Marketing Lists 101

CRMUG Dakotas Chapter Meeting

@CRMUG
www.crmug.com
info@crmug.com

Allow me to introduce myself…

- Webmaster at Dynamic Communities
- 6+ years CRM systems and marketing automation software

Meeting Stefon Diggs (#14) of the Minnesota Vikings

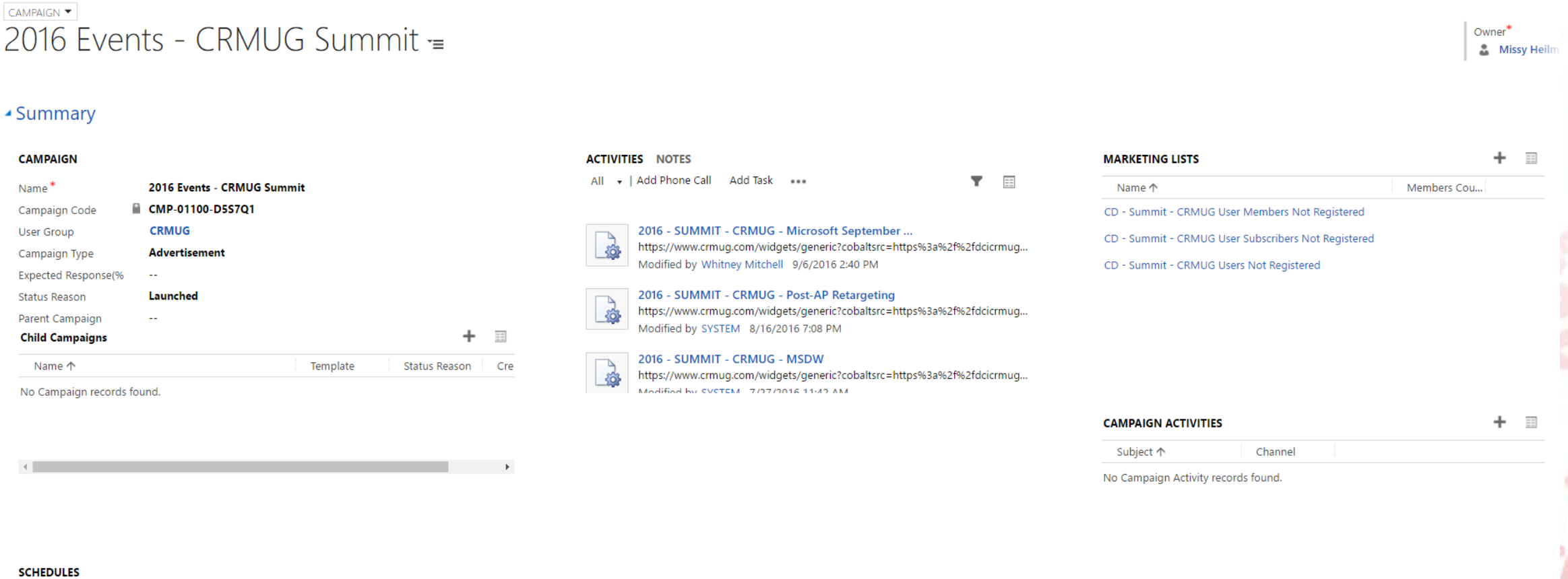
[Connect with me on crmug.com](crmug.com)

Agenda

- Let’s Talk Campaigns
- Static vs. Dynamic Lists
- Creating Lists
- Tips & Best Practices

Let’s Talk Campaigns

Why, Where, How



Identifying Your Target Audience

What is the goal of your message?

- Who are you trying to communicate with?
- Is there anyone who *shouldn't* receive this message?
- What will be communicated?
- What is the Call To Action of the message?

TIP

Think Backwards! What is the action you want your audience to take?

