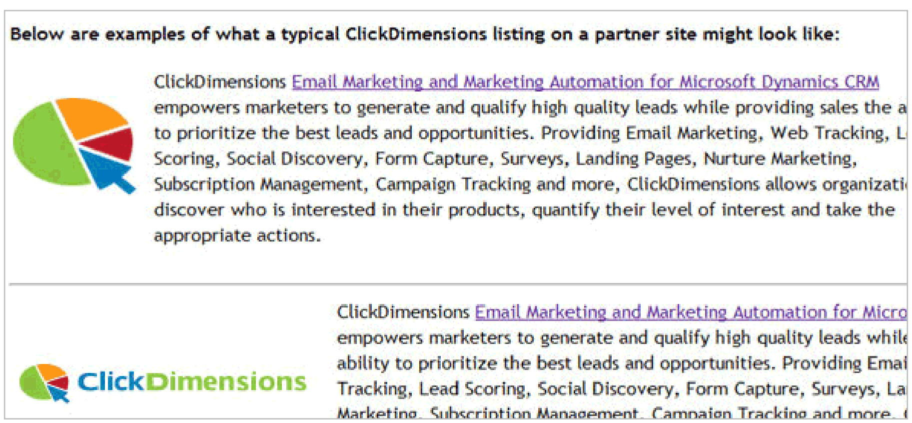
INCREASE YOUR SEARCH RANKINGS WITH OFF-PAGE SEARCH ENGINE OPTIMIZATION (SEO)

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

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

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





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

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

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

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

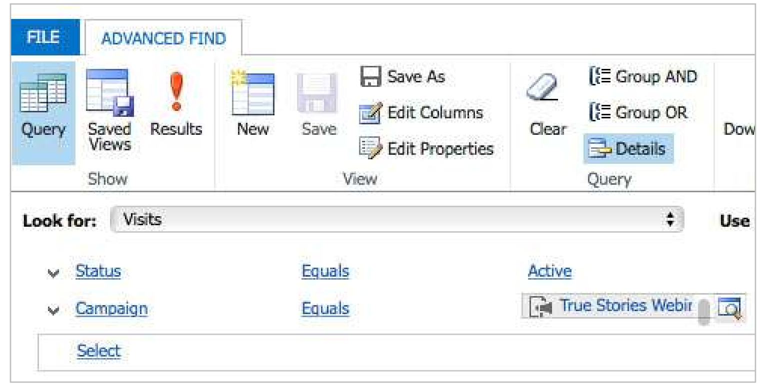
For our True Stories webinar campaign we created a landing page that gave an overview of the event and invited people to register.

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

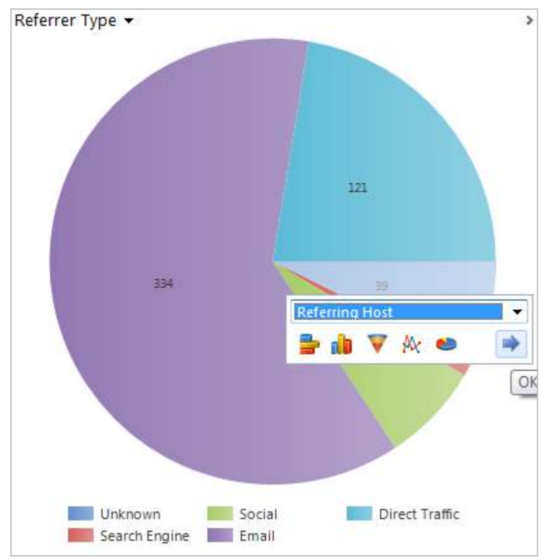
```
<script type="text/javascript">
        var cdScore = 15;
        var cdPriority = true;
        var cdCampaignKey = 'CMP-01052-J8Y1C9';
</script>
```

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

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

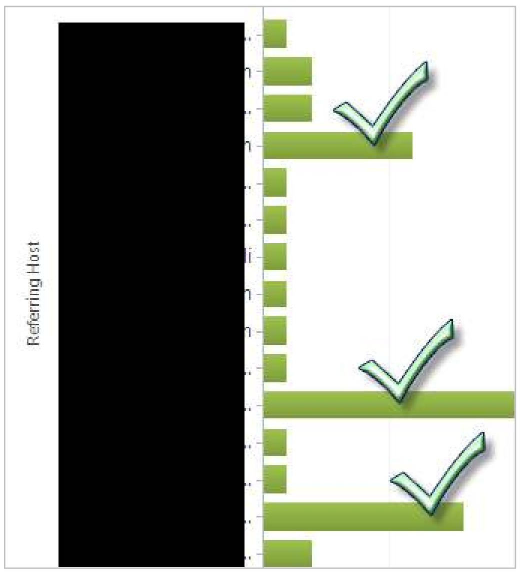


Using CRM's inline charts, we can look at a pie chart of how the traffic was referred to the landing page.



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

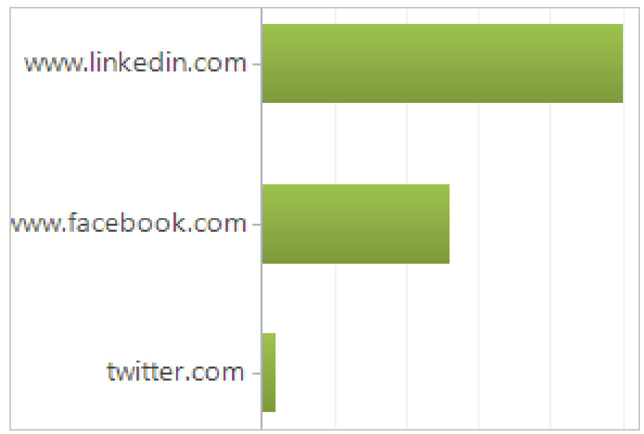
This makes it clear to us that certain blogs drive more visitors than others. With that in mind, we will know who to focus on for help promoting our events in the future. Clearly, three bloggers exert much more influence than the rest. The results were unexpected to us, but very helpful.



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

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

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



Chapter 5

Content Marketing & Lead Generation

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

CREATING A CONTENT MARKETING CALENDAR

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

Identify a goal

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

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

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

Understand what strategies have been successful in the past

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

Decide on topics and timing

Now that you have defined specific goals and have an idea of what strategies have worked in the past, it's time to decide what content you are going to offer and when you will offer it. In order for your eBooks, webinars, blog posts and other content to be enticing, provide valuable information that educates your buyers or solves their problem. Determine when you want to launch each content campaign – considering major events (like tradeshows or product releases), holidays and peak buying times. Use your content to generate awareness and drive traffic at the right times.

Consider distribution

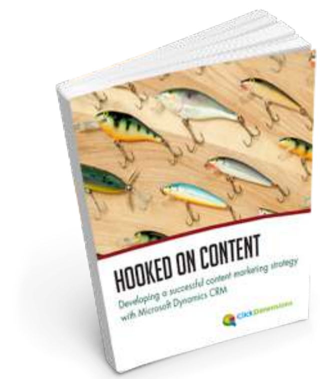
There are many outlets available to promote and distribute your marketing content – blogs, social media, email marketing, direct mail, pay-per-click advertising – the possibilities are endless. Decide which methods would be best for each of your content pieces. Often, you will want to promote your content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

Create the plan

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

Execute

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



Read more about content marketing in our free eBook, Hooked on Content.

5 PLACES TO FIND CONTENT MARKETING INSPIRATION

According to Demand Metric, content marketing generates three times as many leads as traditional outbound marketing, but costs 62 percent less. With stats like that and statements like "content is king," content marketing is hard to ignore in today's marketing landscape. However, marketers are often challenged by creating enough content to meet their company's goals and objectives, while also producing high-quality content.

So, whether your team is new to content marketing or old pros, here are five places you can look for inspiration for your next pieces of first-rate content.

1. Co-workers.
Your sales team is a great place to uncover content marketing inspiration. Ask them what questions they face from prospects or what are the pain points of potential customers. Along the same lines, your company's account management or customer service teams can provide similar insights for existing customers, and help you form ideas about what's going to be a winning piece of content with your audience. In highly-regulated industries such as healthcare or finance, your company's vice president of compliance or compliance officer can be a great source of information about issues impacting your industry.

2. Customers.
While you can always ask other internal teams about customer thoughts and preferences, you can also go straight to the source too. If you don't typically have direct access to customers, ask a salesperson or account manager to connect you with a customer that they think can provide you with valuable insights about your company's products or services, or your industry in general. Surveys can also be very helpful in collecting customer sentiment on a variety of topics, and you could even release the results as a piece of content.

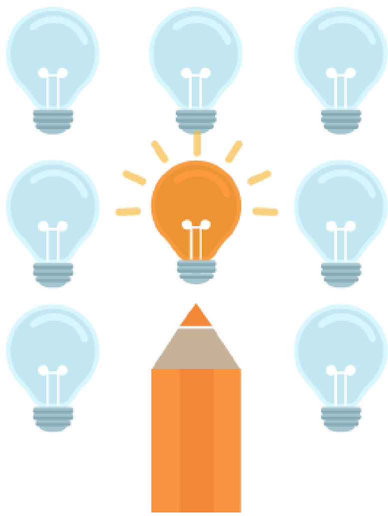
3. Old content.
At ClickDimensions, we produce a new *Marketing with Microsoft CRM Idea eBook* every year, and it's always among our top downloads. When we prepare the new edition, we look through the previous year's version, remove dated content and add many new articles. This lets us use our old content in a way that's brand new to even those that have read every past version of the eBook. Look around your organization and you're likely to find old content that you can make new again too. In addition to updating content, you can also look for ways to publish old content in new formats by turning a blog post into a video, an infographic into a SlideShare presentation or a variety of other repurposing options.

4. Marketing colleagues.

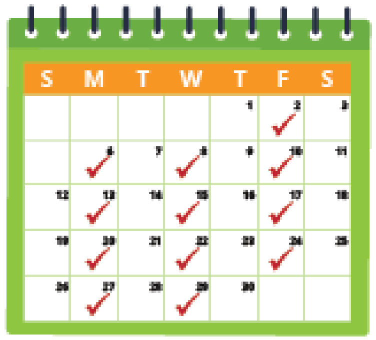
Let's say you work in marketing for a healthcare organization and an old co-worker of yours now works in marketing for a manufacturer. While the two may seem to have nothing in common on the surface, there's still plenty to be learned and inspiration gleaned from the content created by other marketers. Perhaps it's the format they use, a theme that would also work well in your industry or even their overall strategy that can help inspire your next piece of content. So share your work freely with your fellow marketers, either one-on-one or at events, and encourage others to do the same.

5. Social media.

In addition to providing comic relief or commentary to social media posts, hashtags are still a great way to search for conversations on Twitter and, to a lesser extent, Facebook. So get out there and see what your potential leads and customers are talking about and interested in. LinkedIn Groups are also a great social media destination for discovering new content marketing ideas, either by seeing what others are talking about in existing conversations or starting a discussion of your own.



4 TIPS FOR CONSISTENT CONTENT CREATION



You are on a roll! You just finished creating a successful new eBook, your team has been churning out blog posts on a regular basis, your monthly newsletter is more popular than ever and you even have a new infographic that is getting some great traction on social media. You're generating new leads, gaining new blog and newsletter subscribers, increasing website traffic and attracting new social media followers. Sounds great, right?

But how do you keep the momentum going? While the quantity versus quality debate rages on in many circles, consistent content creation is an essential part of long-term content marketing success. Here are four tips for keeping pace while still producing content that gets results:

1. Plan ahead.
This may be the most obvious of tips, but it is still very much worth mentioning and exploring. A content calendar is a must for teams looking to succeed in content marketing. Keep in mind, however, that revisiting and revising your calendar as needed on a regular basis is always a good idea. Take a look at what's working, what isn't and what can be tweaked slightly in order to optimize your content marketing efforts.

2. Round up your resources.
Chances are good that you don't personally have all of the knowledge needed to write every piece of content you plan to publish. If you will have to turn to others within your organization or elsewhere for information, be sure to be proactive in your outreach. Even the best laid and most consistent content marketing plans can be derailed by delays in connecting with these resources. When possible, make sure you plan well in advance for any information needed from others and pad your deadlines to stay on track.

3. Mix it up.

Here at ClickDimensions, one of our most popular pieces of content is this annual *Marketing with Microsoft Dynamics 365/CRM Idea eBook*. It's a great source of new leads and a customer favorite, but with the current version weighing in at more than 210 pages, it isn't the kind of piece that we would have the capacity to create consistently. That's why we create a mix of short-form and long-form content throughout the year. In addition to allowing us to create content consistently, this approach also allows us to give our audience a variety of content to choose from. After all, you might not always have time to read a 30-page eBook or need to go that in-depth on a topic; sometimes a short checklist or a video is all you need and have time for.

4. Outline the approval process.

Depending on your industry and your organization, approval processes can either be a killer or a breeze. No matter which side yours leans towards, make sure you have your approval process outlined for different pieces of content. Include who needs to review and set a turnaround time expectation for each individual or department. Work with the leaders of the departments that are a part of the approval process to establish turnaround times that make sense for everyone.

MAKING THE MOST OF YOUR CONTENT THROUGH REPURPOSING

Have you been inside a clothing store lately? If so, you likely know just how true the following statement is: everything old is new again. And this phrase also applies to the content you create. However, unlike with many current fashions, you don't need to flash all the way back to a different decade. Instead, to repurpose your content, look to that eBook you finished a few weeks ago or the blog posts you have written over the past six months.

Here are a few of our favorite tips for getting the most out of your content – and the hours in your days – through repurposing.

1. Use evergreen content.
Not all content is created equal and not all content is suitable for repurposing either. For example, in 2016, trying to repurpose a blog post about the newest features in Microsoft Dynamics CRM 4.0 into an infographic about the same topic is unlikely to have a positive impact on your marketing efforts. That's because the information is outdated and not relevant to a current audience. Stick to repurposing content that can be valuable and relevant for many months, if not years, to come.

2. Look at what's most popular.
Which blog posts, eBooks, webinars and other pieces of content bring you the most leads? Start your journey into content repurposing with those pieces. They are already a hit with your target audience, so breathing new life into those pieces can often be an effective way to get even more mileage and leads out of great content. Conversely, also take a look at some of your least popular content. Repurposing an unpopular piece into a new format, for example, could be all that's needed for it to succeed.

3. New formats aren't always required.

While a format change is what comes to mind most often when repurposing content, it isn't always required. This ClickDimensions blog post about maintaining and optimizing CRM performance is a great example of repurposing without reformatting. The original blog post was well-received, but with information about CRM 4.0 and CRM 2011 included, the article had become outdated. Our popular *Marketing with Microsoft CRM Idea eBook* is another example. Each year, we produce a new version of this eBook by replacing some of the more dated information with fresher content. In cases like these, refreshing content can make more sense than reformatting it.

4. Revise for different audiences.

Even for organizations that have a very specific customer, chances are good that you can repurpose your content to suit different audiences. Here at ClickDimensions, for example, since our marketing automation solution is natively built inside Dynamics CRM, our customers are entirely made up of organizations that use CRM. While that's a more specific audience than our competitors, we still have a lot of options for repurposing our content by customizing it for different audiences within our customer base. Focusing on different industries is a smart strategy, as is tailoring content for different professionals – sales versus marketing, for example.

5. Look for new outlets.

As we mentioned above, changing the format of the content you want to repurpose isn't necessary in every instance. Instead, try looking for new outlets for your existing content. Webinars could be easily posted to SlideShare or YouTube to expand your content's reach. And here at ClickDimensions, we make our blog posts go the extra mile by repurposing them in our monthly Marketing with Microsoft Dynamics CRM newsletter.

CREATING MARKETING PERSONAS: 4 TOOLS FOR GETTING STARTED

When you know who you are talking to, it's a whole lot easier to say the right things. In a nutshell, that's the basic idea behind creating marketing personas.

Personas and segments are sometimes thought of as being interchangeable terms, but are actually quite different. Segments are customer groups tied together by common factors like geography, age or purchase history. Advertising is often aimed at different market segments.

In marketing terms, a persona is a fictional person that represents your ideal buyer. Personas are helpful when making strategic decisions about how to market to your audience. At what size company does he work? Where does she live? How does he access information online? What does her typical day look like? What are his biggest challenges? These are examples of questions you should ask yourself when identifying your buyer personas.

Personas are given actual names and are often represented within organizations by photos or illustrations to help bring these fictional individuals to life. While the number may vary according to your industry, creating three to five personas is ideal. This number is large enough that you will be able to represent most of your customers, but still small enough to be precise.

So how do you get started creating personas for your organization? Here are four tools that can help:

1. Web analytics and intelligence.

While you may already have an idea of what your typical customer looks like, tools like Google Analytics and the ClickDimensions web intelligence feature can help you discover specific details about where your audience is coming from and what interests them. How do they access your site? What pages do your web visitors view when they get to your site? What are the demographics of your audience? Where are they located?

2. Dynamics CRM.

With Dynamics CRM you have an extremely powerful slicing and dicing platform to divide your audience into manageable groups. You can use the power of advanced finds, views and dynamic marketing lists to comb through the opportunities that you have closed to determine what your best customers have in common. Take a look at the industries of your opportunities and/or active customer accounts to identify any trends there. By doing this, you create personas that will help you seek out more of these same buyers.

3. Interviews.

Going straight to the source is a great way to collect data for personas. Have your account management or sales teams connect you with individuals that would be comfortable with being interviewed about their basic demographic data, their pain points, their position at the company, their role in the buying process, their goals and more. Also, try interviewing people in customer-facing roles within your organization to get a broader view of your customers as a whole rather than just specific individuals.

4. Surveys.

Surveys are another effective way to get a broader view of your customers in order to build your buyer personas. While interviews are a worthwhile tactic for gathering customer data, some individuals may feel more comfortable sharing via a survey the kinds of information that would be helpful in developing personas, particularly demographic data. In addition, you can incentivize customers to complete surveys, which can help strengthen your relationship with them.

6 TYPES OF VIDEO TO USE IN YOUR MARKETING

Showing is more compelling than telling. In today's content-driven marketing world, marketers are increasingly turning to video to showcase their brand's stories and engage with prospects and customers. In fact, according to a Demand Metric report, 69 percent of sales and marketing professionals have used video marketing, and the remaining 31 percent are planning to use it in the future.

Whether you are like the majority of that surveyed group and are a veteran video marketer, or you have yet to utilize this powerful and popular channel, here are six ideas for types of videos that you can use in your marketing initiatives:

1. Explainer videos.
Think of these as how-to or tutorial videos. You can use explainer videos to show customers or prospects how to do something, often in a more effective or efficient way. These videos allow individuals to see what they are trying to accomplish in action, rather than just reading along. A company that makes grills, for example, could create an explainer video to teach people the best way to clean their grills in time for all those summertime backyard barbeques. Or a non-profit organization that focuses on pet rescue could use video to demonstrate how to choose the best collar and leash for your dog.

2. Webinar videos.
Research from the Content Marketing Institute shows that marketers rank webinars among their top five most effective tactics. If your organization currently hosts webinars or is planning to add them to your marketing mix, make your webinar content go the extra mile by recording the event and using the video in your marketing efforts. At ClickDimensions, we have recorded webinars available on our website, with the subject matter ranging from product demos to content marketing.

3. Behind-the-scenes videos.
Also known as culture videos, behind-the-scenes videos do exactly what their name implies – they give you a sneak peek inside an organization. Companies use these videos to provide an inside look at their operations and people, and allow audiences to develop a more personal connection with an organization. Behind-the-scenes videos can serve a wide variety of marketing purposes, and are also an effective recruiting tool for HR teams. Check out this great example from Vistaprint and one from Google about their interns.

4. Testimonial videos.
People often trust their peers more than advertisements, which is what makes case studies so impactful. Take your case studies

to the next level with testimonial videos. When we develop a print case study here at ClickDimensions, we also ask if the person being interviewed would be willing to go on camera for a testimonial. Some people just aren't comfortable being on video, but for those that are, it gives us a great way to showcase our customers' and partners' experiences with ClickDimensions on video and in print.

5. Interview videos.

Looking for some new blog content? An interview video may be just what you're looking for. In an interview video, you could opt to have two or more people on camera, or go with more of a news program style, with the interviewer off camera. This style of video could be used for a wide variety of purposes. For example, a product manager could talk about a new product being launched, a CEO could discuss industry trends or a marketing director could confer the benefits of attending a company conference or event.

6. Welcome videos.

Video can be a compelling part of the customer onboarding process. A welcome video could provide an overview of an organization as a whole, convey a company's philosophy, describe some of the company's history and give people an idea of what to expect as a customer of your organization. A hospital's labor and delivery department, for example, could create a welcome video for expectant moms who will be giving birth there. A cruise line could also make use of a welcome video to show first-time cruisers what to expect once they are on board.

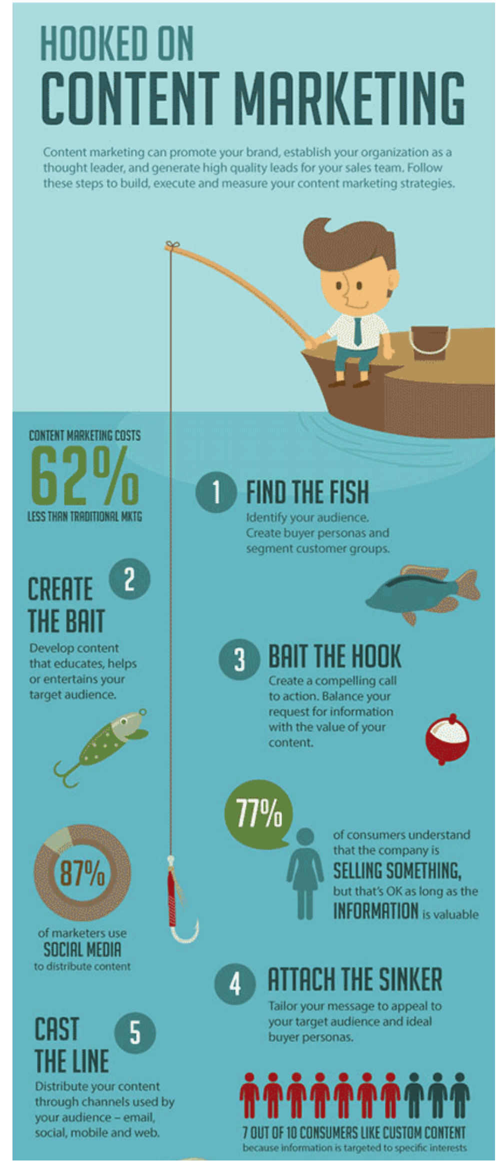
HOW TO CREATE GREAT INFOGRAPHICS

Who doesn't love a good infographic? Here at ClickDimensions, we're big fans of this visual content and how it can help simplify complex concepts or make seemingly boring data more interesting.

When infographics first came on the marketing scene, brands could get attention simply for having infographics in their content marketing mix. But as the popularity of infographics increased, so too did the difficulty of getting audiences to view and share the content. So here are a few tips for creating infographics that stand out from the crowd:

Stay focused.
When deciding on the content that will be featured in your infographic, be specific. Focus on a subset of a general topic, rather than trying to tackle the entire broad topic. Take marketing automation, for example. There is a ton of available information on this topic. So when we set out to make a marketing automation infographic, we focused solely on outlining what marketing automation is and the common features included in a marketing automation solution.

Keep it simple.
As we mentioned in the intro of this blog post, infographics are great for simplifying complex concepts, but their design should be simple too. Use one style for the images, limit the number of fonts and select a simple color palette. Also, remember the power of white space. You don't want your infographic design to look so cluttered that it feels overwhelming.



Be creative.

Try using analogies in your infographics, as they can help pique interest and further help your audience understand the concepts being presented. When we created a content marketing infographic, rather than simply listing out the steps to build, execute and measure content marketing strategies, we compared those steps to a fishing trip. Even for those that aren't avid anglers, this analogy created a theme that was more interesting, eye-catching and easy-to-follow than if we had gone with a more straightforward presentation of the process.

Mind the size.

Infographics can be tricky when it comes to sizing. While it might be easy to view an infographic on your designer's screen, once it's resized for your website, blog or social media, readability could suffer. Counter this effect by ensuring that even the smallest font in your infographic is readable even without someone clicking to enlarge the image. And while scrolling is an expected part of viewing an infographic, be sure that you don't make it so long that people lose interest halfway through.

Get your facts straight.

Last but certainly not least on our infographics tips list is accuracy. Since many infographics focus on presenting data, it's important to ensure that your sources of information are reliable and that the statistics are true. And don't forget to cite your sources at the end of your infographic.

FOUR QUALITIES OF SUCCESSFUL LANDING PAGES

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

1. "Make it simple, but significant." – Don Draper

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

2. Choose for the User

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

3. Explain What Your Organization Does

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

4. Ensure Everything Works

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

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

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

Chapter 6
Social Media

For businesses, a social media presence used to be more of a novelty than a necessity. With a desire to be where their customers are, brands have stepped up their social media game in recent years. Here is a collection of articles that can help your organization do the same.

HOW TO DETERMINE THE RIGHT SOCIAL NETWORKS FOR YOUR BUSINESS

Social media delivers a wide variety of benefits to businesses. It can increase brand awareness and exposure, drive traffic and help you be a part of valuable conversations with your customers and prospects.

On the flip side of that coin, social media can cause a lot of frustration for businesses and marketers. How will you respond to negative comments or reviews? Who will be responsible for posting? How often will you post? And – first things first – which social media platforms should you even be on?

When there were fewer social networks, that last question was significantly easier to answer. Many companies established a presence on all of the big social platforms and called it a day on that decision. But as new social channels began to proliferate, so too did the question of how businesses could be in all social places at one time and – more importantly – should they even try to be. Here are a few things to consider as you determine which social networks are right for your business:

Function

Before setting up shop on a given social network, take time to consider what people do there. In other words, are they sharing recipes or resumes? LinkedIn's business and job-seeking focus make it perfect for a staffing firm, while a food manufacturer might have more success connecting with customers on Pinterest. Also consider the visual nature of each platform. While visuals are becoming increasingly important across all social channels, if your product or service lends itself well to photo or video, a platform like Instagram or YouTube would be a great place to devote some of your social energy. However, don't be afraid to think outside the box on how you could showcase your brand visually. FedEx and GE are two companies where great visuals aren't necessarily the first thing that come to mind, yet they consistently share captivating photos and videos on Instagram.

Fit

The size of a social network doesn't matter as much as fit. When you compare Snapchat's 100 million daily active users with Facebook's more than 1 billion active daily users, it may seem like a no-brainer where you need to devote your efforts. But if the demographics and expectations of Snapchat users suit your brand better, you're better off being there. Also keep in mind that more users often means more competition for attention, so you just might find better opportunities to make solid connections with your audience and stand out on smaller or more niche platforms.

Pay for Play

Twitter and Instagram's recent announcements that they are launching algorithmic timelines has many users up in arms, as was the case when Facebook first made the same change. On Facebook, brands have realized over time that an algorithm-based news feed makes it difficult to reach potential and even current followers organically. To compensate for this lack of reach, many companies invest in Facebook advertising in some form or fashion. Be sure to factor this "pay for play" aspect of some social networks into your overall social strategy. If you don't have the budget to engage in social advertising, or simply don't choose to, that could help determine the platforms you choose to be on and how much time you spend on each.

Newer Doesn’t Mean Better

The more popular social media becomes in our personal and professional lives, the more we will continue to see new social platforms develop. While some of these new additions to the social media landscape will be a perfect fit for your brand, others won’t bring much value. As marketers, we always want to remain on the cutting edge and use the newest methods to communicate with our audiences, but newer isn’t necessarily better in the social media world. Give yourself the freedom to experiment with new social channels, but remember that the social networks that have been around for years have stayed around and popular for good reason.

Finally, keep in mind that choosing social networks for your business doesn’t have to be an all or nothing decision. Your company can have a presence on Facebook, Twitter, Instagram, Google+ and Pinterest, and you don’t have to devote equal energy and effort to each.

Also, don’t forget to follow ClickDimensions on LinkedIn, Twitter, Facebook and Google+!

HOW TO INCREASE YOUR SOCIAL MEDIA FOLLOWING

Quality or quantity – which is better? While the answer to that question often depends on the situation, it's frequently a case of both. Social media is one such area, particularly when it comes to follower counts. It's true that you want high-quality followers that engage with your brand, but you also want a large enough quantity of followers that you can maximize the reach and impact of your messaging. So, here are some of our top tips for growing your social media following:

1. Go where your audience is.

Have you ever wanted to tweet at a company only to find that they don't have a Twitter account? It's frustrating, right? For that reason, your organization should have a presence on all of the top social networks, but prioritize your efforts based on where your audience spends their time. So if LinkedIn suits your audience more than Twitter, dedicate more time to your efforts on LinkedIn. Also, in addition to the larger social networks, don't forget to consider smaller or more niche networks that might be a good fit with your business and your audience.

