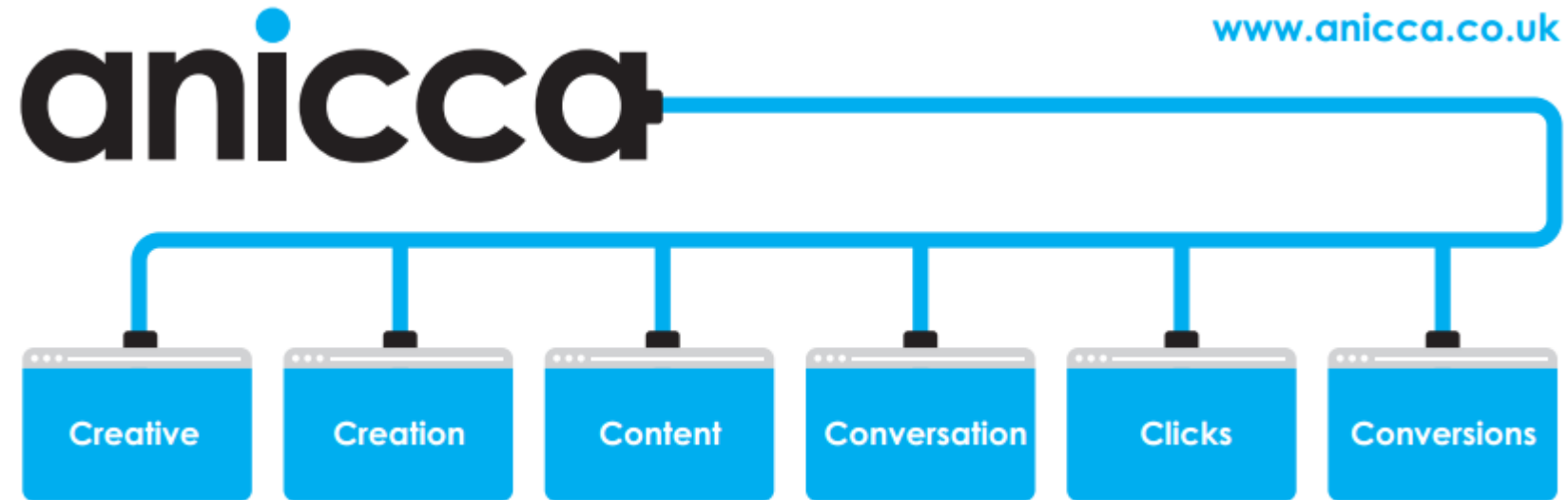


Solving Common Sales & Marketing Problems Using Marketing Automation Software (MAS)

Presented on 24/9/2014
at SEM Days, Bucharest,
by Ann Stanley, Managing Director







Background to Marketing Automation Software (MAS)

What is Marketing Automation?

- A software platform used for automation and integration of your sales and marketing processes
- Mainly used for lead generation and nurturing by B2B companies, particularly where there is a long buying cycle

Key Parts of Marketing Automation?



Initial set-up of MAS

All packages

- Customise **account settings** e.g. for location
- **Tag website** with relevant tracking code
- Set-up **staff users** and profiles
- Use **API Connectors** to link to other software e.g. CRM, AdWords, WordPress
- Upload your **logos and branding**
- Create **website forms**
- **Import lists** (via CSV), map field names, add unsubscribes

Some packages

- Create **Opportunity stages** (for the sales process)
- Set up campaigns (**where did you hear about us?**)
- Use **Social Connectors** e.g. Twitter, LinkedIn (if applicable)
- Set-up **competitors'** websites and social profiles

Set-up tracking code

Settings

MY ACCOUNT

Settings

MY COMPANY

Company Profile

User Accounts

Billing Info

FEATURES

Emails

Custom Fields

Lead Scores

Opportunity Stages

VisitorID

TRACKING

Dynamic Web Content

Shopping Carts

3RD PARTY SETTINGS

SalesForce

SugarCRM

Google AdWords

Webex Credentials

GotoWebinar Credentials

Tracking Options

Dynamic Content

Shopping Carts

Dynamic Web Content

Offer dynamic content to your known leads.

When SharpSpring tracking code is embedded, we'll return any lead data for the person currently viewing your site. This allows you to run any JavaScript code based on that lead's information.

Use this functionality to make your site respond to leads in a more tailored way. For example, a lead with a low lead score indicating that they are new to your site could receive educational materials, or a lead that you're familiar with could receive an offer for instant savings.

Embed Modifications

```
_ss.push(['_setResponseCallback', callThisOnReturn]);
```

Where "callThisOnReturn" is a JavaScript function. The function receives a response object with a "lead" object inside with all the standard lead fields.

```
response: {lead: {id: 1234, 'firstName': 'Joe', 'lastName': 'Smith', ...}}
```

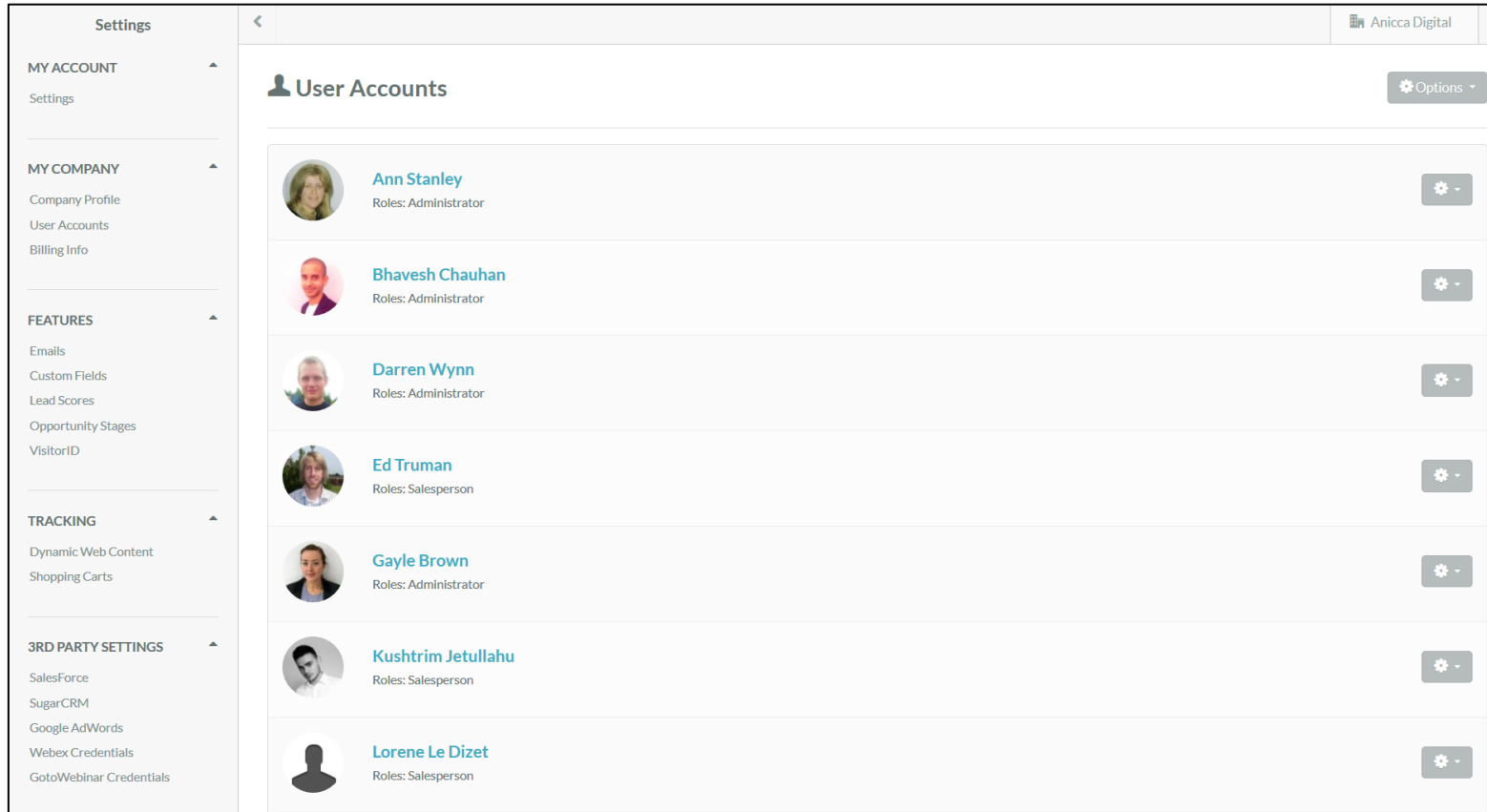
Example

How to make changes to your tracking code.

```
1 <script type='text/javascript'>
2
3   var callThisOnReturn = function(resp) {
4
5     if (resp && resp.lead) {
6       alert('Hi there ' + lead.firstName); // just an example, don't actually use an alert :)
7     }
8
9   };
10
11 </script>
12
13 <script type='text/javascript'>
14
15   var _ss = _ss || [];
16   _ss.push(['_setDomain', 'http://app.sharpspring.com/net/']);
17   _ss.push(['_setAccount', 'KOI-XXXXX']);
18   _ss.push(['_setResponseCallback', callThisOnReturn]);
19   _ss.push(['_trackPageView']);
20
```

Add to your site (ideally via Google Tag Manager)

Set-up unlimited users



The screenshot shows the 'User Accounts' settings page in the Anicca Digital interface. The left sidebar contains a 'Settings' menu with categories: MY ACCOUNT, MY COMPANY, FEATURES, TRACKING, and 3RD PARTY SETTINGS. The main content area is titled 'User Accounts' and lists six users with their roles and an 'Options' button for each.

