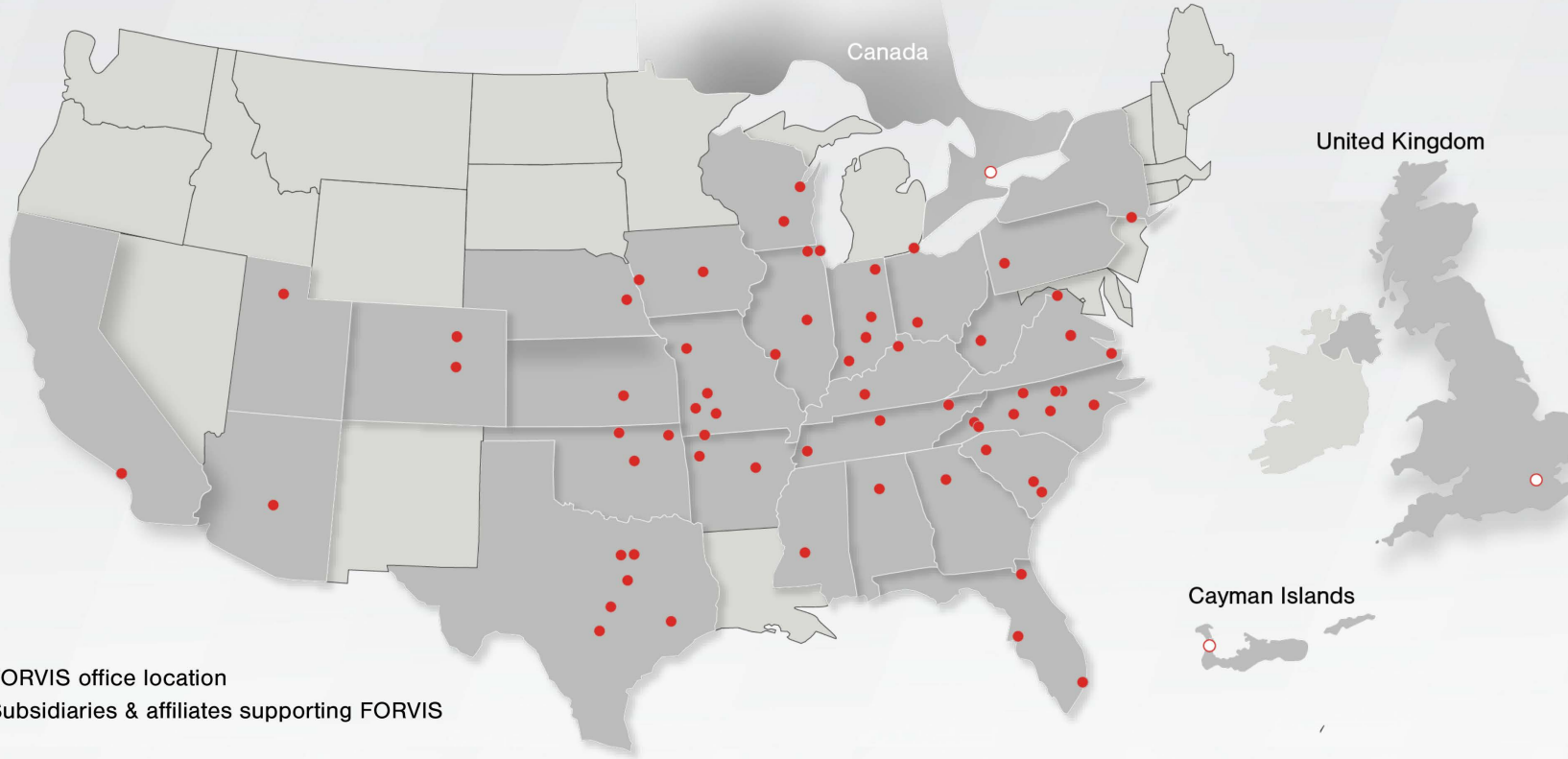


# FORVIS<sup>®</sup>

**Are You Ready  
to Use CRM &  
Marketing  
Automation  
Together?**



# Global Presence & Reach



- FORVIS office location
- Subsidiaries & affiliates supporting FORVIS

## Subsidiaries & Affiliates Supporting FORVIS

- FORVIS Capital Advisors, LLC
- FORVIS Global Advisory Canada ULC\*\*
- TALENT SHIFT, LLC
- FORVIS Wealth Advisors, LLC
- FORVIS Global Advisory Ltd. UK\*\*

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## By the Numbers

**Top 10**  
U.S. Public Accounting Firm \*

**27**  
States + Canada, U.K., & \*\*  
Cayman Islands

**10+**  
Industries

**68**  
Markets

**500+**  
Partners & Principals

**6,000+**  
Team Members



FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.