2. Make sure people can find you.

Before someone can follow your organization's social media accounts, they have to know that they exist. You can promote your company's social presence on your website and blog, in employee email signatures, in advertisements, in email blasts and more. If you are a ClickDimensions customer, you can easily add a social links block to your emails so your subscribers can quickly click through directly to your social media accounts. Cross-promotion of accounts can also be an effective way of boosting your follower count, particularly if one of your accounts has a sizable following. For example, if your company has a significant following on Facebook and you just launched an Instagram account, you can promote your new Instagram presence on your Facebook page to help boost your Instagram following.

3. Consistently share quality content.

You want to be sure that you post frequently enough that visitors to your pages always encounter fresh content, not the most recent post dating back weeks or even months. These posts should also be useful and engaging. While there is room on social for salesy posts, the amount of educational and helpful posts should outweigh those that are product-focused. Word spreads and people share, so if you give your followers something of value, you are sure to gain more of them.

4. Interact with others.

Put the “social” in “social media” on every social network where your organization has a presence. Respond to comments, participate in discussions, and retweet and share posts from others, rather than simply putting your own content out there. This shows that your company is a fully engaged member of a given social platform, and can help drive followers. Following influencers in your industry can also lead to these individuals following you and sharing your content with their sizable networks.

5. Use hashtags.

Using hashtags can be an effective way for brands to increase their reach, follow trends and create conversations on social. Keep in mind, however, that hashtags aren’t best used on every social network. Hashtags are most effective and almost expected on Twitter and Instagram. While you can use hashtags on Facebook and they are linkable to the broader conversation, hashtags aren’t as commonly used on Facebook and it can be difficult to see the full conversation associated with a hashtag due to privacy settings. LinkedIn does not allow for linkable hashtags, so they won’t help boost your follower count there.

4 SIMPLE TIPS FOR SOCIAL MEDIA SUCCESS

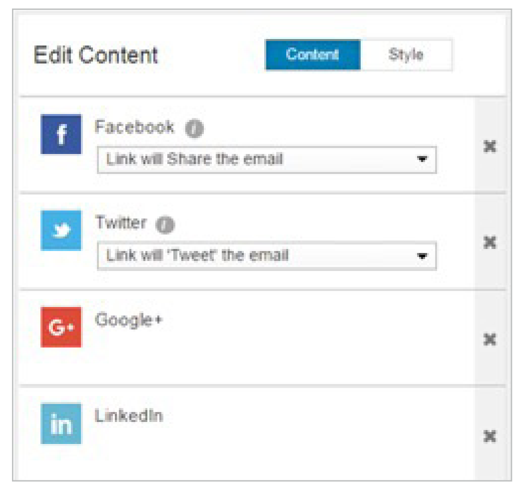
Today, brand awareness and audience engagement go hand in hand with an organization's social media presence. And with the popularity of social media increasing and the number of platforms expanding, every indication is that social media is here to stay for marketers and in a big way.

Creating and maintaining successful social media profiles for your company involves many complexities and details, but let's bring it back to the basics. These four tips are tried-and-true essentials for increasing your social media success – two of which can connect with your email marketing efforts too!

1. Put your audience first.
If you want readers to share and interact with your social media content, there has to be something in it for them. Whether you want someone to stop and think or have a good laugh, always put the needs and interests of your audience first in order to create successful social content. Create compelling, and brief, copy and include visuals to attract attention and engagement. Also, where appropriate, make sure to take advantage of hashtags so your audience can find your posts as part of a broader social media conversation.

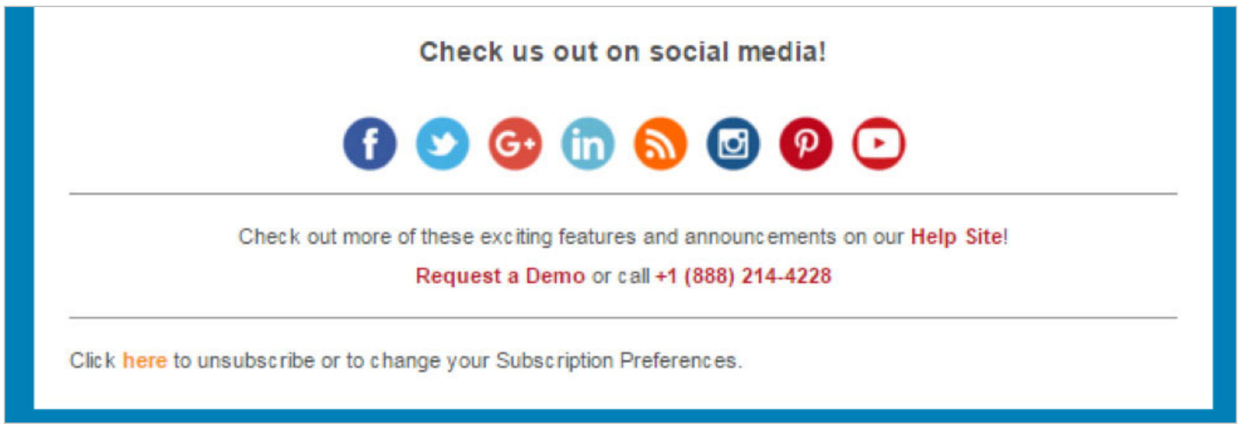
2. Manage negativity.
Angry customers on social media can ruin a brand's image quickly. How you react to those public comments can make all the difference. When you receive negative feedback on your social profiles, make sure you act fast to resolve the issue. Don't delete the comment (unless it is inappropriate), but instead, keep your cool and respond with an apology and a solution. Other followers will respect the tone and timeliness of your response, and you can use these moments to build your brand image.

3. Incorporate social sharing.
Taking advantage of ClickDimensions' email social sharing tools can help increase interest in your brand on social media. Social sharing buttons allow your readers to easily and quickly share the emails they receive from your company on their social media profiles including Facebook, Twitter, LinkedIn and Google+. This can help introduce your content and promotions to new prospects and increase your brand's awareness on social media and beyond.



4. Build your following with social links.

When you send out bulk email messages, be sure to include links to your organization's social media profile pages. With ClickDimensions' built-in social links, you can easily connect your email recipients to your company's Facebook, Twitter, Google+, LinkedIn, blog, Instagram, Pinterest and YouTube profiles. When recipients click these links, they will be directed to the URLs you input, which can turn your email subscribers into social media followers too.



#SOCIALMEDIA: 5 HASHTAG BEST PRACTICES

Social media can be a great place to connect with your audiences, especially once you have found the best platforms for your business. However, with algorithm updates on certain platforms and the sheer volume of posts on others, it can sometimes be challenging to effectively and consistently reach that audience.

Enter the hashtag. This symbol helps brands increase their reach on social, follow trends and create conversations. With such important roles in social media, hashtags should be used strategically and carefully. Here are five best practices:

1. Consider the platform.
It's important to treat platforms as the unique individuals they are, as hashtags function and are accepted differently by users on different platforms. For example, on Twitter, the birthplace of the hashtag, hashtags are a part of most posts from brands. By contrast, on LinkedIn, hashtags are not linked, making them ineffective and rarely used.

2. Quantity.
File this under #annoying: social posts that have a seemingly endless list of hashtags tacked on to the end of the post. Research shows that the number of hashtags greatly impacts engagement. Most often, engagement decreases as the number of hashtags increases. One or two hashtags per post is the engagement sweet spot on Twitter and Facebook. On Twitter, using more than two hashtags causes a 17 percent drop in engagement with a post. The notable exception to this "less is more" approach to hashtags is Instagram. Interactions are highest with Instagram posts that have 11 or more hashtags.

3. Limit the length.

#longhashtagsarehardtoreadandconfusing. Did you catch that the first time you read it? If not, you're not alone. While you want to add some detail to your hashtags to make them more targeted – at ClickDimensions, we often use #emailmarketing instead of simply #marketing or #MSDynCRM rather than #CRM, for example – but overly long hashtags are hard to read and confusing. While individuals might use long hashtags on their personal accounts to add humor to posts, brands are better off steering clear in order to meet their business objectives on social.

4. Use unique hashtags with care.

The internet is filled with stories of hashtag fails from brands of all sizes. To avoid being the subject of the next tragic hashtag tale, use custom hashtags carefully. Be sure to search for your potential hashtag on social platforms or a hashtag search engine like HashAtIt.com to see if it's being used already and, if so, how. Also, to increase engagement, make sure that the hashtag is easy to remember and easy to spell.

5. Quality control.

Checking and re-checking your work is important in all marketing efforts, including using hashtags in your social posts. Be sure that everything is spelled correctly, and that there are no spaces within the hashtag. When using multiple words in a hashtag, use capitalization to eliminate confusion and potentially embarrassing alternative interpretations. It's also always a good idea to run hashtag ideas by multiple other people, in case they catch a meaning that you might not.

5 STEPS FOR GETTING STARTED WITH BUSINESS BLOGGING

We are big fans of blogging at ClickDimensions. After all, what's not to love? Blogging allows us to share our marketing knowledge with others, improves our SEO, and gives us great content for social media and our monthly newsletter.

If your company is ready to take the plunge into blogging, but you aren't sure how to get started, let these five steps be your guide:

1. Outline your objectives.
Ask yourself this: what do you want to get out of your blog? Whether it's lead generation, connecting with customers or establishing your company as an industry thought leader – or some combination of all of these or other reasons – defining your mission upfront will help you stay the course and make blogging-related decisions with those goals in mind.

2. Decide who will write.
At ClickDimensions, blog writing is a responsibility shared by a few different teams. Our marketing success managers each write one post per month, our marketing team contributes weekly posts and even our CEO gets in on the blogging action. This works well for us because it helps distribute the workload and allows us to offer our readers insights and knowledge from throughout the organization. Take a look around your company and make a list of departments or individuals that can contribute content that will help you meet your blog objectives.

3. Determine frequency.
Blogging can often seem overwhelming because of frequency alone, but setting realistic expectations and goals is key. After assembling your blog writing dream team, take some time to think about how often you can realistically expect each person or department on that team to contribute content based on workloads. Also, be sure to consider your audience's perspective on frequency – would daily be too often, but weekly not often enough? And remember that you can always start out on the less frequent side of things and then blog more often as you get into the swing of things.

4. Brainstorm content.
"What are we going to write about?" That's likely a question that you've asked yourself at least a thousand times. It's also often the question that prevents many businesses from blogging in the first place, thinking that they simply won't have enough material to cover. Take the time to brainstorm article ideas, and ask the blog writers you've identified or other key players in your company to join you in that process. Common questions received by your sales or customer service teams are often a good place to look for

blog topic inspiration, as are trends impacting your industry. Once you have a list of topics, use a spreadsheet to create an editorial calendar so you can see how long your initial topics will last once your blog launches and so you can assign deadlines to others.

5. Plan to publicize.

It goes without saying that creating awareness of your company's blog is key to its success. But how do you create that awareness? Loyal customers are often the most loyal readers, so tap into your existing database with an email that announces the blog to customers and encourages them to subscribe. Once you have subscribers, you will also want to set up an RSS to email connector, so you can send blog updates via email to your subscribers at a frequency of their choosing. Social media is also a great place to get the word out about your blog and share your blog posts. And plan to publicize your blog internally as a resource that sales, customer service and other teams can use to educate and connect with customers and prospects.

Once you have these steps completed, or even while you're working on some of them, you will also need to pick a platform (WordPress and Typepad are two popular options) and a URL (blog.yourdomain.com and yourdomain.com/blog are the most common choices, and your IT team can weigh in on the pros and cons of each).

HOW TO GROW YOUR BLOG AUDIENCE

"If a tree falls in a forest…" You know the rest of that age-old question, but we're putting a marketing spin on it: if an article gets posted on a blog and no one is there to read it, does it make an impact?

We think the answer is something along the lines of "no" or "not really," which is why we are bringing you these helpful tips for growing your blog audience:

1. Write quality content.
While it may seem like a no-brainer, this point is so important that we would be remiss if we didn't include it on the list. There are more than two million blog posts published every day, and while you aren't directly competing for attention with all of those posts, there is still stiff competition for readers. Appeal to these readers – and get more of them – by creating great content that answers their questions, offers valuable insights, and is thought-provoking and engaging.

2. Be consistent.
Consistency doesn't mean that you have to post something new on your blog every day, but you should aim to publish a new post at least once a week. This will not only help your existing readers know when to expect content, it can help attract new subscribers as well. If someone is browsing on your website, for example, and comes across your blog, consistent publishing means that they see fresh blog content and are more likely to subscribe or come back to view more posts.

3. Promote your content.
Here at ClickDimensions, we have had great success with growing our blog audience by promoting our content as much as possible. Every post is shared on our LinkedIn, Twitter, Google+ and Facebook accounts, and we also use a number of our blog posts in our monthly newsletter. In addition, from sales to support, ClickDimensions employees often share posts with our customers and prospects to help answer specific questions, which helps expose our content to new audiences and encourages new blog subscribers.

4. Engage guest bloggers.
Guest bloggers are a great way to save time, diversify the perspectives on your blog and boost your subscriber numbers. Encourage guest bloggers to share their posts on their social media accounts or even link to it on their own blog, if they have one, to drive new traffic to your blog.

5. Make it easy to subscribe.
While it may be tempting to ask new subscribers to provide details about themselves, all you should really ask for is their email address. Make sure your email sign-up box is prominently displayed on your blog, and you could also place these boxes strategically on your website or use it as a call to action on your company's Facebook page.

3 TIPS FOR ENGAGING GUEST BLOGGERS

From SEO benefits to helping establish thought leadership to providing monthly newsletter content, blogging brings a lot to the table for organizations of all types and sizes. However, for all the benefits of blogging, there are challenges too – and a lack of time is often at the top of that list of challenges.

At ClickDimensions, we split the blogging workload among several departments and individuals, including our marketing team, marketing success managers, product support and our CEO. We will also occasionally feature posts by guest bloggers outside of our organization.

Guest blogging is not only a great way to save some time on writing posts, it's an excellent strategy for bringing new perspectives and knowledge to your readers. It can also help you build or solidify relationships with the customers, partners or industry experts that are your guest bloggers. To help ensure you have the best possible guest blogging experience – because like blogging in general, it too can have its challenges – we've compiled our three top tips for guest blogging best practices.

1. Find the right contributors.
When you hear the words "guest blogger," a few people might come to mind that you could approach. Maybe it's the loyal customer that posts insightful comments on your blog or the vendor whose own blog you admire. If such individuals don't automatically come to mind, ask around either on your own team or elsewhere in your organization. Perhaps a member of your sales team saw someone from a partner company give a great presentation at a conference that would make a good blog post, or one of your customer

service representatives recently spoke to a customer with a great story to share. Looking at your LinkedIn connections or searching hashtags that are relevant to your industry on Twitter can also give you great ideas for people to contact as guest bloggers. As you create your list of potential guest bloggers, keep in mind that the opportunity should be beneficial for both parties. Sure, you're getting fresh content and your guest blogger is being exposed to your audience, but ask yourself if that exposure is valuable to them too.

2. Have established guidelines.
If your organization already has blog editorial guidelines for internal use, you can send these to potential guest bloggers, but creating a specific guest blogging policy is also a good idea. So your potential authors know what you're looking for in a post, be sure to include information like:

- The type of content you're looking for. For example, you may prefer guest posts to be more educational than product focused.
- Word count or the typical range of post lengths on your blog.
- Any requirements related to images.
- A statement on whether you will accept content republished from other sites or only original content.
- How links can or can't be used.
- Bio guidelines for the author, such as length and the information or links that can be included.

3. Manage expectations.
A guest blogging policy document will go a long way towards managing expectations when it comes to the blog content itself, but don't forget to address timelines and review processes as well. Once you have someone ready and willing to write a post for you, come to an agreement on a draft due date based on their schedule and your blog editorial calendar. Based on that due date, give them a timeframe for review and a publish date. If something changes to alter this schedule, be sure to communicate that to your contributor so everyone can be on the same page, and so your guest blogger can partner with you on promoting their post on their social media profiles.

4 THINGS TO KNOW ABOUT INFLUENCER MARKETING

Which would you trust more: a recommendation of a new restaurant from your best friend or an ad for the same restaurant? If you're like most people, your best friend's endorsement definitely carries more weight. And that's the basic idea behind influencer marketing.

As social media has become a part of our daily lives, people have started looking more towards other individuals to inform their purchasing decisions rather than brands and traditional advertising. At the same time, social media has increased the reach and impact of bloggers, tastemakers and thought leaders. Influencer marketing is driven by these conditions, using key leaders to spread a brand's message to their audience rather than the company marketing directly to consumers.

While influencer marketing is still a relative newcomer to the marketing arsenal, it's gaining ground as an essential element in marketing plans. Recent research from eMarketer shows that 67 percent of marketing and communications professionals worldwide reported using influencers for content promotion, and 59 percent stated they used influencer marketing for content creation and product launches. If you aren't among those numbers, here are four things you should know about this promising channel:

1. It's impactful.

Word of mouth recommendations, as with our restaurant example above, have always been a powerful driver of sales. So it should come as little surprise that influencer marketing would have a similar impact. In a recent study by Augure, 75 percent of marketing professionals consider influencer marketing effective in lead generation, and

76 percent viewed it as an effective tactic for customer loyalty. And a McKinsey study found that influencer marketing generates more than twice the sales of paid advertising.

2. It overcomes ad fatigue.

From billboards to buses and banner ads to the back of public bathroom doors, advertisements are everywhere. Estimates place average daily ad exposures anywhere from 200 to 5,000, but the actual number doesn't matter as much as the fact that people are growing tired of ads and are increasingly tuning them out. Influencer marketing and other forms of native advertising combat this ad fatigue by placing brands within organic content, creating a more enjoyable and attention-grabbing ad experience for consumers, and a more effective promotion for advertisers.

3. It requires the right influencers.

Much like using targeted channels for traditional advertisements, influencer marketing requires finding the right influencers. Context is key. While a fashion blogger might have a million followers on Instagram, if your product isn't related to fashion or your audience isn't big on Instagram, that influencer isn't the best fit for your company and your customers or prospects. Once you find the right contextual fit with an influencer – a mom blogger who agrees to feature your new line of organic kids snacks, for example – their social following and reach as well as their ability to move their audience to action should also play a big part in your decision to partner with that individual.

4. It doesn't cost a fortune.

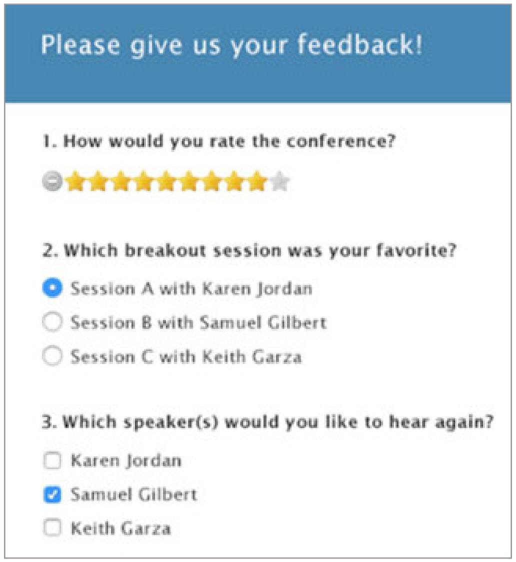
You don't have to have a celebrity-sized budget to engage in influencer marketing. In fact, a recent survey from The Keller Fay Group shows that, even if you did have the funds to spend on a celebrity endorsement, your budget might just be better spent on influencers – with 82 percent of survey respondents saying that they were highly likely to follow an influencer's recommendation. Currently, influencer marketing still provides a great value to marketers looking to embark on such campaigns. While many influencers do charge fees, others may agree to write reviews or promote your business on social media in exchange for free products or services from your company. But as we have seen with other new advertising opportunities that emerge, often as their popularity increases, so too does their price.

Chapter 7
Surveys

Everyone has an opinion, and surveys are a great way to capture them from your customers and prospects. The articles in this section provide insights on various types of surveys, how you can view results in CRM and more.

CREATING EFFECTIVE MARKETING SURVEYS

Surveys are an excellent way to get honest feedback about your brand, products, services, consumer satisfaction and more. Surveys are also great at helping you learn more about your customers. However, designing marketing surveys that provide valid results can be a daunting task. Here are some best practices to keep in mind when designing your next marketing survey:



1. Think ahead

Have a clear idea of how you want to use the data you obtain from your survey. This is the first step because it will help shape the structure of your survey questions. For example, if you want to create charts or infographics from your results, you will want to make sure that each picklist option corresponds with a numerical value.

2. Avoid leading and confusing respondents

When writing your questions, take care to ensure that you are not skewing your data. Avoid questions that lead to a specific response, such as questions starting with "Isn't it true that…". Steer clear of confusing language and industry buzzwords. Keep in mind that people will often stop taking a survey when they do not understand a question. Test your surveys internally with multiple people from different departments to make sure that the questions are clear to everyone.

3. Keep it brief

Make your surveys short; they should not take longer than 5-10 minutes to complete. Use skip logic to narrow down the time it takes someone to complete your survey. Let the customer know how long it should take to complete, the topic and use of the survey in order to set expectations upfront.

4. Pay attention to the order of questions

Always put demographic questions at the beginning, and make them required so that you are not missing out on important demographic data. Start with more general questions, and then get more specific. Never ask the hard questions first.

5. Edit, edit, edit

Have others review your survey. See if there are any unnecessary questions that can be cut. Check for spelling, punctuation and verb agreement. Make sure the writing style is cohesive with the rest of your company's content and your brand's voice.

6. Mind your timing

The timing of sending out marketing surveys is key. Just like email marketing, marketing surveys sent out Tuesday-Thursday during normal business hours are more likely to get responses. Be sure to communicate a deadline for when the survey should be submitted. To improve response rates, also try resending the survey with a reminder before the deadline.

When creating surveys, don't get overwhelmed. The data you will receive at the end will be well worth the effort!

BEYOND CUSTOMER SATISFACTION: 5 WAYS TO USE SURVEYS TO ENGAGE CUSTOMERS

Opinions – everyone has them and businesses often love asking their customers for them. This ask most often comes in the form of a customer satisfaction survey, which is an important tool for organizations looking to understand how they are measuring up in the minds of their customers. But surveying customers shouldn't stop there.

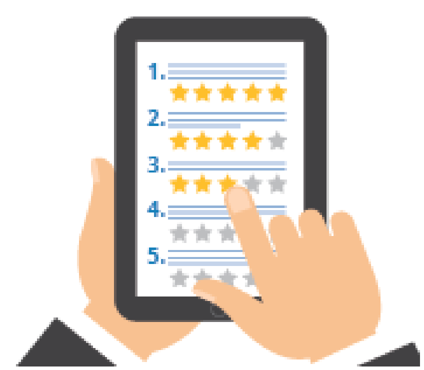
Here are five ways you can use surveys to tap into valuable customer insights while engaging that audience at the same time:

1. Get content ideas.

If you engage in content marketing, you know how difficult it can be to consistently come up with topics that interest your audiences. So why not go straight to the source? Ask your customers what topics they would like to read about on your blog or in eBooks, or if there's a webinar topic that would be of interest. The results may provide ideas that you had never considered before and can fuel your content calendar for months to come.

2. Create a competition.

If your company has several products or services in its lineup, try creating a competition where customers vote for their favorite. This quick survey would be a fun way to boost customer engagement and can also serve as great content for social media. Similarly, if you are planning to launch a new product or service, you could ask customers to vote on specific features to be included or, if appropriate, even ask them to help you name the newcomer.



3. Segment lists.

While it's likely you already have a great deal of information about your customers within your CRM system, surveys can help you fill in missing details. Try adding a survey link in your next customer newsletter or email blast that asks recipients to complete a short survey that will help your organization better tailor communications to their interests. Questions could be demographic in nature, which could also be used to strengthen your marketing personas, or could be used to find out other information such as product or service preferences.

4. Grade your website.

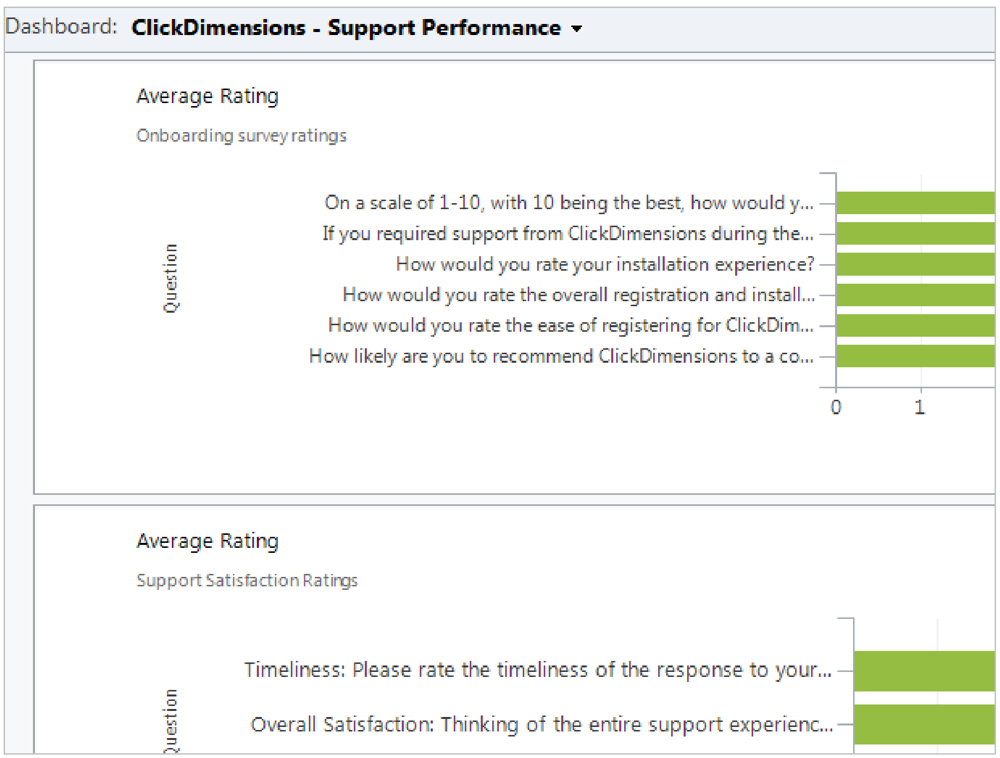
Regardless of your industry, customers often visit an organization's website for a variety of reasons, from making a purchase on an e-commerce site to downloading content to getting contact information for one of your company's office locations. With so many reasons to visit your website, customers are likely to have opinions on how easy it is to access the information they need and the overall user-friendliness of your site. Ask them to complete a short survey in order to find out how you can improve future website visits.

5. Follow up more frequently.

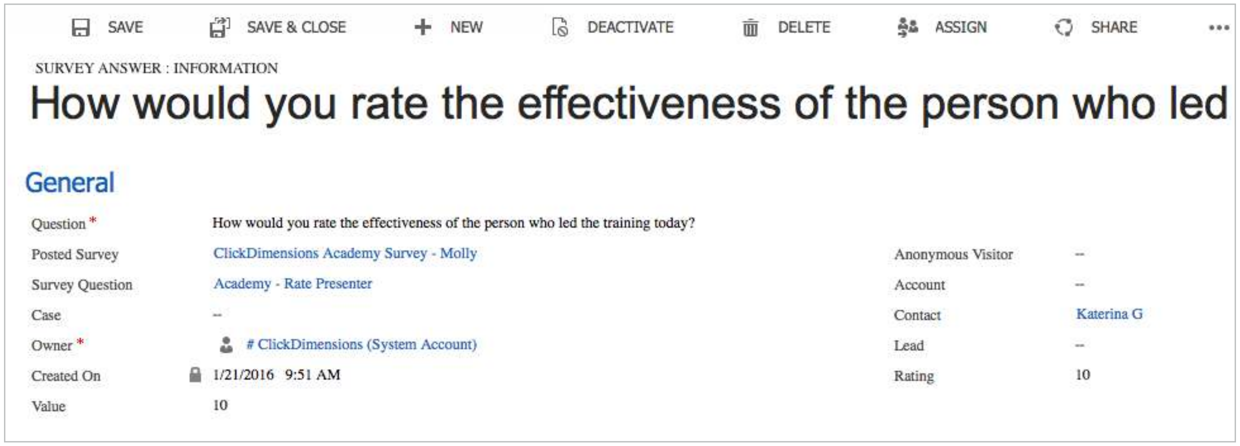
Customer satisfaction surveys are often conducted on an infrequent basis, and quite a few customer transactions and interactions can take place between one customer satisfaction survey and the next. Use short surveys to follow up with your customers more often. For example, in confirmation emails after purchases or donations, you could include a link to a one- or two-question survey that asks about their experience during that particular transaction.