User Name	Role	Options
Ann Stanley	Administrator	[Options]
Bhavesh Chauhan	Administrator	[Options]
Darren Wynn	Administrator	[Options]
Ed Truman	Salesperson	[Options]
Gayle Brown	Administrator	[Options]
Kushtrim Jetullahu	Salesperson	[Options]
Lorene Le Dizet	Salesperson	[Options]

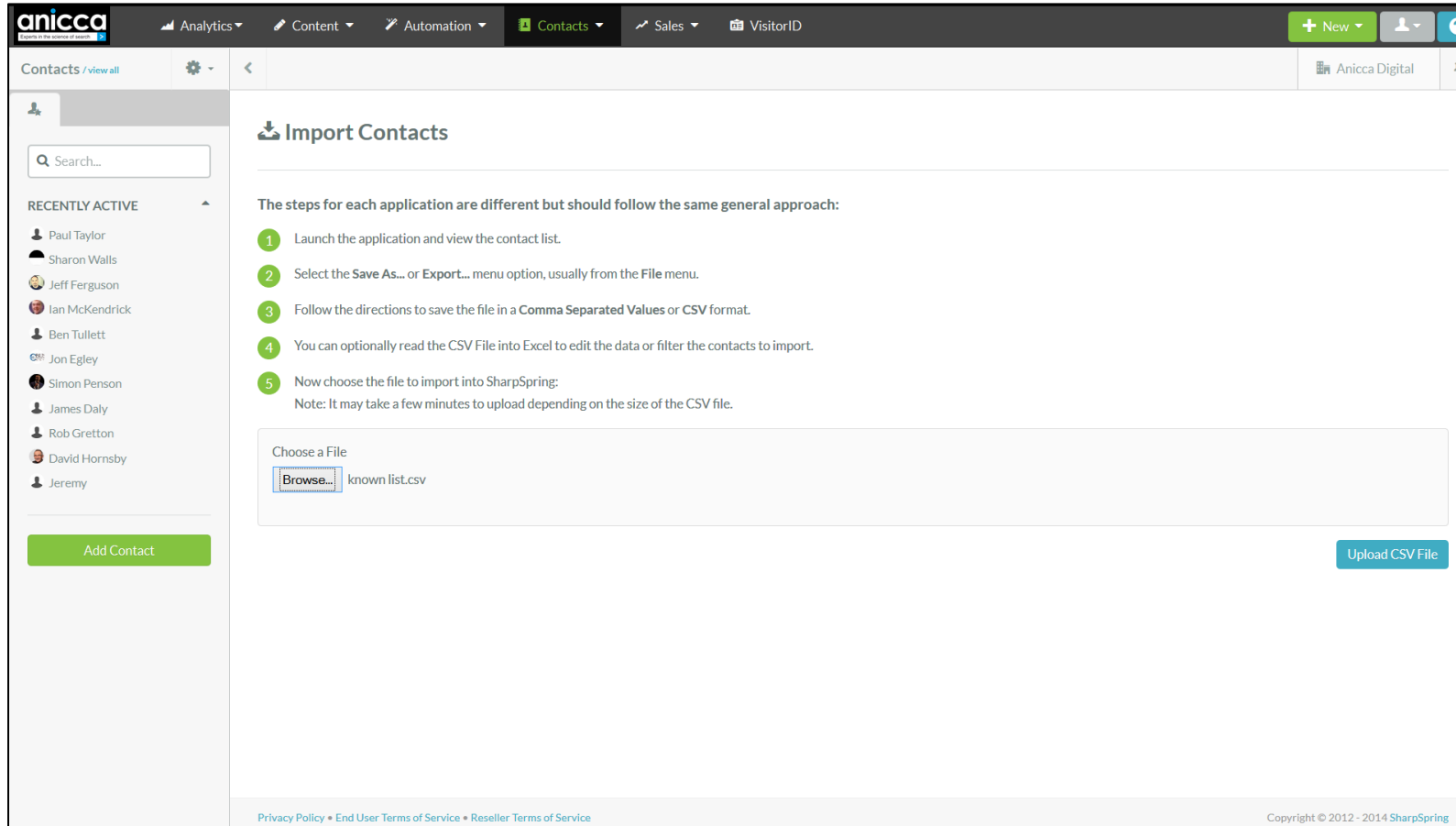
Use of MAS
to solve common sales and
marketing problems

Customer Relationship Management (CRM) and List Management

CRM and List Management

Problem	Common Solutions	MAS solution
<ul style="list-style-type: none">• Use of Excel for your customer contacts• Multiple lists in each department• No central or correct list• Contacts out of date• Creation of segmented lists	<ul style="list-style-type: none">• Use of Customer Relationship Management (CRM)• Zoho, Sugar CRM, Salesforce, Microsoft Dynamics	<ul style="list-style-type: none">• Internal CRM system with contact manager in the MAS• Integration with 3rd party CRM systems• Upload existing lists into MAS• Creation of dynamic lists within MAS

Importing a CSV list of contacts into MAS



The screenshot displays the Anicca MAS web application interface. The top navigation bar includes tabs for Analytics, Content, Automation, Contacts (active), Sales, and VisitorID. A sidebar on the left shows a search bar and a list of 'RECENTLY ACTIVE' users. The main content area is titled 'Import Contacts' and provides instructions for importing a CSV file. It includes a numbered list of five steps: 1. Launch the application and view the contact list. 2. Select the 'Save As...' or 'Export...' menu option, usually from the File menu. 3. Follow the directions to save the file in a Comma Separated Values or CSV format. 4. You can optionally read the CSV File into Excel to edit the data or filter the contacts to import. 5. Now choose the file to import into SharpSpring; Note: It may take a few minutes to upload depending on the size of the CSV file. Below the instructions, there is a 'Choose a File' section with a 'Browse...' button and the text 'known list.csv'. An 'Upload CSV File' button is located at the bottom right of the main content area. The footer contains links for Privacy Policy, End User Terms of Service, and Reseller Terms of Service, along with a copyright notice for SharpSpring from 2012 to 2014.

anicca Analytics Content Automation **Contacts** Sales VisitorID + New User Profile Help

Contacts / view all

Search...

RECENTLY ACTIVE

- Paul Taylor
- Sharon Walls
- Jeff Ferguson
- Ian McKendrick
- Ben Tullett
- Jon Egley
- Simon Penson
- James Daly
- Rob Gretton
- David Hornsby
- Jeremy

Add Contact

Import Contacts

The steps for each application are different but should follow the same general approach:

- 1 Launch the application and view the contact list.
- 2 Select the **Save As...** or **Export...** menu option, usually from the File menu.
- 3 Follow the directions to save the file in a **Comma Separated Values** or **CSV** format.
- 4 You can optionally read the CSV File into Excel to edit the data or filter the contacts to import.
- 5 Now choose the file to import into SharpSpring:
Note: It may take a few minutes to upload depending on the size of the CSV file.

Choose a File

Browse... known list.csv

Upload CSV File

Privacy Policy • End User Terms of Service • Reseller Terms of Service

Copyright © 2012 - 2014 SharpSpring

Importing lists using CSV and mapping field names

Import Leads / Map Fields

Note: It may take a few minutes to upload depending on the size of the CSV file.

LIST SETTINGS

List Name
Known contact

Import List As...
Contacts

How should we handle duplicate leads?
Ignore the record completely.

☒ Assign these leads to a campaign?
Existing database contact

☐ Assign these leads to a particular user?

Don't Import

Custom CSV Field

Use CSV Column Title

Fields

First Name
Last Name
Email
Company Name
Title
Industry
Website
Phone Number
Number of Bounces
Hard Bounced Email Address
Mobile Phone
Fax
Street
City
Country
State

CSV Columns	Lead Fields
Score	Act-On Lead Score
Salutation	Salutation
First Name	First Name
Last Name	Last Name
E-mail Address	Email
Company	Company Name
Job Title	Title


Creating a new list

Add New List

What's your list name?

High Scores

☒ Rules Based - Contacts are added as they match criteria
☐ Manual - Add specific people to the list




Rules based lists are created via a set of triggers or filters.
Manual list members are added via import or individually.

Cancel

Create List

Creating a Dynamic filter (List = High scores)


When all of the groups
conditions are met...

+ New Group

Apply
when any
of the following conditions are met:
RULE GROUP 1

Add the Trigger
: When a contact
fills out the form
Select a Form
Add Rule

Triggers

Filters

1. When a contact has the lead score of 25 or more
-or-
2. When a contact has the field **Act-On Lead Score** with 30 or more
-or-
3. When a contact has the field **Mailchimp Score** with 40 or more
-or-
4. When a contact has the field **Mailchimp Score** with Unknown - 30+ exactly

