



# Marketing Automation

## Deliver impactful marketing campaigns and consistent communications with Microsoft Dynamics™ CRM for Marketing

Provide marketing professionals with robust data cleansing and segmentation tools, leading campaign management features, and insightful marketing analytics to increase the effectiveness of marketing programs, improve efficiencies, and better track key metrics. Microsoft Dynamics CRM business software provides a holistic, comprehensive set of marketing capabilities so you can target your customers effectively.

### Microsoft Dynamics CRM for Marketing



The functionality outlined in the above diagram showcases the Microsoft Dynamics CRM capabilities that help organizations effectively manage their campaign lifecycle and optimize their marketing mix.

“Microsoft helps us understand not only our own capabilities, but also new opportunities we can present to clients, so that we can channel them more effectively.”

DAVID JOHNSON  
CIO,  
Jones Lang Lasalle

“Microsoft Dynamics CRM provides us the ability to better serve our customers by delivering relevant communications and the innovative products they desire. Our implementation of Microsoft Dynamics CRM will result in multimillion dollar savings for Cold Stone Creamery over the next two to three years.”

HEATHER DORR  
Senior Manager of Marketing  
Information Systems,  
Cold Stone Creamery

#### PLAN MORE PROACTIVELY

Transform customer information into clear, actionable knowledge thanks to deep analytics that enable your company to respond quickly to changing customer preferences and emerging market opportunities.

#### GAIN A CLEAR VIEW OF THE CUSTOMER

Gain a clear, 360-degree view of the customer with access to deep segmentation based on comprehensive customer, sales, and demographic information.

#### GET YOUR MARKETING MIX RIGHT

Use reporting and analysis features to evaluate the performance of your print, e-mail, online, and other marketing efforts so that you can concentrate on your most effective marketing channels.

#### MANAGE WORK MORE EASILY

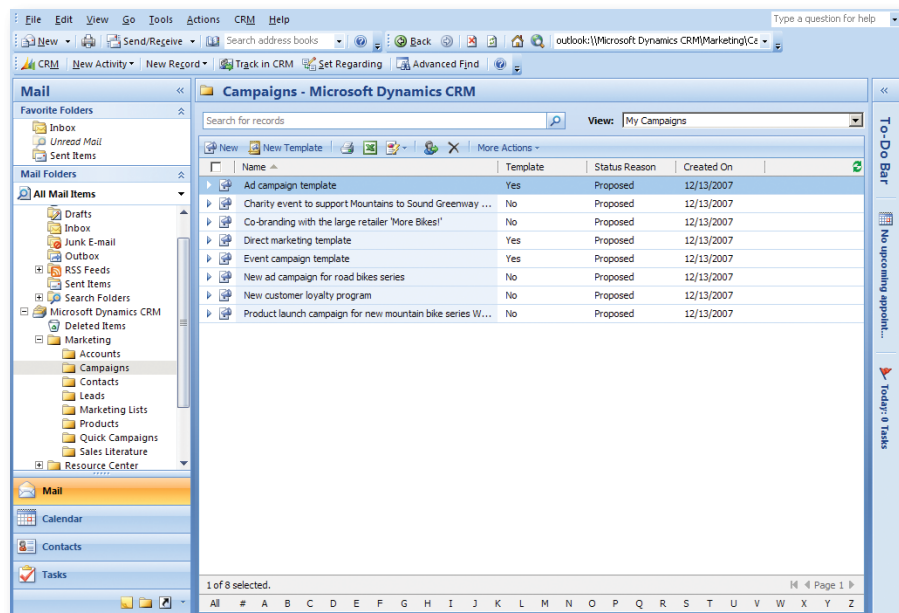
Provide your marketers with customer relationship management (CRM) functionality as a natural extension of Microsoft® Office Outlook® 2007, so they can manage customer e-mail, appointments, tasks, and contacts from a single business application. Create marketing communications quickly with Microsoft Office Word 2007 Mail Merge.

#### EXECUTE SMARTER CAMPAIGNS

Use intelligent list and segmentation features to reach prospective customers, retain existing customers, and transform successful campaigns into templates that can easily be re-used.

#### GET REAL-TIME VISIBILITY

Take advantage of deep reporting and analysis capabilities to track response rates, measure interest levels, and monitor costs for every campaign and activity in real time.



Design, execute and track campaigns effortlessly using customizable templates.

## ENABLE PROACTIVE OFFERS

Use a holistic view of each customer's preferences, relationships, and buying history to anticipate their future needs, make effective cross-sell and up-sell offers, and enhance customer loyalty.

## DEVELOP LISTS MORE EFFICIENTLY

**Create lists:** Automatically create static or dynamic lists based on accounts, contacts, or leads. Use Advanced Find to identify potential customers based on a wide range of user-specified criteria. Import lists while ensuring accurate data capture using the Data Import Wizard

**Complete tasks in bulk:** Import data and leads in bulk at non-peak operating hours for optimal system performance with enhanced support for batch operations.

**Improve data accuracy:** Automatically detect and remove duplicate records in your lists to improve response rates and campaign performance. Easily define rules to correctly handle duplicates.

**Manage permission-based marketing:** Make sure your list is based on customer permission from the start with native opt-in/opt-out tracking for all contact records to avoid wasted cycles and improve response rates.

