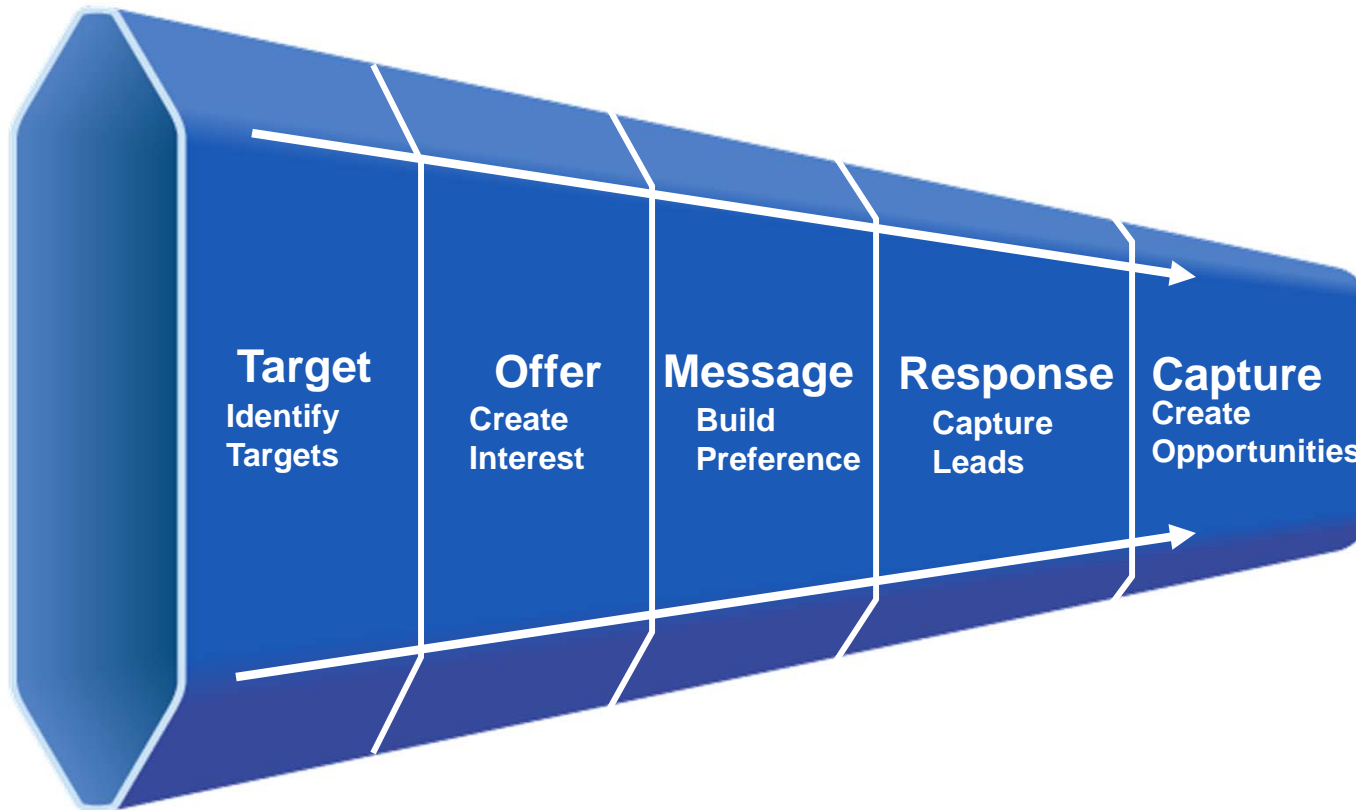# SugarCRM Marketing Automation

June 6, 2011

SUGARCRM.
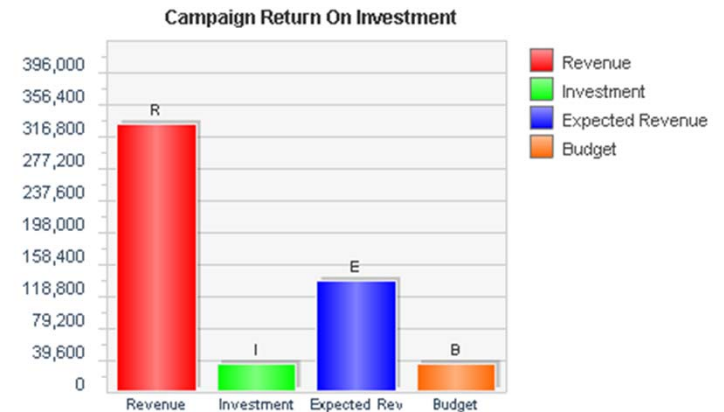
What is Marketing Automation?