AND

Apply
when any
of the following conditions are met:
RULE GROUP 2

Add the Trigger
: When a contact
fills out the form
Select a Form
Add Rule

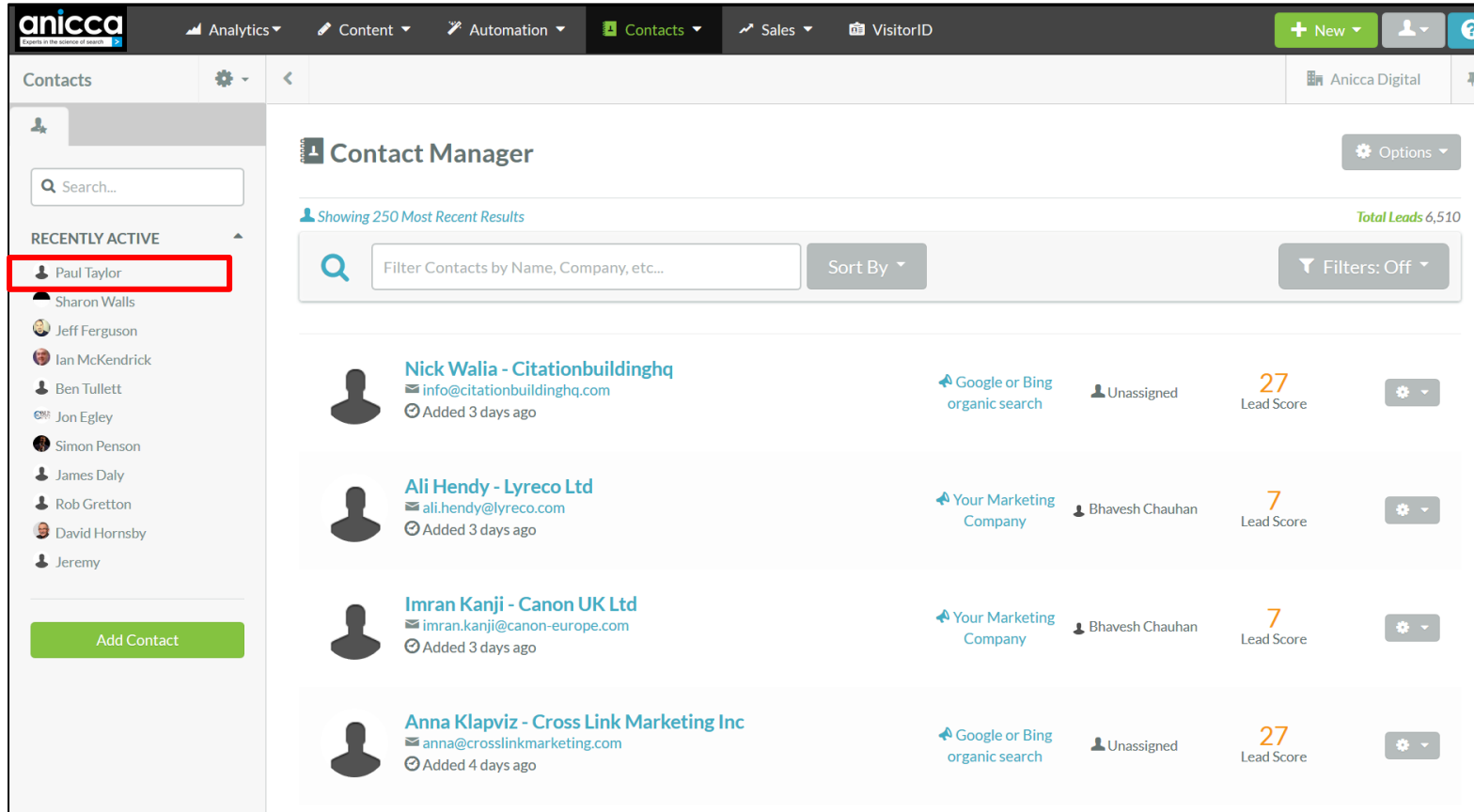
Triggers

Filters

1. When a contact is not a member of the list **Unsubscribe**

Save Changes

Contact manager



The screenshot displays the Anicca Contact Manager interface. The top navigation bar includes tabs for Analytics, Content, Automation, **Contacts**, Sales, and VisitorID, along with a '+ New' button and user profile icons. The left sidebar features a search bar and a 'RECENTLY ACTIVE' list with names like Paul Taylor, Sharon Walls, and others. The main area is titled 'Contact Manager' and shows 'Showing 250 Most Recent Results' and 'Total Leads 6,510'. It includes a search filter, a 'Sort By' dropdown, and a 'Filters: Off' button. Below this, four contact cards are listed, each showing a name, email, source, assigned user, and lead score.

Name	Email	Source	Assigned To	Lead Score
Nick Walia - Citationbuildinghq	info@citationbuildinghq.com	Google or Bing organic search	Unassigned	27
Ali Hendy - Lyreco Ltd	ali.hendy@lyreco.com	Your Marketing Company	Bhaves Chauhan	7
Imran Kanji - Canon UK Ltd	imran.kanji@canon-europe.com	Your Marketing Company	Bhaves Chauhan	7
Anna Klapviz - Cross Link Marketing Inc	anna@crosslinkmarketing.com	Google or Bing organic search	Unassigned	27

Contact record

anicca
Experts in the science of people

Analytics

Content

Automation

Contacts

Sales

VisitorID

+ New

Contacts / view all

Anicca Digital

Search...

RECENTLY ACTIVE

Imran Kanji

Ali Hendy

Paul Taylor

Sharon Walls

Jeff Ferguson

Ian McKendrick

Ben Tullett


Jon Egley

Simon Penson

James Daly

Rob Gretton

Add Contact



Paul Taylor
at Brittany Travel

Added 12 days ago

Overview


Life of a Lead 16

Memberships 8


Lead Score 38

Tracking Devices 1

Contact




Paul Taylor




Title not provided


Connect




ptaylor@fcvillas.co.uk



Phone not provided




No mobile provided




Fax not provided


Company Information




Brittany Travel



Hospitality



fcvillas.co.uk



Location not provided


Notes

Auto-Notify

Add To

Client (existing or previous)

Assigned To Ann Stanley




Ann Stanley

☒ Associate with opportunity • Tue July 15th

Add a Comment

Tasks and Reminders

New



Brittany - meeting with Ann to discuss proposal

Due 5 days ago

Assigned to Ann Stanley

Custom Fields

Save

Monthly Marketing Budget

Act-On Lead Score

Mailchimp Score

£500 - £1000


36

30

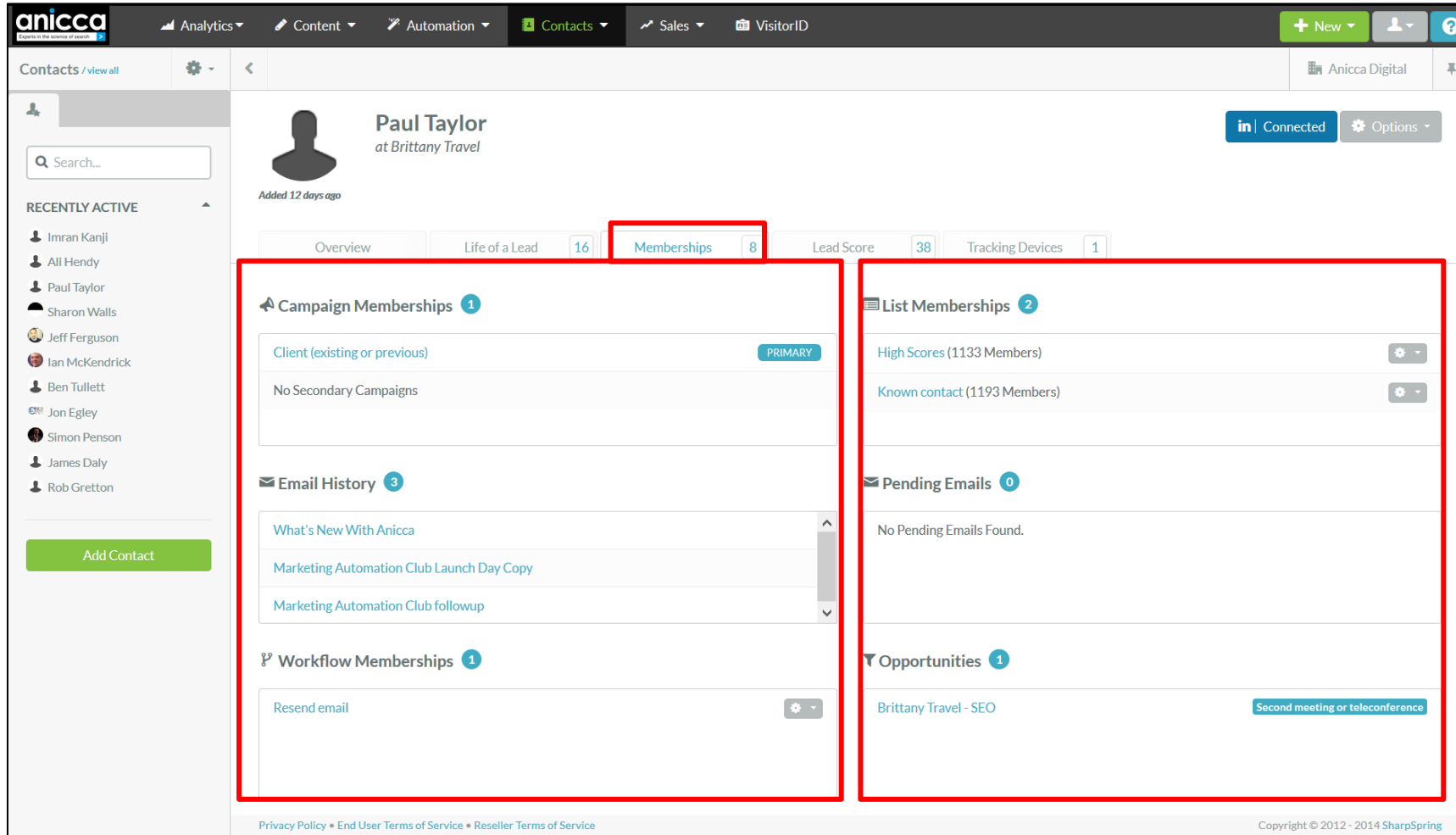
Salutation

Type

Client - old



List membership and activities



anicca Analytics Content Automation **Contacts** Sales VisitorID + New

Contacts / view all

Paul Taylor
at Brittany Travel
Added 12 days ago

Overview Life of a Lead 16 **Memberships 8** Lead Score 38 Tracking Devices 1

Campaign Memberships 1

- Client (existing or previous) PRIMARY
- No Secondary Campaigns

Email History 3

- What's New With Anicca
- Marketing Automation Club Launch Day Copy
- Marketing Automation Club followup

Workflow Memberships 1

- Resend email

List Memberships 2

- High Scores (1133 Members)
- Known contact (1193 Members)

Pending Emails 0

No Pending Emails Found.

Opportunities 1

- Brittany Travel - SEO Second meeting or teleconference

RECENTLY ACTIVE

- Imran Kanji
- Ali Hendy
- Paul Taylor
- Sharon Walls
- Jeff Ferguson
- Ian McKendrick
- Ben Tullett
- Jon Egley
- Simon Penson
- James Daly
- Rob Gretton

Add Contact

Privacy Policy • End User Terms of Service • Reseller Terms of Service

Copyright © 2012 - 2014 SharpSpring


Management of staff tasks and customer notes


Managing staff tasks and customer notes

Problem	Common Solutions	MAS solution
<ul style="list-style-type: none">• Allocation and tracking of staff tasks• Tasks recorded in calendars• History of activities associated with customers• Ability of staff to see all notes, correspondence and emails for a customer	<ul style="list-style-type: none">• All staff copied into emails (just in case they are interested)• Use of separate or integrated calendars• CRM systems such as Zoho SalesForce etc. have staff tasks linked to customer records• Task management software e.g. Asana	<ul style="list-style-type: none">• Allocation of tasks to staff – saved onto customer record• Email sent with calendar integration/invite• History of notes and activities stored on customer record• History of emails stored on customer record

Adding a task to a customer record

Tasks and Reminders

 Brittany - meeting with Ann to discuss proposal
Due 5 days ago Assigned to Ann Stanley