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

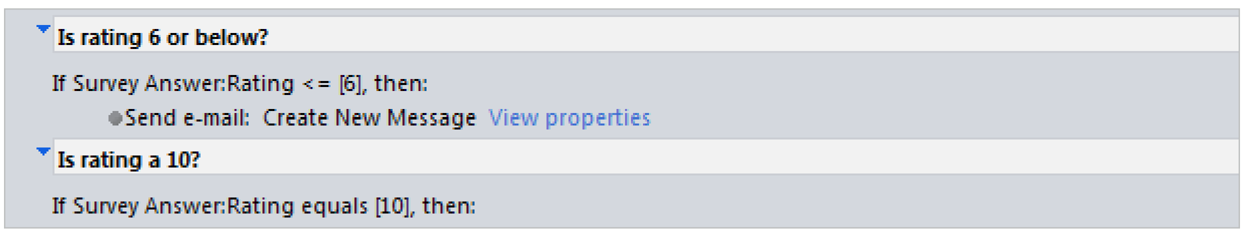
At ClickDimensions, we have two key surveys we use to gauge customer feedback. The first is our support satisfaction survey that is sent after each and every technical support case. The second is our onboarding survey that is sent when a new customer has completed our onboarding process and training.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



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



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



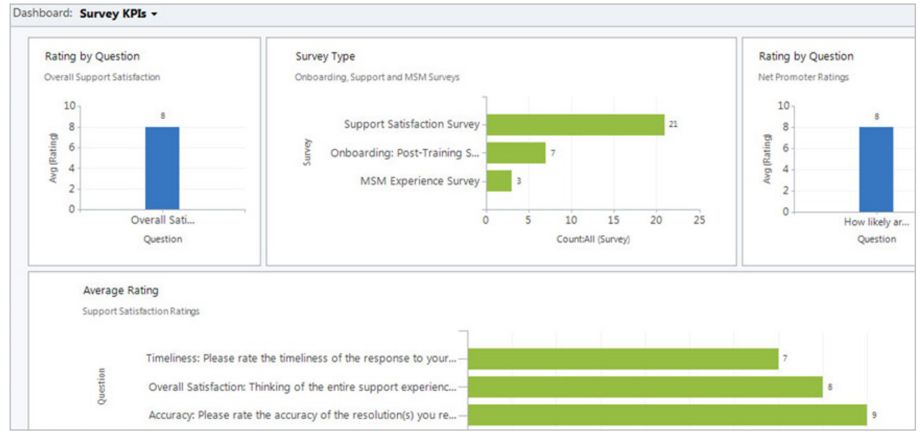
The workflow sends an email alert to key people in the organization. Now, when we get a great (10) or not so great (six or lower) rating on a survey question, we know immediately and can take the appropriate action.

MEASURE CUSTOMER SATISFACTION WITH SURVEYS AND A SURVEY KPI DASHBOARD

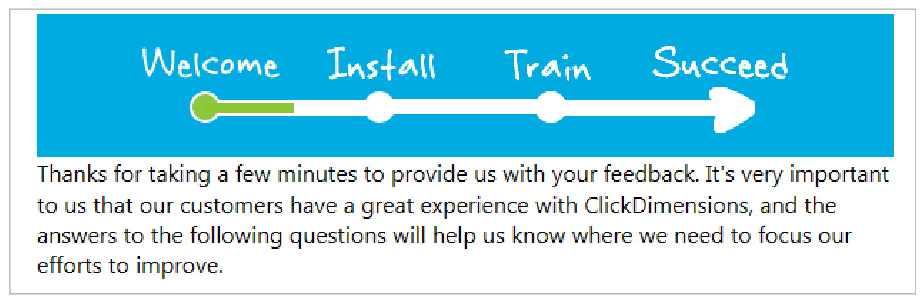
At ClickDimensions, we really care about the happiness of our customers. We care so much that we survey our customers regularly and expose the results of these surveys on a dashboard for all employees to see. We survey on three levels. Here they are from top to bottom:

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

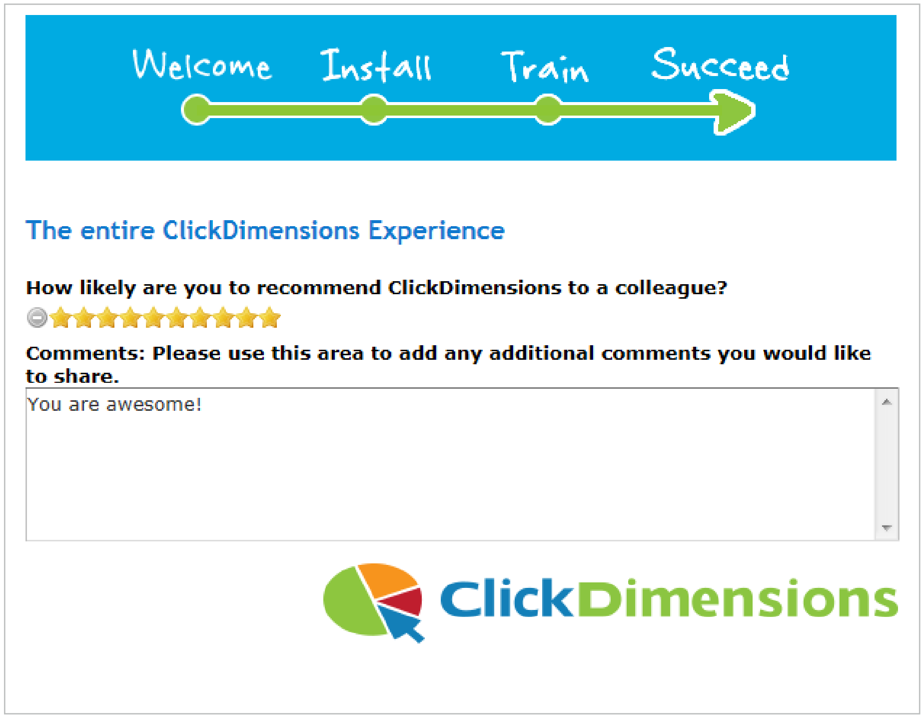
In each of our surveys, we ask the customer to rate us on various dimensions using a scale of one to 10. Because we are using the ClickDimensions survey tool, all data is captured inside CRM entities so we can build views, charts and dashboards with it. Bringing all this information together, we have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



The data behind this survey is fed by several surveys. Below is our post-training onboarding survey where customers can tell us how we did in each phase of the on boarding process. Starting with the first page of the survey:

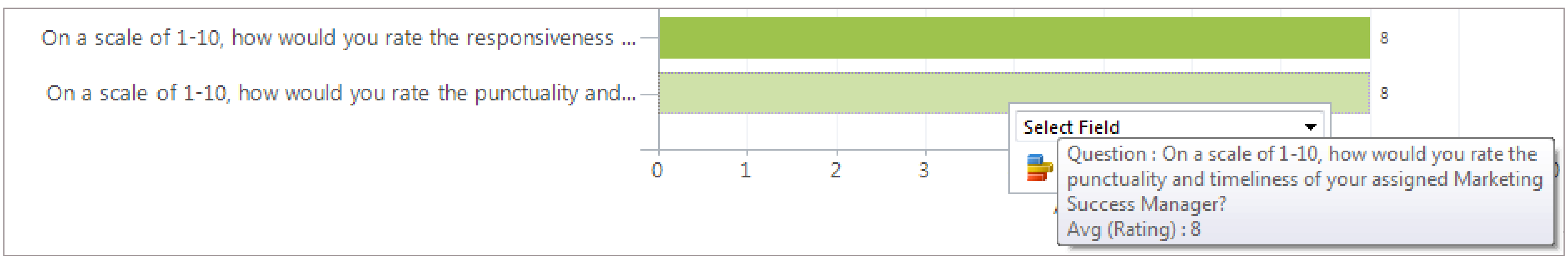


To the final page:



It is very helpful to look at our dashboard and see how we are doing in support, training, onboarding and overall satisfaction. The chart in the dashboard (below) shows that we're getting good reviews on the knowledge, responsiveness and timeliness of our Marketing Success Managers (trainers). Our dashboard has similar graphs for tech support, Net Promoter and overall satisfaction.

So, with Microsoft CRM and ClickDimensions, there is no reason to wonder what your customers think of you.



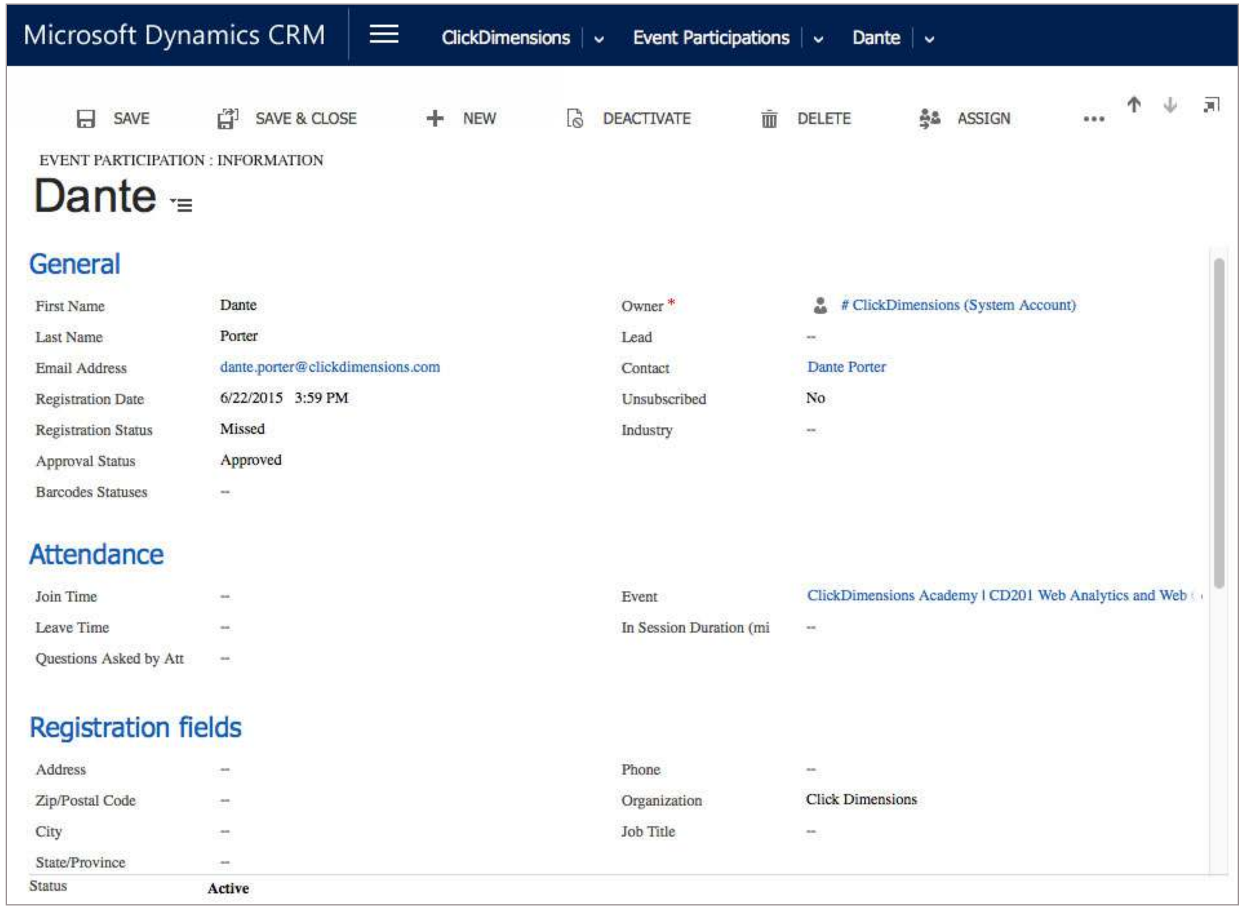
SEE WHICH CUSTOMERS HAVE TAKEN ADVANTAGE OF YOUR TRAINING

At ClickDimensions, all of our customers and partners have unlimited access to our training classes, [ClickDimensions Academy](). We deliver all of this training via GoToWebinar, which means we can take advantage of our [GoToWebinar integration]().

We also like to periodically check in to see if our customers are taking advantage of our training. This helps us to know how engaged they are with our company and product, as well as if we should extend a new invitation to them to join our training. We also like to see who at a company has participated in training.

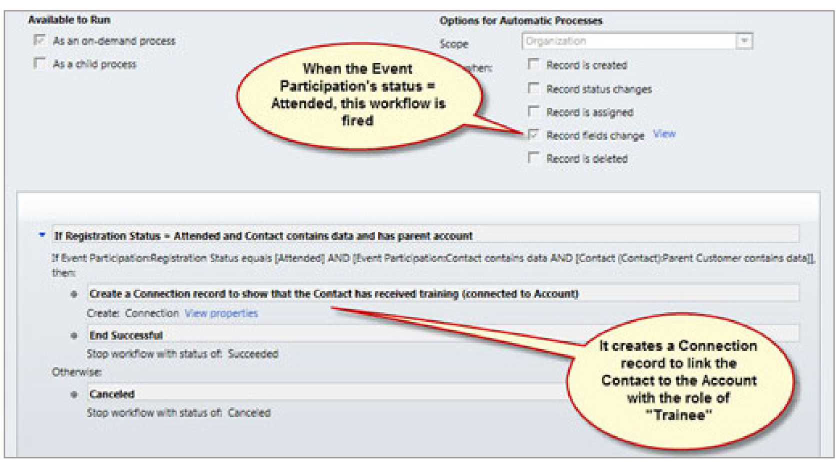
Who has participated in training at a customer company?

ClickDimensions' GoToWebinar integration creates Event Participation records in CRM when someone registers for an event like our training. They're automatically linked to the contact (see right).

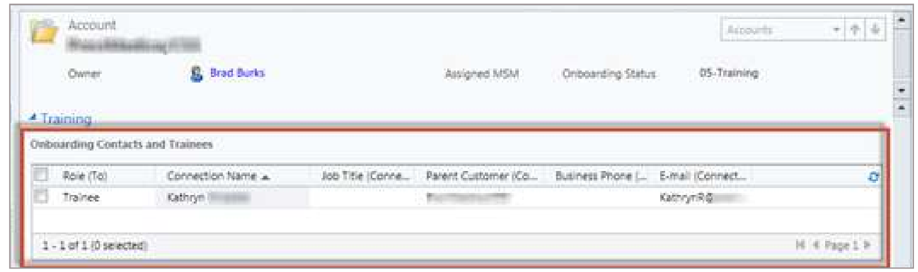


After the webinar, the Event Participation record is updated to show whether the individual attended or not, and for how long:

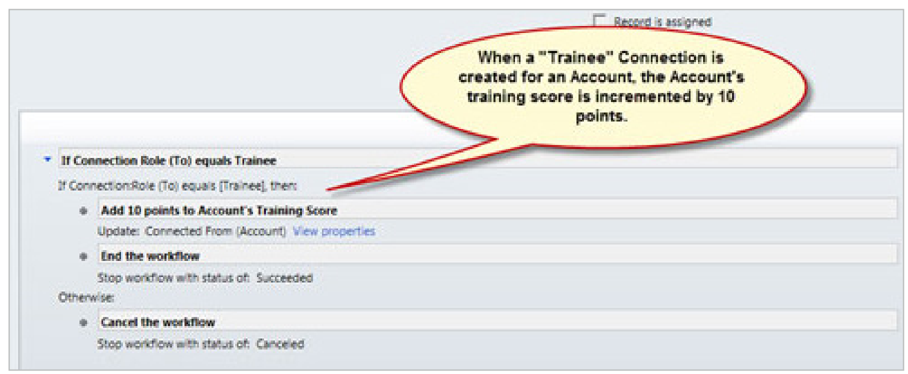
This is great if you are looking at individual contacts and want to see their training or attendance, but we like to also look at things from the account level in CRM. Unfortunately, CRM has a limitation where custom entities, like the Event Participation record, do not "roll up" to the account Level. So to overcome this, we have a workflow that creates a new connection record whenever someone has attended one of our Academy trainings:



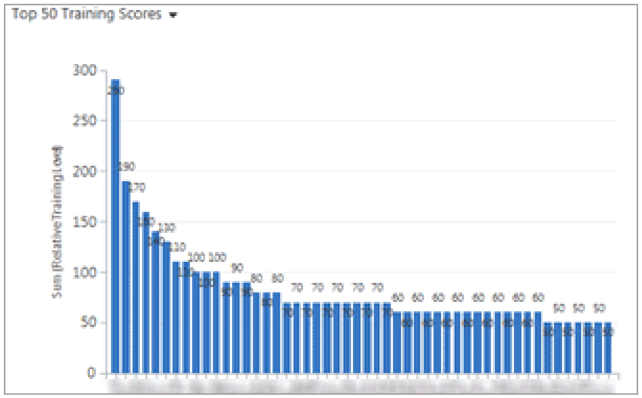
We show the connections on the account form so we can see at a glance who has been trained:



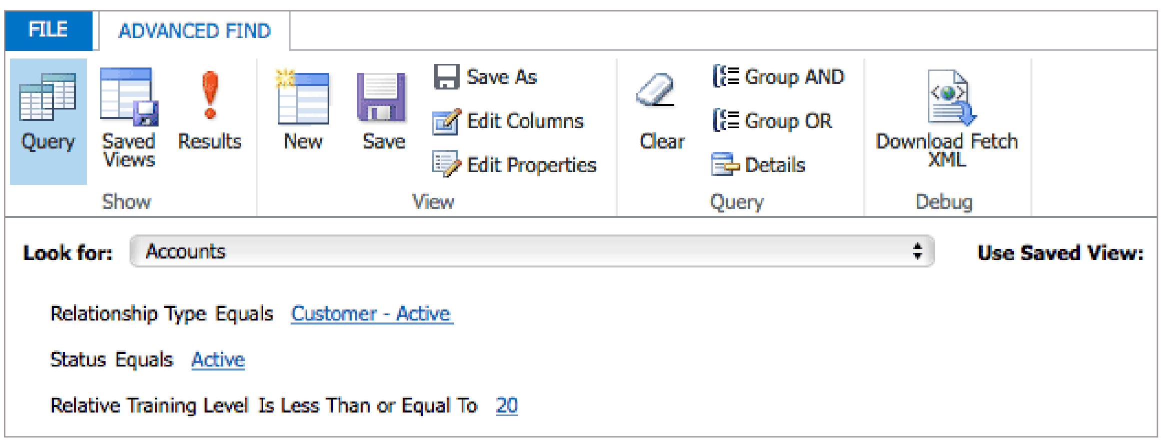
We also want to see this information in aggregate, so we can quickly identify customers who could benefit from some more training. We created another workflow rule that increments a score in a custom field on the account that we call "Relative Training Level."



With all of this done, we can now work with views and charts to make it easy to see who is being trained and who isn't. This view of active customers shows the top 50 Training Scores. It's easy to see that some customers have done lots of training.



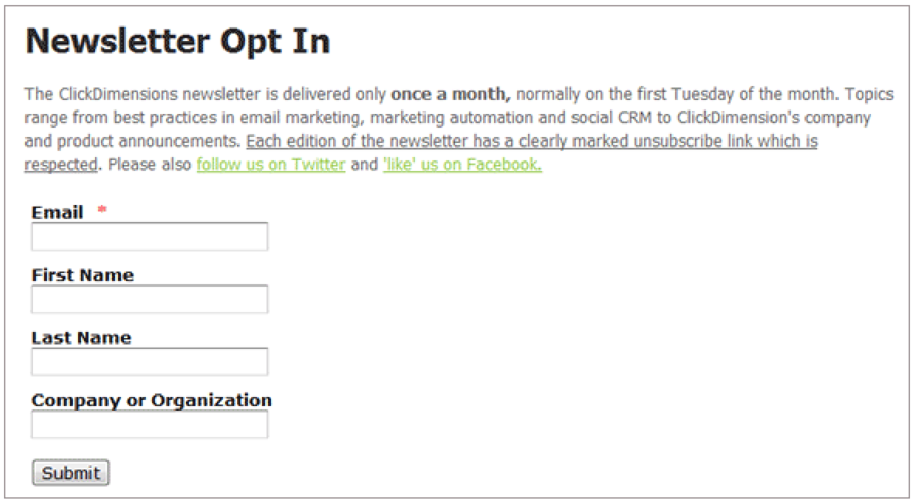
And here's how we find out who hasn't gotten trained. An advanced find for customers whose relative training score is less than or equal to 20. These folks should be invited to our ClickDimensions Academy!



PRESENT A SURVEY AFTER A WEB FORM HAS BEEN COMPLETED

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

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



Newsletter Opt In

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

Email *

First Name

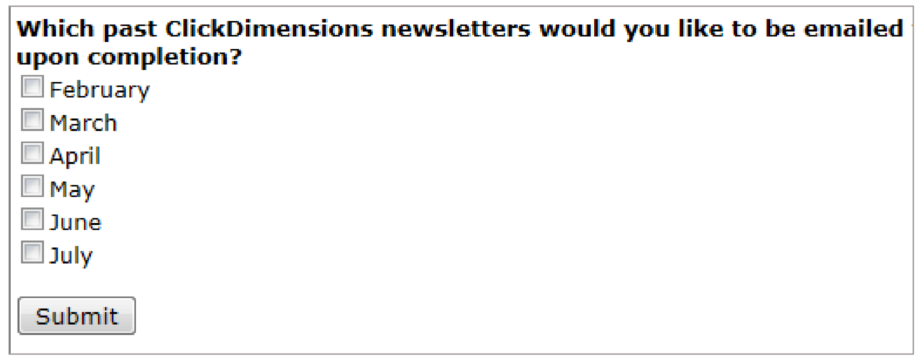
Last Name

Company or Organization

Submit

When you sign up for the newsletter, you will immediately receive a copy of our most recent newsletter. Previously, when you clicked the Submit button on the form, you saw a message telling you that the newsletter was on the way, and thanking you for signing up. However, we realized that, with our survey capability, it would be easy to create a one question survey that the visitor would see when they sign up for the newsletter. The question would ask the visitor if they would like to receive any past issues of the newsletter and would trigger a workflow to immediately send those past issues once the survey question was submitted.

We simply created a one question survey.

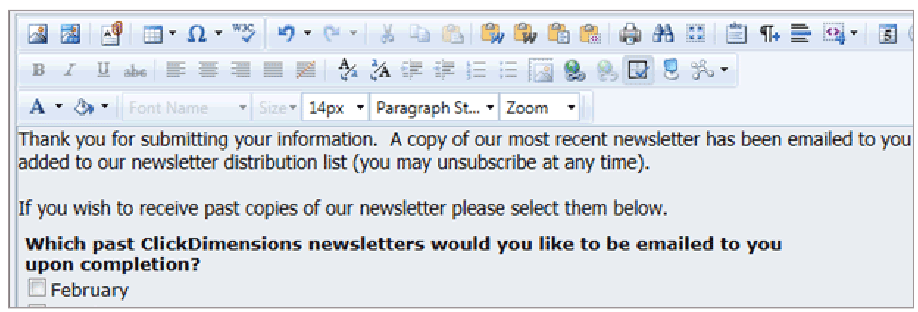


Which past ClickDimensions newsletters would you like to be emailed upon completion?

- February
- March
- April
- May
- June
- July

Submit

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



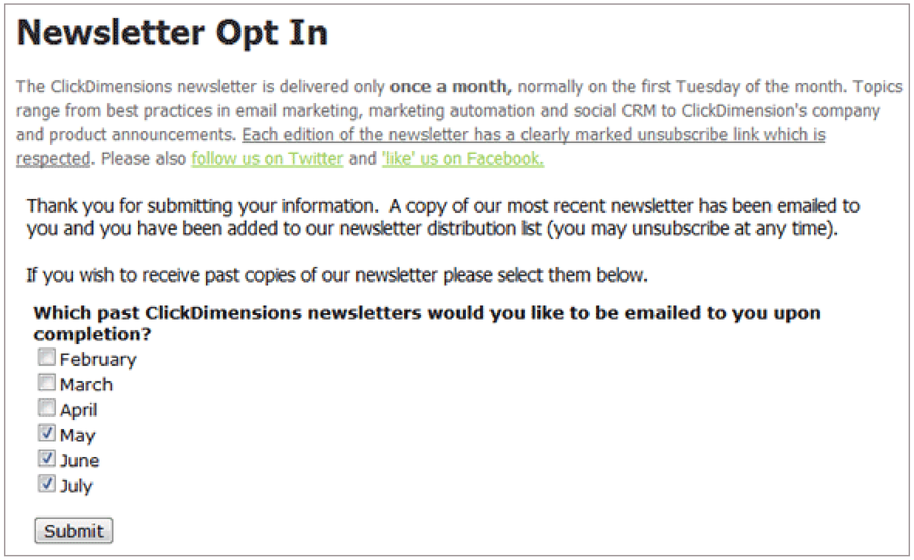
Thank you for submitting your information. A copy of our most recent newsletter has been emailed to you added to our newsletter distribution list (you may unsubscribe at any time).

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

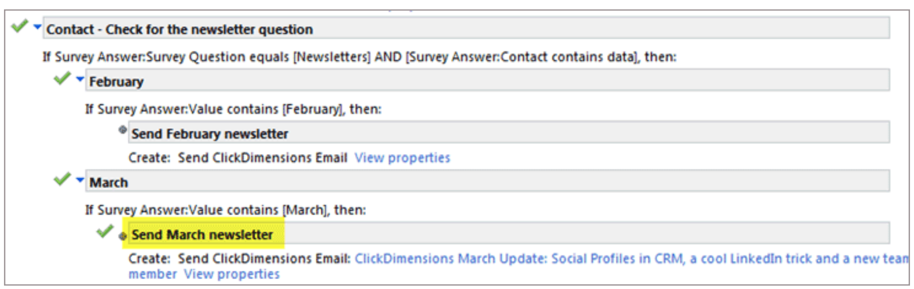
Which past ClickDimensions newsletters would you like to be emailed to you upon completion?

- February

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



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



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

Chapter 8

SMS Marketing

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

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

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

1. Clean it Up

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

2. Double-Check Recipients

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

3. Let Them Opt-Out

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

4. Personalize the Text

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

5. Timing is Everything

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

6. Keep Your Messages Short and Sweet

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

7. Call to Action

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

8. Review

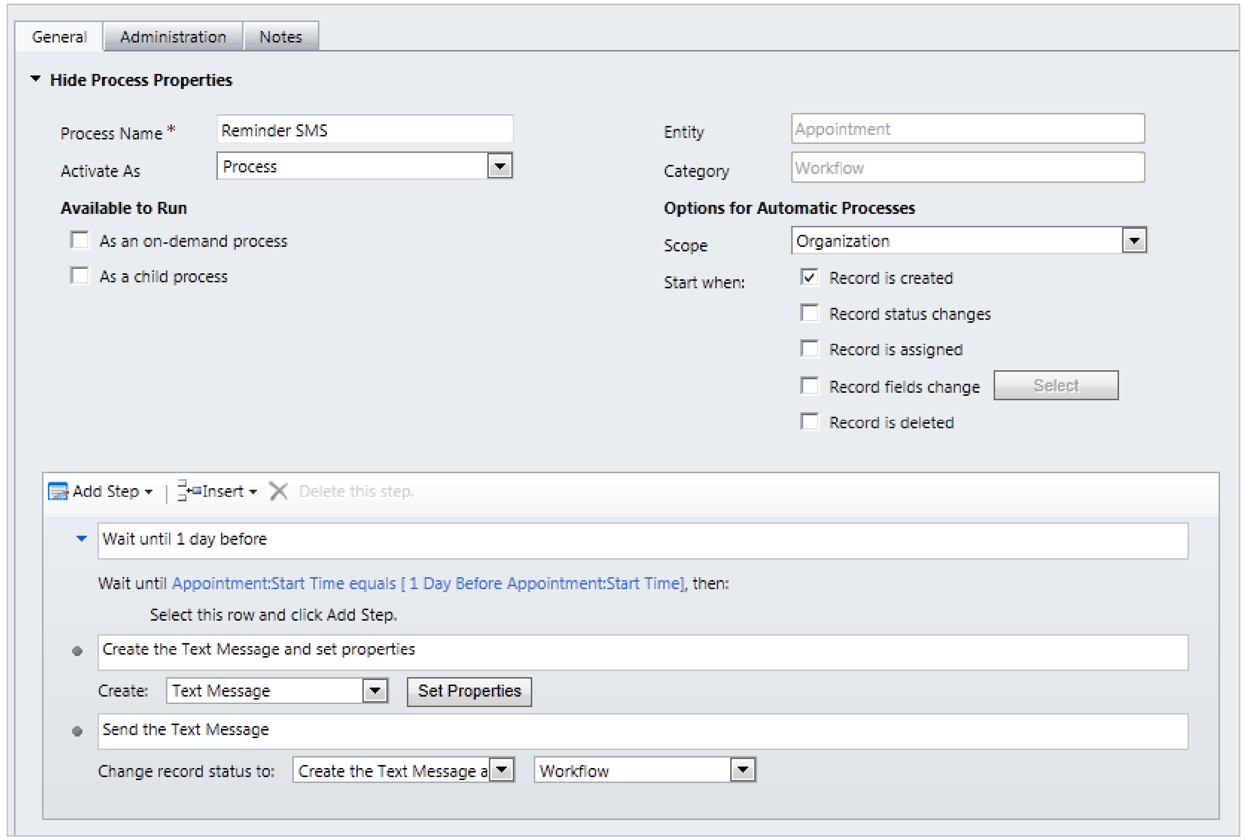
Measure the effectiveness of your message. How many responses did you get? How many opt-outs? What time of day got the best response? Take note of important findings so that you can make improvements on your next send!

