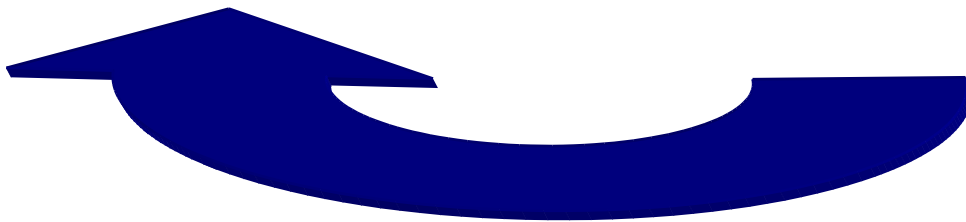# Marketing to the Masses
with SugarCRM

Marketers are facing a more challenging environment than ever. Not only has the number of campaigns and general marketing activities increased inside most organizations, but these activities are growing in complexity. Multi-channel marketing has become a given, but managing a high volume of cross-channel campaigns can be difficult without the proper tools. SugarCRM has designed its marketing automation offering to best suit the changing needs of today's marketing professionals.

This white paper explores some of the key issues facing marketers, as well as the ways in which SugarCRM's marketing software helps alleviate many of these pain points. The topics covered include:

- The challenges facing marketers today
- Managing high volume marketing activities with SugarCRM
- How SugarCRM addresses marketing activities across multiple channels
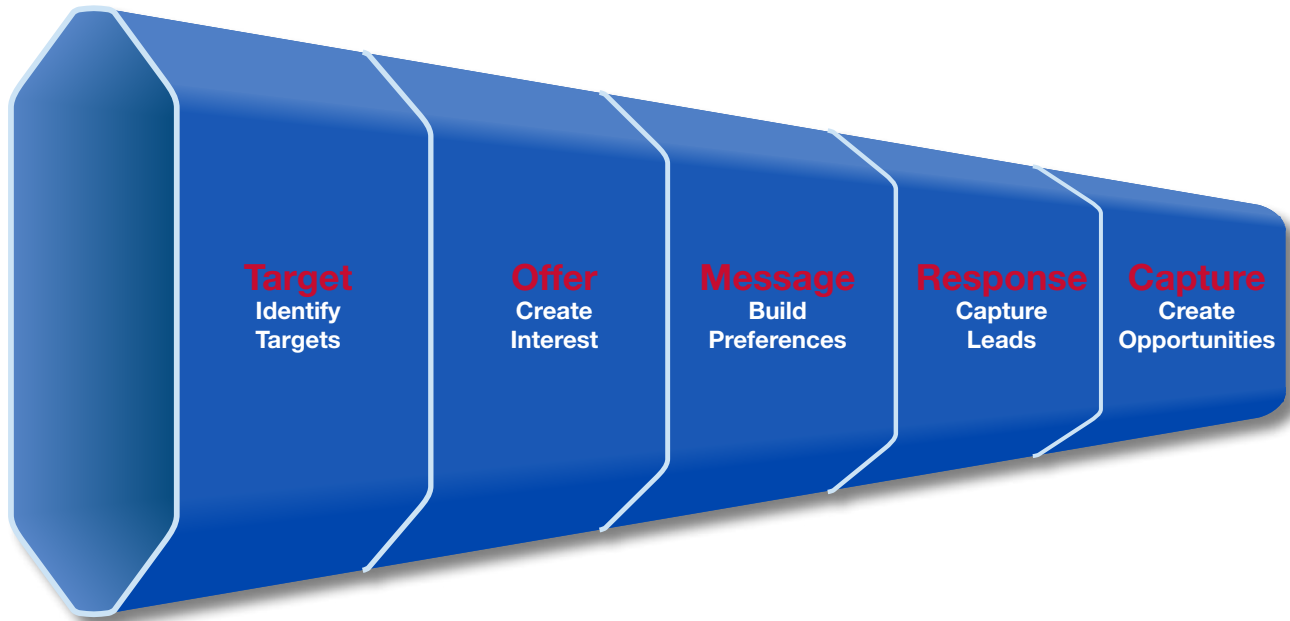- Tracking ROI on your marketing spend with SugarCRM

Automating Your Marketing Processes

For many businesses, marketing remains an art rather than a science. Money is allocated towards advertising, promotions, and other revenue generation activities, but little tracking or accountability is placed on the team performing these tasks. The old adage "Half of my marketing spend is useless…I just do not know which half," still rings very true to this day for many firms.