New

A general Reminder

Make a phone Call

Send an email

Schedule a Reminder

Brittany Travel - send meeting notes


A general Reminder Ann Stanley Brittany Travel - SEO

Complete by
2014-07-15 05 30 PM Specify Time

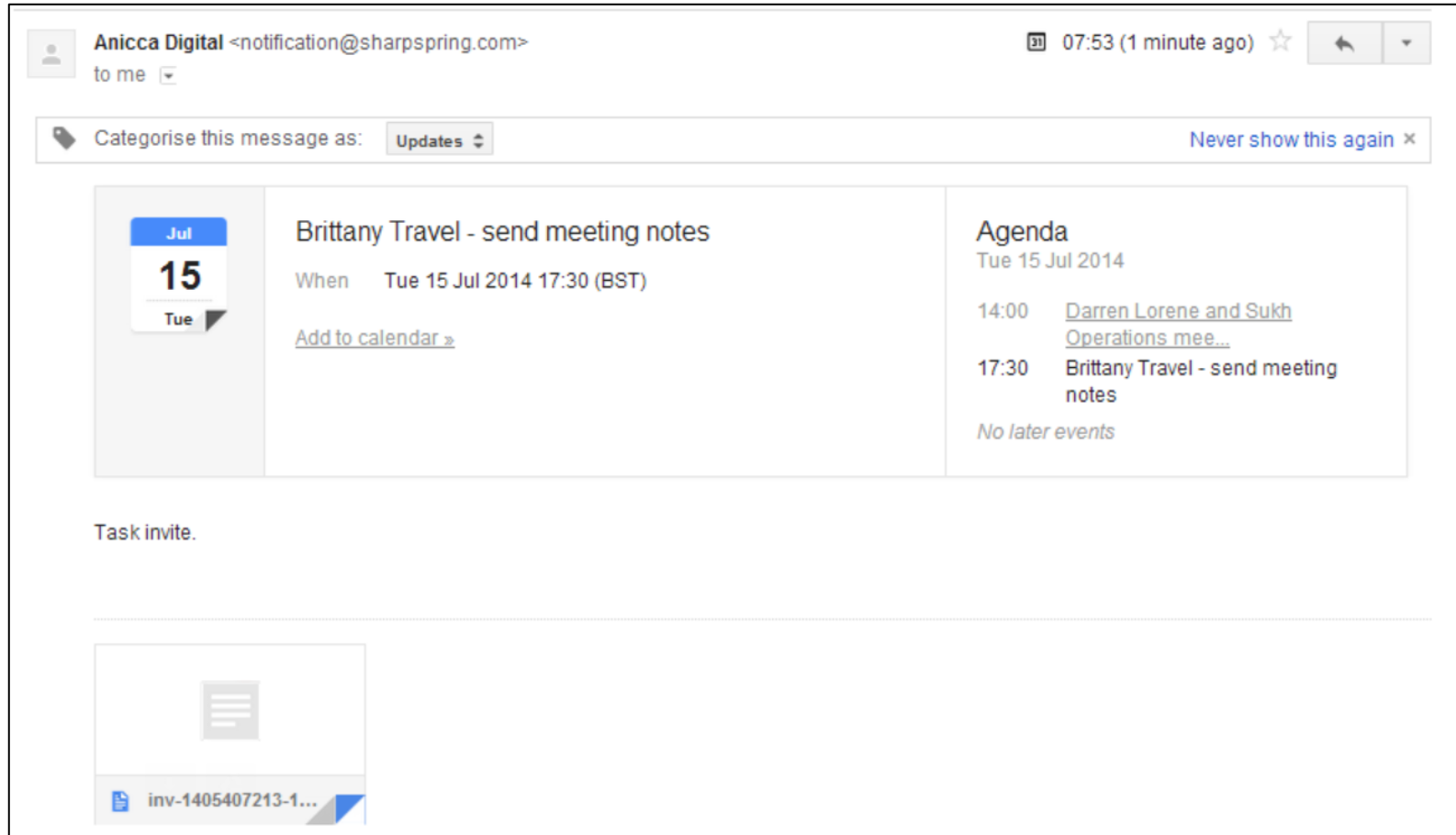
☒ On Save send a calendar invite to the task's owner

Cancel Set Reminder

Tasks and Reminders

 Brittany Travel - send meeting notes
Due 9 hours from now Assigned to Ann Stanley

Task or meeting sent as email and can update user's calendar



Creation of new forms and
landing pages on your website

Creation of new forms and landing pages on your website

Problem	Common Solutions	MAS solution
<ul style="list-style-type: none">• Ability to create and add new forms onto your website• Create landing pages for specific promotions• Create landing pages for A:B testing	<ul style="list-style-type: none">• Use CMS system within your website• Use form creator plug-in on your website e.g. for WordPress• Use 3rd party landing page creation and testing tools e.g. Unbounce, Visual Optimizer, Optimizely	<ul style="list-style-type: none">• Custom field creator• Form creator (where standard and custom fields can be added)• Add form to website via an i-frame• Creation of landing pages or integration with 3rd party software

Set-up Custom fields for use in forms and contact database (CRM)

The screenshot displays the 'Custom Field Manager' interface in the Anicca CRM. The left sidebar contains navigation menus for 'Settings', 'MY ACCOUNT', 'MY COMPANY', 'FEATURES', and 'TRACKING'. The main content area lists several custom fields: 'Monthly Marketing Budget' (highlighted with a red box), 'Project Description / Enquiry', 'Services', 'Act-On Lead Score', and 'Select number of days for SEO'. Each field entry shows its type (e.g., Picklist, Textarea, Checkbox) and availability (e.g., Lead Field, Available in Forms). A settings gear icon is visible for each field.

Monthly Marketing Budget
Picklist • Lead Field • Available in Forms

Project Description / Enquiry
Textarea • Lead Field • Available in Forms

Services
Checkbox • Lead Field • Available in Forms

Act-On Lead Score
Text input • Lead Field • Available in Forms

Select number of days for SEO

Make Changes for Monthly Marketing Budget

Field Label
Monthly Marketing Budget

☒ Available when creating forms ☒ Editable in Contact Manager ☐ Email merge variable

Radio Groups display as a Drop-Down Select in the contact manager.

☐ Text Input ☐ Text Area
☒ Drop-down Select ☐ Checkbox Group
☐ Radio Group

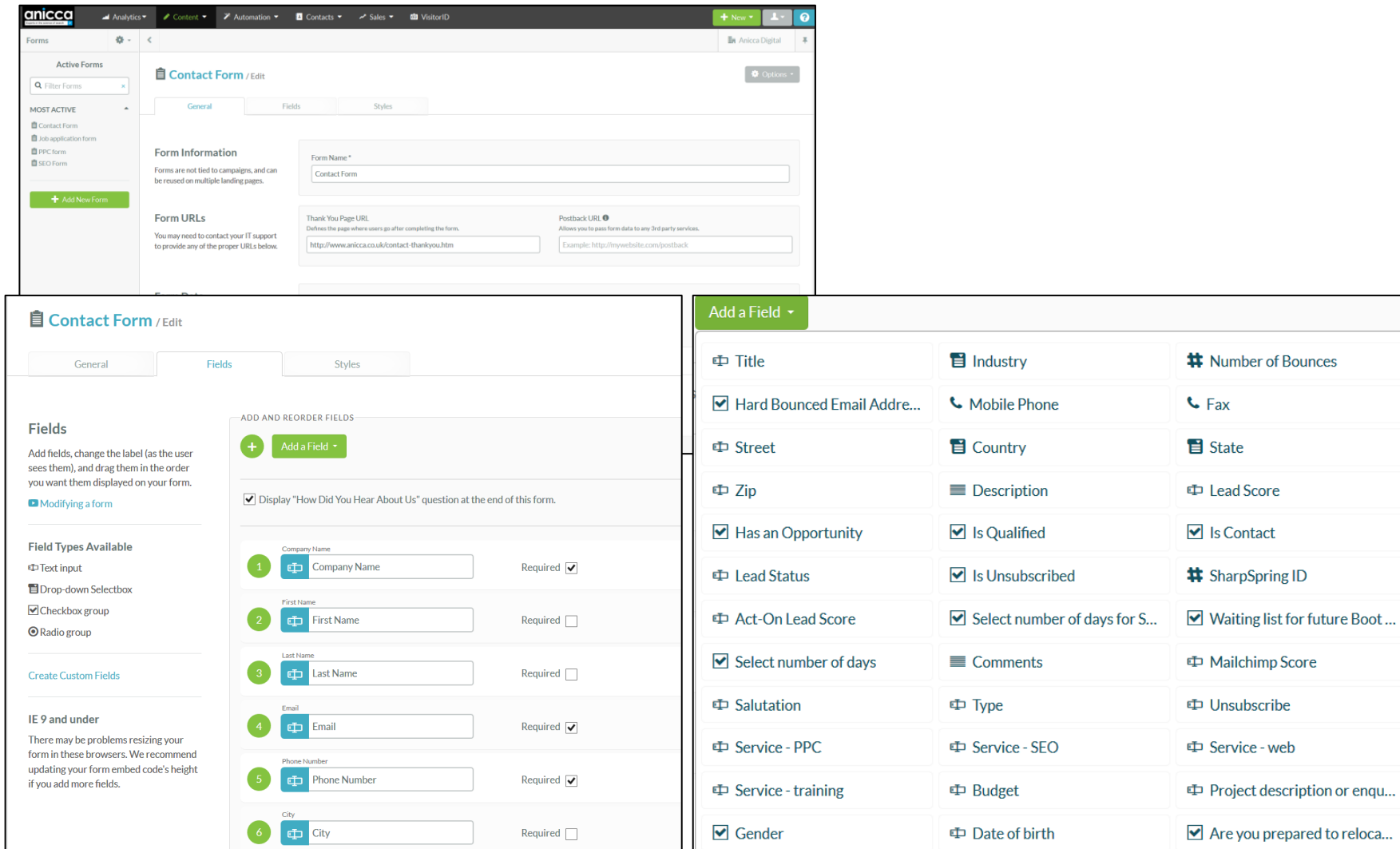
Cancel Update Field

Make Changes for Monthly Marketing Budget

Label	Value	Checked by Default
£500 - £1000	£500 - £1000	<input type="radio"/>
£1000 - £2500	£1000 - £2500	<input type="radio"/>
£2500 - £5000	£2500 - £5000	<input type="radio"/>
£5000 - £10000	£5000 - £10000	<input type="radio"/>
£10000 - £25000	£10000 - £25000	<input type="radio"/>
£25000 +	£25000 +	<input type="radio"/>

Cancel Update Field

Create (or edit) contact form using pre-existing fields or new custom fields



Form Information

Forms are not tied to campaigns, and can be reused on multiple landing pages.

Form Name *

Contact Form

Form URLs

You may need to contact your IT support to provide any of the proper URLs below.

Thank You Page URL

Defines the page where users go after completing the form.

http://www.anicca.co.uk/contact-thankyou.htm

Postback URL

Allows you to pass form data to any 3rd party services.