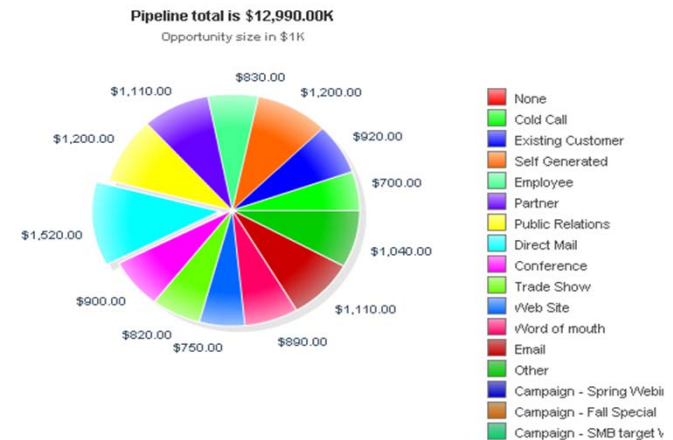Define, create, execute and measure marketing activities

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Generate Higher ROI on Marketing Activities

- Create and execute campaigns across marketing channels
- Captures leads directly into CRM System
- Measures return on investment of campaigns

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SugarCRM Marketing Automation

| Issues	Solution	Impact
Difficulty launching and managing campaigns across channels	▪ Multichannel campaigns and campaign set-up wizard ▪ Create target lists based on reports or from 3rd part data sources	**Create email, telesales, ad campaigns in a few simple steps**
Importing leads into CRM requires intensive manual efforts	▪ Import/Export from multiple data sources in a few simple steps ▪ Web-to-lead forms capture leads on web site and auto-import into Sugar	**Spend less time on manual processes and more time on effective marketing**
Inability to measure marketing programs	▪ ROI calculator for each campaign tracks lead-to-sale process ▪ Pre-built dashboards show leads by source and sales stages	**Obtain all the tools to ensure marketing is accountable**

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Multichannel Marketing

- 🔴 **Supports all disciplines:**
  - ⚪ Broadcast Marketing
  - ⚪ Direct Marketing
  - ⚪ Lead Nurturing
- 🔴 **Manage campaigns across all channels**
  - ⚪ Email marketing
  - ⚪ Online advertising
  - ⚪ Newsletters
  - ⚪ Event planning
  - ⚪ Search engine marketing
  - ⚪ List rentals
 - ⚪ Telesales programs
  - ⚪ Ad Programs

SUGARCRM.
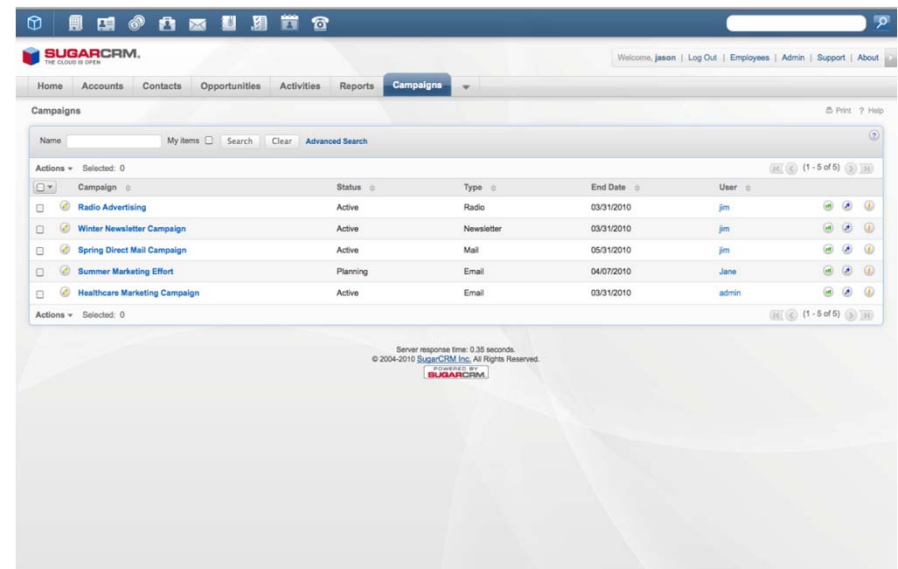
Campaign Wizard

- Simplifies campaign design, execution and tracking
- Ensures proper testing, suppression, and list management
- Offers real-time activity and ROI reports

