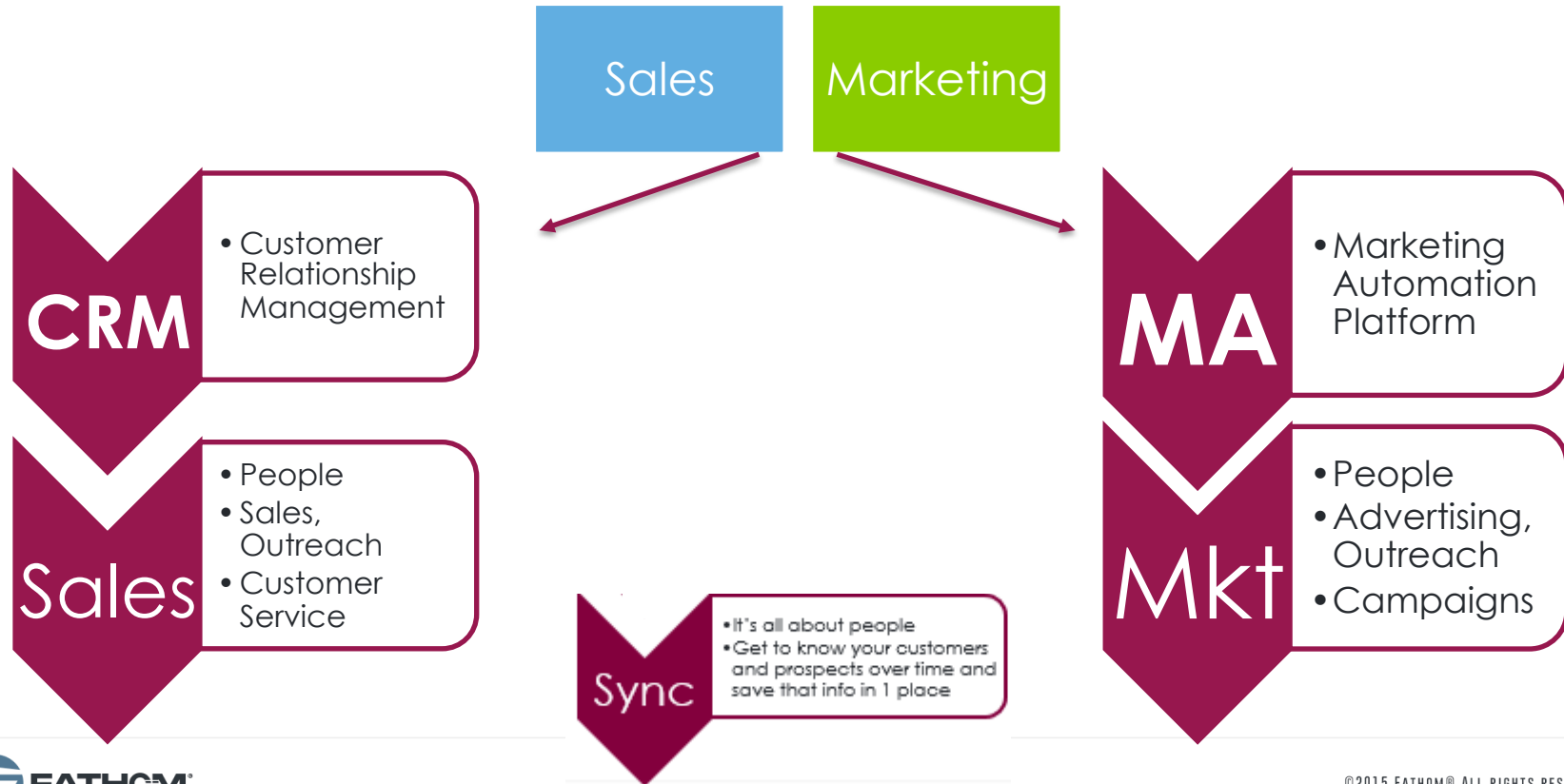




Dolla Dolla Bills: Makin' It Rain Leads through MA & CRM

MA and CRM

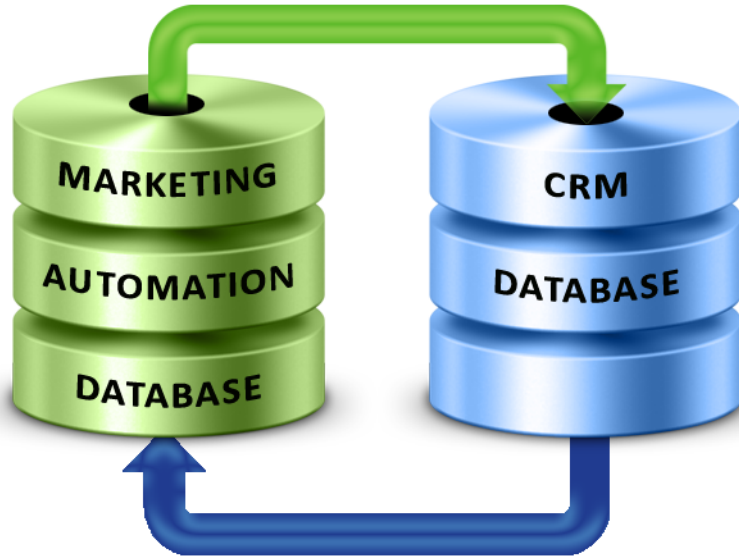
Department Breakdown



MA and CRM

Working Together

Sales & Marketing Alignment



Closing the Loop

Telling a story of the customer

4

MA

Sally Smith goes shopping

MA

The MA tool now has Sally's purchase AND personal info

MA

The MA tool syncs her purchase and personal info with the CRM tool.

MA

Sally buys make up and gives her email address at checkout

MA

Sally clicks on the link, goes to website, and fills out a form to get a 20% off coupon

CRM

The CRM tool tracks more and more sales associated to Sally over time...

MA

Sally's email automatically gets put in the MA tool

MA

