



Marketing Lists 101

CRMUG Dakotas Chapter Meeting



@CRMUG
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Allow me to introduce myself...

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

[Connect with me on
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Meeting Stefon Diggs (#14) of the Minnesota Vikings

Agenda

Let's Talk Campaigns

Static vs. Dynamic Lists

Creating Lists

Tips & Best Practices

Let's Talk Campaigns

Why, Where, How

CAMPAIGN ▾

2016 Events - CRMUG Summit ≡

Owner
Missy Heilm

Summary

CAMPAIGN

Name * **2016 Events - CRMUG Summit**

Campaign Code **CMP-01100-D557Q1**

User Group **CRMUG**

Campaign Type **Advertisement**

Expected Response(%) --

Status Reason **Launched**

Parent Campaign --

Child Campaigns

Name ↑	Template	Status Reason	Cre
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No Campaign records found.



SCHEDULES

Proposed Start --

ACTIVITIES NOTES

All ▾ | Add Phone Call Add Task ...

2016 - SUMMIT - CRMUG - Microsoft September ...
<https://www.crmug.com/widgets/generic?cobaltsrc=https%3a%2f%2fdccirmug...>
Modified by Whitney Mitchell 9/6/2016 2:40 PM

2016 - SUMMIT - CRMUG - Post-AP Retargeting
<https://www.crmug.com/widgets/generic?cobaltsrc=https%3a%2f%2fdccirmug...>
Modified by SYSTEM 8/16/2016 7:08 PM

2016 - SUMMIT - CRMUG - MSDW
<https://www.crmug.com/widgets/generic?cobaltsrc=https%3a%2f%2fdccirmug...>
Modified by SYSTEM 7/27/2016 11:42 AM

MARKETING LISTS

Name ↑	Members Cou...
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CD - Summit - CRMUG User Members Not Registered

CD - Summit - CRMUG User Subscribers Not Registered

CD - Summit - CRMUG Users Not Registered

CAMPAIGN ACTIVITIES

Subject ↑	Channel
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No Campaign Activity records found.

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

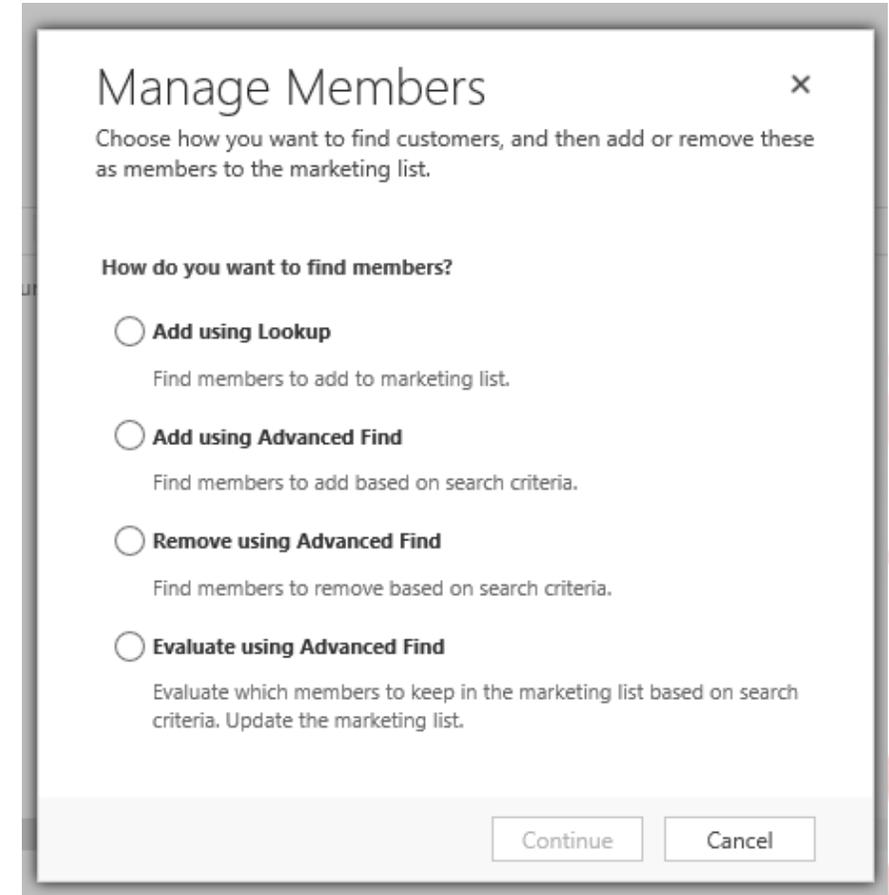
STATIC

- 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



The screenshot shows a 'Manage Members' dialog box with a close button (X) in the top right corner. Below the title, there is a descriptive text: 'Choose how you want to find customers, and then add or remove these as members to the marketing list.' The main section is titled 'How do you want to find members?' and contains four radio button options:

- Add using Lookup**
Find members to add to marketing list.
- Add using Advanced Find**
Find members to add based on search criteria.
- Remove using Advanced Find**
Find members to remove based on search criteria.
- Evaluate using Advanced Find**
Evaluate which members to keep in the marketing list based on search criteria. Update the marketing list.

At the bottom right of the dialog, there are two buttons: 'Continue' and 'Cancel'.

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

The screenshot displays the 'Advanced Find' window in a CRM system. At the top, there are 'File' and 'Help' menus. Below the 'Find' tab, there is an 'Edit Columns' section. The 'Look for:' dropdown is set to 'Contact', and the 'Use Saved View:' dropdown is set to '2016 Summit - All UG Registrants'. Below this, there are buttons for 'Details', 'Clear', 'Group AND', and 'Group OR'. The main area shows a tree view of criteria: 'Status' (Active) is expanded, and 'Meeting Registrations (Contact)' is selected. Under 'Meeting Registrations (Contact)', there are two sub-criteria: 'Meeting' (AXUG Summit 2016 in Tam...) and 'Status Reason' (Submitted). At the bottom right, there are 'Use Query' and 'Find' buttons.

Creating a Static Marketing List

Demo

Creating a Dynamic Marketing List

Demo

Tips & Best Practices

Our Top Tips

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

Questions?