Example: http://mywebsite.com/postback

Fields

Add fields, change the label (as the user sees them), and drag them in the order you want them displayed on your form.

[Modifying a form](#)

Field Types Available

- ☐ Text input
- ☐ Drop-down Selectbox
- ☒ Checkbox group
- ☐ Radio group

[Create Custom Fields](#)

IE 9 and under

There may be problems resizing your form in these browsers. We recommend updating your form embed code's height if you add more fields.

ADD AND REORDER FIELDS

[+ Add a Field](#)

☒ Display "How Did You Hear About Us" question at the end of this form.

1	Company Name	Required <input checked="" type="checkbox"/>
2	First Name	Required <input type="checkbox"/>
3	Last Name	Required <input type="checkbox"/>
4	Email	Required <input checked="" type="checkbox"/>
5	Phone Number	Required <input checked="" type="checkbox"/>
6	City	Required <input type="checkbox"/>

Add a Field

<input type="checkbox"/> Title	<input type="checkbox"/> Industry	<input type="checkbox"/> Number of Bounces
<input checked="" type="checkbox"/> Hard Bounced Email Address	<input type="checkbox"/> Mobile Phone	<input type="checkbox"/> Fax
<input type="checkbox"/> Street	<input type="checkbox"/> Country	<input type="checkbox"/> State
<input type="checkbox"/> Zip	<input type="checkbox"/> Description	<input type="checkbox"/> Lead Score
<input checked="" type="checkbox"/> Has an Opportunity	<input checked="" type="checkbox"/> Is Qualified	<input checked="" type="checkbox"/> Is Contact
<input type="checkbox"/> Lead Status	<input checked="" type="checkbox"/> Is Unsubscribed	<input type="checkbox"/> SharpSpring ID
<input type="checkbox"/> Act-On Lead Score	<input checked="" type="checkbox"/> Select number of days for S...	<input checked="" type="checkbox"/> Waiting list for future Boot...
<input checked="" type="checkbox"/> Select number of days	<input type="checkbox"/> Comments	<input type="checkbox"/> Mailchimp Score
<input type="checkbox"/> Salutation	<input type="checkbox"/> Type	<input type="checkbox"/> Unsubscribe
<input type="checkbox"/> Service - PPC	<input type="checkbox"/> Service - SEO	<input type="checkbox"/> Service - web
<input type="checkbox"/> Service - training	<input type="checkbox"/> Budget	<input type="checkbox"/> Project description or enqu...
<input checked="" type="checkbox"/> Gender	<input type="checkbox"/> Date of birth	<input checked="" type="checkbox"/> Are you prepared to reloca...

Contact form added via an i-frame onto your website

www.anicca.co.uk/contact.htm

Analytics Of... Google AdWords - ... Inbox (334) - ann@a...

Sales: 0116 298 7482
 Web Technical Support: 0116 298 6458
 Online Marketing and SEO: 0116 298 7488
 Pay Per Click: 0116 298 7496
 Ann Stanley: 0116 298 6460
 Ann Stanley Mobile: 07930 384443

Or complete the form below with your enquiry

Company Name *
 Anicca Digital

First Name
 Ann

Last Name
 Stanley

Email *
 ann@anicca.co.uk

Company Name *
 Anicca Digital

First Name
 Ann

Last Name
 Stanley

Email *
 ann@anicca.co.uk

Phone Number *
 07930384443

City
 Leicester

Website
 anicca.co.uk

What services are you interested in? *

☐ PPC
 ☐ SEO
 ☐ Marketing Automation Club
 ☐ Analytics & conversions
 ☐ Training
 ☐ Web or ecommerce
 ☐ Other

Monthly Marketing Budget *
 - Select a Value -

Project Description / Enquiry

Where did you hear about us? *
 Please Choose

Submit

Please Choose

Referral - agency

Google or Bing organic search

Referral - client

Email - July Newsletter

Client (existing or previous)

Call from our marketing team

Training workshop

Google paid ad

Conference/event

Email

Other web or social media site

Please Choose

- Select a Value -

- Select a Value -

£500 - £1000

£1000 - £2500

£2500 - £5000

£5000 - £10000

£10000 - £25000

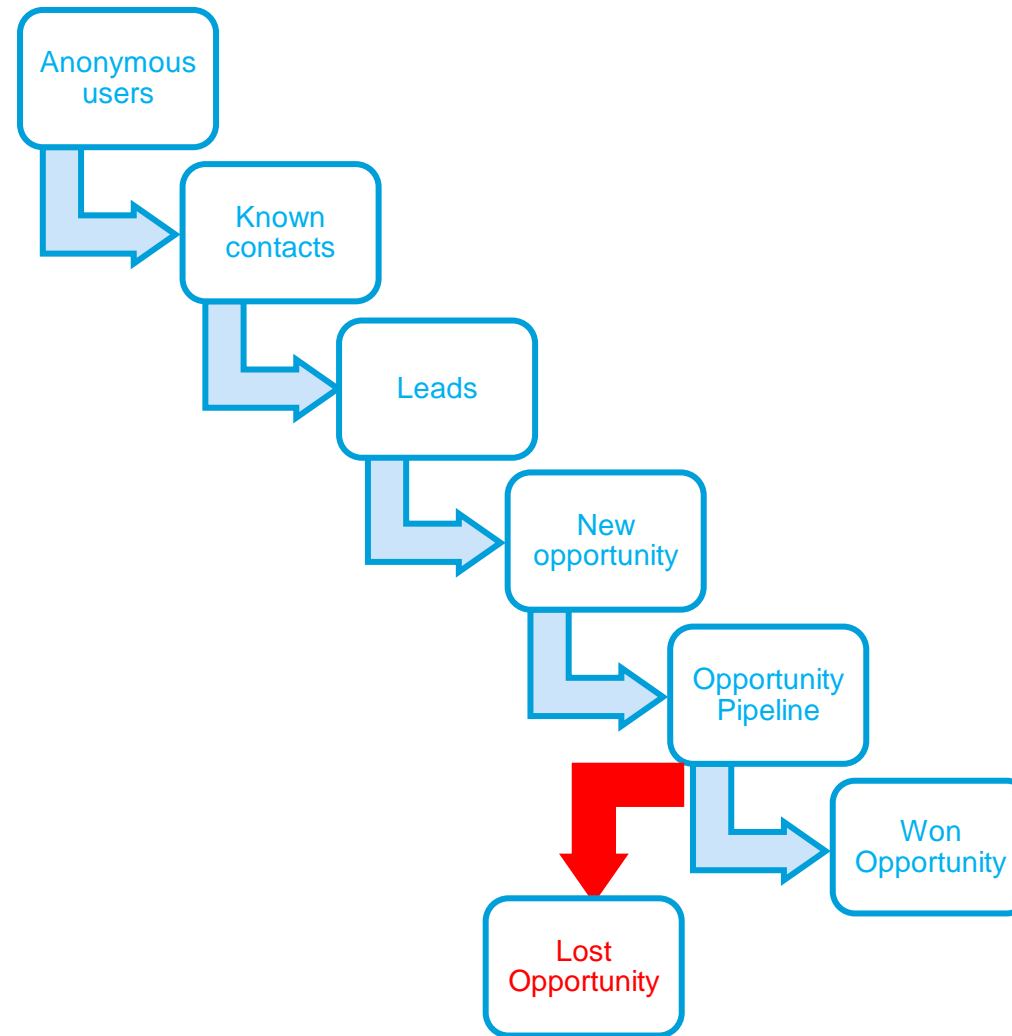
£25000 +

Anonymous visitors, tracking of
individuals and web Analytics

Anonymous visitors, tracking of individuals and web Analytics

Problem	Common Solutions	MAS solution
<ul style="list-style-type: none">• Understanding user behaviour on your website• Who has been to your website and not contacted you?• History of each individuals' visits to your site	<ul style="list-style-type: none">• Google Analytics (tracks trends and averages)• Reverse DNS Look-up to identify company name of visitors• Software from Lead Forensics, Canddi, AIwebstats, Ruler Analytics, Who Is Visiting) etc.	<ul style="list-style-type: none">• MAS also uses DNS look-up to track anonymous visitors• Refer to a database to provide additional company information• History is saved, and added to customer card once they become known visitors• Complete history of individual retained

