8thManage®

CRM

Marketing Campaign Management

Successful marketers are apt to communicate well with their customers, sending targeted marketing messages to them frequently, updating them with the latest trends and offerings, and enticing them with promotions. Managing a marketing budget well also requires special attention, but generating sales leads is perhaps the most important responsibility of the marketing department.

Using 8thManage CRM's email Campaign, you are empowered to design, schedule, send and track email campaigns, and to assess their return on investment (ROI). Unlike using an outsourcing email marketing service, you do not expose your confidential customer list to outside parties; you can send multiple emails to a client in a multi-touch sequence at practically no incremental cost. And with 8thManage CRM's embedded BI technology driving the email campaign engine, you can implement personalized emails – as personal as you want them to be.

Email Campaigns:

- Email campaign driven by embedded BI technology
- Email Content Management
- Personalized Email Execution
- Campaign Result & ROI Tracking

Sending Marketing Messages via Email Campaigns

The 8thManage CRM Email Campaign module takes advantage of several 8thManage technologies, enabling users to create and send personalized marketing messages via email automatically.

8thManage Embedded BI

8thManage CRM Embedded BI is a market segmentation tool that allows the user to search a group of customers with common characteristics or interests. The search essentially returns a mailing list that is coupled with the 8thManage CRM email campaign engine to automatically merge and send out different content to different groups of email recipients in accordance with the multiple search criteria.

8thManage Email Content Management

In designing email templates, the marketing specialist uses an easy-to-use email content creation wizard to produce high impact email messages by uploading graphical images that have been specifically designed for the campaign. Using the same wizard, the marketing specialist can preset and embed email personalization criteria that will be used at execution time.

Marketing Cost Tracking:
- Group marketing budget allocation & tracking
- Marketing campaign budget allocation and tracking
- Campaign ROI reporting

8thManage Email Execution with Personalization

Email campaign execution is done in real-time when pre-configured email templates are merged with recipient data on the mailing list prepared by 8thManage CRM Embedded BI technology. This way, highly personalized HTML email can be easily prepared and sent. The email dispatch engine allows for sending queued emails in accordance with a pre-defined dispatch schedule securely under the user's complete control.

Campaign Result Tracking & ROI Tracking

The 8thManage CRM email marketing capability provides for automatic response tracking of emails sent to measure the effectiveness of campaigns. Each email sent is tracked to determine whether it is delivered successfully, opened and read, and that information is automatically captured and presented in a report.

After the email performance results have made their way home, they are tracked together with campaign costs, sales leads generated as a result of the campaign, opportunities uncovered and finally the revenues generated; a Campaign ROI report is generated in real-time. A summary listing of all campaigns ROI information is thus generated with links that allow for drilling down to the input source page level.

Marketing Cost Management & Performance Tracking

Marketing Department Budgeting and Cost Tracking

8thManage CRM supports cost budgeting, reporting, and tracking of expenditures across the organization. User-defined fields may be used specifically to define marketing cost classifications. Costs are aggregated to show cost summary reports; but links are available for the user to drill down to specific cost detail as required. Provision is provided for the responsible person to forecast and propose costs to be incurred, and for the submission of the proposals to authorized person(s) for approval. Upon approval the revised budget becomes official. The same management page is used to submit actual cost expenditure in real-time.

Individual Campaign Budgeting and Cost Tracking

8thManage CRM supports cost budgeting, reporting, and tracking of expenditure for individual campaigns. For each campaign, the expenditure items are listed and an estimate expenditure plan is drawn up.

As the campaign is executed and the expenses incurred, the "Budget and Expenditure" page shall be used to input the actual expenditure. The approved campaign budget plan and the actual expenditure report may be compared side by side.

Sales Lead Generation

Sales Leads:
- Auto-assignment
- Sales lead qualification
- Sales lead conversion

Sales Lead Capture & Assignment

Sales leads are regularly captured by inside-sales representatives and marketing specialists who enter sales lead information manually into sales lead databases, or when sales leads are captured automatically via the company website connected to 8thManage CRM.

Upon capture, these sales leads are automatically routed to appropriate responsible managers with suggested assignees based on pre-defined policy of territory, industry, expertise or other criteria.

The manager may take the recommendation and confirm the assignment, upon which the system will update the assignment and send dashboard notification to the assignees concerned. The assigned leads are then automatically tracked to ensure that the assignees will take appropriate actions.

Sales Lead Qualification

Upon receipt of the sales leads, sales representatives shall qualify the sales leads by following a simple policy previously set up by the administrator via a drop-down menu. The sales lead qualification rules may include criteria such as "Prospect is not bankrupt" , "Prospect is not on the company black-list" , "Prospect is not on the Export Denial List," etc. Following qualification, the sales lead may be further processed with the prospect of being converted into an opportunity.

Sales Lead Conversion

When properly populated, an 8thManage CRM sales lead/client information profile offers the sales representative with a wealth of information including:

- Client company profile, including legal status, financial status, organization structure and value as a customer
- Contacts within the client organization
- Client interests by way of products and services
- Lead source such as a campaign or a trade-show
- Estimated value and estimated business closure date when these become evident

When ready, the sales representative will convert a qualified sales lead to a new opportunity by clicking on a "Generate Opportunity from Lead" button, and the profile of the prospect will automatically be pre-loaded into a new opportunity page ready for use by the sales representative.

Alternatively, a new opportunity record may be created and then linked to the correct prospect/client via a drop-down selection menu.

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Marketing Automation:

- Email Campaign
- Campaign Results Tracking
- Marketing Cost & Performance Tracking
- Sales Lead Management

Summing-up

8thManage CRM provides for a totally self-contained, embedded BI driven email campaign system that is powerful, easy-to-use and very cost effective. It enables you to communicate well and frequently with your customers, keeping them updated on the best that you have to offer. It enables you to efficiently capture sales leads, distribute them to sales teams, and to track them to ensure they are well utilized. In the event a "no-action" condition is detected, 8thManage CRM will send out alerts and, as necessary, will escalate the issue to ensure that nothing falls between the cracks. 8thManage CRM provides for full-cost budgeting, tracking and reporting so that the utilization of the marketing budget is well understand, and helps to ensure that they are put to the best use.

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