# Business Technology Solutions

**FORVIS** Business Technology Solutions provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

In addition, our Insights & Automation services include business intelligence (BI) and robotic process automation (RPA) assessments, implementations, and training.

**10+**

Years Legacy Marketing Consulting Services

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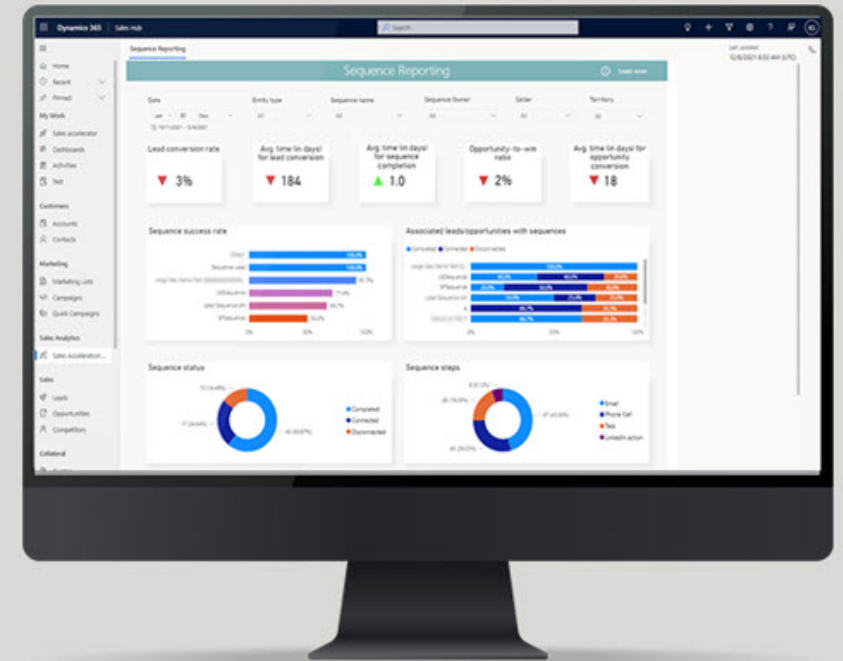
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Microsoft  
Partner

Sage Partner

ORACLE  
NETSUITE  
Solution Provider

salesforce  
PARTNER



From sales forecasting to financial reporting,  
learn what CRM and ERP technologies can do.

# Meet the Presenter



**Kevin Beale**

Lead Consultant / Business Technology Solutions

920.560.6984

[kevin.beale@forvis.com](mailto:kevin.beale@forvis.com)

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# FORVIS<sup>®</sup>

**Are You Ready  
to Use CRM &  
Marketing  
Automation  
Together?**



“

**If you don't have time to do it right,  
when will you have time to do it over?"**

---

**John Wooden**

UCLA Men's Basketball

10 championships in 12 years

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# What's Your Role?

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# Agenda

- Marketing Automation vs. CRM
- Key Data Points
- Choosing a Marketing Tool
- Common Barriers to Success
- Q&A

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# Objectives

- Describe high-level features of marketing automation tools & how these differ from core CRM features
- Define common data points used by automation tools & how to use each for improved lead segmentation & more
- Discuss several marketing automation tools & their key differentiators



# Marketing Automation vs. CRM

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# Marketing Automation vs. CRM