Campaign Return On Investment

SUGARCRM.
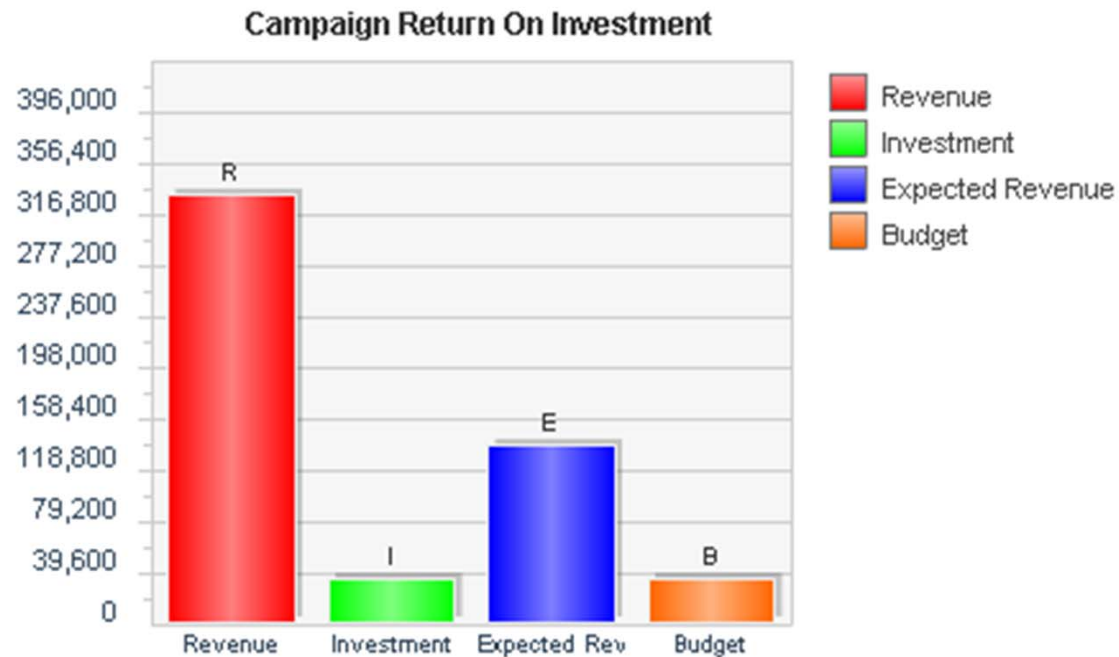
Email Marketing

- Ensure campaigns are brand consistent and coordinated across customer channels
- Monitor campaign execution to ensure offers reach the targeted audience
- Track and assign opportunities to campaign leads
- Control opt-in and opt-out lists

Campaign Response by Recipient Activity

Rollover a bar to view details.
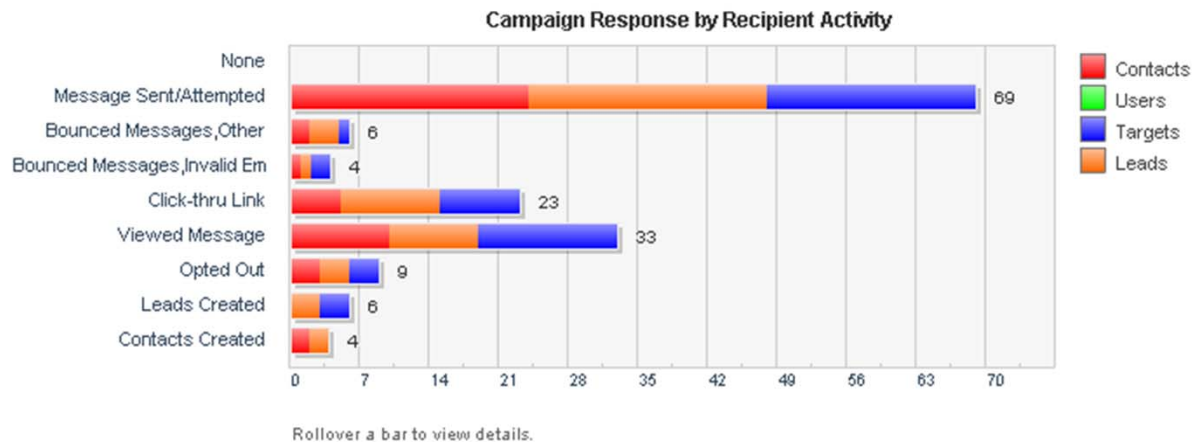
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Web-to-Lead Forms

- Automate lead import from Web into SugarCRM
- No programming needed
- Presents all fields and values from the Leads module
- Offers design flexibility and lowers IT time in marketing support

Campaigns » Lead Form Wizard

Drag and drop lead fields in column 1 & 2

Available Fields	Lead Form (First Column)	Lead Form (Second Column)
Description	First Name	Office Phone
Salutation	Last Name *	
Title		
Department		
Do Not Call		
Home Phone		
Mobile		
Other Phone		
Fax		
Primary Address Street		
Primary Address City		

Add All Fields   Cancel   Next

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Lead Management

- Segment leads based on your sales objectives
- Import and export lists from third-parties
- Automatically capture leads across multiple channels
- Convert leads to opportunities and ensure appropriate follow-up

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Marketing Analytics

- Understand the ROI of marketing programs
- Track which channel is most/least profitable
- Replicate successful campaigns in a few simple steps

ALL OPPORTUNITIES BY LEAD SOURCE

Pipeline total is $12,990.00K
Opportunity size in $1K

Legend	
None	
Cold Call	
Existing Customer	
Self Generated	
Employee	
Partner	
Public Relations	
Direct Mail	
Conference	
Trade Show	
Web Site	
Word of mouth	
Email	
Other	
Campaign - Spring Webii	
Campaign - Fall Special	
Campaign - SMB target \	

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