Sally gets her first MA email prompting her to sign up online for 20% off

CRM

...and this helps the company forecast revenue and channel marketing efforts, advertising, etc by location, gender, and many more ways.



RESERVED.

Marketing Automation In Action

Simple B2C Example

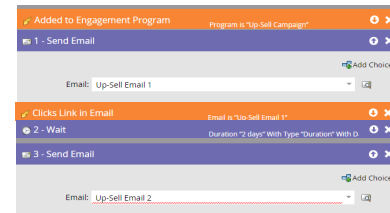
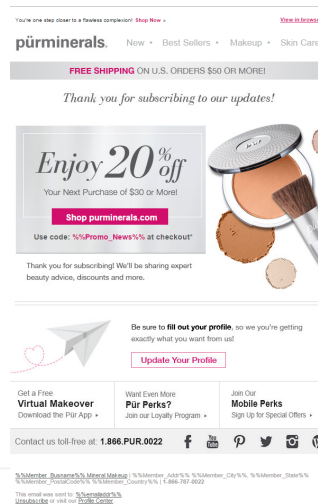
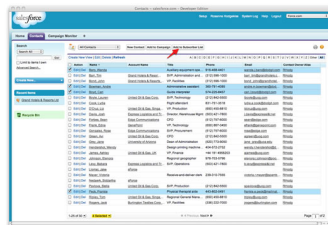
5

Sally walks into her favorite retail store & purchases makeup. While checking out Sally gives the cashier her email address.

The email address is entered into the company's CRM with the items that she purchased.

Within minutes Sally receives a welcome email from the retailer with 20% off her next purchase.

After the welcome email is sent, Sally's profile is assigned the up-sell campaign in the MA platform.