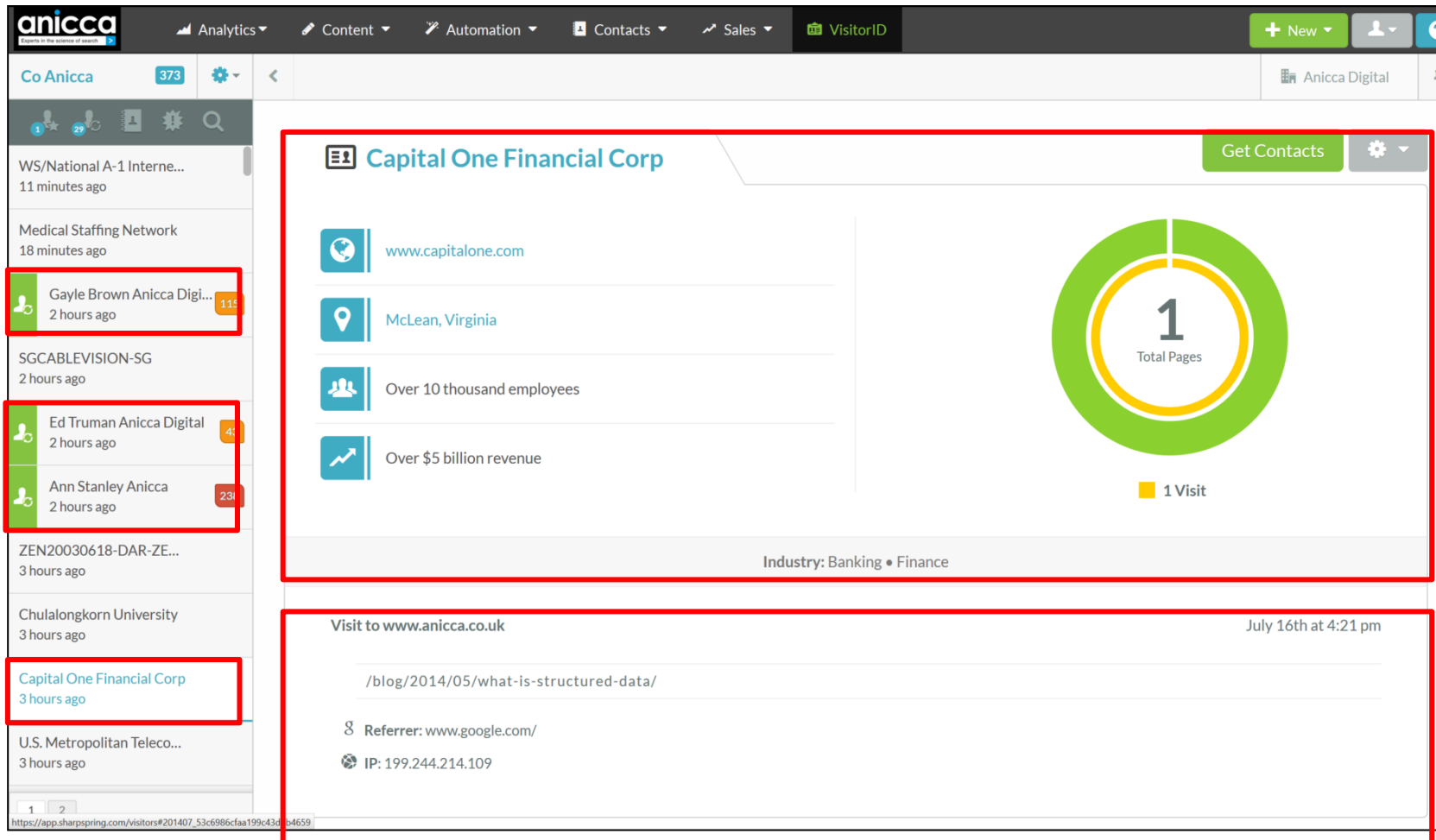
Naming convention



Techniques for Anonymous becoming a known visitors

- **Completed a form** on your website
- **Visited a page** on your website after receiving an email
- **Click a link** from an **email** you have sent out
- **Click a link** from a **social media** post you have created
- Note: Not all software uses the same methods

Anonymous and known visitor tracking



The screenshot displays the Anicca VisitorID dashboard. The left sidebar lists recent visitors, with three highlighted in red boxes: Gayle Brown Anicca Digi... (2 hours ago), Ed Truman Anicca Digital (2 hours ago), and Ann Stanley Anicca (2 hours ago). The main content area shows details for Capital One Financial Corp, including its website (www.capitalone.com), location (McLean, Virginia), employee count (Over 10 thousand employees), and revenue (Over \$5 billion revenue). A donut chart indicates 1 Total Pages and 1 Visit. The bottom section shows a visit to www.anicca.co.uk on July 16th at 4:21 pm, with a referrer of www.google.com/ and IP address 199.244.214.109.

Capital One Financial Corp Get Contacts

www.capitalone.com

McLean, Virginia

Over 10 thousand employees

Over \$5 billion revenue

1
Total Pages

1 Visit

Industry: Banking • Finance

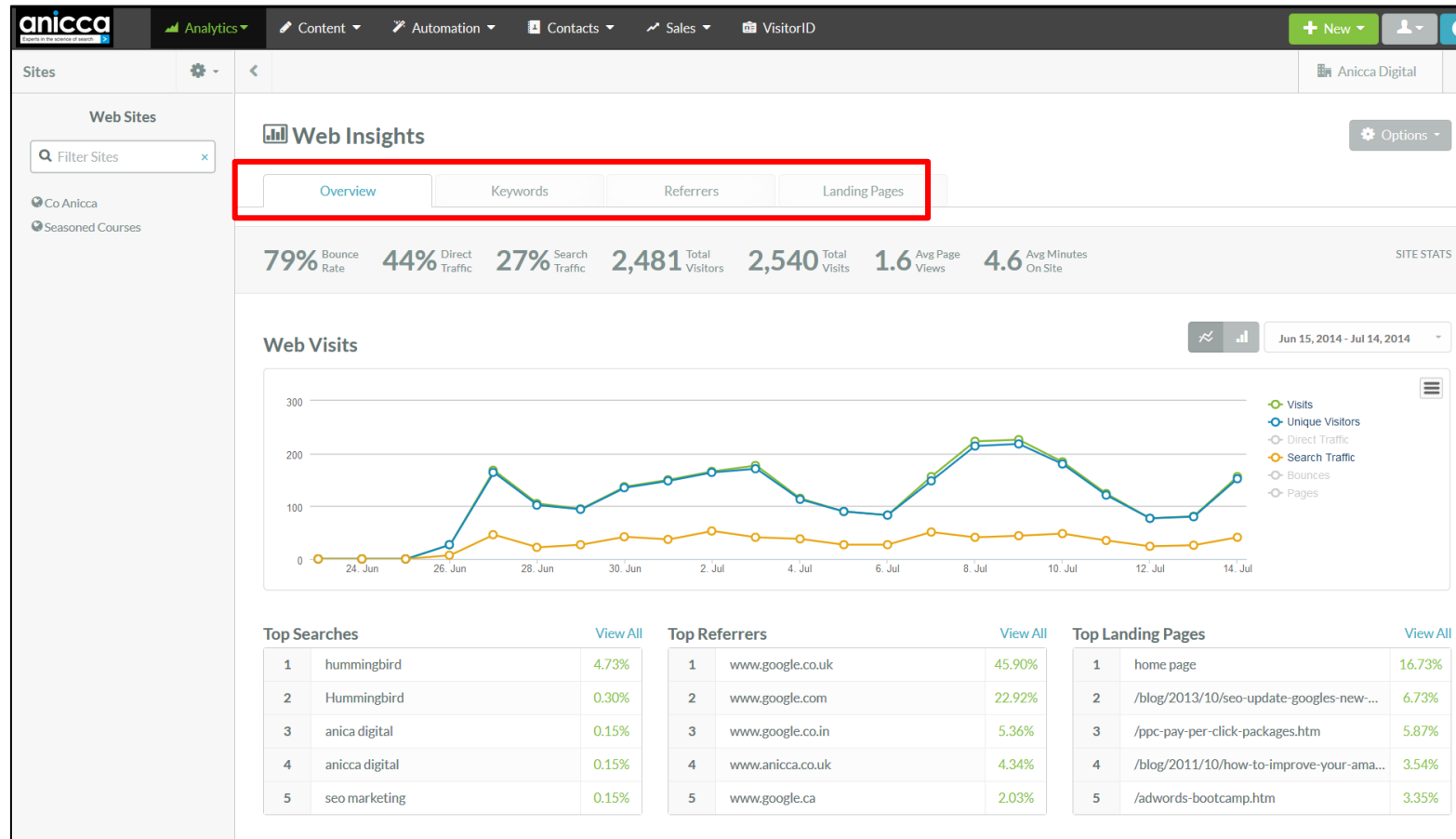
Visit to www.anicca.co.uk July 16th at 4:21 pm