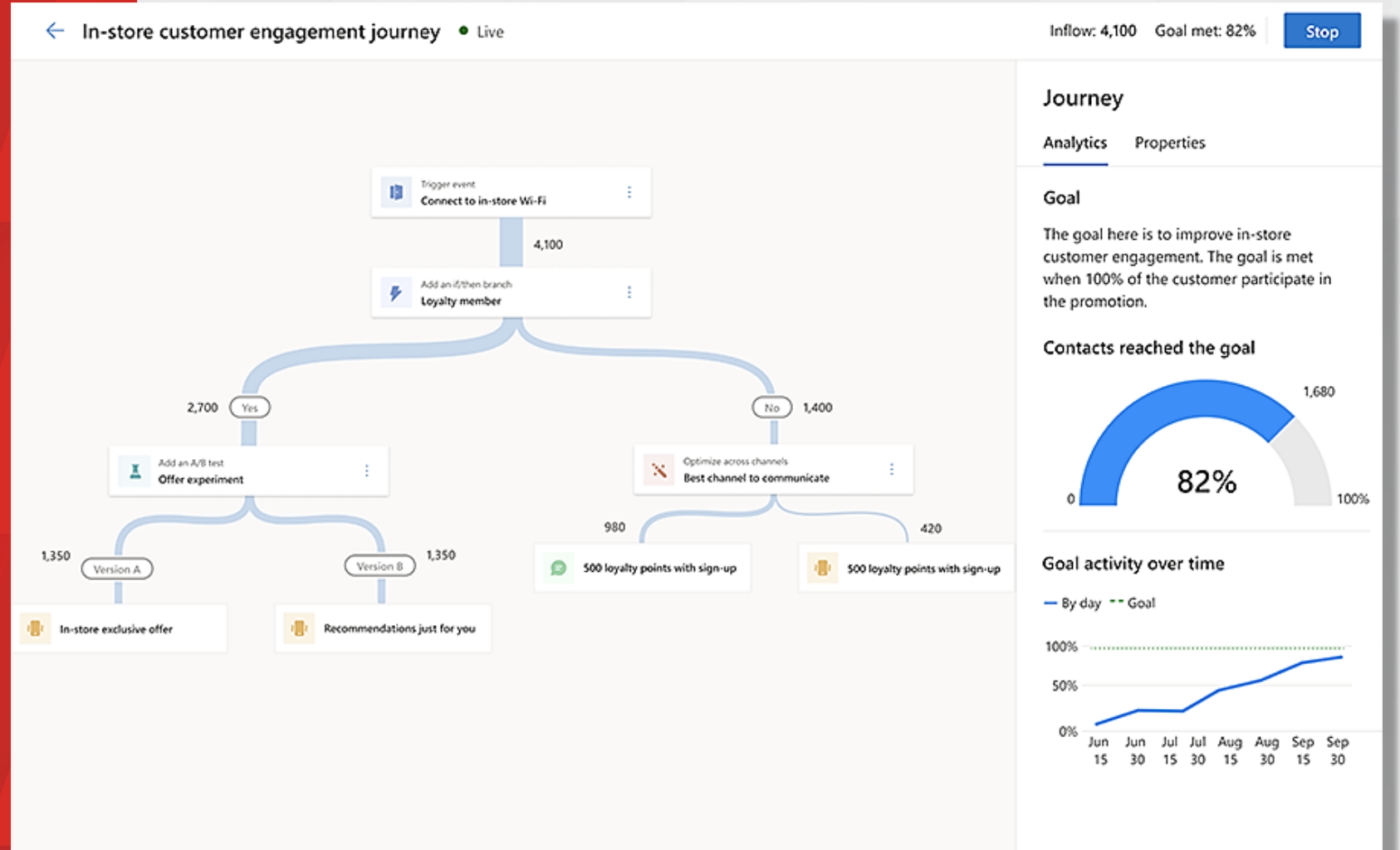
- Mass Email Sending With Click-Tracking
- Automated Email Sequences\*
- Forms & Landing Pages\*
- Automatic Lead Scoring\*
- Activity Tracking/Engagement Timeline\*
- Integrations With Webinar/Event Platforms

# Marketing Automation vs. CRM

- Specialized Analytics/Reporting\*
- Advanced List Building Tools
- Consent Management/GDPR Features
- Public File Hosting
- Custom Domains ([www2.yourbrand.com](http://www2.yourbrand.com))
- Social Media Connectors

# Automation Programs

Source: Microsoft Learn



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# Landing Pages & Forms

## Form Title

What is your first name? \*

What is your last name? \*

What is your email? \*

What is your phone number?