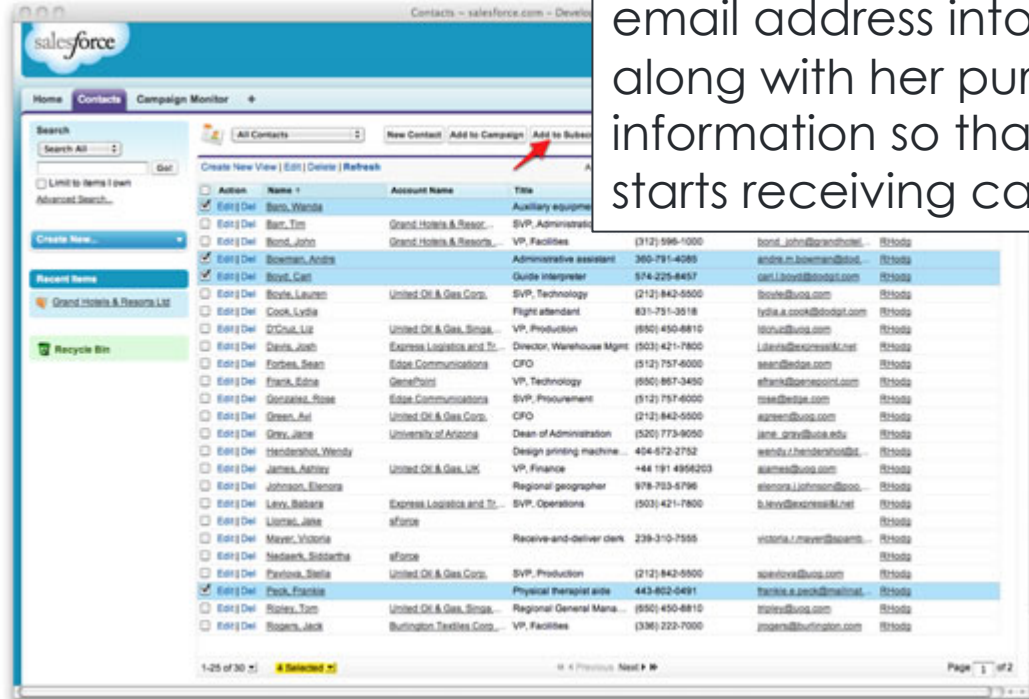


Marketing Automation & CRM Integration

A lead is added to the CRM



The cashier adds Sally's email address into the CRM along with her purchase information so that she starts receiving campaigns.



Marketing Automation & CRM Integration

The Welcome email is sent to Sally

A call-to-action or “CTA” is included to encourage Sally to start shopping immediately.

A dynamic code that is attributed to Sally is sent in her 20% off welcome email.

Secondary CTAs are included to encourage Sally to continue engaging with the retailer in addition to shopping. This encourages her to become a lifetime customer.

You're one step closer to a flawless complexion! [Shop Now](#) »

[View in browser](#)

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Marketing Automation & CRM Integration

Sally is triggered into the Makeup Up-Sell Campaign

Because we know Sally purchased makeup in the store, we know she might also be interested in other relevant items.

Added to Engagement Program	Program is "Up-Sell Campaign"	⬇️ ✕
2 - Wait	Duration "14 days" With Type "Duration" With I	⬇️ ✕
1 - Send Email		⬆️ ✕
Add Choice		
Email:	Up-Sell Email 1	📧
Clicks Link in Email	Email is "Up-Sell Email 1"	⬇️ ✕
2 - Wait	Duration "2 days" With Type "Duration" With D	⬇️ ✕
3 - Send Email		⬆️ ✕
Add Choice		
Email:	Up-Sell Email 2	📧

Types of Marketing Automation Campaigns

Examples of Nurtures a.k.a. Drip Campaigns

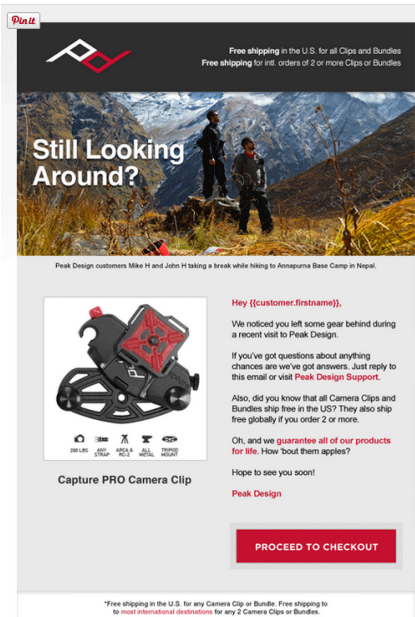
- **Welcome:** Typically provides incentive to make your next purchase & offers additional information about the company
- **Promotional:** Informs the customer of sales, or limited-time deals
- **Product Announcement:** Explains what the new product is & when it will be available in stores or online
- **Re-engagement:** For customers who have not purchased, clicked or opened emails to encourage them to re-engage with the company
- **Review/Referral:** Encourages the customer to write an online review or refer the company to one of their friends
- **Cart Abandonment:** Reminds the customer that there is an item that has not been purchased in their online cart
- **Up-Sell:** Entices the customer to purchase an item that might go along with the first item they purchased, or to get a better model/version.