SEND A TEXT MESSAGE AUTOMATICALLY

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

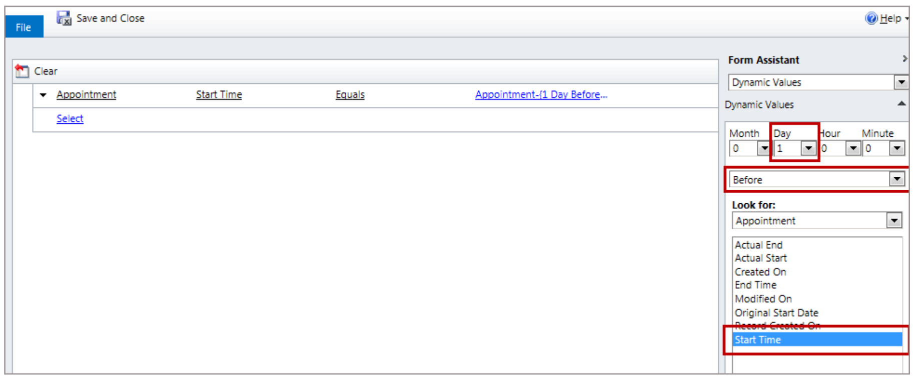
In this example, we will be reminding a client of an appointment on the day prior to the appointment date. We will use a workflow to send a text message one day before the appointment is scheduled to start. To begin, create a workflow (Settings > Processes > Workflows > New), and choose the entity you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

Here is what the finished workflow will look like:

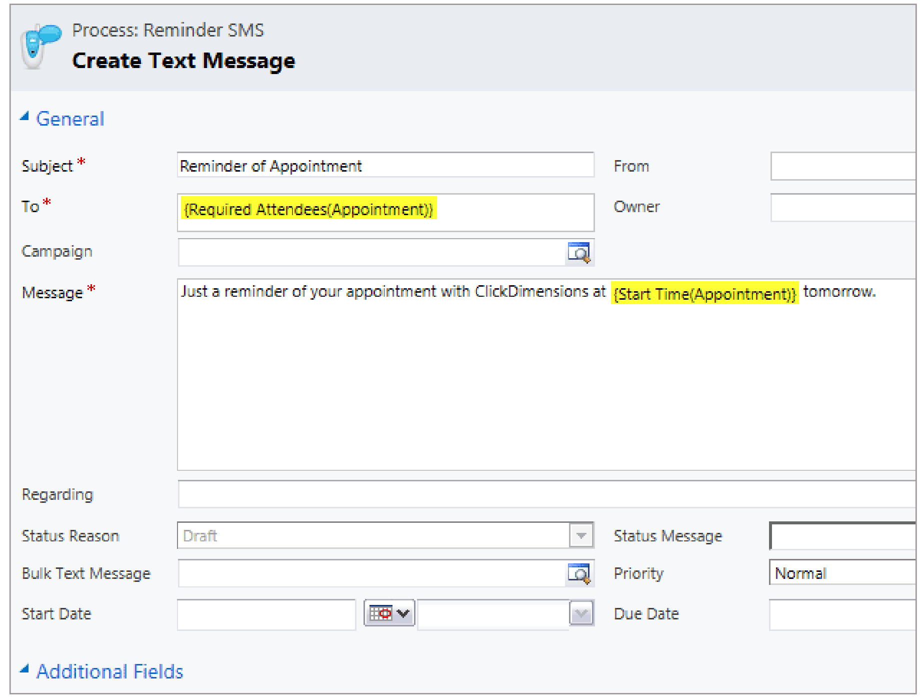


We want the record to run whenever any user creates an Appointment record, so we set Scope to Organization and Start When to Record is Created.

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



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



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

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

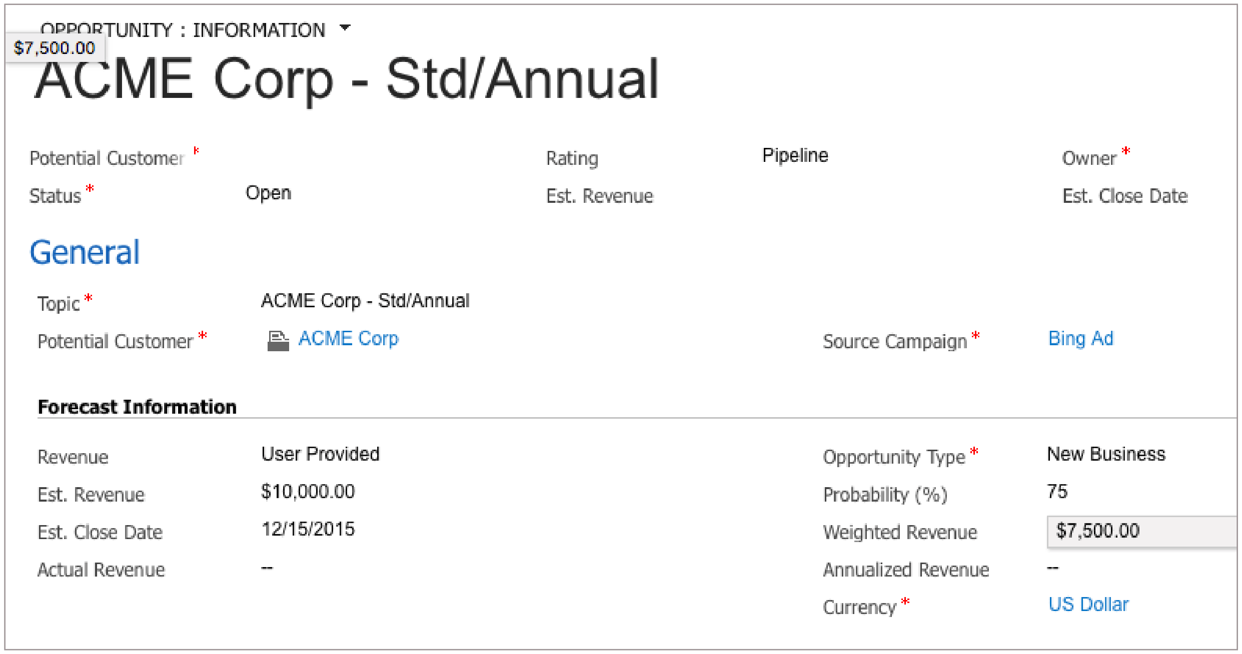
Chapter 9

Sales Process & Performance

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

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

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



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

Estimated revenue

This is the conservative revenue amount for the opportunity.

Estimated close date

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

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

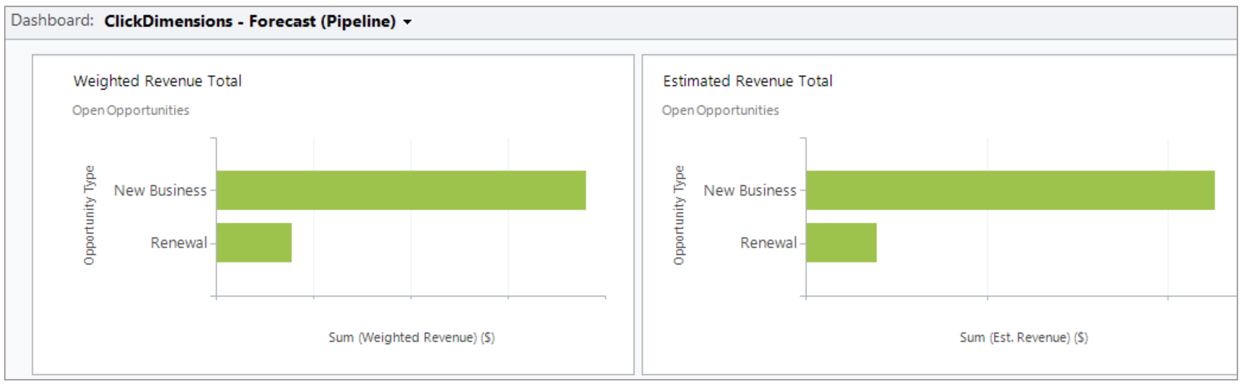
Opportunity type
Since we are a SaaS business, we want to separate our revenue into new customer deals and renewals from customers that have been on board for more than 12 months. This is because, after the initial 12 months, customers are transitioned from a new business salesperson to a relationship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

Weighted revenue
This is a custom field containing the estimated revenue multiplied by the probability. We use a CRM workflow to automatically calculate weighted revenue.

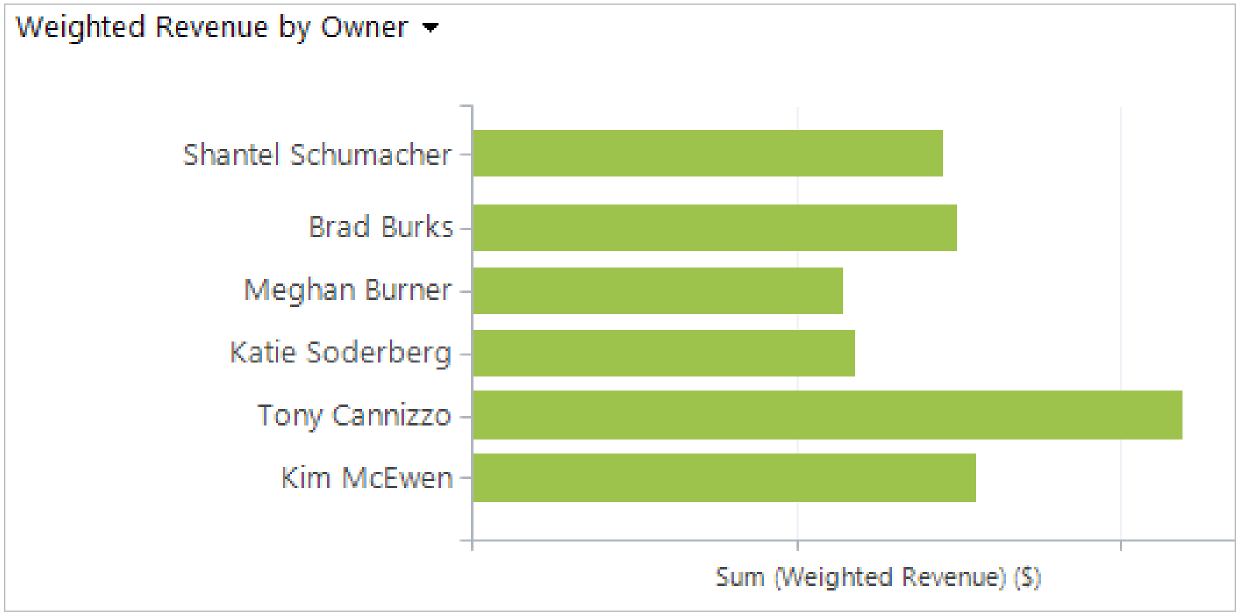
Actual revenue
This is entered by our finance director when he closes an opportunity record. We make opportunity closing a process for the finance team so we can ensure that the amounts are correct for our dashboards and commission tracking.

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

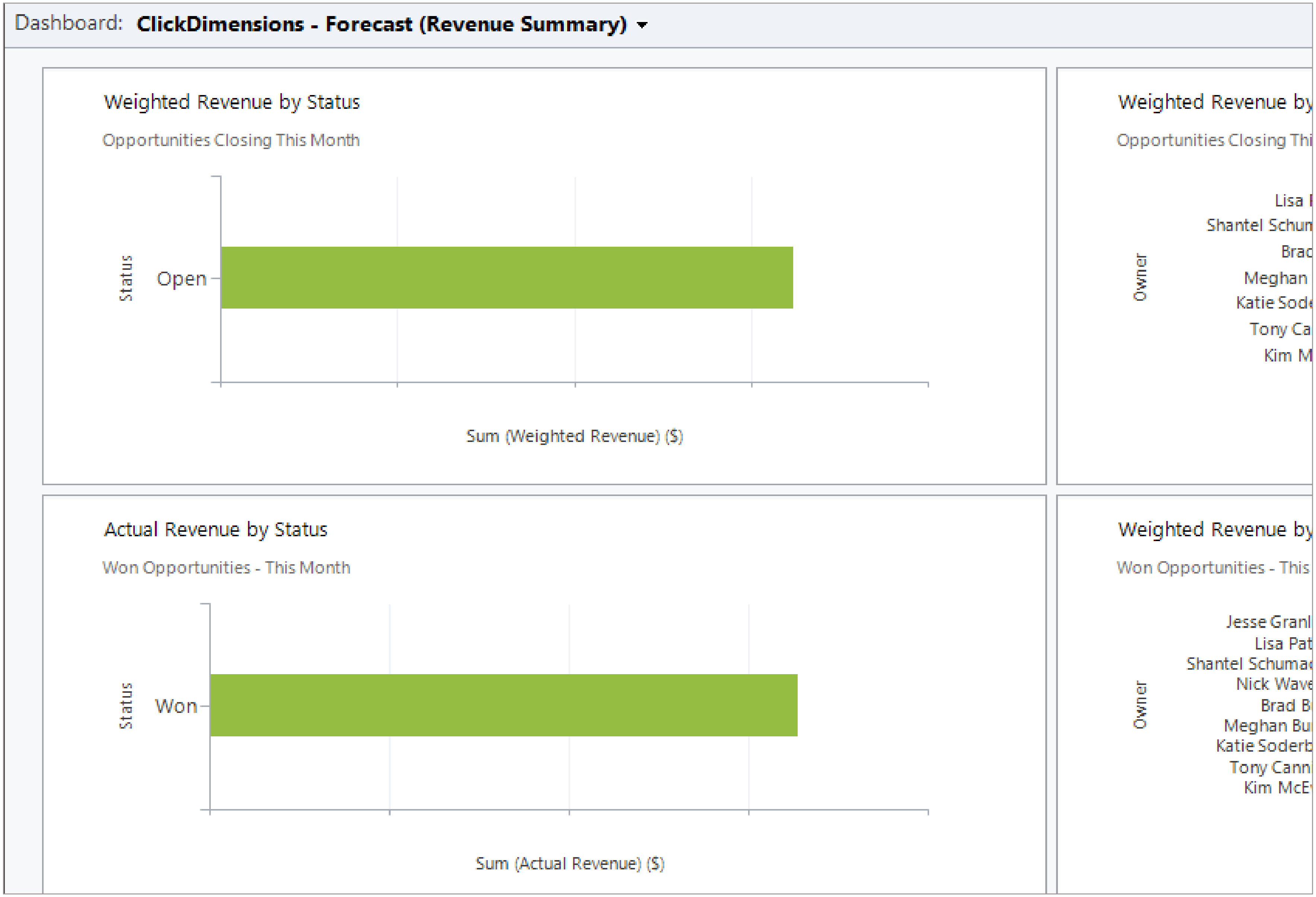
Now let's talk about pipeline. By pipeline, we are referring to the total and weighted opportunity revenue amounts by sales rep, month and opportunity type (new business vs. renewal business). This is critically important! Here we are referring to opportunities in the open state. As you can see below,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



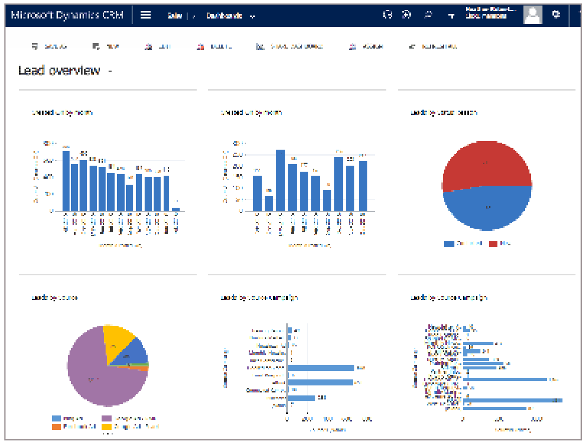
What is shown above is simply a chart of weighted revenue next to a chart of estimated revenue with both charts being grouped by our opportunity type field. Along the same lines, we can add the same charts, but grouped by sales rep and month, to our dashboard.



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


Dashboard: ClickDimensions - Forecast (Revenue Summary)
Weighted Revenue by Status
Opportunities Closing This Month
Status
Open
Sum (Weighted Revenue) ($)
Weighted Revenue by
Opportunities Closing Thi
Owner
Actual Revenue by Status
Won Opportunities - This Month
Status
Won
Sum (Actual Revenue) ($)
Weighted Revenue by
Won Opportunities - This
Owner

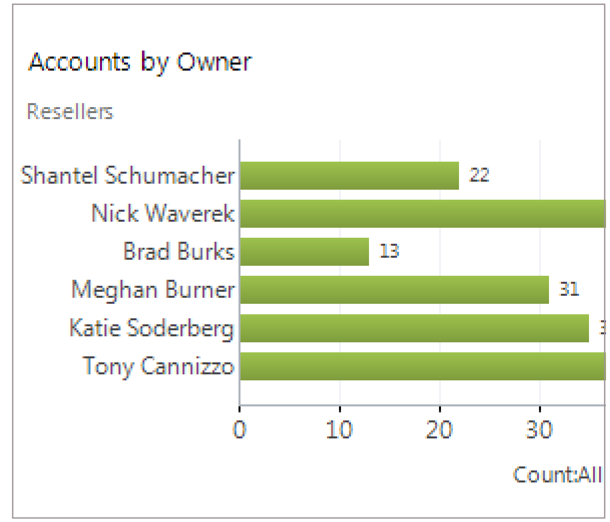
BUILDING DASHBOARDS TO SIMPLIFY THE PROCESS OF CAPTURING METRICS



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

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

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

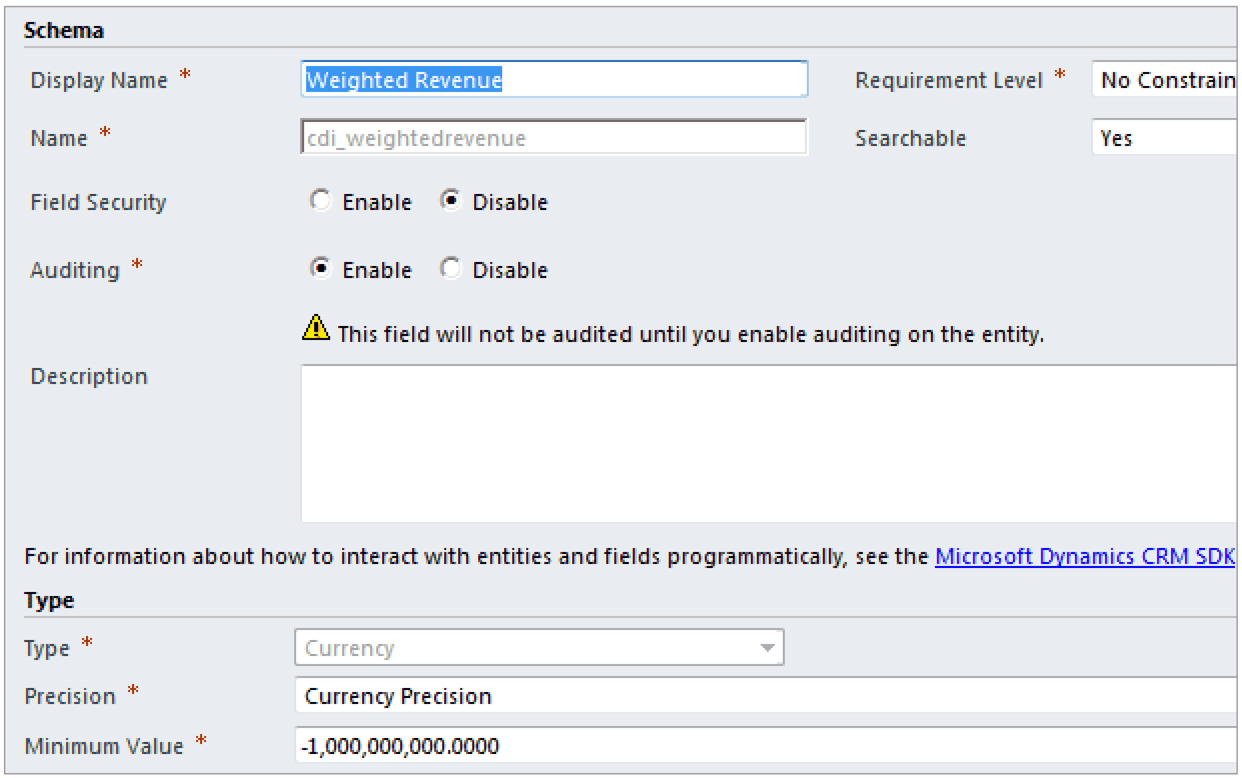


Because you can easily create a chart of anything you can count, sum or average in Microsoft CRM, you can combine these charts into dashboards and then record the metrics on a predetermined frequency so that you will be able to look back and see how metrics like your customer count or overall pipeline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

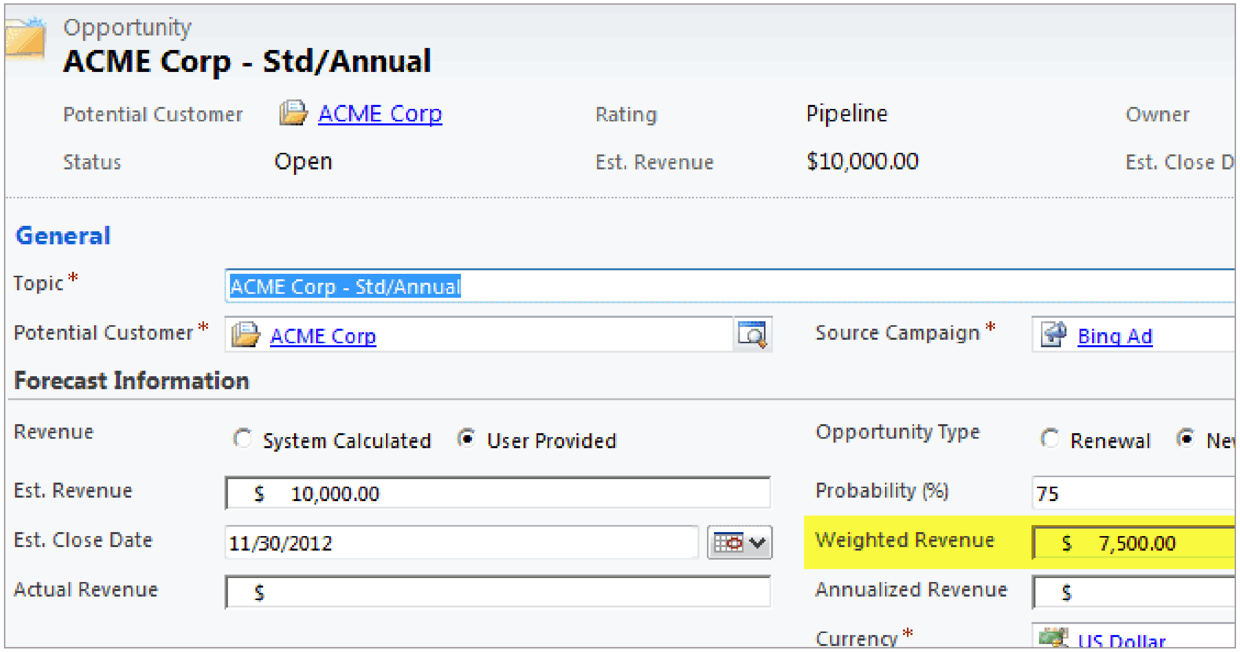
USING CRM WORKFLOW TO CALCULATE WEIGHTED REVENUE ON OPPORTUNITY RECORDS

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

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

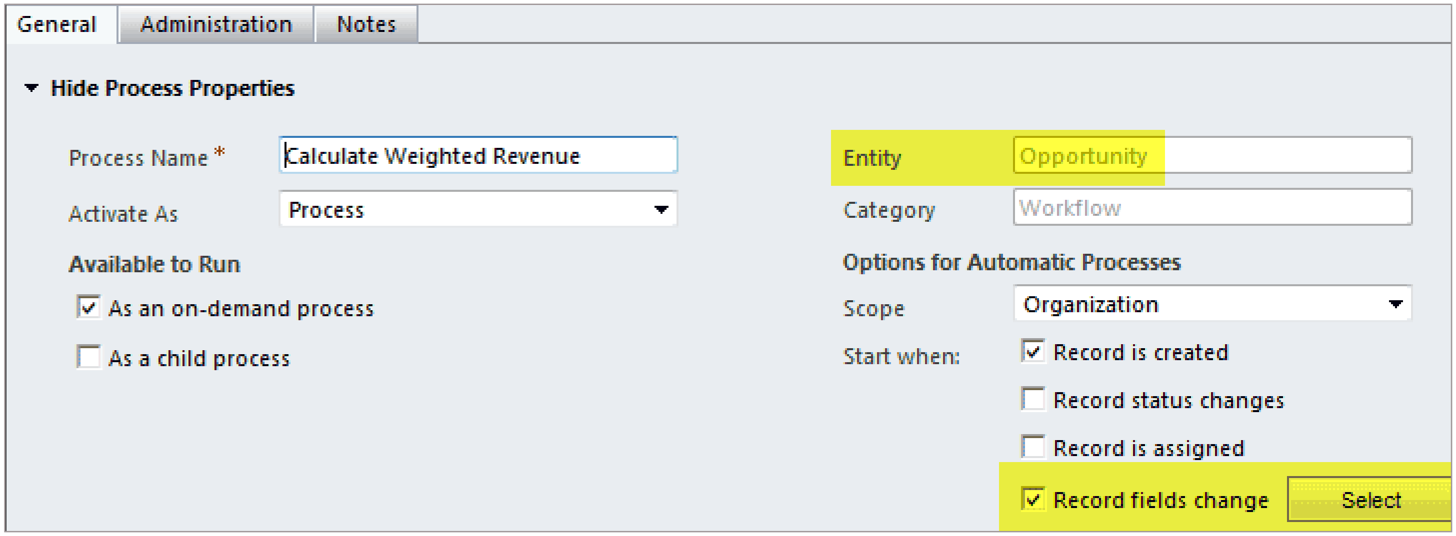


Add your new field to your opportunity record form(s).