## MANAGE CAMPAIGNS BETTER

**Manage the campaign life cycle:** Define tasks, activities, and marketing materials for the entire campaign life cycle. Create budgets and define follow-up activities for respondents and non-respondents.

**Enhance brand value:** Collaborate across teams and business units to maintain and enhance the consistency and power of your brand.

**Work in a familiar user interface:** Automatically synchronize e-mail messages, tasks and contact details through seamless integration between Office Outlook 2007 and Microsoft Dynamics CRM. Quickly create and send communications using Office Word 2007 Mail Merge, and manage mail merge templates from anywhere in the world through a Web-based interface.

**Track responses:** Drive closed-loop campaign execution by tracking responses to every campaign activity. Convert e-mail responses to leads or opportunities, qualify leads, and do much more with just a few clicks.

**Monitor results:** Generate detailed real-time performance reports that track key performance factors including return on investment, response rates, and cost per response.

## LAUNCH CAMPAIGNS QUICKLY

**Plan and execute campaigns:** Use predefined system templates for future re-use in campaigns, or create new campaigns from scratch. Schedule campaign activities to be performed immediately or at specific times in the future, and launch campaigns anywhere in the world with strong multi-lingual and multi-currency capabilities.

**Communicate clearly:** Create professional-looking e-mail templates and effortlessly launch mail-merge-based communications. Intelligently convert e-mails into contacts, leads, and opportunities automatically according to rules you set up.

**Define activities:** Choose activities for a campaign, such as e-mail messages, phone calls, faxes, or meetings, and assign them to appropriate people.

"Microsoft Dynamics CRM is delivering Pumpkin Patch with more targeted and effective direct marketing campaigns, resulting in high levels of customer service and satisfaction."

BRUCE WALKLEY  
General Manager,  
Pumpkin Patch

“Instead of making hundreds of phone calls to ask the representatives of companies how their campaigns were doing, we used the Microsoft Dynamics CRM bulk e-mail system to accomplish this project. Talk about saving **time and money!**”

SANDY CLIFFORD  
Director of Market  
Technology and IT,  
United Way Greater Twin Cities

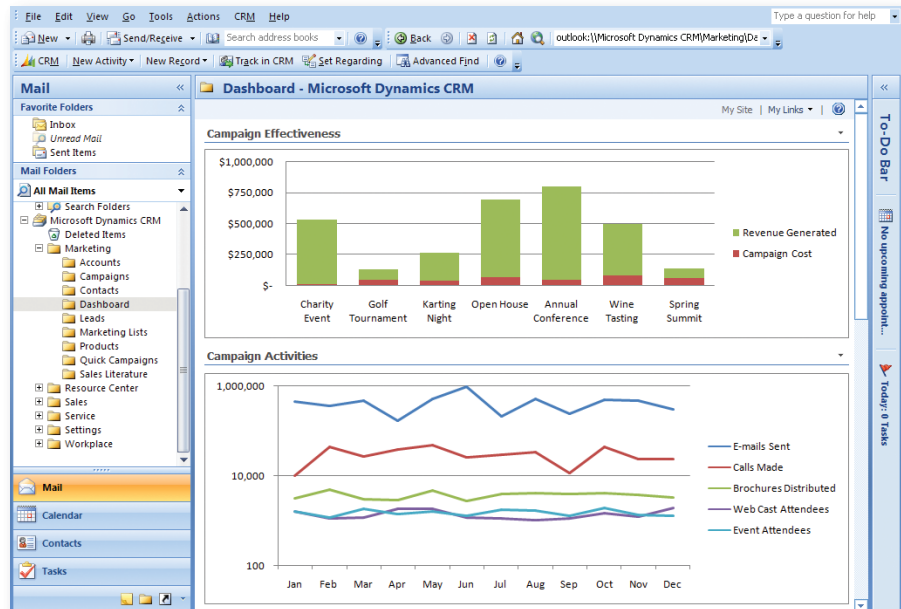
For more information about  
Microsoft Dynamics CRM, visit:  
[www.microsoft.com/dynamics/crm](http://www.microsoft.com/dynamics/crm)

## TURN LEADS INTO OPPORTUNITIES

**Improve lead handling:** Easily distinguish new prospects from existing customers and promote qualified leads to new opportunities with a single click.

**Route leads automatically:** Automatically deliver the right lead to the right person according to product, territory, dollar amount, or any other criteria based on workflow rules that you define.

**Uncover hidden opportunities:** Intuitively track relationships between customers, prospects, influencers and suppliers so you can uncover new opportunities. Understand and leverage complex business scenarios with enhanced support for many-to-many relationships.



Track campaign effectiveness, program activities and much more in one unified screen.

## TRANSFORM INFORMATION INTO MARKETING INTELLIGENCE

**Identify trends and forecast performance:** Introduce new products and services efficiently, and improve up-sell and cross-sell opportunities. Allocate marketing resources based on a clear understanding of trends and opportunities.

**Build loyalty:** Take advantage of the 360-degree customer view to proactively suggest replacements or renewals, or to just reward frequent customers.

**Analyze demographics:** Segment customers by their demographic profile and spot purchase trends as they develop.

**Articulate the ROI of marketing:** Create insightful and focused dashboards for executives and top constituents that adeptly highlight key marketing metrics and performance indicators and drive home the value of marketing programs.