

# How to Select a Marketing Automation Solution for Microsoft Dynamics 365

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Presented by:

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# Agenda

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- Introduction
- What is Marketing Automation?
- Why is Marketing Automation so Important Today?
- Selecting a Marketing Automation Solution for Microsoft Dynamics 365: Eight Questions to Ask
- Final Thoughts
- ClickDimensions Demo
- Q&A

# Introduction: ClickDimensions

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## Fully Native

ClickDimensions is a powerful marketing automation solution natively built inside Microsoft Dynamics 365. That means there are no integration costs and no hassles synchronizing data between systems – just a complete picture of leads and customers for greater marketing, sales and customer experience success.



## Fully Supported

We measure our success on your success, and our team will ensure you get the most out of your marketing investment. Our full range of support, training and services help you get started and get results quickly and over time, whether you want to do the work or have us do it for you.



## Fully Committed

ClickDimensions is the only marketing technology company that is 100% committed to the Microsoft ecosystem. We have six times more Dynamics customers than our nearest competitor. Marketing for Dynamics – it's all we do.

# What is Marketing Automation?

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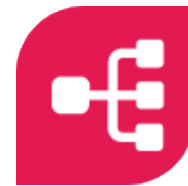
Email Marketing



Event Management



Social Marketing



Campaign Automation



SMS Messaging



Reporting



Form Capture



Survey



Landing Pages



Training & Support



Web Intelligence



Lead Scoring

# Why is Marketing Automation so Important Today?

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**89% of customers** begin their buying process with a search engine  
*(Fleishman-Hillard)*



It takes an average of **10 marketing-driven "touches"** to progress a lead from the top of the funnel to revenue generating.  
*(Aberdeen Group)*



**79% of marketing leads never convert into sales.** Lack of lead nurturing is the common cause of this poor performance.  
*(MarketingSherpa)*

# Why is Marketing Automation so Important Today?

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80% of marketers use automation software **generate more leads.**

*(LinkedIn)*



Companies that have implemented a marketing automation platform report **higher levels of collaboration between sales and marketing.**

*(Forrester Research)*



63% of companies that are **outgrowing their competitors** use marketing automation.

*(The Lenskold Group)*

Selecting a Marketing Automation Solution for Microsoft Dynamics 365:

# Eight Questions to Ask

# 1. Does it Include the Features Your Organization Needs?

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- Marketing automation solutions are capable of much more than email marketing
- Think about what tools your company needs – now and in the future
- Choose a solution that can grow with your company



## 2. Is it Easy to Implement and Use?

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- Don't sacrifice simplicity for functionality
  - get the best of both worlds
- A system that's not user-friendly won't be used to the fullest and won't help you realize the biggest benefits of marketing automation
- If a solution is difficult to implement, your organization is unlikely to realize maximum ROI



*64% of C-level leaders say ease of implementation is the most important evaluation criteria for selecting a marketing automation solution*  
**– ClickDimensions with Ascend2**

### 3. What are the Options for Training and Support?

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- Different users have different preferred learning methods
  - look for a vendor that offers a variety of training options
- Be aware of when support is available, particularly if you have global operations or are in a different time zone than your vendors
- Look for training and support options that can help you get started and get results quickly

## 4. Does it Integrate Well with Microsoft Dynamics 365?

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- A marketing automation platform is the marketing engine for a CRM system
- The two solutions maximize the power, effectiveness and value of each
- The level of integration varies widely and can impact the cost and timeline for implementation as well as functionality and performance



*ClickDimensions is the leading marketing automation solution for Microsoft Dynamics 365. Our fully native integration with Dynamics 365 not only eliminates the need for syncing systems, it delivers unparalleled access to CRM data for better segmentation, hyper-personalization and marketing success.*

## 5. How Often is the System Updated?

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- A marketing automation platform should evolve with the changing needs of marketers
- Vendors should regularly add new features and improve on existing ones
- Ask if customer requests help drive product updates
  - this can help you determine whether they put customer needs first

## 6. What Reporting and Analytics Capabilities Does the System Provide?

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- Marketing automation reporting should help marketers make smarter decisions
- Marketing automation reporting should also allow for smarter business decisions and insights organization-wide
- Be sure to look at how easily marketing automation data and intelligence can be accessed throughout an organization



**Remember:**  
*Marketing Automation Isn't  
Just for Marketing Anymore*

# 7. What is the Total Cost?

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- When properly implemented and utilized, a marketing automation platform should pay for itself over time
- Look at the overall value
- Be sure to ask if there are fees for set up, training, CRM integration, additional users or contacts, and other miscellaneous items



*Companies spend an average of 7% of their overall budgets on marketing automation  
- MarketingSherpa*

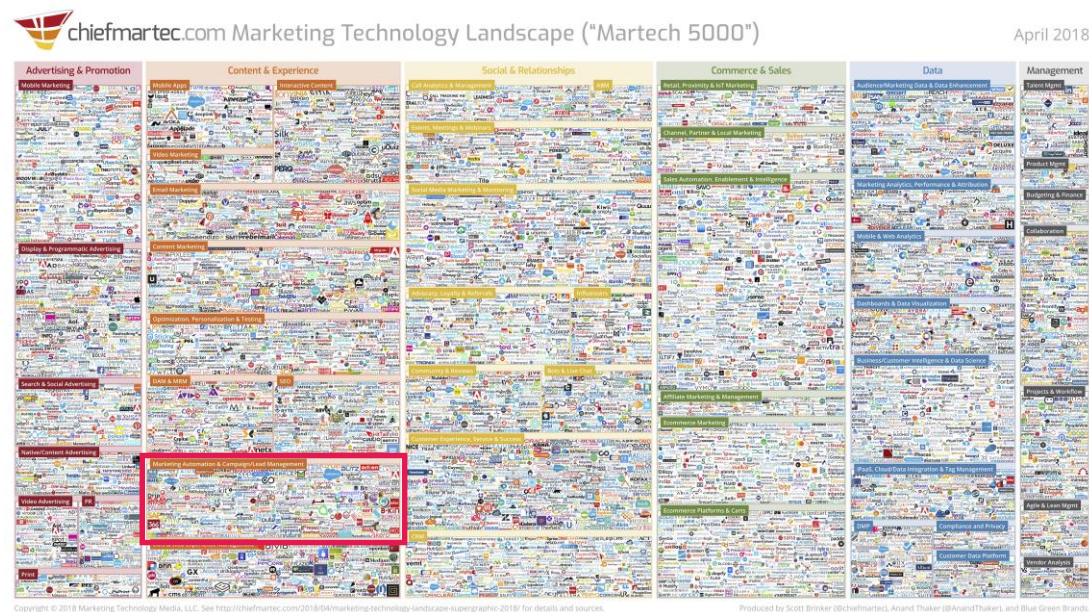
## 8. Does the Provider Have a Good Reputation?

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- When purchasing a marketing automation solution, you are investing in a relationship as much as the technology
- The nature of the system requires an ongoing relationship with the vendor
- Seek out customer testimonials, online reviews and ratings – and a Microsoft Partner for Dynamics 365 can be one of the best sources of information and referrals

# Final Thoughts

- The number of marketing automation solution providers has increased rapidly in recent years
- Marketing automation solutions aren't one-size-fits-all – selection requires careful consideration, particularly when it comes to CRM integration





# ClickDimensions Demo

Q&A