Apart from the simple lack of tools to help better manage marketing spend, marketing methods are changing rapidly. To survive in this day and age, companies need to not only better serve their existing customers and retain their loyalty, but must also constantly seek and win new customers. What results is a constant loop of customer acquisition and retention, resulting in multiple ongoing campaigns over various media that often overlap in terms of time and scope. Managing these campaigns manually is time consuming and causes major lag time in terms of reacting to the leads generated and the insight gained by these activities.

But the fact is, organizations need to get smarter about how and where they market to their customers. The internet has enabled more personalized and direct communication between a company and its prospective customers. And the advances in customer relationship management (CRM) software make it easier than ever to more intelligently manage where marketing dollars go, and to see which campaigns and promotions are the most effective. And CRM systems can simply help automate a lot of these once highly manual and labor intensive processes, which in itself saves valuable time and money in the campaign creation and execution process.

"We have seen tremendous results from using SugarCRM. Our marketing team has become more effective in communicating to the right customers at the right time."

Naomi Simson
CEO
RedBalloonDays

Take a look at this process funnel:

How many of the steps in this basic marketing process model are automated within your organization? If the answer is not "all," then there are gaps that a CRM system can help fill. Read on to learn more about how SugarCRM has built up a full marketing automation tool set to best serve the high volume, multi-channel world that marketers live in today.

Marketing Automation in a High Volume Environment

While the need to generate new business is always a priority, the need to better nurture and upsell existing clients is also paramount in many businesses. Organizations simply need to manage a much higher volume of campaigns and other outbound marketing activities at a time. Gone are the days when companies could send out a few direct mail campaigns and hope for the best. Instead, organizations need to manage several mass marketing campaigns as well as a large volume of smaller, more targeted email campaigns to new and existing customer segments.

One of the great aspects of a CRM system is that it enables marketers to manage several opportunities at a time. Sometimes, you are marketing to overlapping groups of targets, as well as looking to target completely new sets of prospects. SugarCRM's marketing automation tools allow marketing managers to not only manage several different campaigns, but the system also provides high visibility across these campaigns.

With dashboard views into key performance metrics, marketers can see where the most leads are coming from. They can also see which campaigns are the most productive in terms of sales conversions. Able to see this complex data at a glance, marketers can quickly act on this information, altering marketing spend or activities to better suit the trends they see in the CRM data.

All Opportunities By Lead Source

$220K
$160K
$235K
$135K
$135K
$270K
$125K
Employee
$350K   17.9%
Click for drilldown
$85K
$350K
$85K
$75K $75K