Static vs. Dynamic Lists

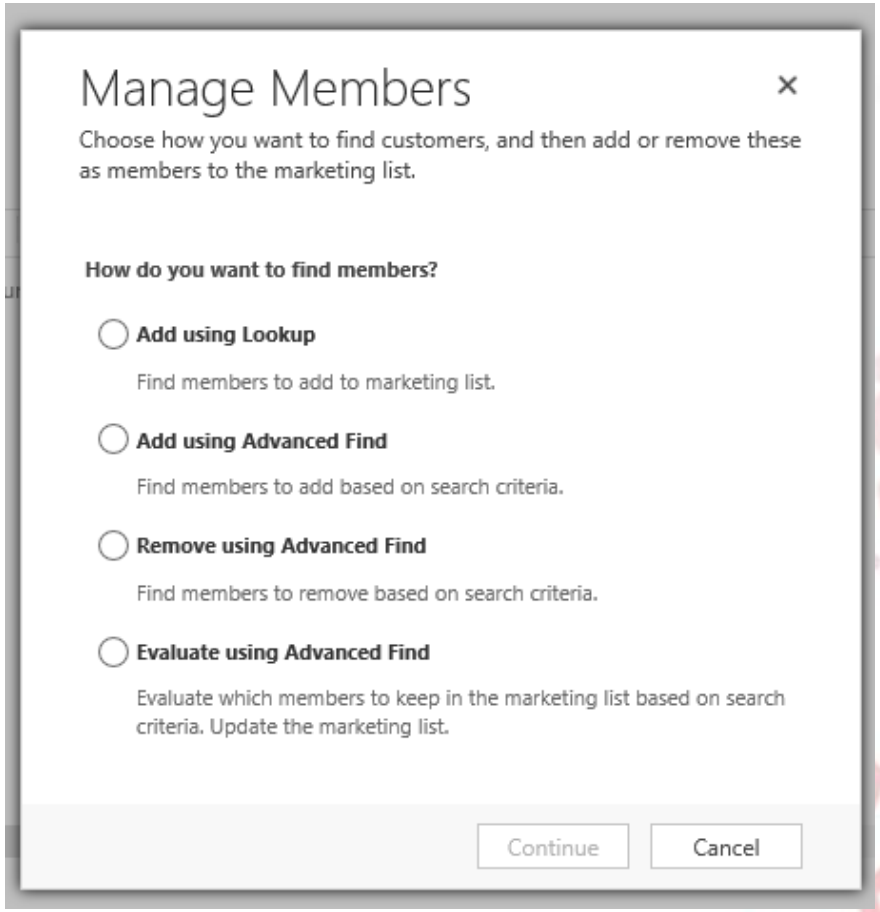
STATIC

- Contact/account/lead records are added manually or through Advanced Find
- List is not automatically updated when new records meet the Advanced Find
- Ability to manually remove records

Example of When To Use A Static List:

List of past attendees

MANAGING RECORDS WITHIN A STATIC LIST



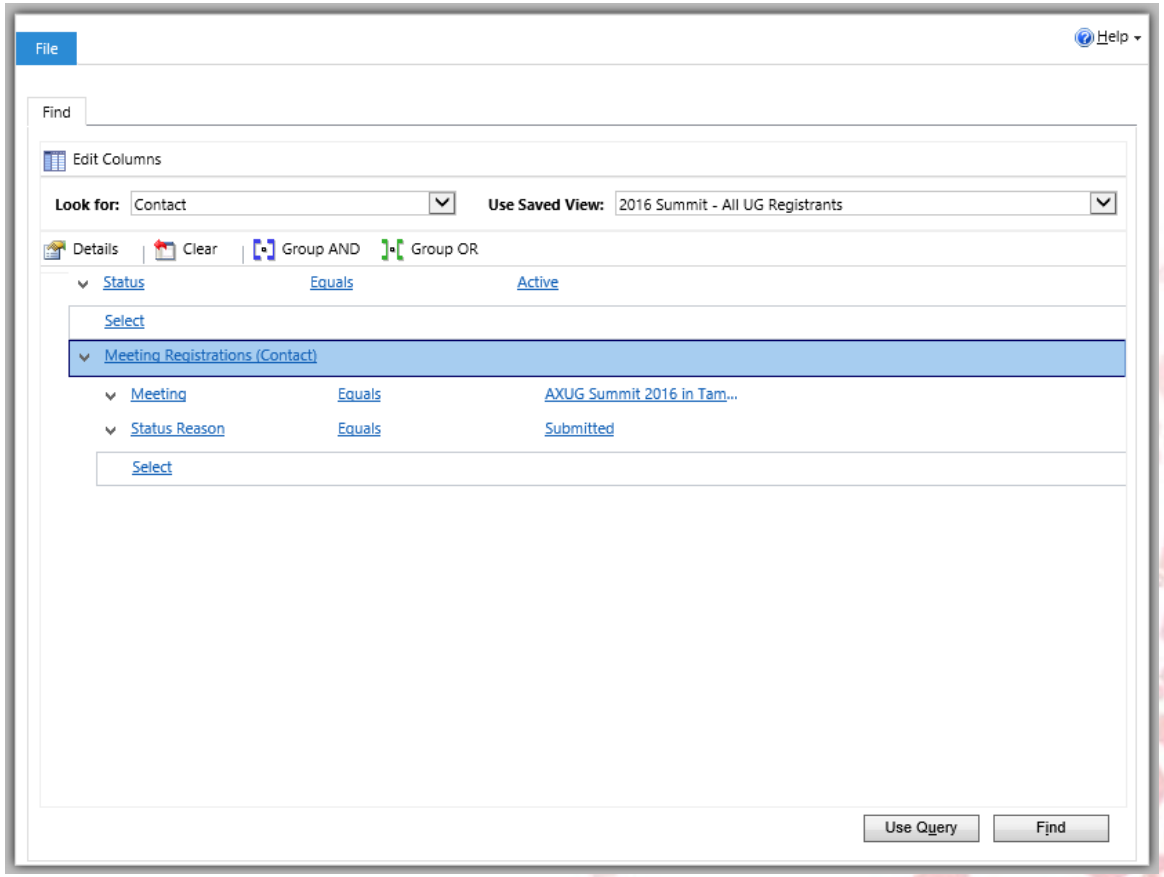
DYNAMIC

- Criteria is defined through an Advanced Find
- New contact/account/lead records are automatically added to list when they meet the Advanced Find criteria
- Records can be removed only through an Advanced Find

Example of When To Use A Dynamic List:

List of next year attendees (builds as individuals register)

MANAGING RECORDS WITHIN A DYNAMIC LIST



Creating a Static Marketing List

CRMUG
DYNAMICS CRM USER GROUP

Demo

Creating a Dynamic Marketing List

CRMUG
DYNAMICS CRM USER GROUP

Demo

Tips & Best Practices

Our Top Tips

- Consistent naming
- Descriptions – use them & make them count
- Deactivation is your friend
- Associate, associate, associate

Questions?