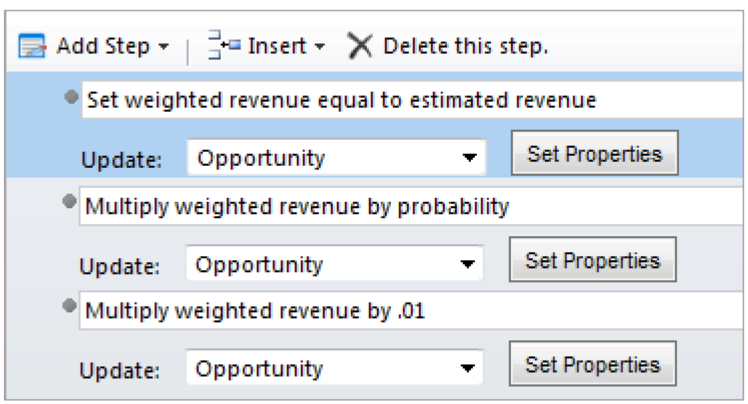
Now comes the fun part of building the workflow to automatically calculate the weighted revenue value. Weighted revenue will be equal to estimated revenue times probability. But, since the probability field is actually not a percentage, but an integer from 1–100, we will need to divide by 100 after we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

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

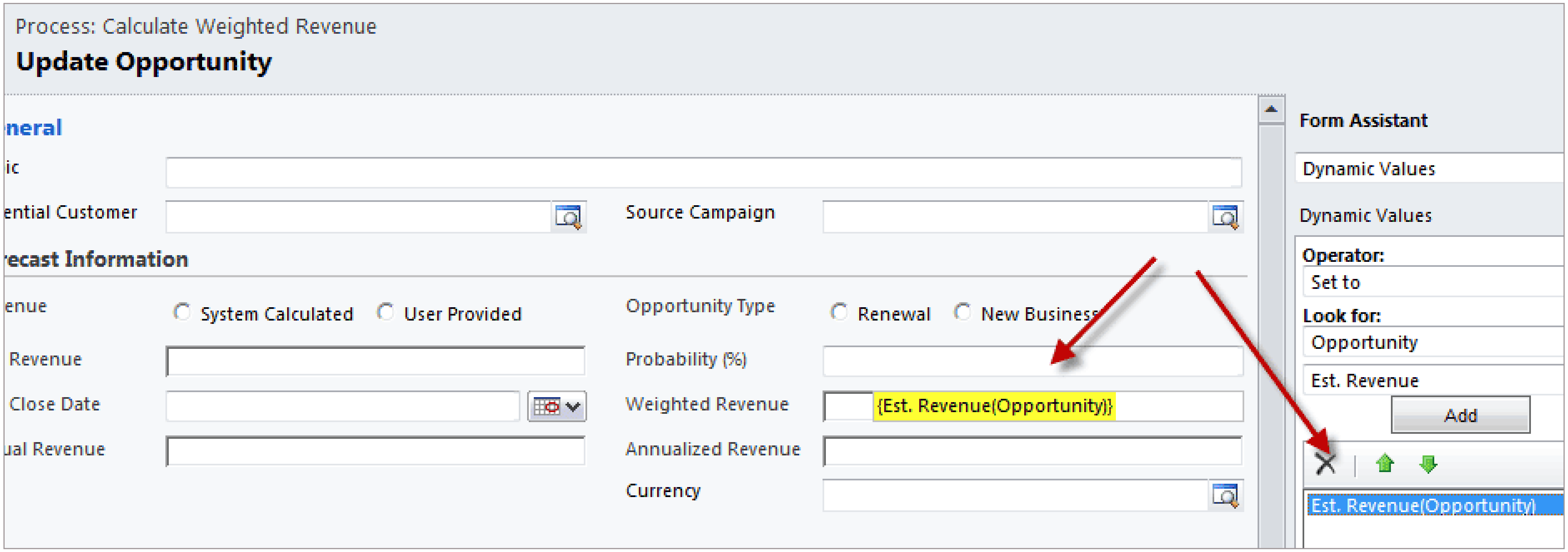


Then we will have three steps in the workflow:

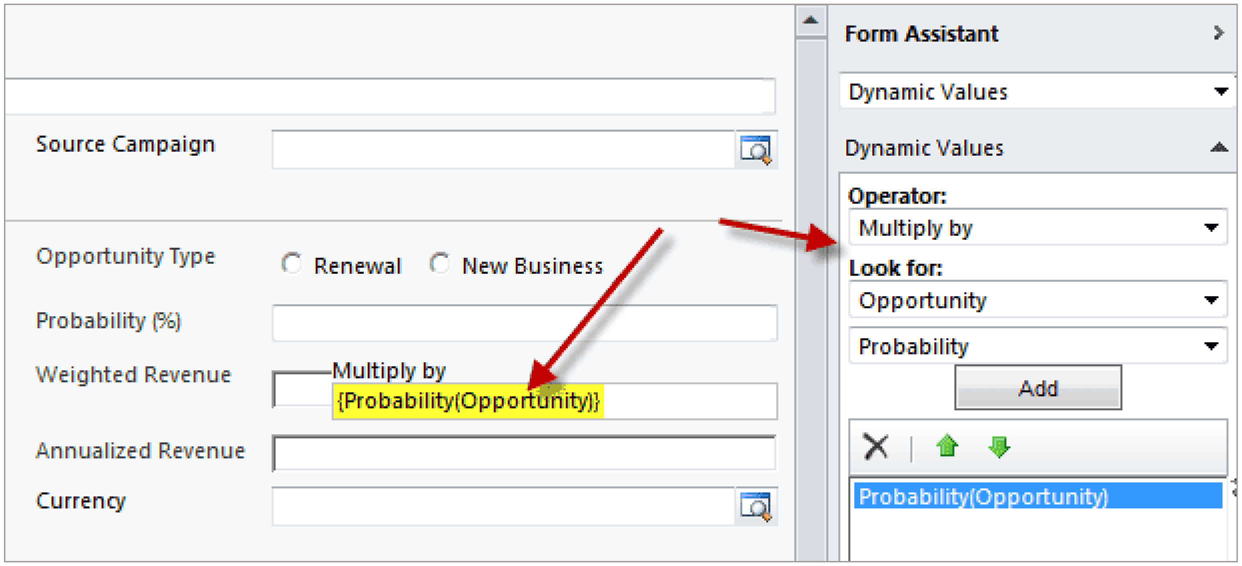
1. Set weighted revenue equal to estimated revenue
2. Multiply weighted revenue by probability
3. Multiply weighted revenue by .01 (this is the same as dividing by 100)



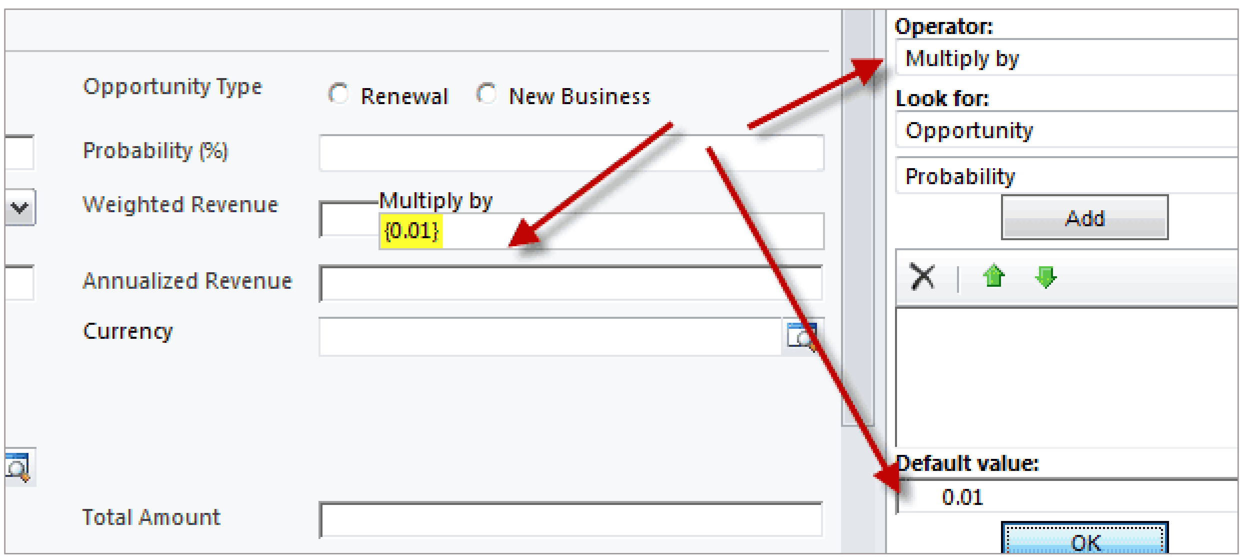
Step 1 looks like this:



Now step 2:



Finally, step 3:



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

Chapter 10
Data & Research

Data and research are essentials for modern marketers. Here are a few ideas for collecting and calculating various kinds of data.

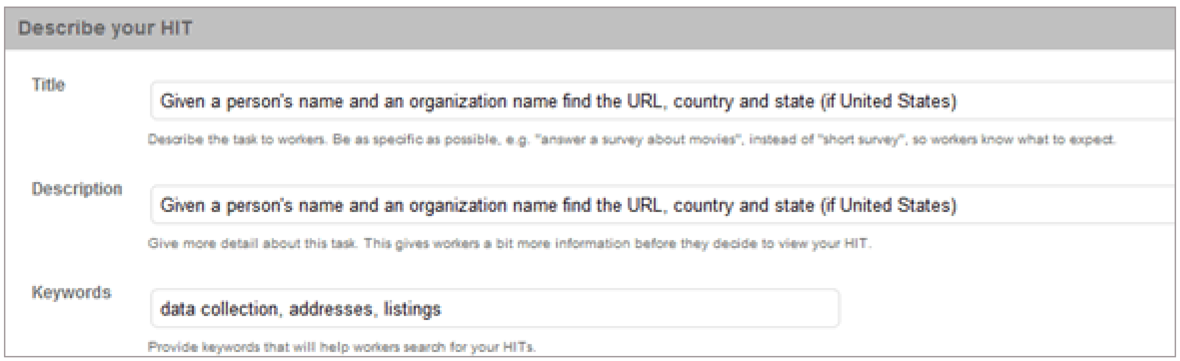
AUTOMATE YOUR DATA WORK WITH AMAZON'S MECHANICAL TURK

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

Amazon's Mechanical Turk is a website located at www.mturk.com where you can design a job that various people can do for you. For example, my job is to have people search on a company name (and optionally an individual's name) to find the company URL and location. In Amazon's terms, I am a "requester" of work, and the people that will do my tasks (called "HITs" – human intelligence tasks) are "workers." The workers can be stay-at-home moms/dads, students or anyone else with a computer, internet and a desire to earn a few dollars. Anyone can sign up and become a worker, but Amazon allows you to only expose your work to people that they deem certified. Let's get started.

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

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



Describe your HIT

Title: Given a person's name and an organization name find the URL, country and state (if United States)

Describe the task to workers. Be as specific as possible, e.g. "answer a survey about movies", instead of "short survey", so workers know what to expect.

Description: Given a person's name and an organization name find the URL, country and state (if United States)

Give more detail about this task. This gives workers a bit more information before they decide to view your HIT.

Keywords: data collection, addresses, listings

Provide keywords that will help workers search for your HITs.

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

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

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

Indiviudal Name: **${IndiviudalName}**

Company/Organization Name: **${OrganizationName}**

URL:

Country:

State (if USA):

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

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

	A	B
1	IndiviudalName	OrganizationName
2	Hit1_IndiviudalName_data	Hit1_OrganizationName_data
3	Hit2_IndiviudalName_data	Hit2_OrganizationName_data
4	Hit3_IndiviudalName_data	Hit3_OrganizationName_data
5		

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

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

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

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

The next metric to factor is the average profit (not revenue) per prospect. Your financial person can give you an idea of that by providing basic margin and customer data. For example, if you closed 100 customers last year and made $100,000 profit, then you made $1,000 profit per customer. Taking the 25% probability of closing a new lead and the $1,000 profitability per customer, you can determine that your **maximum** spend per good lead should be $250. But keep in mind that is the maximum spend, which leaves you with no profit. Depending on how aggressively you want to either grow the top or bottom line, you can determine how close you should spend to the maximum. Companies that are focused on revenue (top line) may be comfortable spending up to $250 per qualified lead. Those that are focused on profitability will be much more conservative.

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

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

> *ClickDimensions has allowed us to collect all the data for our marketing activities onto a single solution, and build our marketing intelligence based on that data.*
>
> JASPINDER SINGH,
> BUSINESS APPLICATION MANAGER
> IMG

Chapter 11

Microsoft CRM Features

Many books have been written on this topic, but here we will share a few of our favorite tips and tricks for using Microsoft Dynamics CRM.

CRM WORKFLOWS: WAIT VERSUS TIMEOUT

When creating a workflow you may find that you need to insert a delay between one step and another. There are two main ways to accomplish this: a wait condition or a process timeout. It is important to understand the difference between the two so that your workflow can fulfill its intended purpose.

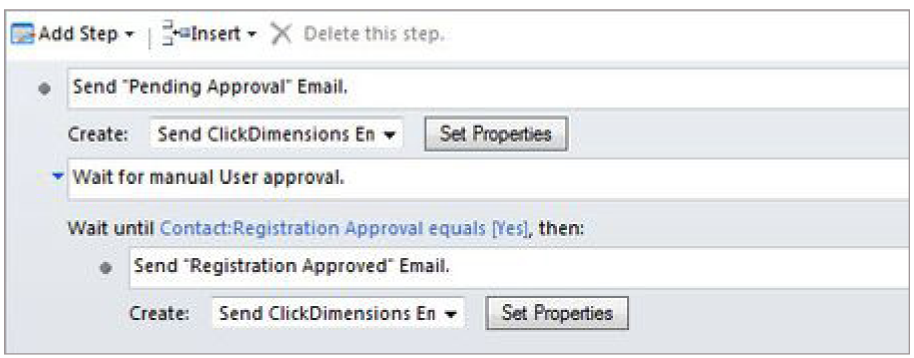
Simply put, a wait condition is action- or state-dependent while a process timeout is date or time-dependent. Below I outline an example scenario for each.

Wait Condition

A wait condition tells the workflow to wait until some specific action has occurred, such as a field changing or updating to a specific value. This is useful for situations in which you need to wait for something to be done, rather than wait a specific amount of time. Wait conditions are great for building workflows that are coordinated with manual processes carried out by users. You can add a wait condition to a workflow by selecting Add Step > Wait Condition.

Imagine that you want to create a “Registration Communication” workflow to automate communications with a contact regarding the status of their registration for a service. You have already created a form that, when submitted, marks a flag field on the contact that will trigger the “Registration Communication” workflow. You want the workflow to send an email to the contact letting them know that their registration request is pending review, and to send an acceptance email once this approval has been manually granted by a user who changes a Registration Approval field to Approved.

You need a wait condition to accommodate this manual approval portion of the process, as shown here:



When set up like this, the workflow will begin by sending the Pending Approval email to the contact, wait for the user to change the contact’s Registration Approval field to Yes and, once this is done, send the Registration Approved email to the Contact.

Process Timeout

A process timeout tells the workflow to wait for a specific amount of time or until a specific date. The former is essential for building workflows that should space out the execution of certain steps while remaining fully automated, while the latter is needed when a given step has to execute on a certain day or time. You can include a process timeout in a workflow by selecting Add Step > Wait Condition, and then adjusting the values as shown here:

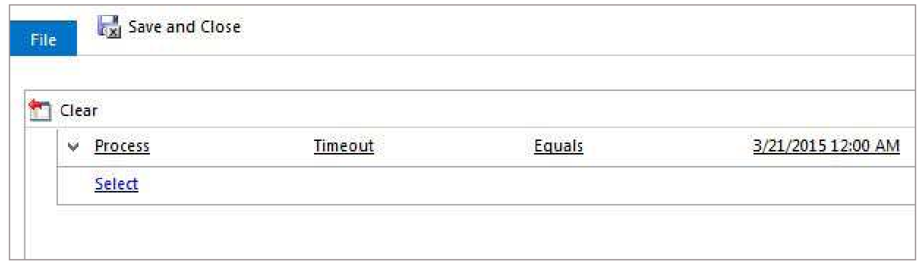
Imagine that you are creating a Registration Confirmation workflow that, as above, runs when a flag field on a contact record is updated by a form submission. You want this workflow to send a confirmation email asking the contact to review the information they have submitted. In the email you tell them that they have 48 hours to review the information and respond with any adjustments, after which time the registration information will be locked in. This process does not require any manual review, so a process timeout is appropriate here.

The workflow would send the confirmation email to the contact as soon as the flag field was updated, wait for two days, and then send the contact an email letting them know that their information has been finalized.

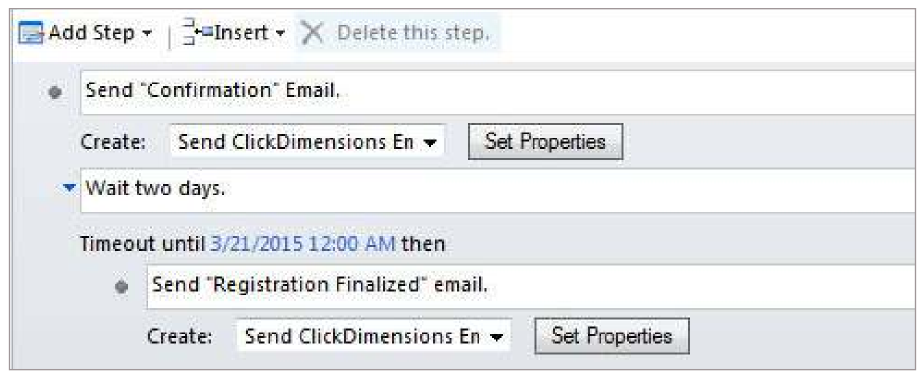
The process timeout step looks like this:

And the workflow looks like this:

Another option that you have here is to wait until a specific date rather than a set amount of time. For example, if a registrant should be able to update their information up through but not after March 20, 2015 you would set the Process Timeout to equal 3/21/2015 12:00 AM.



Which, once saved, will look like this in your workflow:



These are pretty simple examples, but you could use these same principles to create some pretty complex workflows that accommodate for manual processes, variable process start times, scheduled deadlines and start times, and more.

CRM WORKFLOWS: PARALLEL WAIT BRANCHES

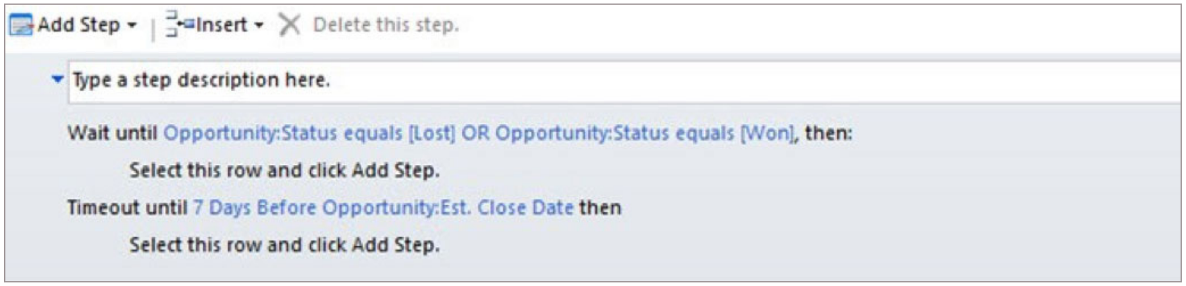
Imagine that your sales users are required to fill in an Estimated Close Date field on every opportunity that they create in CRM, and you want to automatically create a reminder task for the sales user one week before the estimated close date. However, to avoid confusing your sales users with irrelevant tasks, you need to make sure that the reminder task is not created if the opportunity is won or lost more than one week before the estimated close date.

The key here is that we want the workflow to wait for either of two conditions to be met, execute the steps following the condition that is met and then not execute the steps following the other unmet condition.

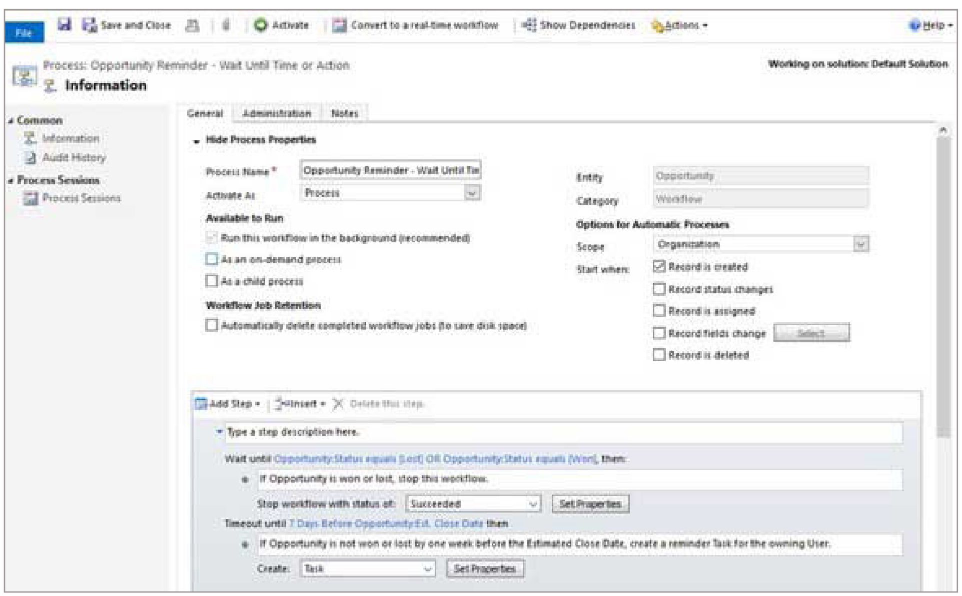
The first idea that many users have when faced with this situation is to create a single wait condition that contains a process timeout and a check condition set as an OR group. This is sound logic, however, CRM does not allow a process timeout to exist alongside any other condition; the desired OR group is impossible to create.

Thankfully, the parallel wait branch gives you the tools to construct a workflow that follows that same OR logic without remaining within the properties of a single wait condition. To set a parallel wait branch, all you need to do is add a normal wait condition to your workflow, select that wait condition and then choose the Parallel Wait Branch option from the Add Step menu. The parallel wait branch will appear on the same level as the original wait branch.

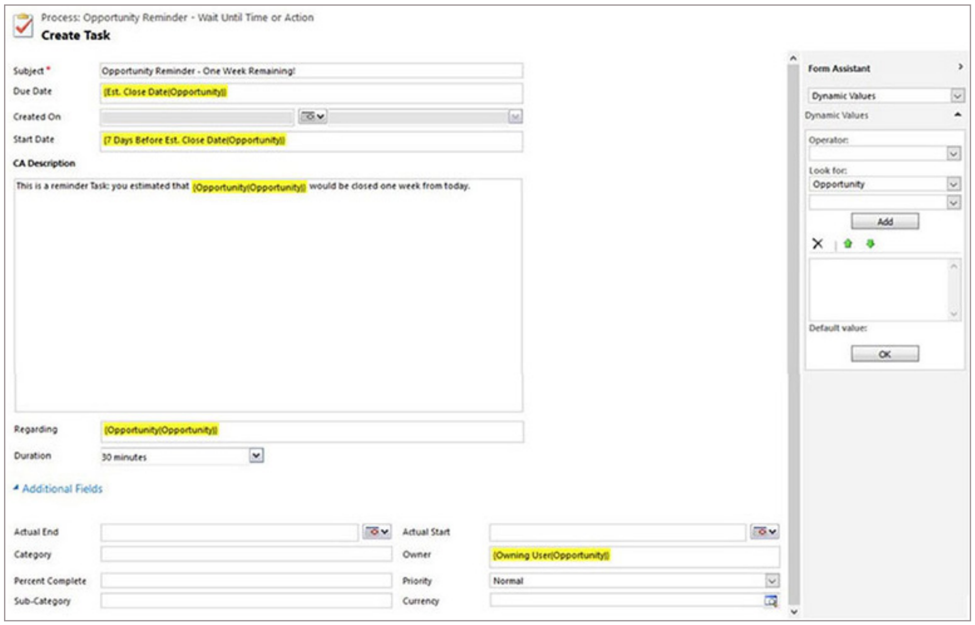
Here is what it looks like in CRM:



As you can see, one wait branch is set to wait until the opportunity's status equals Lost or Won and the other is set with a process timeout that waits until seven days before the opportunity's estimated close date. Now, all that we need to do is set the actions that we would like to occur for each wait condition. I have set it to stop the workflow if the opportunity is lost or won, and to create the reminder task one week before the opportunity's estimated close date:



Here are the properties for the Create Task step. You can see that I have set the Due Date field to equal the opportunity's estimated close date, the Start Date field to the day the task is created (seven days before the opportunity's estimated close date), and the Owner field to equal the opportunity's owning user. I have also used the opportunity itself in the Description and Regarding fields:



And that's it! Once this workflow is activated, it will run for every opportunity that is created and either end with no action or create a reminder task one week before the opportunity's estimated close date.

This is just one example – you can use parallel wait branches to build workflows that are much more accommodating to a variety of actions and situations than what is possible with a single wait branch.

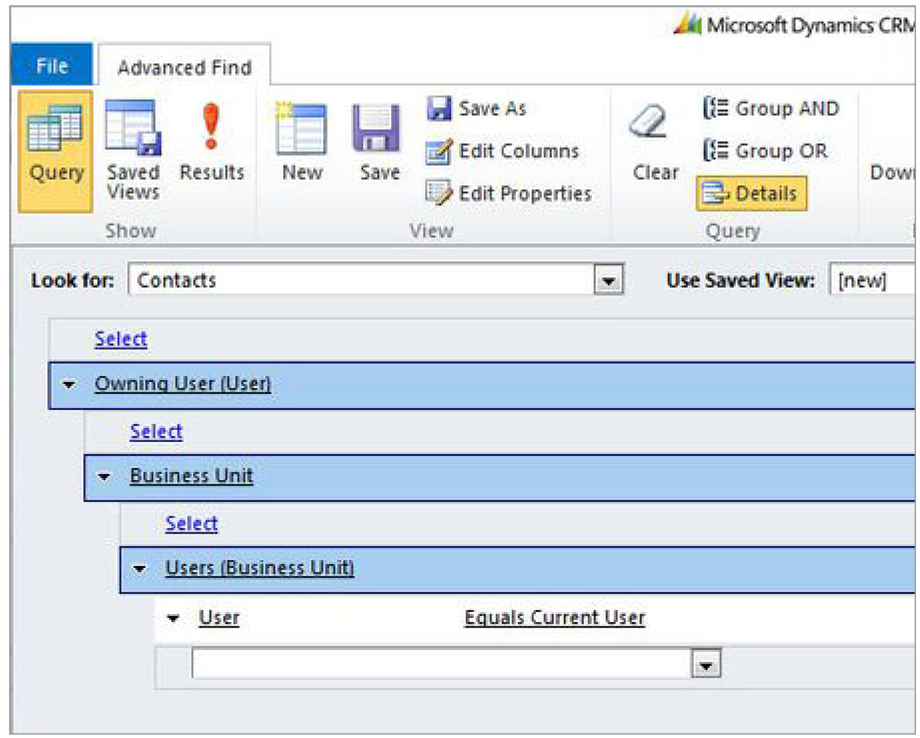
ADVANCED FIND: SOME COMMON NEEDS

Microsoft Dynamics CRM's advanced find feature is a powerful tool for searching and sorting through the data a records in your CRM. On a basic level, all you have to do is specify some criteria and run the advanced find query to return all of the records that meet those criteria. However, things can get a bit tricky when it comes to the advanced find tool's specific requirements and limitations, and what seem like basic tasks end up being more complicated than expected. This blog post outlines queries and workarounds for three such needs:

- Creating a view that shows records in the current user's business unit.
- Return parent records that have multiple specific child records of the same entity type.
- Generate a list of records that fail to meet specific criteria.

Creating a View that References the Current User
Many businesses have CRM set up so that users are in business units with other users with whom they share records; for example, contacts. While each user can easily see their own records in the My Contacts view, it would be beneficial to give them an easy way to view all contacts owned by any user in the same business unit.

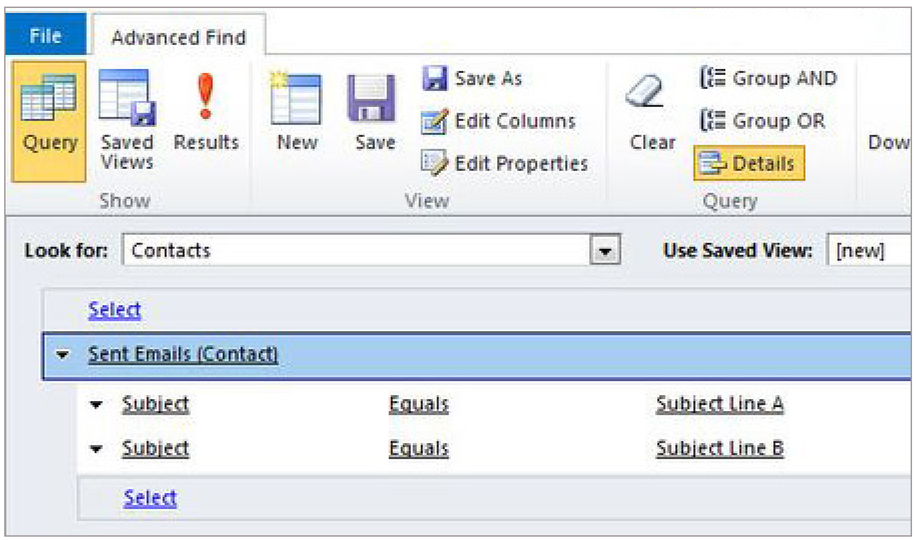
This can be accomplished by creating an advanced find that returns all contacts with an owner who is in a business unit that contains the user who is currently running the advanced find. This is how this looks in advanced find:



Now all you need to do is save this as a view and each user can easily view every contact in their own business unit.

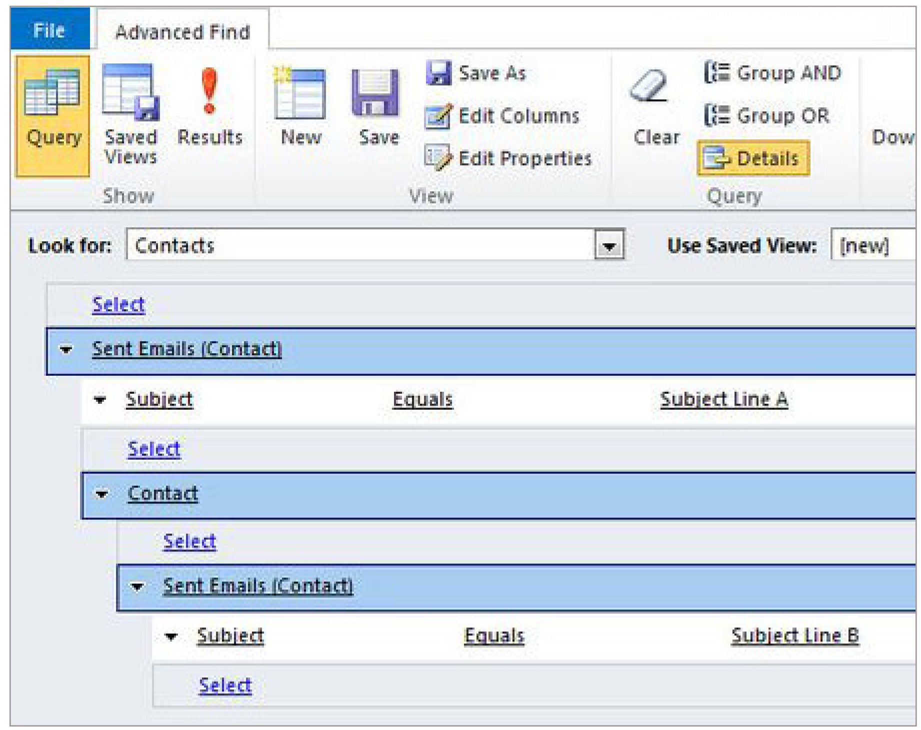
Parent Records with Multiple Specific Child Records of Matching Entity Type

Another common need that businesses have is return parent records that have multiple different child records of the same entity type. For example, you may need to see a list of every contact who been sent both Email A and Email B. One common misconception here is that you could simply search for all contacts that have a related sent email, as shown below:



However, this is actually searching for contacts who have a related sent email record where the subject is both Subject Line A and Subject Line B. This is clearly impossible, as the Subject field cannot contain both simultaneously. Instead, you can accomplish this by creating an advanced find that searches for contacts with a related sent email where subject equals Subject Line A, then reaching back to the associated contact and searching for a related sent email where subject equals Subject Line B. You can continue looping back to that owning contact to specify all of your necessary criteria.