Employee   Conference   Public Relations   Self Generated
Web Site   Other   Partner   Word of mouth
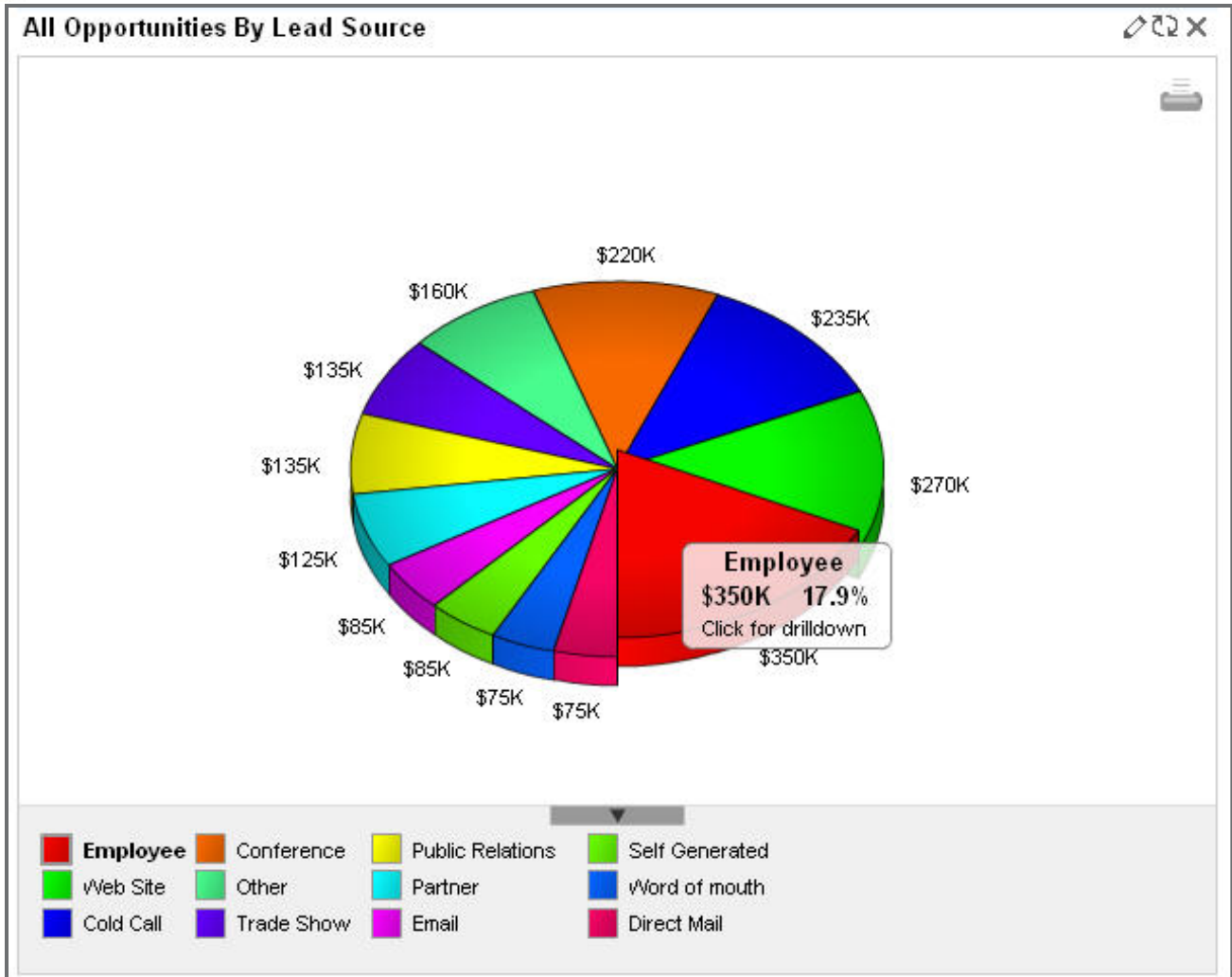Cold Call   Trade Show   Email   Direct Mail

Fig 1. This is just one of the many graphical views marketers have that provide insight into how their high volume marketing system is operating. This dashboard view gives marketers a better idea of which marketing activities are generating qualified sales opportunities. With this data, marketing executives can adjust marketing budgets to better focus on high performing activities.

Managing Multiple Marketing Channels

While marketers are now dealing with a higher volume of marketing campaigns and lead generation activities, these campaigns are becoming increasingly diverse in terms of delivery media. The average B2B organization acquires new customers by a variety of methods. There are more traditional methods, such as trade show attendance and participation, as well as direct mail and newsletters. But more and more, companies are relying on new concepts like email campaigns, web marketing, search engine optimization, banner ads, podcasts, vidcasts, behavior tracking and etc. So, companies are now managing more campaigns than ever.

The SugarCRM marketing automation tools have been designed to manage activities across multiple channels, such as the web, email, traditional mail and even telesales activities. The Campaigns module allows marketers to design and execute multiple campaigns across many channels in a fully automated fashion. Target lists from the Opportunities and Leads modules can be instantly pulled into the campaign design process. And a Campaign Wizard makes creation of any type of supported campaign foolproof.

Fig. 2. The Campaigns module allows users to manage multiple campaigns across several channels, all from one easy to use console.
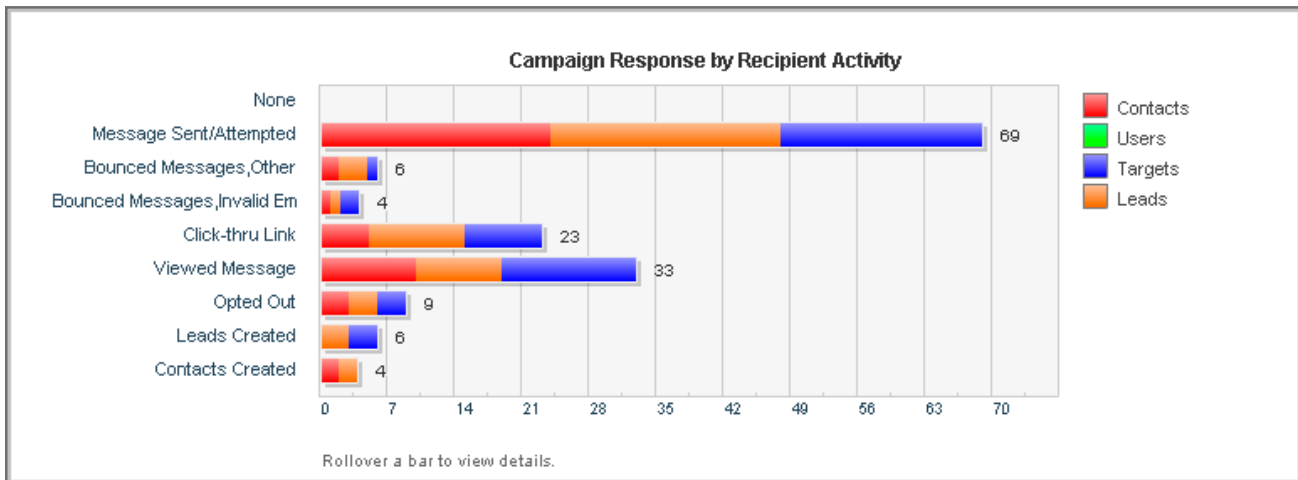