</blog/2014/05/what-is-structured-data/>

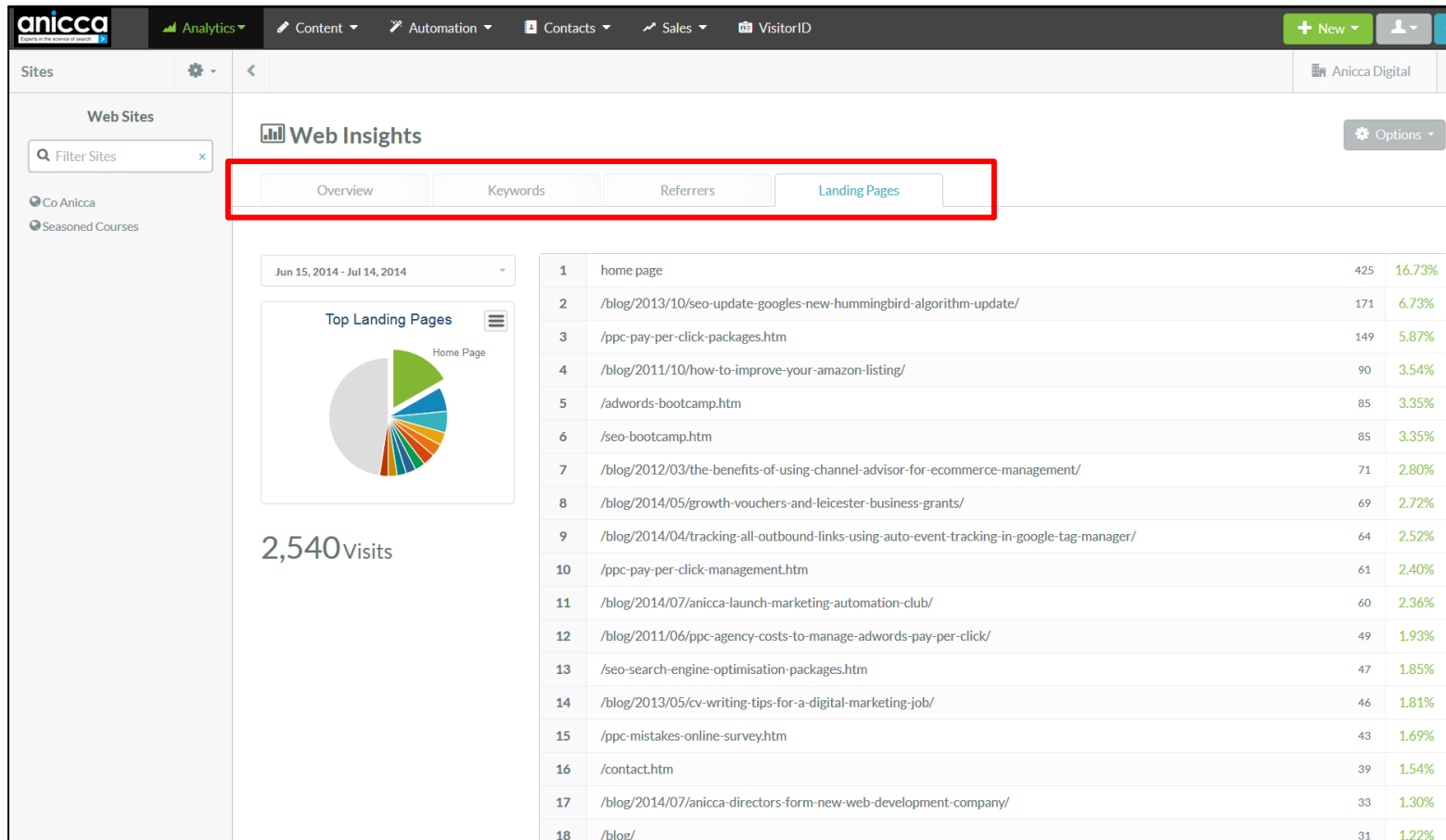
Referrer: www.google.com/

IP: 199.244.214.109

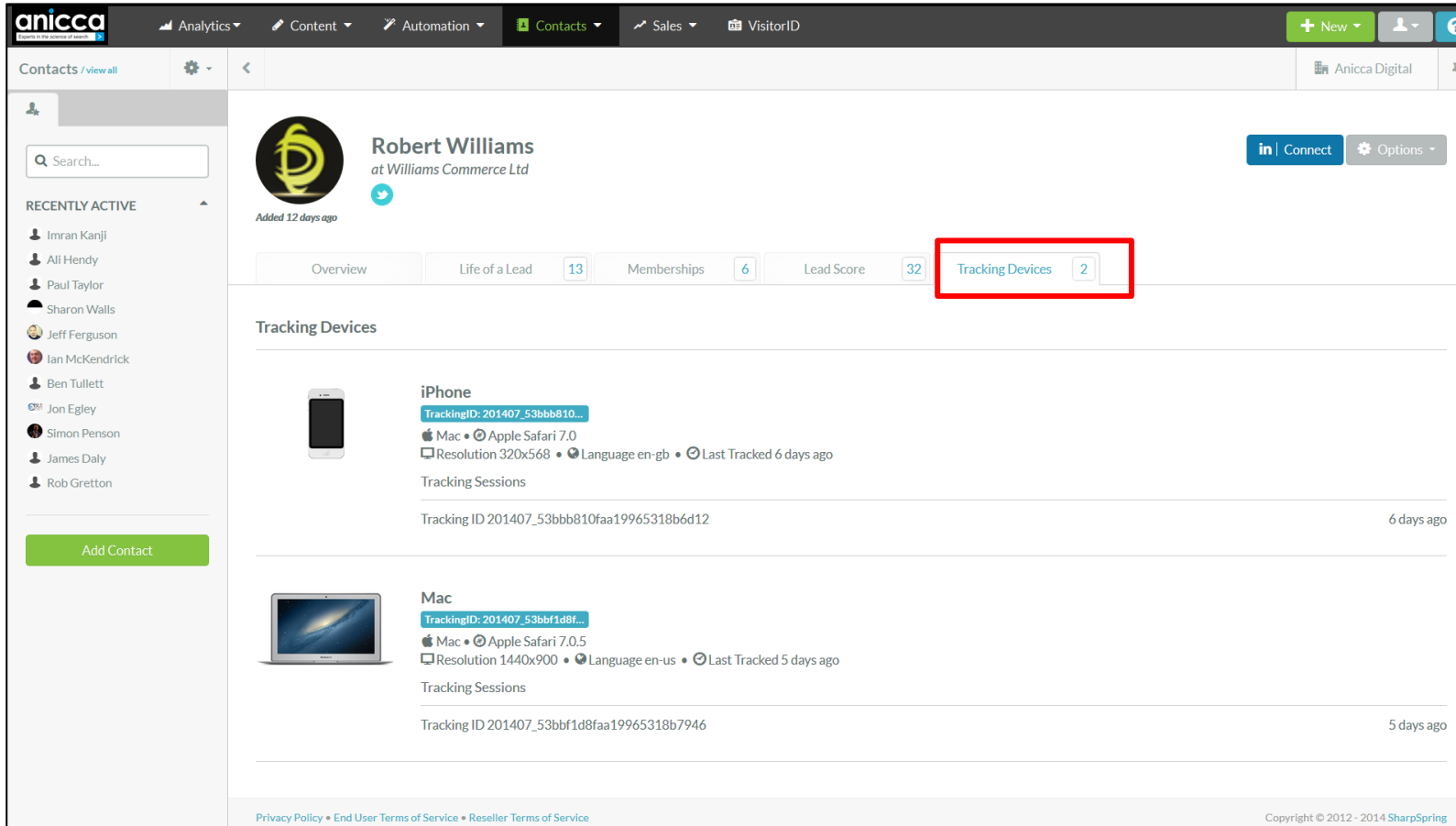
Website analytics



Landing page statistics



Tracking devices



The screenshot displays the Anicca CRM interface. The top navigation bar includes tabs for Analytics, Content, Automation, **Contacts**, Sales, and VisitorID. A sidebar on the left lists 'RECENTLY ACTIVE' contacts and an 'Add Contact' button. The main content area shows the profile for Robert Williams at Williams Commerce Ltd. Below the profile, a row of tabs includes Overview, Life of a Lead (13), Memberships (6), Lead Score (32), and **Tracking Devices (2)**, which is highlighted with a red box. The 'Tracking Devices' section lists two devices: an iPhone and a Mac, each with its Tracking ID, specifications, and last tracked date.

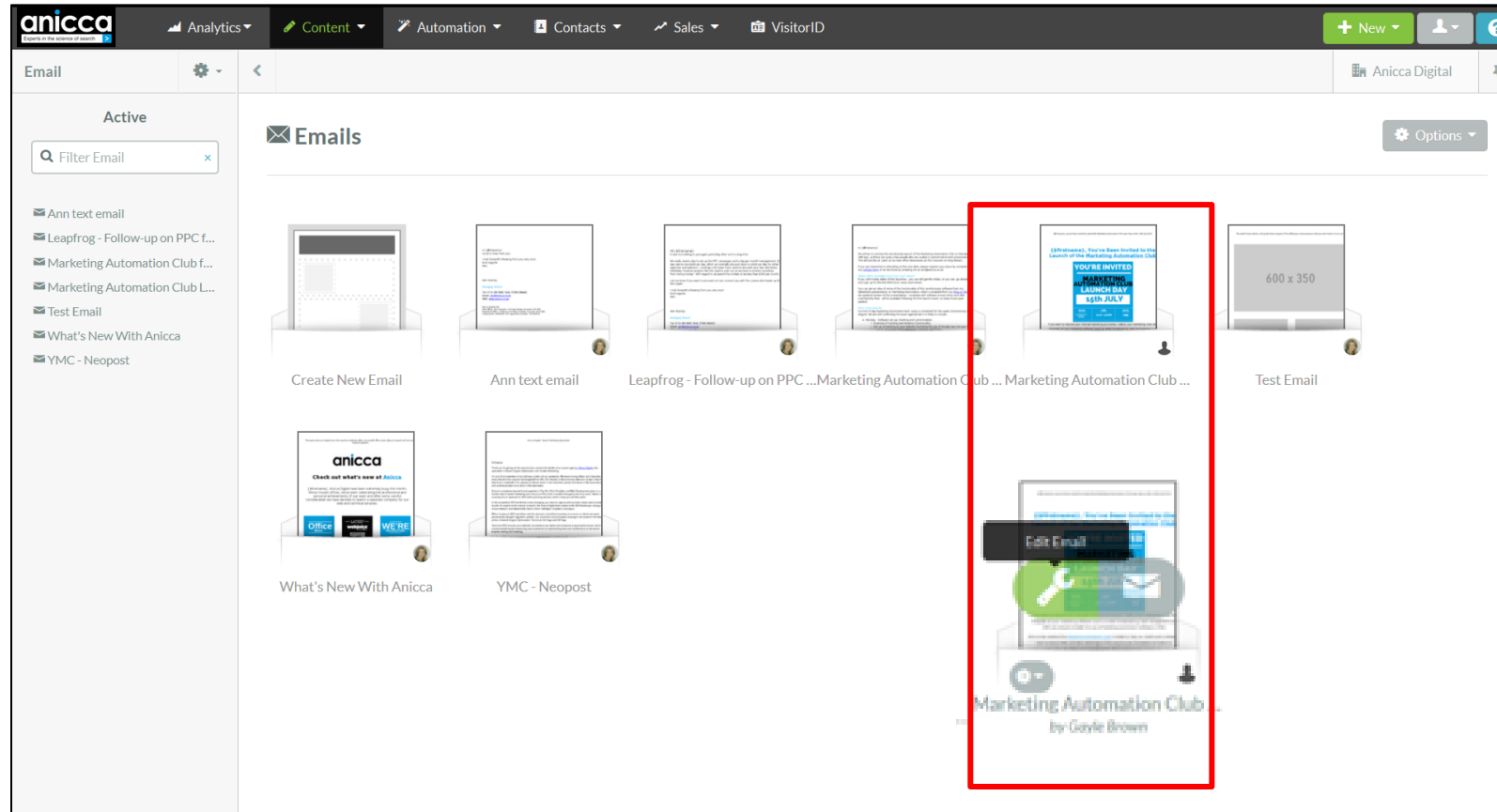
Device	Tracking ID	Last Tracked
iPhone	201407_53bbb810faa19965318b6d12	6 days ago
Mac	201407_53bbf1d8faa19965318b7946	5 days ago

Email broadcasting and reporting

Email broadcasting and reporting

Problem	Common Solutions	MAS solution
<ul style="list-style-type: none">• Ability to email using own templates• Ability to upload your own list• Blocking of an account if it contains info@ or sales@ addresses• No tracking of customers history	<ul style="list-style-type: none">• MailChimp and web-based broadcasting are cost effective• Have to purchase own software e.g. Adestra, Pure360 to overcome issues around uploading your own lists• Use of CRM or other system to track history	<ul style="list-style-type: none">• MAS has integrated email broadcasting system• Ability to upload own lists• Ability to use MAS templates or upload your own• Reports email performance for each email or each customer

Email management



Editing an existing email

anicca

AnalyticsContentAutomationContactsSalesVisitorID

+ New

Anicca Digital

Marketing Automation Club Launch Day Copy / Editing

OptionsPreview EmailSave Changes

SubjectAnicca's Marketing Automation Club - join us at the launch event?

{Firstname}, you've been invited to attend the Marketing Automation Club open day on the 14th July 2014.

{Firstname}, You've Been Invited to the Launch of the Marketing Automation Club

YOU'RE INVITED

MARKETING AUTOMATION CLUB LAUNCH DAY

15th JULY

PLACE	TIME	ENTRY
2-14 King Street Leicester LE1 6EX	12:00 - 4:00PM	FREE

If you want to improve your internal marketing processes, reduce your marketing costs and integrate all your marketing software (such as email broadcasting, lead management and CRM) you should consider the use of Marketing Automation Software or MAS.