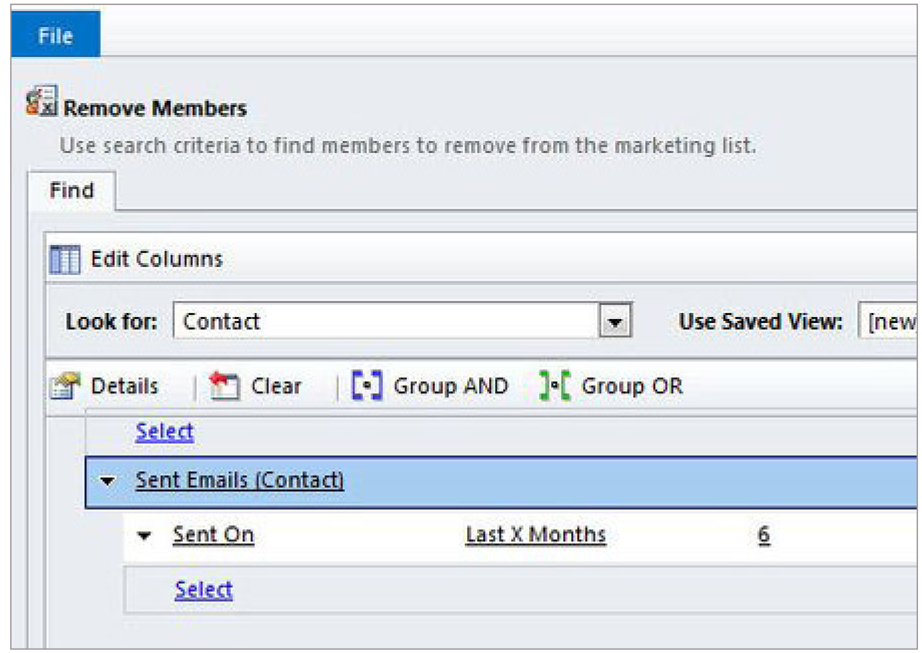
The query looks like this in the advanced find:



Return Records that Fail to Meet Criteria

One very common need is the ability to generate a list of records that fail to meet certain criteria, or that do not have a certain related record. For example, every contact who has not been sent any emails in the last six months. Unfortunately, CRM does not allow you to simply run an advanced find for all contacts who do not have a sent email record any time in the last six months.

The workaround for this is to generate a static marketing list containing all potentially relevant contacts, and then remove every contact who has a related sent email from any time in the last six months, thus generating a marketing list containing every contact who has not been sent an email in the last six months. Assuming you have already populated your static marketing list with the full list of potentially relevant contacts, you would run the following Remove Members query:



After removing every contact who meets this criteria, you will be left with a static marketing list containing every contact who has not been sent an email in the last six months.

AUTOMATICALLY CREATE AND UPDATE CONTACTS BASED ON A CUSTOM ENTITY

When speaking with prospective customers, our sales team is often asked if it is possible to automatically create and update a contact record based on the information entered into a custom entity record.

For example, a university may have a custom parent entity that is used to store information about students' parents. On certain occasions, the university will want to send emails to these parents, and to do so they must have each parent's information stored in a lead, contact or account record. In this blog post, we'll outline how to set up a pair of workflows that will automatically create and update a contact record for each parent (or any other custom entity) record so that emails can easily be sent out to these parents via the contact records at any time.

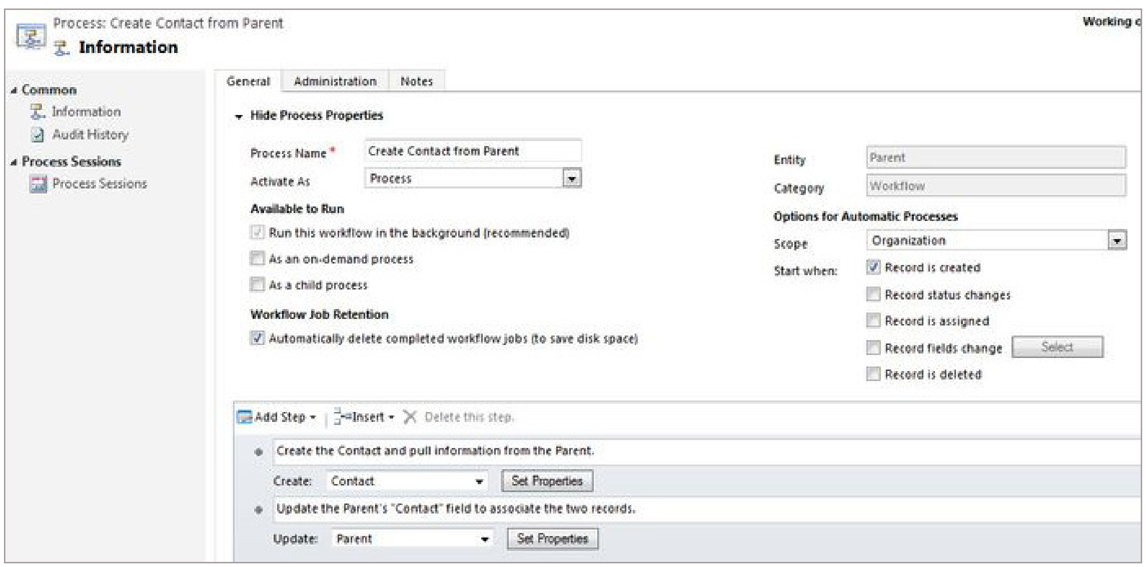
To automatically create a contact when a parent is created, and to keep this contact current with any updates to the information on the parent record, you will need two workflows: one that runs when a parent record is created and another that runs when a parent record is updated. We'll call these the Create Contact and Update Contact workflows, respectively. Both workflows should have parent as the primary entity and will need a scope that is appropriate to your CRM's structure. An organizational scope will allow the workflows to run on every parent record in your CRM, though you should check with your CRM admin if you are unsure of what the appropriate scope is for your organization.

Note that while the Create Contact from Parent workflow will always work, the Update Contact from Parent workflow will only work if the parent has a 1:1 or N:1 relationship with contacts. With any other kind of relationship, CRM's workflow functionality will not be able to access the existing contact via the parent.

The Workflows

The Create Contact from Parent workflow should run when a parent record is created and have a Create Contact step that creates a contact record and uses the workflow's dynamic values to pull the desired information from the parent record into the contact record. Then, use an Update Record step to update the parent record's Contact lookup field with the contact that was just created; this is crucial for the second workflow to function properly.

Here is an example of the overall Create Contact from Parent workflow:

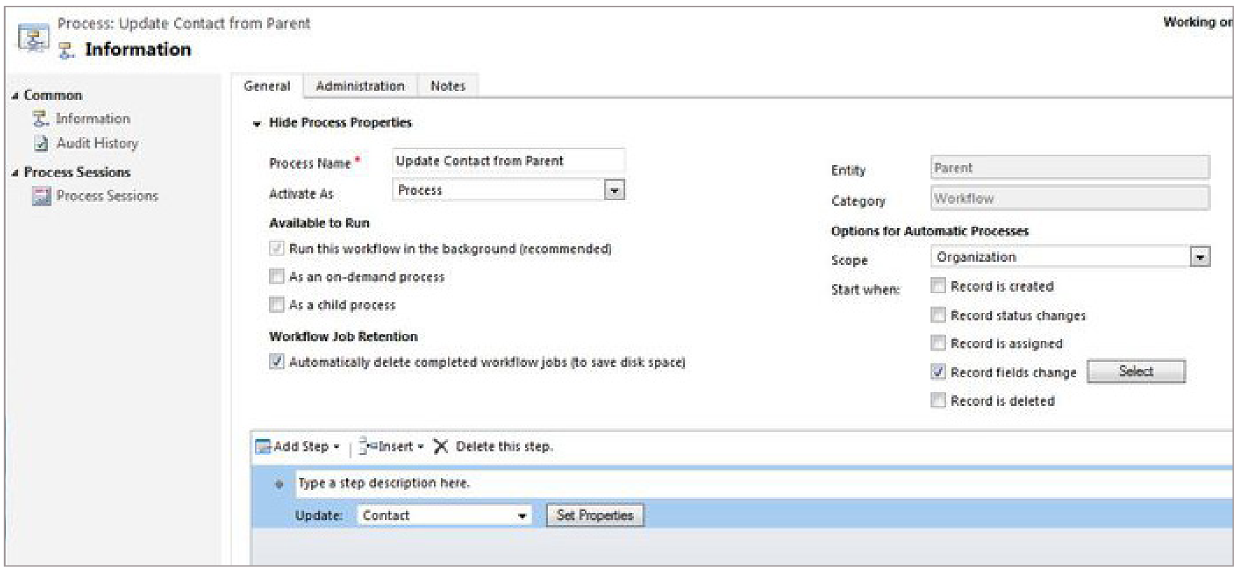


And here is an example of the properties for this workflow's Create Contact step. Note the dynamic values pulling the email and business phone from the parent record:

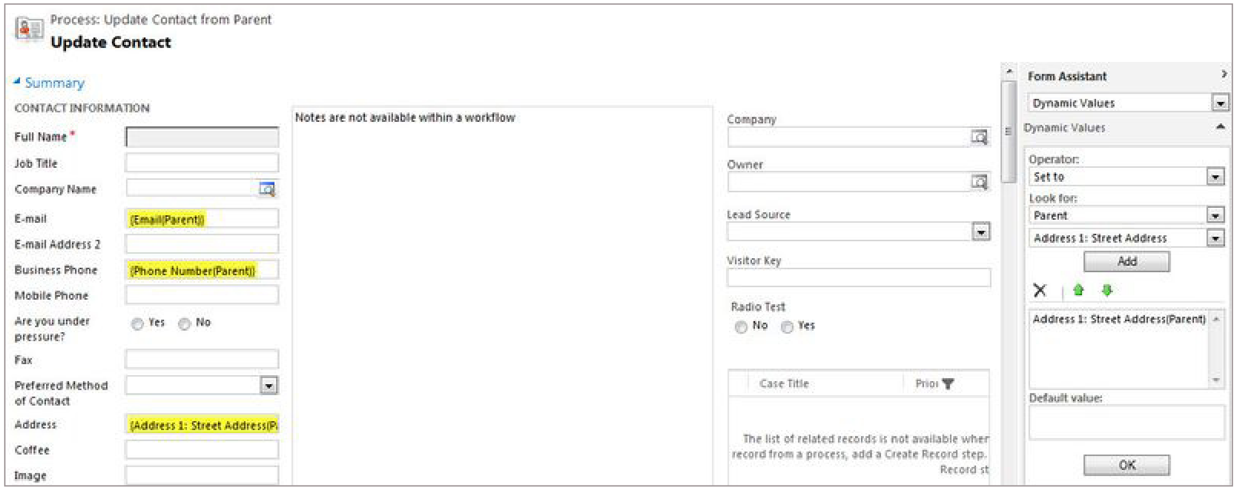
And, finally, an example of the update parent step:

The Update Contact from Parent workflow should run when a parent record's fields change. You specify in the workflow which specific fields on the parent record will trigger the workflow when updated. This workflow should use an Update Record step to update the parent's associated contact with the current info pulled from the parent record. You will need to be sure to use dynamic values to pull information into every important field that may have been updated. This way, no matter which field was updated, all of the current information is brought in.

Here is an example of the overall Update Contact from Parent workflow:



And here is an example of the properties for this workflow's Update Record step:



Once you have activated these two workflows, any time a new parent (or any custom entity you have set this up with) is created, a contact will be created, associated to the parent, and filled with the desired information from the parent record. As existing parent records are updated, their contacts will automatically be updated with the current information.

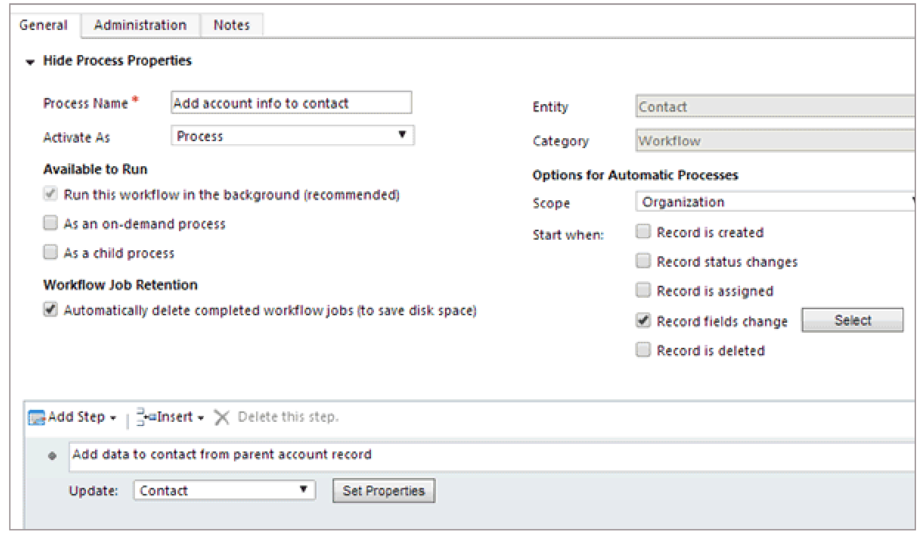
If, after setting this up, you would like to send an email to all of the parent's contacts, all you need to do is create a marketing list and add every contact that has an associated parent record where email (or any other required field) contains data. You can of course get more specific with your filtering as necessary.

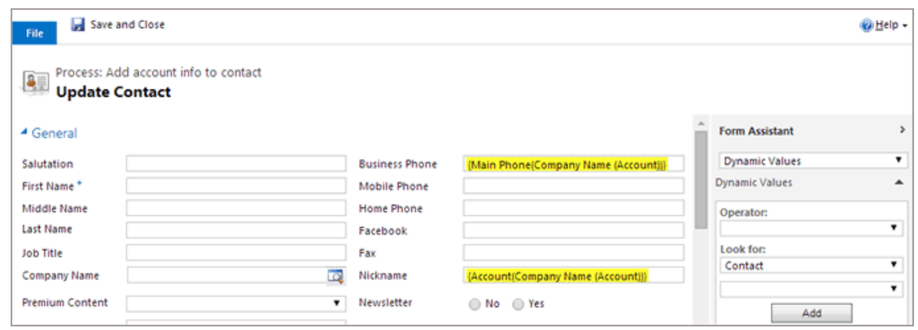
PRE-POPULATE A FORM WITH DATA FROM THE RECIPIENT'S PARENT ACCOUNT

It has long been possible to streamline the form submission process for your customers by pre-populating forms sent out through ClickDimensions emails (if you are not familiar with this process, you can read about it here on our help site). This is great, but you can only populate data from the recipient's record. So what if you are sending out a form in which you need some data from the recipient's parent account as well? This can be accomplished using a pair of simple workflows.

How do I get the parent account data onto the form?

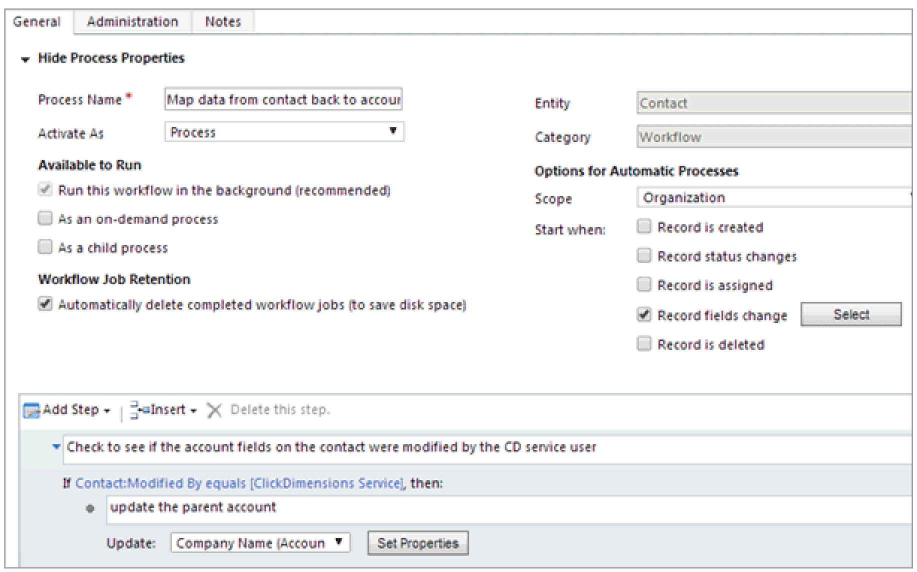
In order to pre-populate the data from the parent account record, it will need to be stored somewhere on the contact record. You may or may not need to make some custom fields depending upon what data you want and how you are currently using your contact record. Once your record is ready to house the parent account data, you can add it to your contacts using the following workflow:

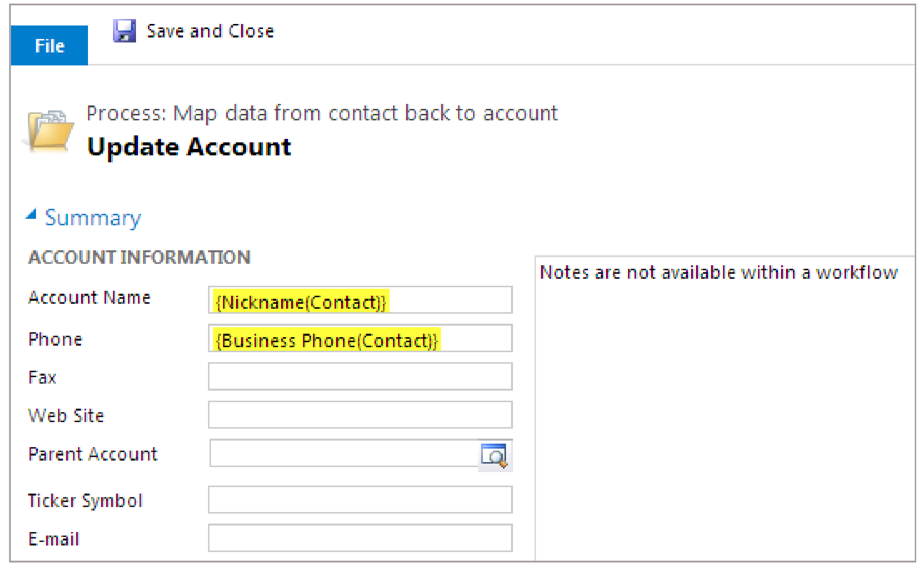




The workflow is based on the contact entity and is set to run when the Company Name field on the contact record is updated. Once the field is changed, the workflow will be triggered and an Update Record step will run that will update the contact record by populating the fields for parent account data with the corresponding data from the parent account (note that the workflow can be set to run as an on-demand process to update contacts who already have a parent account specified on their record). Now that the data is on the contact, you can set it to pre-populate the form like you would any normal contact data, such as first name or email address.

How do I get the parent account data back onto the account?
When your form is submitted, the updated parent account data will be mapped back to the contact record. In order to have this updated data mapped to the account record, use the following workflow:





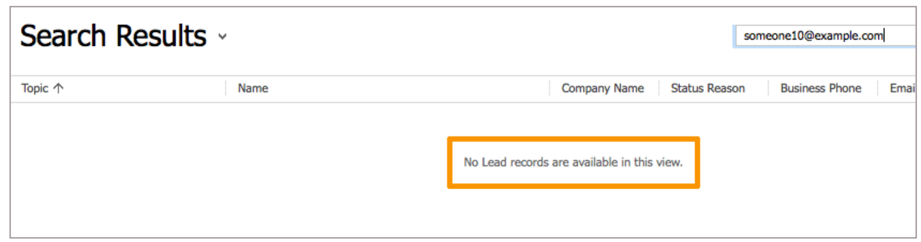
This workflow is also based on the contact entity, but it is set to run when one of the fields containing the parent account data is updated. This workflow starts with a Check Condition step that checks to see if the field was modified by the ClickDimensions service user (the specific name of the user will vary from customer to customer and will not necessarily match the name in the screenshot). This will indicate that the fields were updated by the form submission mapping data back to the contact. After this, the workflow runs an Update Record step that updates the parent account record with the updated data that is stored on the contact record.

MAKE FIELDS SEARCHABLE IN MICROSOFT CRM AND FIND DATA MORE EASILY

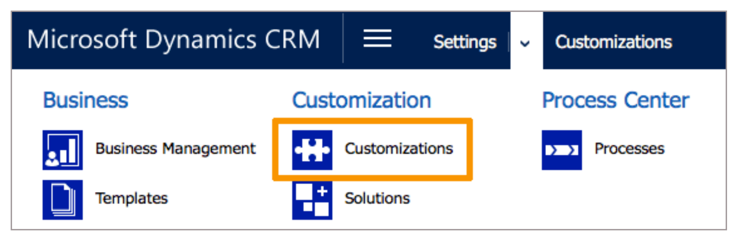
Because we know marketers are very dependent on CRM data, here's a tip on how to make sure you can find the data you're looking for in CRM. Have you ever tried to search on a field in CRM only to find no records? But, at the same time, you know what you are searching for exists? The reason you can't find what you are looking for is that not all fields in CRM are searchable by default. To make a field searchable you need to add it as a "find column" to the entity's Quick Find view.

Here's a great example. In a version of Microsoft CRM online where no customization has occurred, I can see that the lead pictured to the left has the email address someone10@example.com.

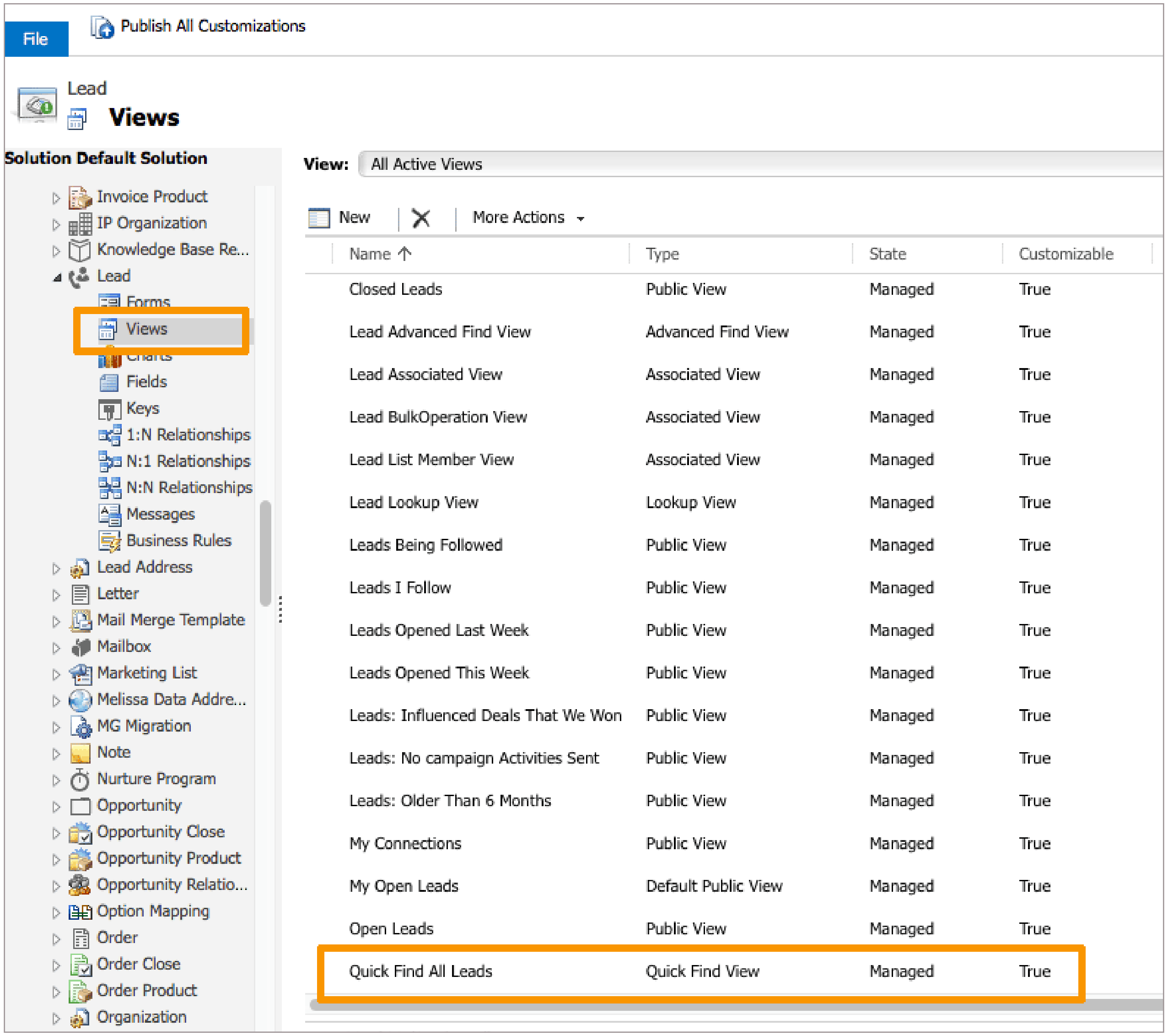
However, when I enter that value into the lead search box and press enter, I get the message that nothing is found. Why?



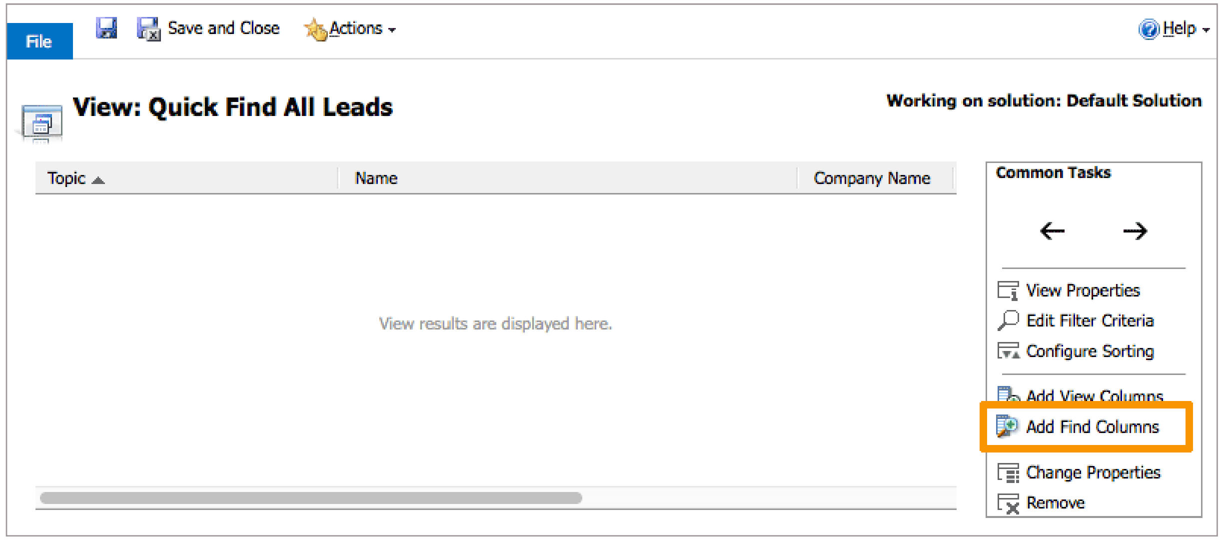
The reason that nothing is found is that the email field is not searchable. To make it searchable, go to the Customizations option on the navigation ribbon.