Why Marketing Automation?

Increased Revenue shown through a Cart Abandonment Campaign

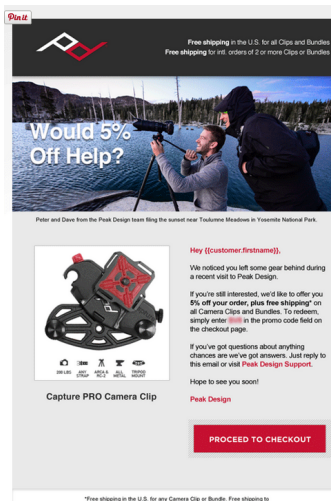
60-70% of Online Shopping Carts are Abandoned

Clicked



Send an email reminding them

Did Not Click



Offer Additional Savings

(Total Abandoned Carts)
X
(12%)
X
(AOV)

=

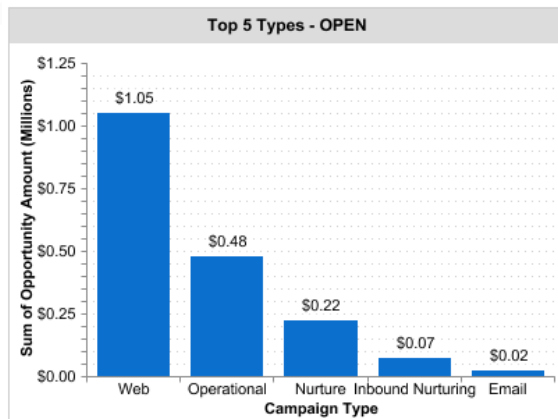
Recovered Revenue

What Does This Do for Us?

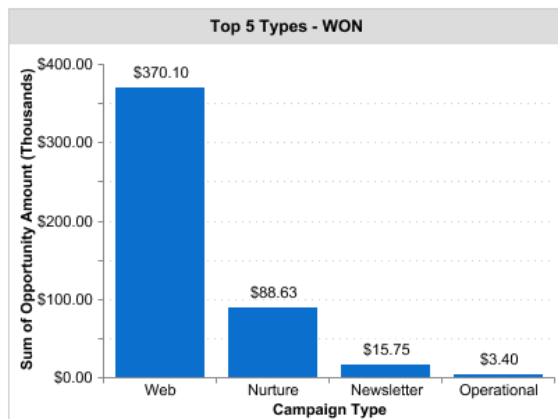


What Does This Do for Us?

OPP CAMPAIGN INFLUENCE: All



Opp Close Date is This Year



Opp Close Date is This Year

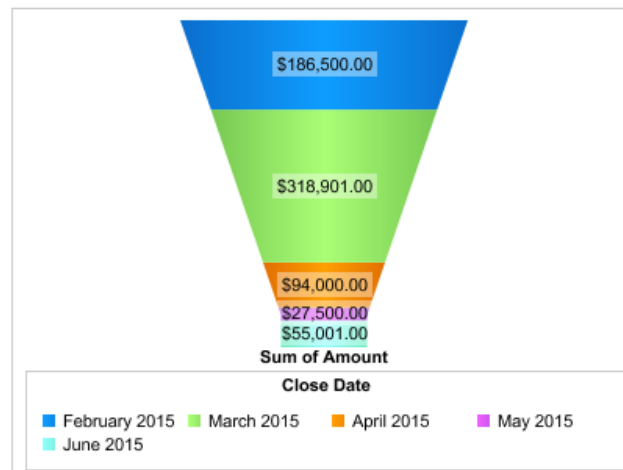
LEADERBOARD: MKT CAMPAIGNS

Top 5 Primary

Campaign Name	Sum of Opportunity Amount
20130913 - MD Organic	\$370,100
2014.06 Client Industry Newsletters	\$15,750
20130730 - MD General Nurturing	\$10,625
20150101 - MD Sales Industry Specific Newsletters	\$3,400

Current Year

180 Day MFG Pipeline



YTD Closed Business-MFG