Fig 3. The Campaigns module includes many reports out of the box. This report gives marketers instant visibility into the target activity surrounding an email campaign.

"We have a much better grip on expected revenues due to Sugar, which helps us manage our business more effectively."

John Gromala
VP Sales and Marketing
NinjaTrader

As email marketing becomes the preferred method of communicating with customers, SugarCRM has built out its email marketing capabilities accordingly. With more stringent rules about email contact, SugarCRM has built in ability to control opt-in and opt-out lists so that prospects and customers are receiving relevant email. Of course, the digital nature of email allows all emails to be tracked. With SugarCRM, marketers can instantly see at any time throughout an email campaign which targets opened the emails, which ones bounced back, which prospects actually clicked through to a link inside the email, and various other metrics. Marketers can easily take this information and easily create leads from these activity reports, or assign opportunities to the leads generated in these campaigns.

The Internet is also a great medium for reaching new customers, and SugarCRM has built out a web-to- lead form which allows users to capture pertinent customer data in a highly automated fashion. By using a simple wizard, users can create web-based forms that can be used for a variety of lead and data capture initiatives. There is also an easy to use html editor to change the look and feel of the form to best match a company's web property. And the forms can also easily be formatted using external web design tools.

Fig 4. This screenshot shows how simple it is to create web-to-lead forms in Sugar. Users simply pick the available fields they want expressed presented on the form, and with the click of the mouse the form can be deployed via email or on a user's web site.

Web-to-lead forms capture the data and instantly import the lead information captured into the Leads module. So, no programming or IT involvement is needed to create multiple lead capture tasks. The forms can utilize all of the fields and values from the Leads module, so the forms can be as in-depth or as simple as the user desires.

Tracking Return on Marketing Investment

As marketing teams are now being held more accountable for increasing top line sales and aiding profitability, organizations need a system that better tracks the success of marketing activities. SugarCRM's marketing modules are designed to do just that.

Tying the marketing tools into Sugar's robust reporting capabilities provides detailed views into effectiveness of campaigns across marketing and sales. Since marketers can associate opportunities to campaigns, once that sale is made, a report can be generated revealing which closed deals were tied to which campaign. Marketers can also easily create benchmarks to determine which campaigns are the most successful.

And since marketers can see which campaigns were most successful, they can then replicate those campaigns easily. By adding new target lists to saved campaigns built with the Campaign Wizard feature, a new campaign with a high likelihood of success can be deployed in minutes.

Also, for more complex sales processes, the reporting and analysis tools allow for better management of multiple campaign offers across sales stages. So, if sales and marketing teams require multiple touch points along a sales process, those steps can be more easily tracked and managed in the system. Marketers can see where sales may not have picked up the handoff between departments, and follow up accordingly.