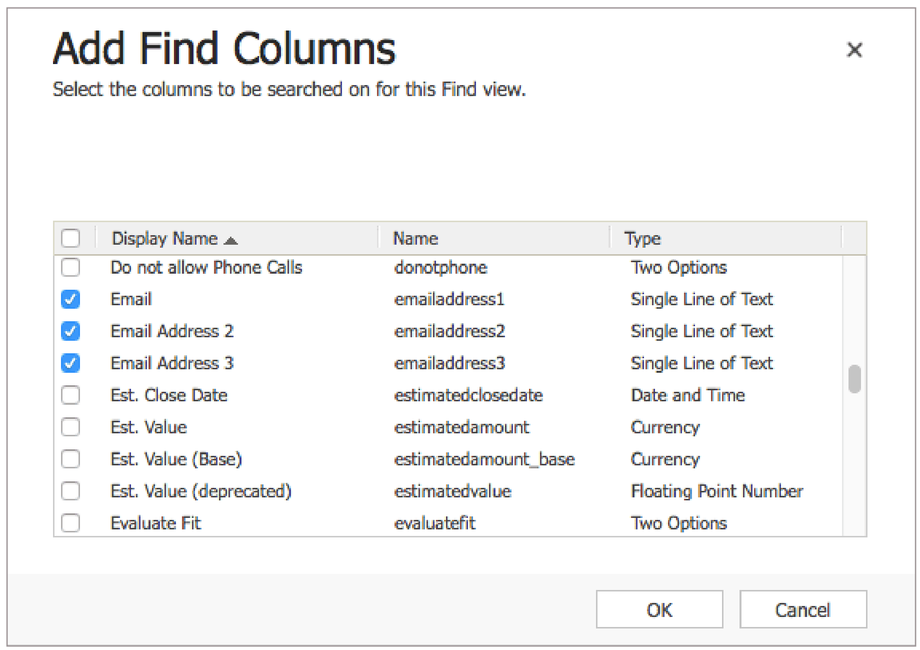
This will launch the customization screen where you can then choose the Views option under the lead entity.



Open the view whose type is Quick Find View and select the Add Find Columns option.



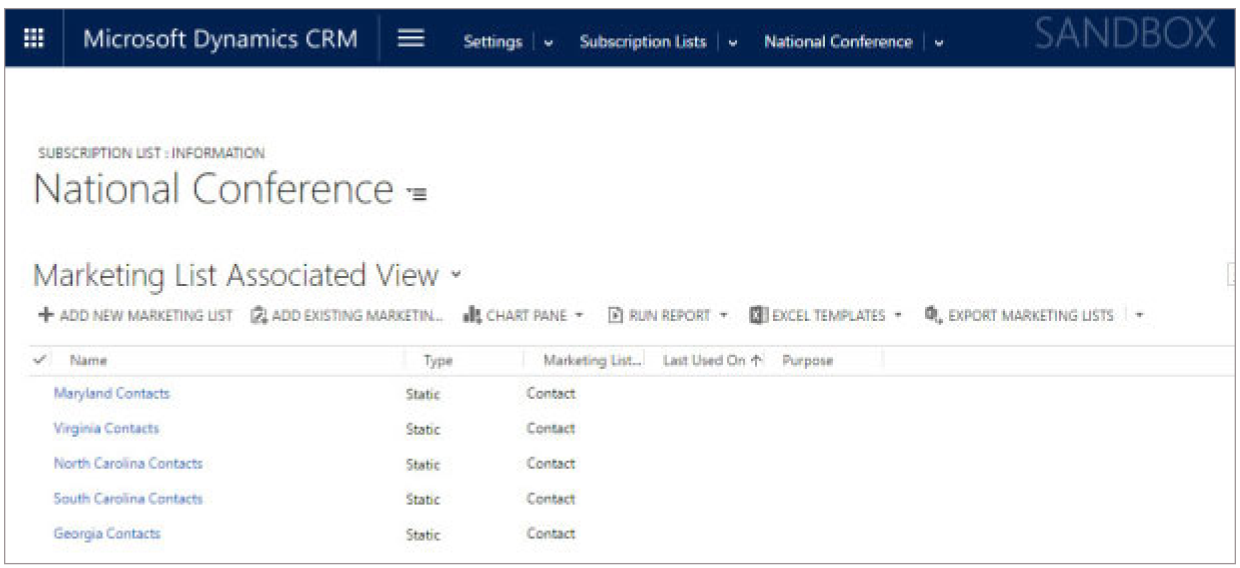
Then simply put a check mark next to the email field so you can now search on it. Publish your customization for it to take effect.



REMOVING MARKETING LISTS FROM SUBSCRIPTION LISTS

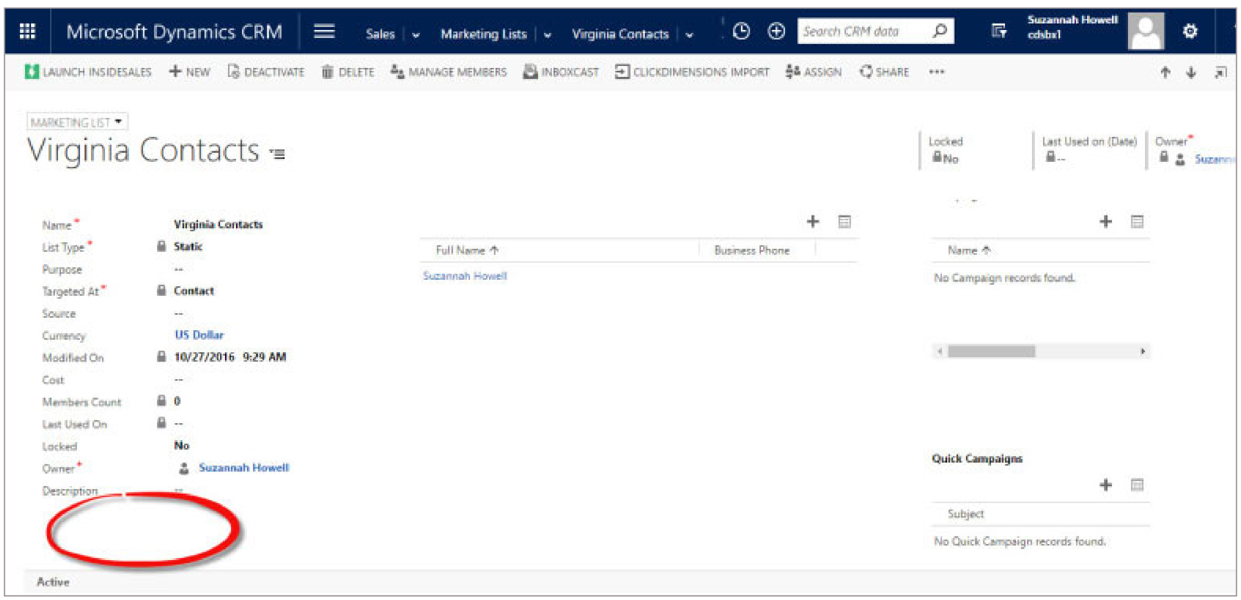
Have you ever needed to remove a marketing list from a subscription list, but couldn't find a way to do it? It could be that the necessary field is hidden from your entity form. Adding this field back to your marketing list form makes changing your subscription list associations quick and easy.

Think of your marketing list as a container for a group of people you want to email, and your subscription list as a topic. Since a marketing list can only be appended to a single subscription list, it's possible you may want to shift your group of recipients to a different topic. For instance, if you have a subscription list for your organization's annual national conference, you may have five marketing lists appended to it – separate lists for Maryland, Virginia, North Carolina, South Carolina and Georgia contacts.

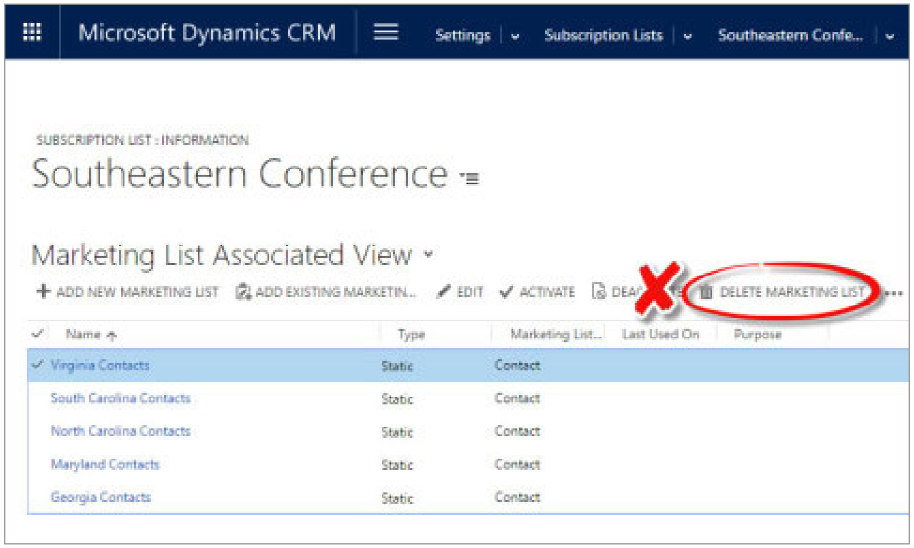


In the past, you invited everyone to the same conference and sent them emails about that event. But this year, you're going to have two conferences – a Mid-Atlantic conference and a southeastern conference. If you rename your National Conference subscription list to Southeastern Conference, then you don't need to move three of your marketing lists. Since you plan on making a Mid-Atlantic Conference subscription list as well, you will need to break the association between your other two marketing lists and the original subscription list. This will let you associate your Maryland and Virginia marketing lists with your new Mid-Atlantic subscription list.

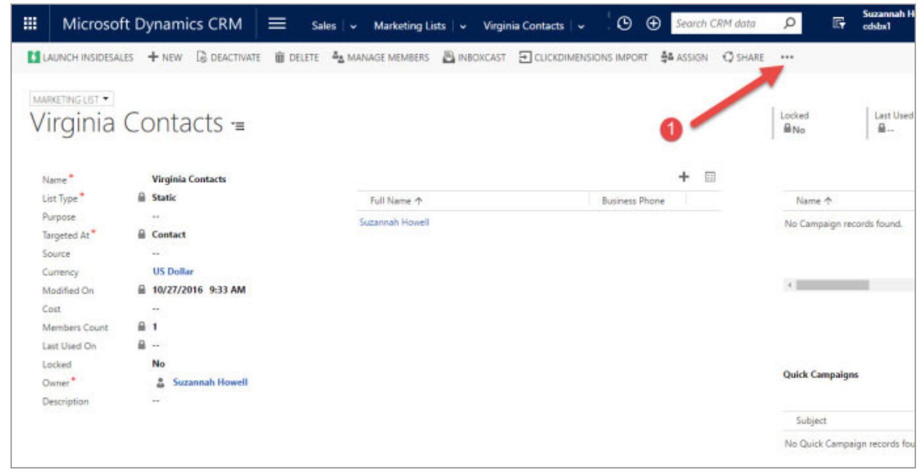
If you don't see the subscription list look up field on your marketing list entity form, read on. If you already have this field visible on the form, skip down to step number five below.



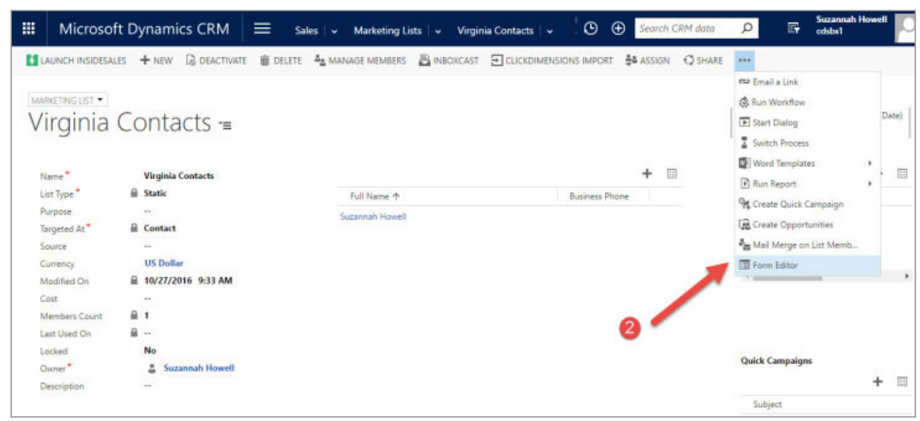
Using the Delete Marketing List button from the subscription list related records menu will not break the relationship between the two records. It will delete your marketing list entirely, and you will have to rebuild it from scratch. Save yourself some work and use this six-step method instead.



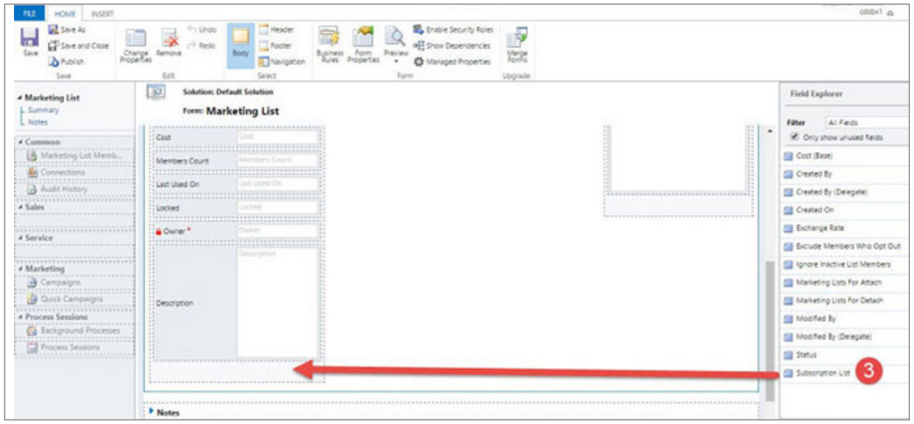
1. The first step in this process will be opening the form editor for the CRM marketing list entity. You can do this from your CRM settings or you can access the form editor from any marketing list record, as we are doing in this example. All you need to do is open the record and click the ellipses menu.



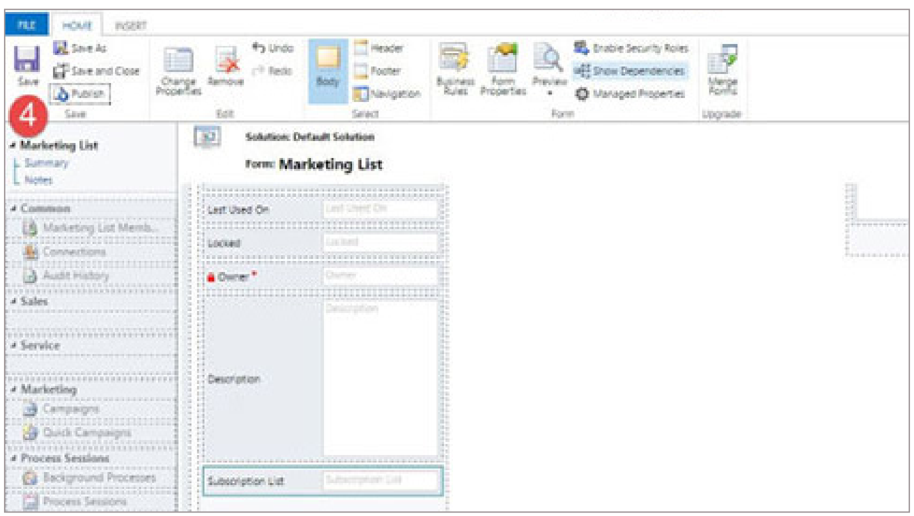
2. Use the drop-down menu to select the form editor. This will open the form editor for the marketing list entity as a whole, not just this individual record, so your changes will be applied to every marketing list record.



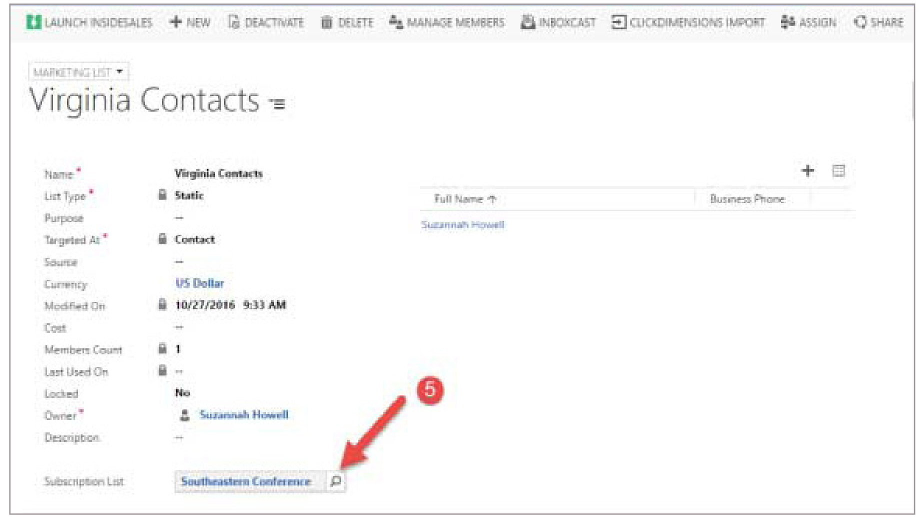
3. Next, find the subscription list field in the field explorer menu on the right. Drag it onto the canvas.



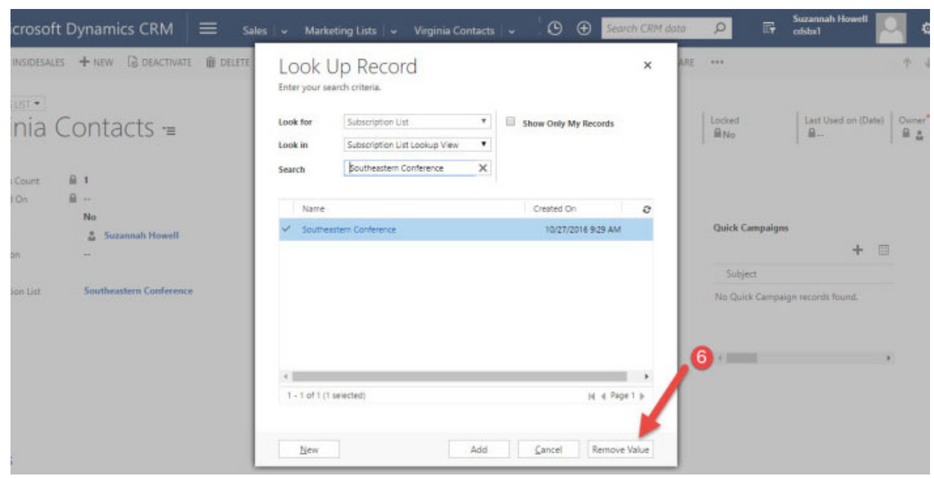
4. Be sure to save and publish your changes in order to apply them.



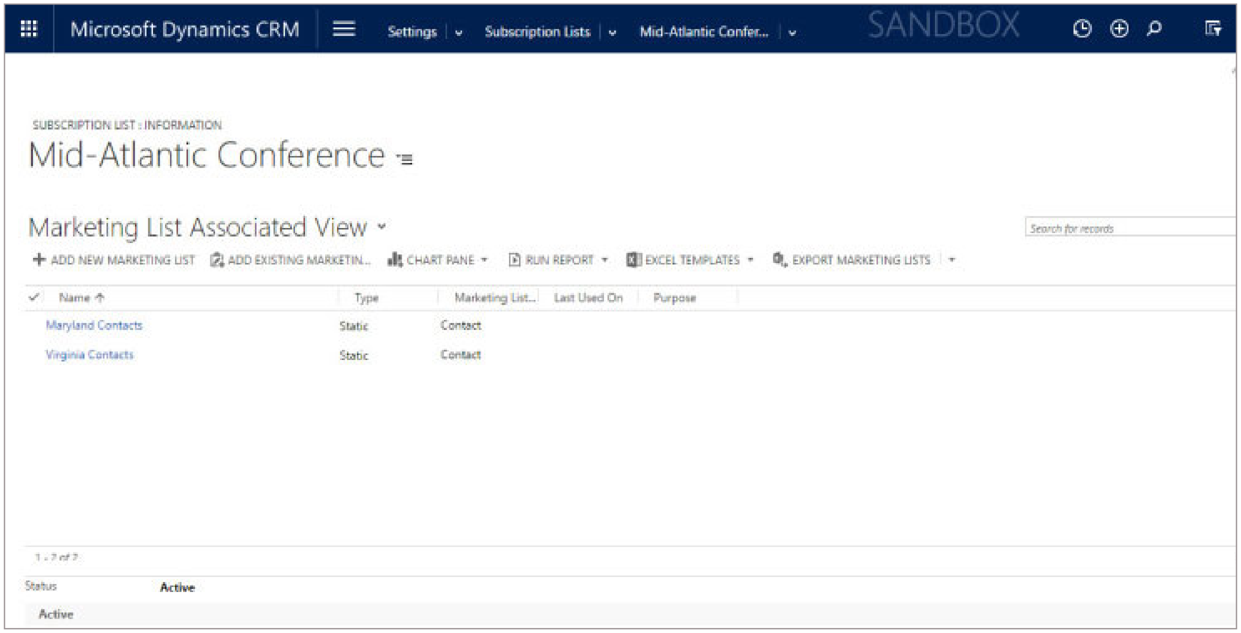
5. Now, when you go back to your marketing list record, a look up field will appear that displays the subscription list to which your marketing list is related.



6. If you open the look up view, you can remove the subscription list.



Once the association has been removed, you can append your existing marketing list to another subscription list.

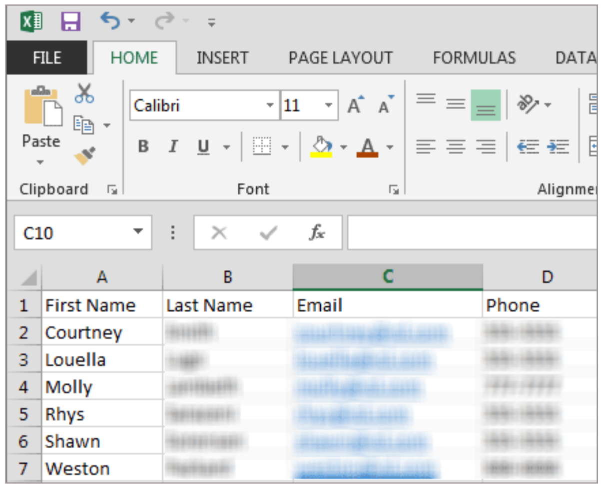


IMPORT AN EXCEL SHEET INTO CRM AS A MARKETING LIST

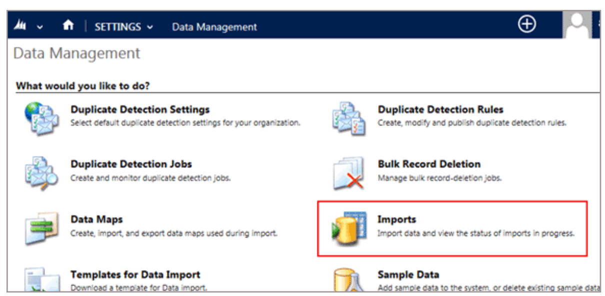
There may be occasions when you want to send an email to a group of prospective customers, but you have their data stored in an Excel file and not in CRM. ClickDimensions emails can only be sent to recipients stored within your CRM, so you will have to import this data as leads (or contacts) then track down the records created and create a marketing list. How exactly is this done? The following steps describe using native Dynamics CRM functionality to turn an Excel list into a CRM marketing list.

Creating a Marketing List from an Excel File

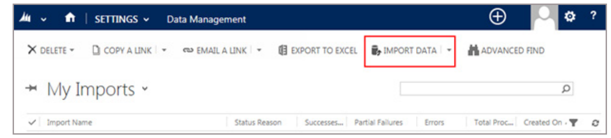
First, you will need to properly format your Excel file. To do this, include a header row at the top of the Excel sheet with column labels for all of the data you have in the file, such as first name, last name, and email address, then place the data for each person in their own row so that their data matches up with the labels in the header row. Once the Excel sheet is good to go, save it as a .csv file.



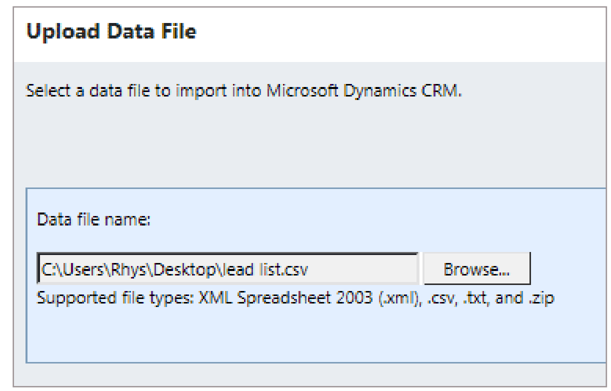
In your CRM environment, navigate to Settings > Data Management > Imports,



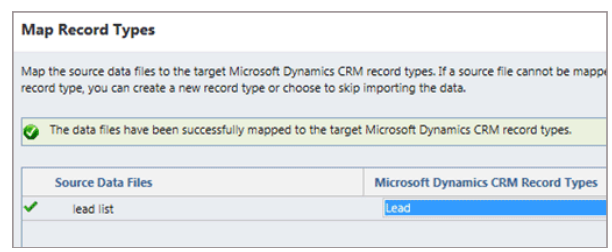
then click Import Data.



This will open a file select window where you will select your .csv file,

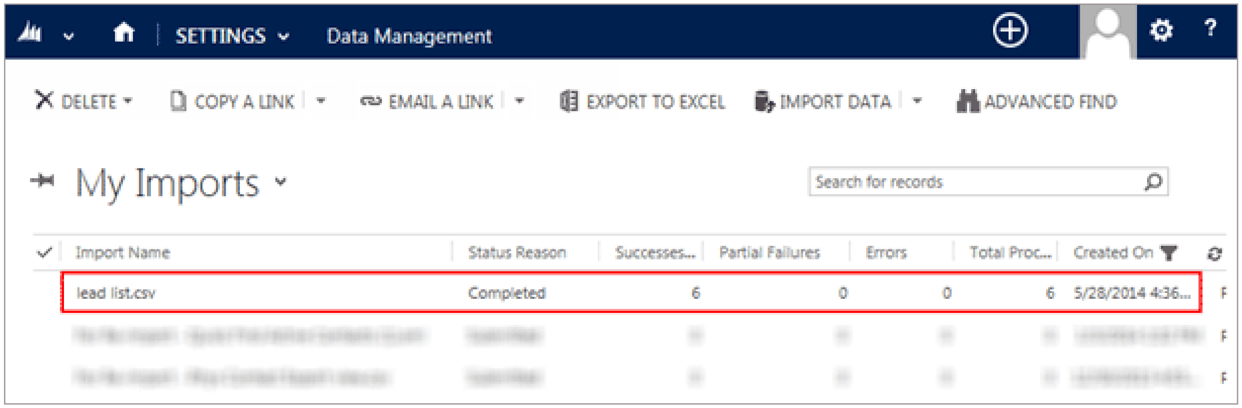


which will open an Import Wizard that will guide you through the process of successfully importing your data as leads.

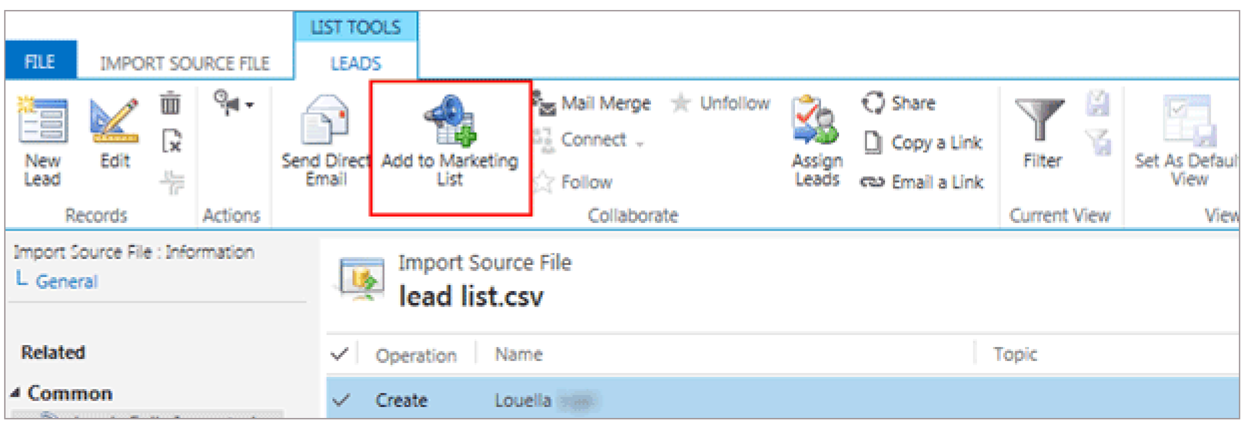


Once your new records have been created in CRM, navigate back to Settings > Data Management > Imports. This will bring up a list of all of your record import jobs.

Open the one with the same name as your .csv file, then click Leads Fully Imported.



This will show you a list of all of the leads created from your .csv file. Select all of the records, then click the Add to Marketing List button and choose the marketing list to which you want to add the records.