What is your job title?

We are committed to protecting and respecting your privacy. We will only use your personal information to administer your account and provide the services requested.

### Elements

- Text
- Image
- Captcha
- Submit
- Divider

### Consent

- Purpose
- Topic

### Layout section types

- 1 column
- 1:2 column
- 2 column
- 2:1 column
- 3 column
- Custom

# Lead Scoring & Grading

## Lead Scoring

- How engaged are they?
- Based on activity

Event Participations	+75 Points
Form Submission	+50 Points
Email Clicks	+10 Points
Website Page Views	+3 Points

## Lead Grading

- Are they a target customer?
- Based on ideal customer profile

Company Size	+25 Points
Buying Influence	+25 Points
Job Level	+20 Points
Industry	+10 Points



**Don't work in a vacuum**

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# Activity Tracking

The screenshot displays the Microsoft Dynamics 365 Marketing interface. The top navigation bar includes 'Dynamics 365 | Marketing', a search bar, and various utility icons. The left sidebar lists navigation options: Engagement (Get started, Journeys, Analytics, Triggers), Audience (Segments, Consent center, Contacts, Leads), Channels (Emails, Forms, Push notifications, Text messages, More channels), and Assets (Library). The main content area is titled 'Real-time marketing' and shows an 'Overview' for the period 'Jan 22 2022 - Feb 22 2022'. The overview is divided into four main sections: Channel engagement, Email, Text message, and Custom channels. Each section contains a bar chart for activity counts and a summary table for key metrics. The 'Email' section also includes a 'Form' summary card. The 'Push notification' section includes a 'Text message' summary card. The 'Custom channels' section includes a 'Text message' summary card. The 'Channel engagement' section includes a 'Form' summary card. The 'Email' section includes a 'Text message' summary card. The 'Text message' section includes a 'Push notification' summary card. The 'Custom channels' section includes a 'Text message' summary card.

**Channel engagement**

Emails opened	25
Emails clicked	20
Forms visited	12
Forms submitted	4
Text link clicked	14
Text message replied	8
Push notifications opened	9
Push notifications link clicked	5
Custom channel clicked	5

**Email**

Total opens	Open rate	Delivery issues
25	46%	7

**Text message**

Total clicks	Delivery issues
14	7

**Custom channels**

Total clicks	Delivery issues
5	2

**Form**

Submissions
4

**Push notification**

Opens	Open rate	Not sent
9	56%	8



# What NOT to Expect

- “One platform that does it all”
- Direct management of digital advertising
- Line-by-line order confirmations
- Advanced social media posting features
- Social “listening” or sentiment analysis
- Event management (Microsoft Dynamics 365 Marketing)
- Built-in webinar hosting
- Built-in video hosting

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# Key Data Points

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Adopt the mindset, not the specifics

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# The Architect Mindset

- What does my team need to know to serve our customers quickly & efficiently?
- How would we engage **differently** based on this information?
- How do I want to report on this in the future?

# A Note About Field Types

- **Option Sets/Picklists** are preferred
- **Multi-Selects & N:N/Related Objects** are hard to update in bulk or with form submissions
- **Text** fields are a last resort for most segmentation fields, but can be useful as “detail” fields