"Sugar makes it extremely easy to stay in contact with our prospects—something that is vital in our industry. We are all in agreement that our investment in Sugar has had a big impact on our bottom line."
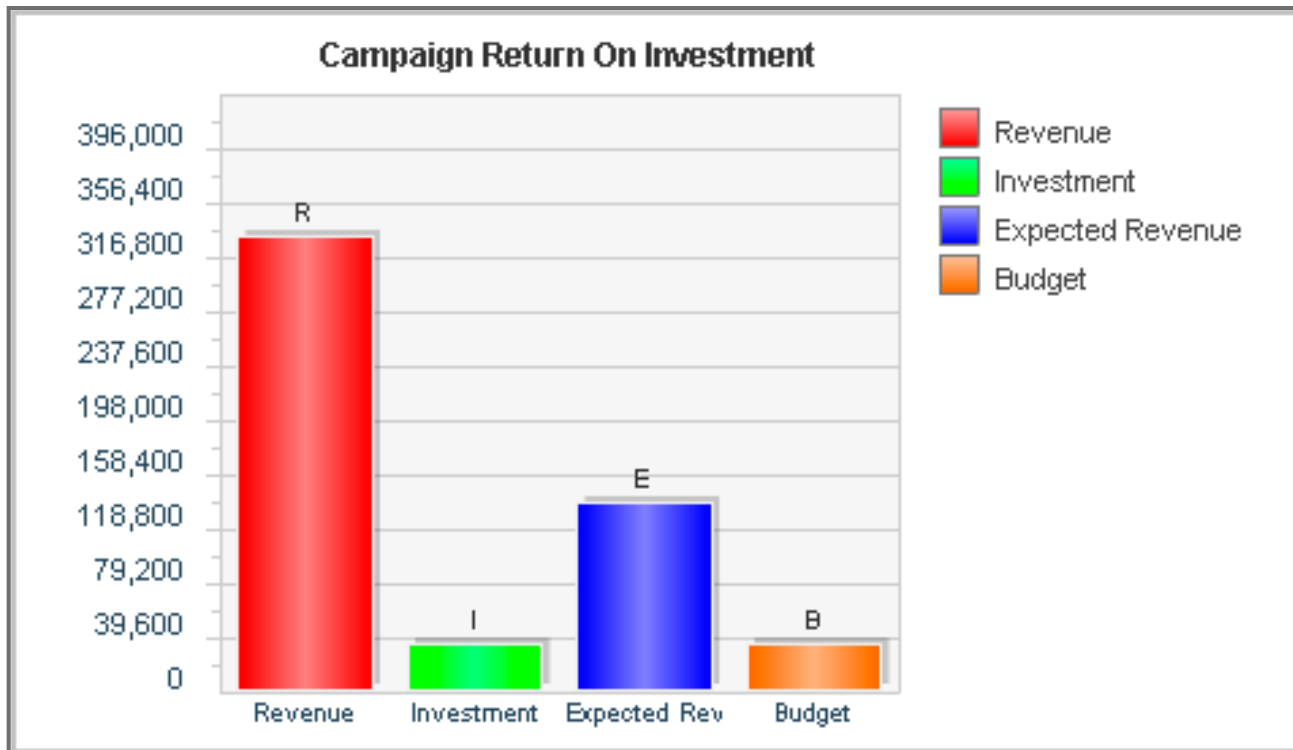
Dan Gronnin
Director of Marketing
Rise Realty

Fig 5. SugarCRM allows marketers to easily generate reports indicating the success of an individual campaign. The robust reporting system also allows marketers to gauge the success of multiple campaigns at a glance.

Conclusions

As the basic principles of marketing move forward, organizations need a system that can keep up with the growing complexity of high volume marketing. SugarCRM's marketing tools were designed with the modern marketer in mind. The result is a flexible, scalable marketing automation system that handles diverse marketing activities across multiple channels.

And the SugarCRM marketing tools was also designed to better assist marketers being held more accountable for outbound marketing campaigns and tasks. With strong analytics and tools to measure return on investment, both managers and front-line marketers alike can gain more visibility into the most profitable activities earlier in the cycle. And Sugar's marketing tools make it easier than ever to replicate and re-deploy the most successful marketing campaigns. And the reporting tools present this critical data in an easily consumed and distributable format. All told, with the demands being placed on marketing departments in today's demanding business world, few marketing managers can afford not to have a strong system in place to manage the growing number of complex marketing activities going on in their line of business.

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**

SugarCRM is a highly flexible system designed to solve the myriad of issues sales, marketing and service professionals face every day. This chart details how some of the more common problems facing marketers today are resolved utilizing Sugar's marketing automation tools.

Faye Business Systems Group
Helping you over the wall.

About Faye Business Systems Group

Faye Business Systems Group is a Southern California-based technology consulting firm and software company with over 25 years of experience in helping growing companies get "over the wall" and optimize their financial and business systems to become more profitable. FBSG uses SugarCRM, Sage MAS 90 and MAS 200, and a variety of custom software solutions to meet client needs. Services include software development, project management, packaged software implementations, custom software implementations, integration, consulting, training, and support. For more information, call (818) 227-5130, email info@fayebsg.com, or visit http://www.fayebsg.com.

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