TIPS AND RESOURCES FOR MAINTAINING AND OPTIMIZING CRM PERFORMANCE

Microsoft CRM is an amazing system that makes use of an incredible combination of software and hardware – everything from Windows Server, SQL Server, IIS, the .NET Framework, DNS, ADFS, Outlook, Office and SharePoint. If you're not using CRM Online, it can sometimes require a lot of skill and expertise to keep all these pieces humming along like a well-oiled machine.

ClickDimensions makes full use of the range of CRM's capabilities in order to bring an astounding level of analytical intelligence to your marketing efforts. But tracking your website traffic and email delivery statistics means bringing a lot of data into your CRM. Here are some resources and tips that can be helpful in optimizing CRM's performance and maintaining your data. These tips not only apply to ClickDimensions, but to CRM in general.

1. Optimization whitepapers from Microsoft:
These whitepapers cover a lot of territory. ClickDimensions makes use of just about every piece of the CRM application, so every piece of CRM can be put through its paces: the database, the servers, your internet connection and all points in between. Some of the information in these whitepapers is geared towards developers like those at ClickDimensions, who have incorporated optimization techniques in the code for our solution, but there are also a lot of practical instructions for optimizing the CRM database and infrastructure.

Some of the key optimizations you should consider include creating and maintaining indexes (see item #4 below for some of the ClickDimensions entities whose tables you might want to optimize), ensuring your SQL Server has sufficient RAM, and keeping transaction logs on a separate disk from the data. Make sure you understand the ramifications of any change you make in SQL Server, and if you're unsure, consult an experienced database administrator. CRM also has the ability to be deployed in multiple server configurations, spreading server roles across multiple machines. Depending on the size of your organization and your usage of CRM, you may get varying mileage from the tips that Microsoft provides in these whitepapers:

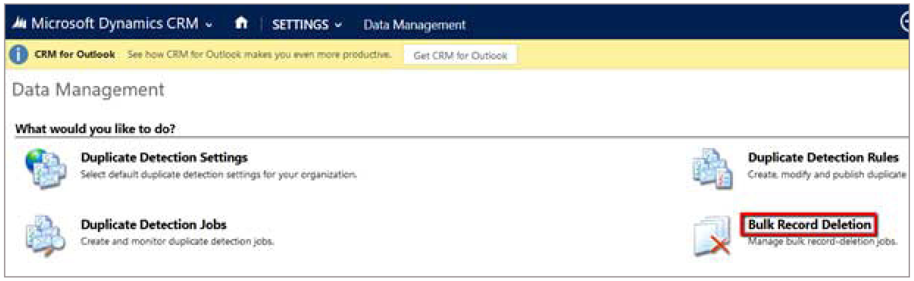
- **For CRM 2013:** https://www.microsoft.com/en-us/download/details.aspx?id=42037
- **For CRM 2015/2016:** https://www.microsoft.com/en-us/download/details.aspx?id=45905

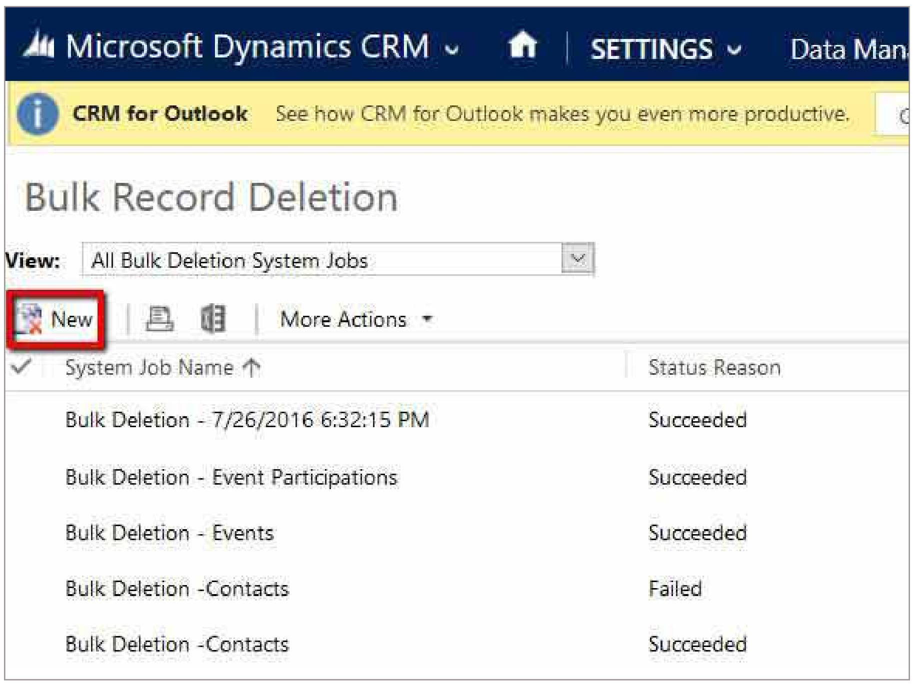
2. If you're running SQL Server 2008 R2, Microsoft has an additional document on some CRM performance improvements you can make in this PDF:
http://www.microsoft.com/download/en/details.aspx?DisplayLang=en&id=8438

3. Bulk record deletion:
Some entities in CRM can collect a lot of data, resulting in large tables in the SQL Server database. If your SQL Server is not adequately optimized, users may notice slow responses when querying these entities through views, reports or other means. If the data is only valuable for a certain amount of time, it might make sense to periodically remove old records to keep the size of these tables in check. (See item #4 below for a list of ClickDimensions entities for which you might consider periodically deleting old records. As with anything related to CRM, make sure you understand how your business users make use of the data in CRM, and always make sure you have good, scheduled backups.) Fortunately, CRM has an easy way to start bulk record deletion jobs that is built right into the UI.

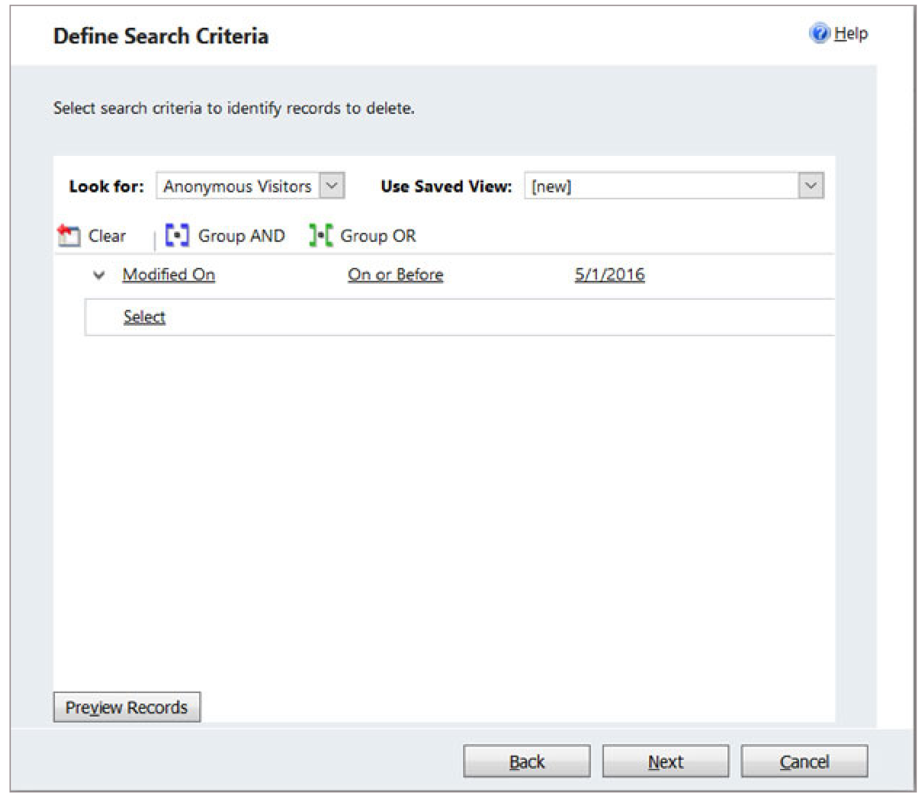
For CRM 2013/2015/2016:

Navigate to the Settings area and click on Data Management. Click the Bulk Record Deletion link and then click New to launch the Bulk Record Deletion wizard.

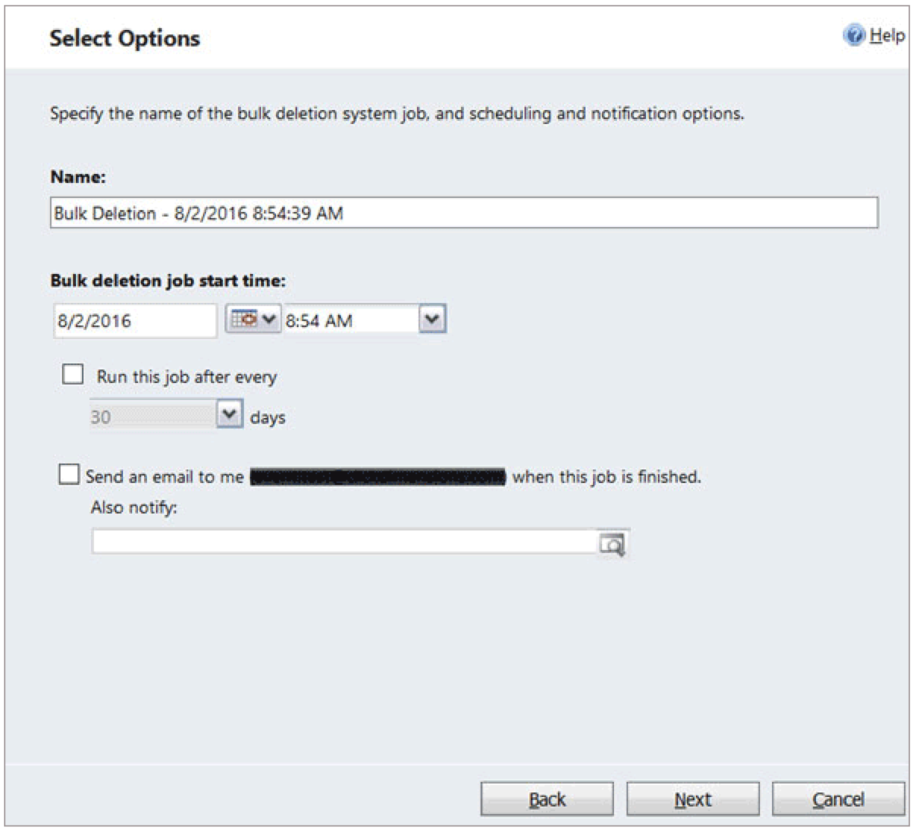




In the Bulk Record Deletion wizard, define the records you wish to delete based on criteria that makes sense for your business users. The interface is very similar to CRM's Advanced Find. In the screenshot below, I'm setting up criteria to remove "anonymous visitor" records that were created on or before a certain date:



Next, choose the date and time to start the bulk record deletion. If the criteria you defined in the previous step lend themselves to it, you can even schedule this as a recurring job. (It wouldn't make much sense in my example to create a recurring job, since the date in my example is fixed.) You can even tell CRM to email you when the job is completed. Depending on the number of records you are deleting, this may take a while to run.



4. Here is a list of some of the entities in CRM that may collect a lot of data, where you might consider removing some older records from CRM when they are no longer needed. Create system views with filter criteria that match your business requirements and think carefully about what the right data retention policy should be for your company. Note that many of these entities are inter-related, so deleting an Anonymous Visitor record will delete its child Visit records and Page View records:

- Anonymous Visitor (cdi_anonymousvisitor)
- Visit (cdi_visit)
- Page View (cdi_pageview)
- Email Events (cdi_emailevent)

5. To reduce the amount of data flowing into CRM: Lastly, it always makes sense to evaluate the type and amount of data you are collecting in CRM. For example, your website statistics can drive a lot of value for your marketing efforts, but you may find it helpful to focus on key strategic and actionable statistics, such as landing pages, pricing pages, etc. Consider limiting the pages where you place the ClickDimensions tracking script on your website to just pages that are important for your sales and marketing efforts. If you place the tracking script on a webpage that has a good deal of traffic but little value to your sales and marketing goals, you may end up with a lot of data in CRM that is not actionable and not worth retaining.

Chapter 12

Other Marketing Topics

The articles in this section may not fit well in the other sections of this book, but from marketing automation to direct mail and positioning to wearable technology, they provide some valuable insights for marketers today.

3 TIPS FOR MARKETING AUTOMATION IMPLEMENTATION

Why is breakfast the most important meal of the day? In short, because it helps ensure a good start to your day. It's a short-term action that contributes to long-term success.

Similarly, a good start to using a marketing automation system can lead to great results down the line. With that in mind, here are three helpful tips for successfully implementing a marketing automation solution:

1. Choose wisely.
The first step in a successful implementation begins well before implementation itself. While there are many factors to weigh when choosing a marketing automation solution, the level of integration is critically important to consider. While some

marketing automation platforms can be used without being connected to a CRM system, integration between the two solutions maximizes the power, effectiveness and value of each throughout an organization. If you're a Microsoft CRM user, there are a number of marketing automation systems on the market today that integrate with CRM, but their level of integration varies. The level of integration can impact the cost and timeline for implementation, as well as the overall functionality. ClickDimensions is the only marketing automation solution that is natively built within Microsoft Dynamics CRM. This unparalleled level of integration means that all of your sales and marketing data is in one place and can be viewed in real time, no syncing required. It also allows for quicker implementation and user adoption, as your team already knows how to use Microsoft CRM.

2. Start small.

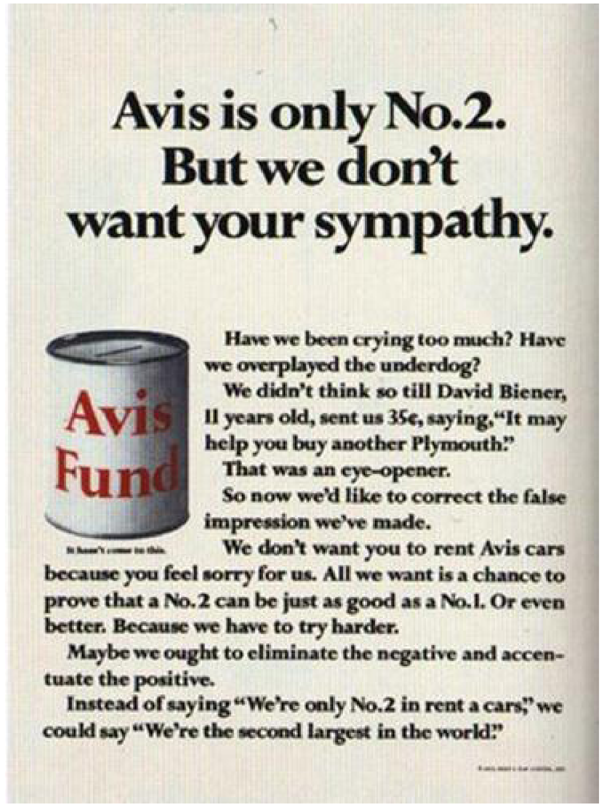
While features may vary according to the particular marketing automation system you are implementing, email marketing, campaign automation, forms and landing pages, surveys, web tracking, event management, SMS messaging and more are all commonly included. With so many valuable tools suddenly at your fingertips, it may be tempting to start using all of them all at once. However, this can easily lead those using the system to feel overwhelmed right out of the gate. It can also often mean that users aren't getting the most out of each feature because they haven't taken the time to learn how to use it to its full potential. Instead, marketers and other key stakeholders should discuss and map out their priorities, and begin using marketing automation features from there accordingly. We find that email marketing is the most common place to start for ClickDimensions customers, with many opting to connect their email campaigns to landing pages and forms shortly thereafter.

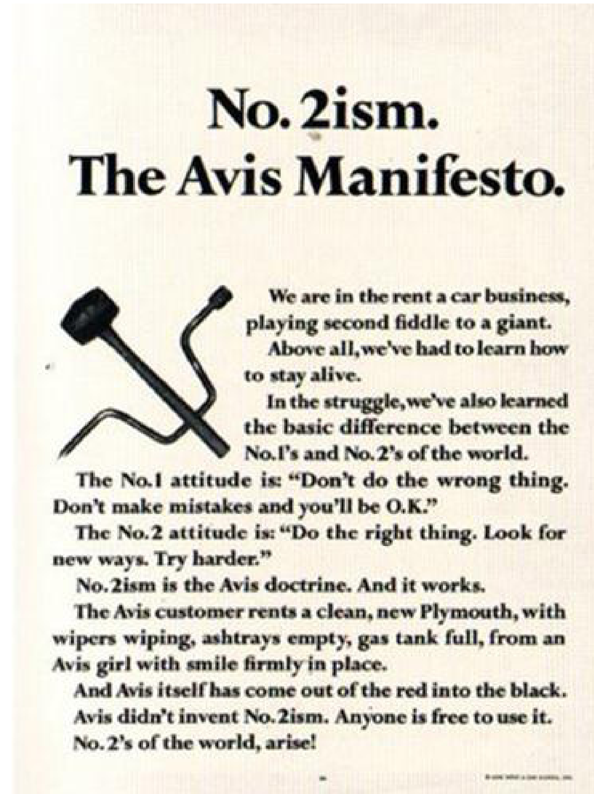
3. Utilize resources.

Don't go it alone when implementing a marketing automation system. The company whose solution you choose should provide a wide variety of resources to help get you started – and keep you going! – including training and support. Since different users have different ways of learning and different schedules, when in the search process, look for a marketing automation vendor that offers a variety of training options such as live webinars, recorded courses, help articles and blog posts. Similarly, support should be offered in different ways to suit your company's needs and operating hours. Then, make sure that the users of your marketing automation system are aware of these resources and that they take advantage of them in order to have a smooth implementation and ongoing usage of the solution.

IF YOU CAN'T FIX IT, FEATURE IT! THOUGHTS ON POSITIONING

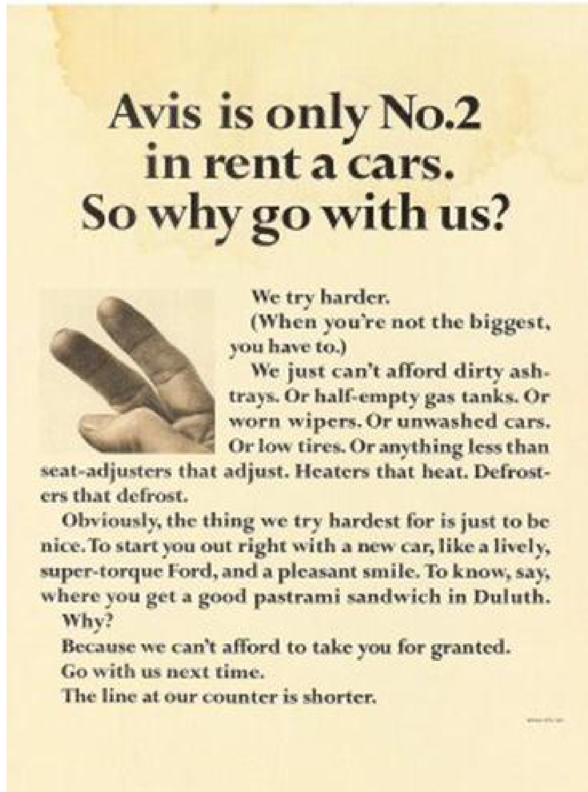
The year is 1962, and Avis Rent A Car is in trouble. The company hadn't made a profit in 13 years, and, although they were technically second in the US rental car market, with only 11 percent market share, they were well behind market leader Hertz. Clearly, there were business issues that needed to be fixed to improve their situation, but what about positioning? Even if they did improve their product, how were they going to convince their prospects and customers?

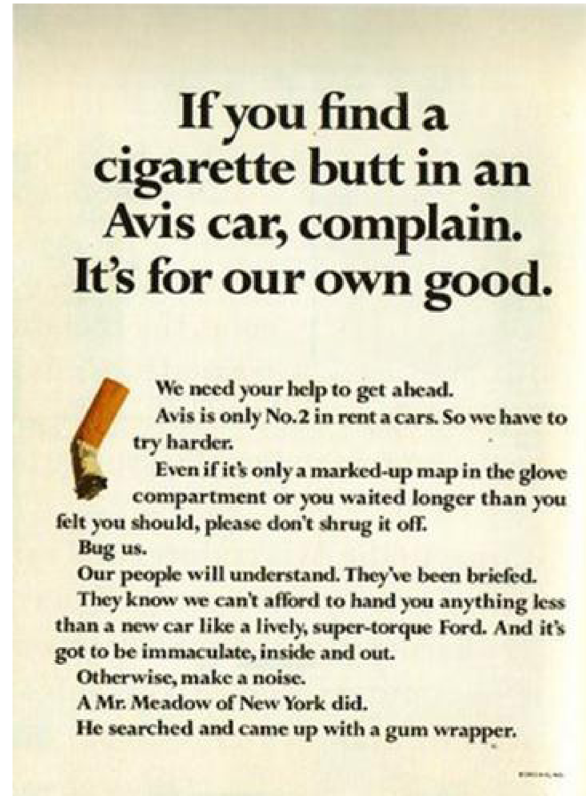




Well, Avis pulled out a trick that every marketer should have in their bag. **If you can't fix it, feature it.** There are times when, instead of making excuses, you are better off to embrace the situation and use it to your advantage. This is exactly what Avis did. After hiring a new CEO that worked hard to fix their product problem, Avis embarked on a marketing campaign that is now legendary. They embraced their #2 status by proudly featuring it in advertisements along with a new tag line: “**We try harder**.” In addition to the external campaign, Avis launched an internal campaign involving management visits to all Avis branches to emphasize the importance of the “we try harder” tag line.

Avis’s campaign and supporting maniacal focus on customer service changed everything. By 1966, Avis had a 35 percent market share and was profitable. They featured their #2 position proudly and consumers identified with their underdog status. They backed up their “we try harder” slogan by truly trying harder. The result was a huge success for Avis and a rethinking of product positioning for marketers from that day forward.





5 TIPS FOR EFFECTIVE DIRECT MAIL

A whopping 72 percent of people prefer communication via email, according to Litmus. And a Forrester survey reveals that 89 percent of marketers said that email was their primary channel for lead generation. Despite email's popularity among consumers and marketers alike, it's still a great idea to diversify your communications and engage your customers and prospects across multiple channels.

Direct mail may be one format to consider adding to your marketing mix. While it's often thought of as an outdated tactic, as the inbox grows more crowded, the mailbox is often less so, opening up new opportunities for direct mail. If you're considering a direct mail campaign, here are five tips for getting the most out of it:

1. Personalize the experience.
Customization is an essential part of communications today, no matter the format. Achieve this with your direct mail by segmenting your lists, much as you would do with email marketing campaigns. You can choose to target one particular segment with your direct mail piece or, if budget allows, create multiple pieces that speak to individual audiences. If your company creates educational software for kids, for example, you might develop variations on a piece that target your three main audiences of parents, grandparents and educators. You can also add a recipients' name, geographic location or other details to your mailing for an added touch of personalization.

2. Mind the timing.
Timing can have a big impact on response rates, so make sure that you consider not only what would be most impactful for your audience, but also what would be most effective

based on what you're promoting in the mailer. For example, a direct mail piece promoting a big sale should arrive several days or a week before the sale starts, and not so far ahead of the start date that recipients forget about it by the time the sale rolls around. Also, think about timing in terms of the buying cycle too. Make sure that each piece is appropriate for the recipient's stage in the buying cycle.

3. More is more.

People often spend more time with a direct mail piece than with an email. Take advantage of the tendency to linger over direct mail by providing more information in your piece. Include all of the details someone would need to make a decision or purchase, anticipate what questions they might have, and provide compelling images and visuals. In addition, provide multiple ways for someone to act on your call to action – whether that's visiting your website, calling your organization, going to a physical business location or following your business on social media.

4. Integrate the campaign.

While direct mail can perform very well on its own, integrated campaigns can be far more effective. Let your direct mail piece be the heart of your campaign, and then reinforce that message via email, advertising, social media and other channels. Every channel isn't for every person, so this approach can help drive conversions by reaching people on their preferred channels and reinforcing messaging from one channel to the next.

5. Measure success.

As with all marketing endeavors, measuring results should be an essential part of any direct mail campaign. So what should you measure? Key metrics for calculating your return on investment for your direct mail campaign include cost per mailing, total campaign budget, response and conversion rates, number of buyers, average revenue per buyer and total revenue generated.

MARRYING PRINT AND DIGITAL MARKETING

There's an increasingly common marriage in the marketing world today – the one between print and digital marketing. While the rise of digital marketing may have some marketers thinking that there's no place in their marketing mix for print initiatives, the increasing competition for attention in the digital space means that opportunities have opened up for effective print marketing once again. In fact, according to the Direct Mail Association, 65 percent of consumers of all ages have made a purchase as a result of direct mail.

So, how do you bring this power couple together for marketing success? Here are our top tips:

1. Be social.
Social media is such an effective digital tool that it only makes sense to connect it to your print marketing efforts, and this can be done in a few different ways. You can make your direct mail recipients aware of your social presence by including your social handles in the marketing piece. You could also use hashtags within the piece to encourage social engagement. For example, if the direct mail is a printed invitation to a charity event, you could include a hashtag on the mailer that people can use on social media to share that they are attending the event and spread awareness about it. Depending on the message and purpose of the piece, you could also showcase content or promotions from your social pages to help attract new followers.

2. Drive traffic.

Beyond just listing your website's URL on printed materials, use a call to action to drive your direct mail recipients there. Landing pages are especially helpful in these situations because you can easily tailor the content to your recipients. Just be sure to use a URL that's short and easy to type, so it doesn't take a lot of effort on the part of your recipients' to get to your site. QR codes are another option to unify your print and digital marketing efforts. These codes are easy to scan with a smartphone QR code reader and can be printed on almost anything your marketing team can dream up.

3. Leverage influencers.

Influencer marketing, or using key leaders within an industry or among a demographic to spread a brand's message, has grown in popularity alongside social media marketing. Print marketing can be a great way to tap into this unique channel by sending select influencers an inventive mailer that they are invited to share on social media – and are excited to do so. For example, a furniture company could send home design bloggers miniature replicas of their new living room line that the bloggers could then creatively use in blog posts and on social media.

4. Focus on content.

Content marketing is most often thought of as a digital marketing tactic, and when people think of print marketing, they commonly think of sales messages. You can defy both of these conventions – and produce more effective print collateral – by focusing your pieces on more informative, rather than salesy, messaging. You could try out this tactic through a call to action to download a white paper or view an educational video on your website, or by printing part of a blog article and then inviting recipients to continue reading online.

HOW WEARABLE TECHNOLOGY IS SHAPING MARKETING

According to Business Insider, wearable technology sales could increase from 33 million devices sold in 2014 to 148 million devices in 2019. As that expansion occurs, and wearables become less of a novelty, so too does the interest from brands and the impact on marketing. Here are three ways wearable technology is shaping marketing today and into the future:

1. Simplicity

With more messages and information competing for attention than ever before, modern marketers are accustomed to a "less is more" approach in communications. Wearable technology will challenge marketers to take that minimalist approach to the next level. With screen sizes smaller than those encountered even in other mobile marketing initiatives, marketers have to ensure that their messages can be understood and effective at a rapid glance. Eye-catching visuals and short, memorable messaging are essentials for marketing via wearables.

2. Context

With nurture marketing gaining in popularity in recent years, the concept of context, by sending customers and prospects the right messages at the right time, is already in practice in the marketing efforts of companies of all types and sizes. Marketing initiatives for wearables, with their ability to tap into location-based marketing, require context as well. To be effective, marketing messages will have to take into account a wearer's emotions and location. Where will someone be at the moment they see your message, what activities will they be involved in, and how can you consider and appeal to what they are feeling at that moment in time?

3. Convenience

The customer experience is nothing new, but wearables can help improve upon the experience your company delivers in new ways. For brands, it won't be enough to just be there for customers on their wearable devices, they will have to add value too. For wearables, problem solving should be the focus rather than product messaging, and convenience is at the heart of the customer experience. Helping individuals avoid traffic or other delays in their day, schedule appointments or quickly place routine orders are all ways that brands can help deliver convenience and improve the customer experience.

A Business Insider survey indicates that many consumers don't see why they should own a smartwatch, but the same was true for smartphones once too. While marketing via wearables may not be right for your brand right now, it's a channel to watch for all marketers as the technology and consumer adoption continues to evolve.

Want more inspiration?

Subscribe to the ClickDimensions "Marketing with Microsoft CRM" newsletter by visiting www.clickdimensions.com/newsletter/ and we'll keep you up-to-date with fresh ideas!

Interested in learning more about ClickDimensions email marketing and marketing automation for Microsoft Dynamics CRM? Watch our 7-minute demo video, take a tour of our features or contact us to schedule a live demonstration.

And don't miss the Marketing with Microsoft Dynamics CRM Idea Conference. This online conference features ideas, case studies and best practices for marketing with Microsoft CRM presented by marketing leaders and CRM experts.

> *After learning how to efficiently use ClickDimensions, I was able to increase my sales by over 30% the first two months.*

ABBY HANSON, SALES MANAGER
SWI

ClickDimensions

www.clickdimensions.com