# Key Standard Data Points

## Entities

- Lead
- Contact
- Account
- Opportunity
- Marketing List
- Campaign

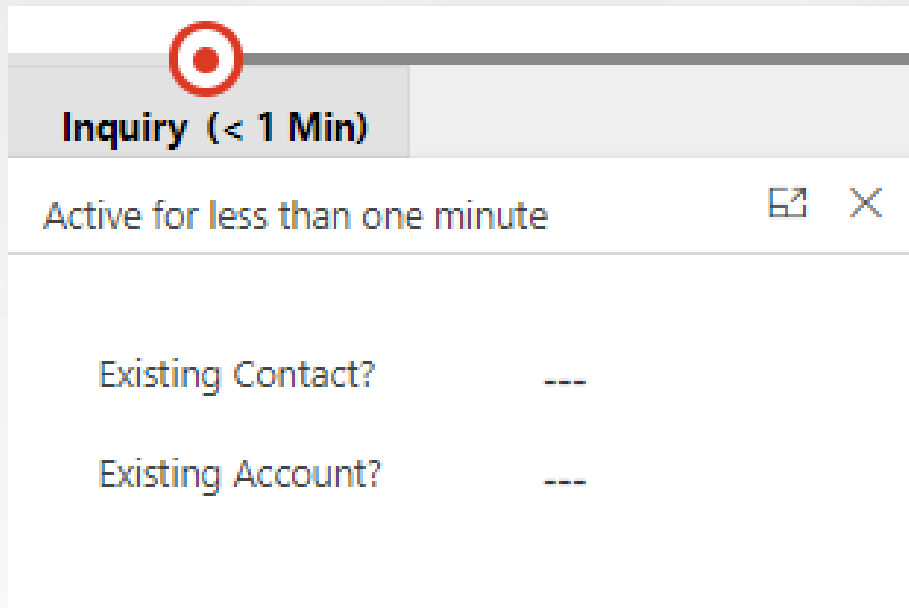
## Fields

- Lead Source
- Source Campaign
- Opt-Out
- Email
- ParentContactID\*
- ParentAccountID\*





# Key Standard Data Points

## ParentContactID & ParentAccountID



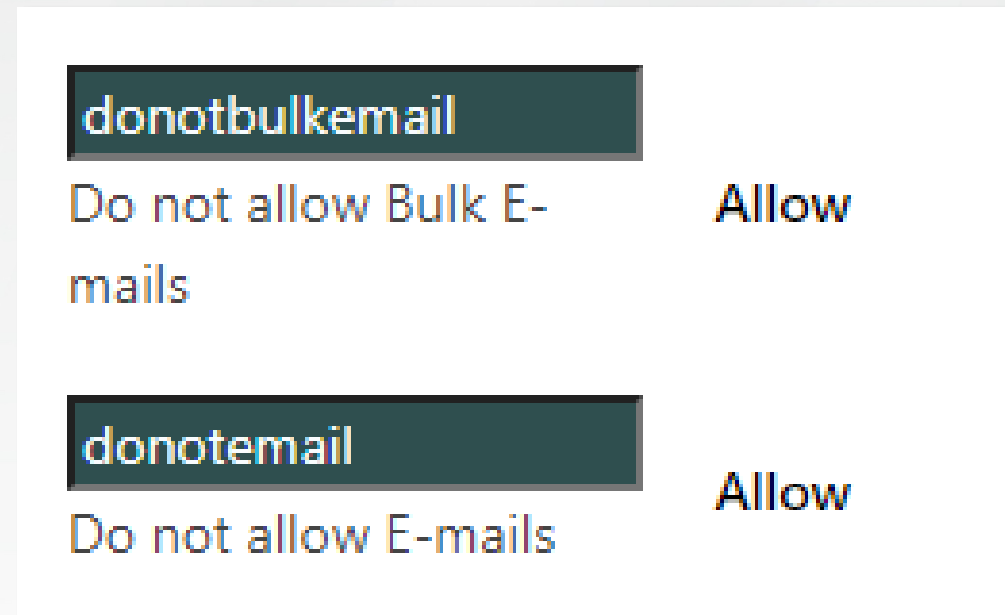
**Inquiry (< 1 Min)**

Active for less than one minute  

Existing Contact? ---

Existing Account? ---

## Do Not Allow Bulk Emails & Do Not Allow Emails



**donotbulkemail**

Do not allow Bulk E-mails **Allow**

**donotemail**

Do not allow E-mails **Allow**

# “Allow” vs. “Opt-In”

- “Allow” doesn’t necessarily mean “opt-in”
- Opt-Out = false doesn’t necessarily mean “opt-in”
- Capture clear consent for subscribers
- Consider dedicated “Opt-In” &/or “Opt-In Source” fields



# Key Segmentation Data Points

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# Position or Role

## Department

- Executive Team
- Information Technology
- Procurement
- Operations
- Engineering
- Quality
- Sales & Marketing
- Human Resources

## Job Role/Function

- Branch Sales Manager
- Design Engineer
- Hygiene Specialist
- Procurement
- Consultant
- Board Member

# Job Level or Influence

## Job Level

- C-Suite
- Senior VP/Director
- VP/Director
- Senior Manager
- Manager
- Team Member

## Buyer Role

- Decision Maker
- End-User
- Champion
- Stakeholder
- Influencer
- Economic/Technical Buyer

# Size

## Employee Range

- Less than 50
- 50–99
- 100–249
- 250–999
- 1,000–2,500
- 2500+

## Company Size

- Number of Locations
- Number of Branches
- Number of Technicians
- Number of Members

# Interest/Customer Goal

## Product Interest

- Auto Loan – New Car
- Auto Loan – Used Car
- Home Mortgage
- Small Business Loan
- Small Business Credit Card
- ...

## Inquiry Type

- Quote Request
- New Project Request
- Technical Support
- Career/HR
- Sponsorship
- ...

# Lead Source

- Event – Tradeshow
- Event – Public Workshop
- Event – VIP
- Event – Webinar
- Lead Form – Website
- Lead Form – Paid Social
- Lead Form – Paid Search
- Download – eBook




# Tuning Your Option Sets

- **Too specific** can be dangerous
- **Too broad** can be dangerous
- **Ambiguous** can be dangerous
- **Time-based** values lead to runaway options

# How Many Is Too Many?





**Cultivate confidence for your users**

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# Choosing a Marketing Tool

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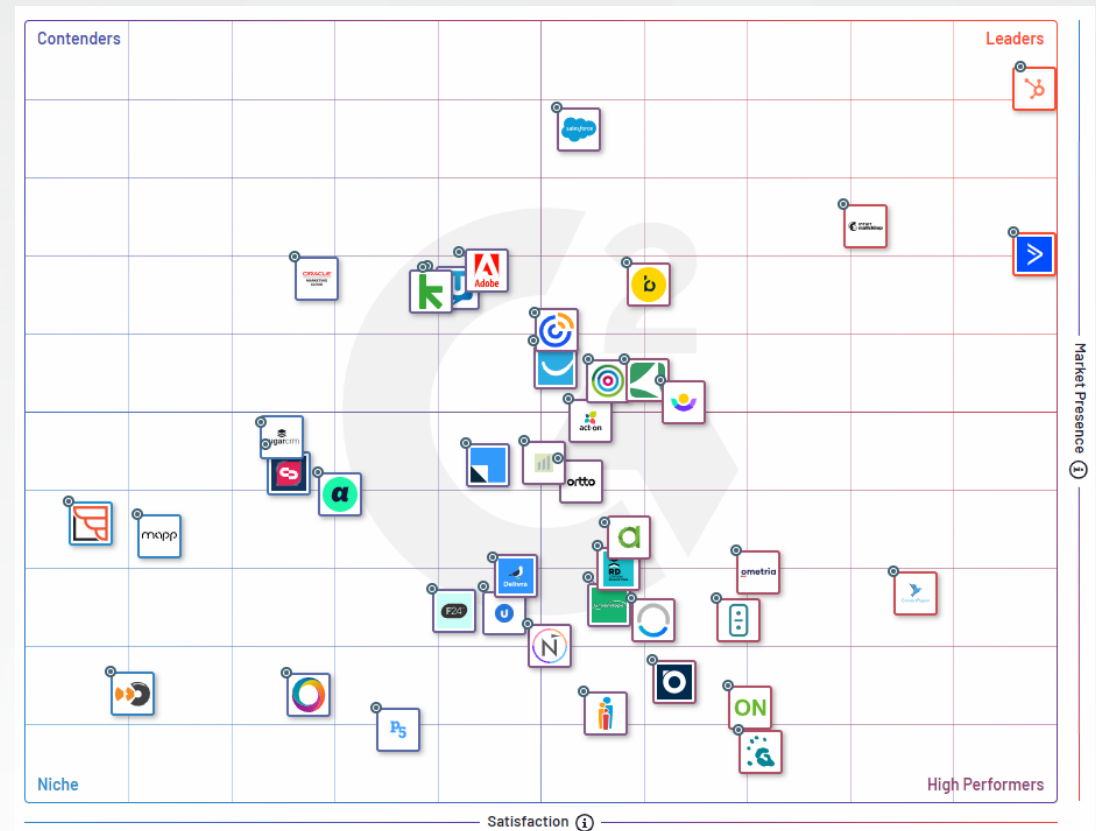
**No system/platform is perfect**

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# So Many Options ...

- Dynamics 365 Marketing
- ClickDimensions
- Marketo
- Act-On
- ActiveCampaign
- Eloqua
- HubSpot
- ...

Source: g2.com



G2 Grid® Scoring

Satisfaction ⓘ

Market Presence ⓘ



# Key Technical Differentiators

- Create a lead for each form submission
- Ability to keep prospects in a separate database
- GDPR & consent management features
- Segmentation options with custom entities
- Automation program flow control
- Analytics like UTM/URL parameters
- Third-party integrations
- Landing page/form editors



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# Items to Consider

## Low

SMS & Mobile

Social Media

Surveys

Content Hosting

Admin & Security

Account-Based Marketing

Offline Marketing

## Medium

Website Tracking

Campaign Management

Events & Webinars

Audience Building

## High

Email Marketing

Lead Scoring

Third-Party Integrations

## Critical

Landing Pages & Forms

Automation Programs

CRM Integration

Segmentation

GDPR

Reporting





**Start with “simple & reliable”**

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# Learn More

- G2.com is a great place to do your own research
- Talk to a professional with experience in multiple platforms
- Talk with your professional network
- Review companies' user forums to see how active each community is



# Common Barriers to Success

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# Common Barriers to Success

- Alignment of Definitions
- Alignment of Processes
- Alignment of Systems



**Align before you launch**

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# Alignment of Definitions



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## What is a lead?

- Existing customer visits your booth to discuss a new project
- New prospect attends one of your webinars
- Existing customer sends in a quote request
- Existing customer adds a product to their cart

# Alignment of Definitions



## What is a qualified lead?

- Lead Score > x
- Meets 2+ BANT (**B**udget, **A**uthority, **N**eed, **T**imeline)
- “Requested Sales Follow-Up”
- Submitted Quote Request or Lead Form
- Job Level > x
- Company Size > x

# Alignment of Processes



- Who's responsible for qualifying leads?
- Who's responsible for assigning leads to sales?
- Should marketing be talking when sales is engaged in 1:1?
- What communication should never be sent to customers?
- How should we communicate to customers vs. prospects?



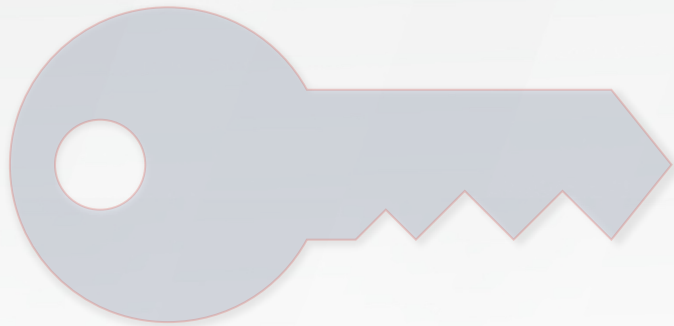
# Alignment of Systems



- General Data Management
  - Ex., Lead Source – first-time update only!
  - Ex., Do Not Allow Bulk Emails – educate users or prevent access
  - What’s the “source of truth” for subscriptions & consent to email?
- Lead to Opportunity Qualification
- Non-Standard Entities (lead, contact, account, opportunity)
- Non-Standard Fields (donotbulkemail)
- Subscription Management/Topics

# Key Takeaways

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# Key Takeaways

- Don't work in a vacuum
- Cultivate confidence for your users
- Adopt the mindset, not the specifics
- No system/platform is perfect
- Start with “simple & reliable”
- Align before you launch



# Q&A

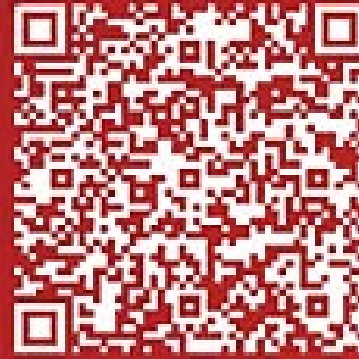
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Microsoft  
Partner



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# Thank You for Attending

**FORV/S**

Kevin Beale

**FORVIS** / Business Technology Solutions

[kevin.beale@forvis.com](mailto:kevin.beale@forvis.com)

*Please fill out your survey!*

# Thank you!

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