Anicca has created the Marketing Automation Club in order to help our clients and colleagues learn all about

ContentStylesAttachmentsEmail InfoHTML

EditInsertFormatMerge VariablesCustom Fields

FormatsParagraphFont FamilyFont Sizes

15th JULY

PLACE	TIME	ENTRY
2-14 King Street Leicester LE1 6EX	12:00 - 4:00PM	FREE

If you want to improve your internal marketing processes, reduce your marketing costs and integrate all your marketing software (such as email broadcasting, lead management and CRM) you should consider the use of Marketing Automation Software or MAS.

Anicca has created the Marketing Automation Club in order to help our clients and colleagues learn all about MAS and take advantage of this easy-to-use, innovative tool (which is only available through digital agencies like ours). This is an exclusive membership club for those interested in using the tool, where they can attend our MAS training boot camp, set-up the software and marketing processes or get professional advice. What's more, boot camp attendees get a months software trial absolutely free!

The monthly membership then gives you ongoing use of the MAS software from only £100/month (normal membership is £200/month with discounts for existing clients).

Broadcast email to lists

Send the email "Marketing Automation Club Launch Day Copy" to a List

Time/Date

☒ As Soon as Possible

☐ : : AM

☐ Send to everyone on the list, even those who have already received the e-mail

Select A List Select A Tag Filter Lists

<input type="radio"/> Client - current (dynamic) 69 Members Updated 2 days ago	<input type="radio"/> Clients - web 67 Members Updated 5 days ago	<input type="radio"/> Collective contacts 3 Members Updated 6 days ago
<input type="radio"/> High Scores (dynamic) 1133 Members Updated 1 hour ago	<input checked="" type="radio"/> Known contact 1193 Members Updated 2 days ago	<input type="radio"/> Staff List 11 Members Updated 12 days ago
<input type="radio"/> Unknown contacts 5510 Members Updated 6 days ago	<input type="radio"/> Unsubscribe 400 Members Updated 7 days ago	<input type="radio"/> Your Marketing Company leads 0 Members Updated 7 minutes ago

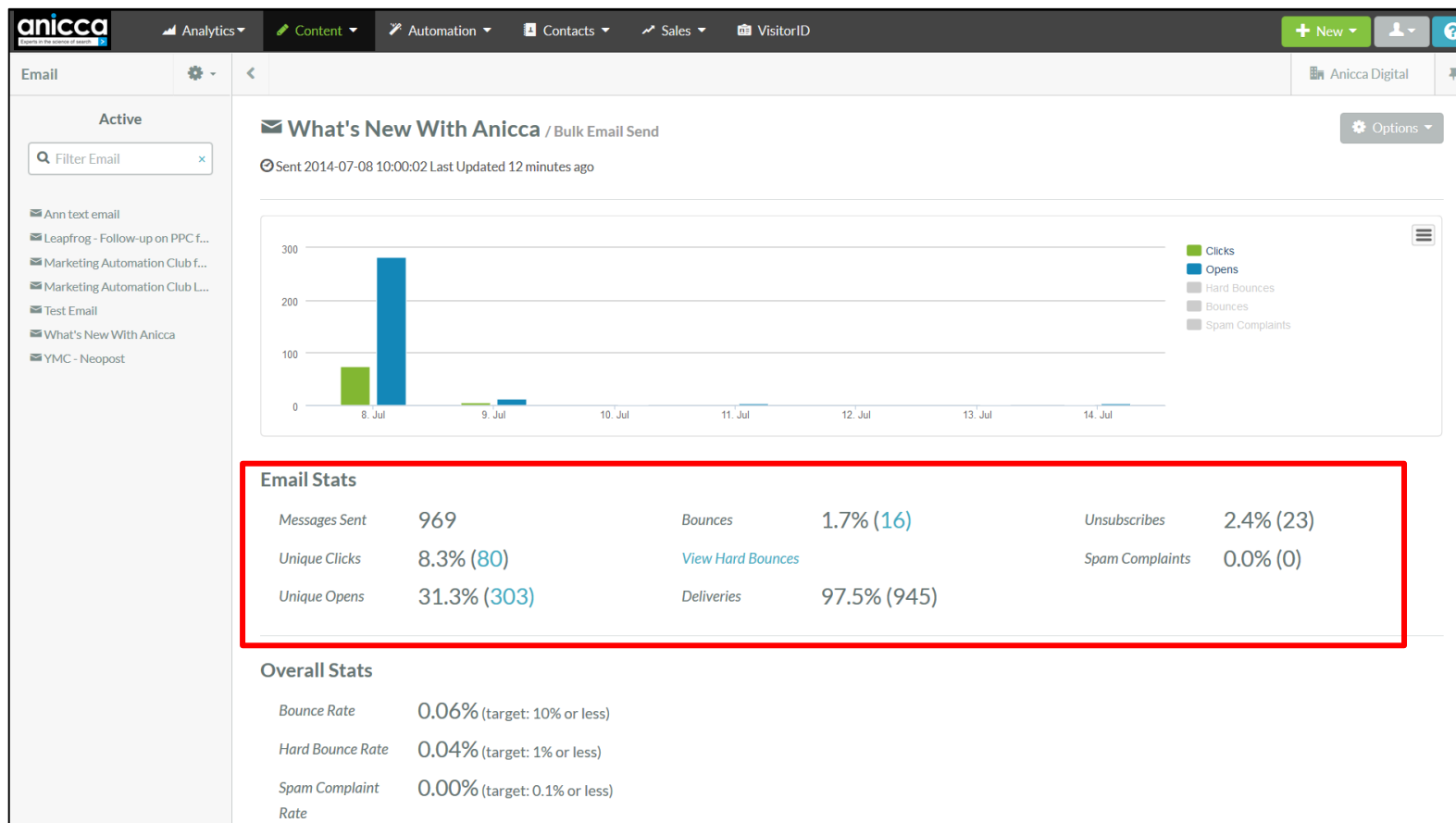
Email history (lists)

✉ Email Job History / showing 1-8

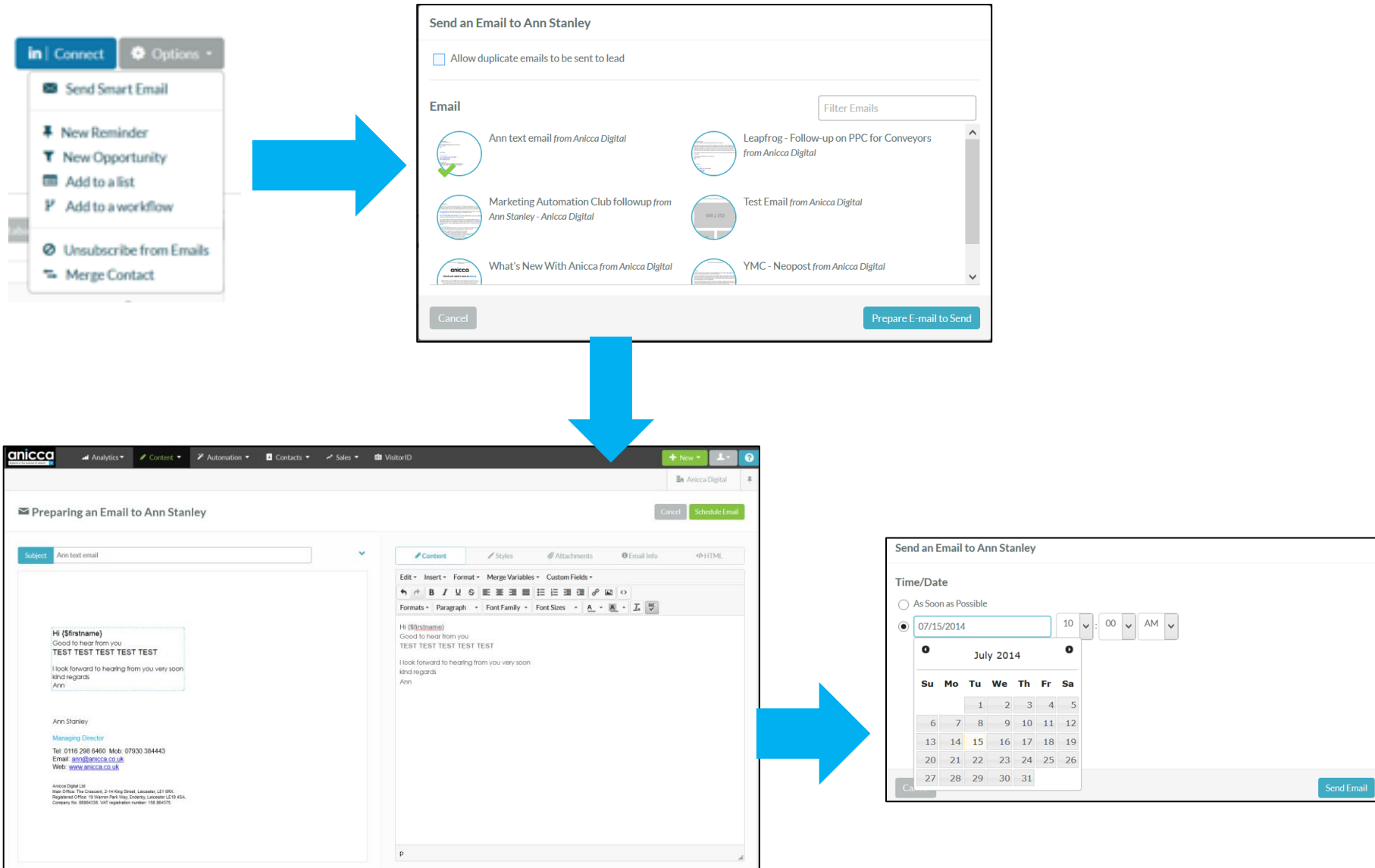
Lists ▾

Subject	Sends	Recipients	Send Date	Email Title
Marketing Automation Club Additional Launch Date - July 28th	887	High Scores (dynamic)	2014-07-14 12:59:01	Marketing Automation Club followup
Marketing Automation Club Additional Launch Date - July 28th	931	Known contact	2014-07-14 12:58:02	Marketing Automation Club followup
Anicca's Marketing Automation Club - join us at the launch event?	896	High Scores (dynamic)	2014-07-09 20:01:01	Marketing Automation Club Launch Day Copy
Anicca's Marketing Automation Club - join us at the launch event?	938	Known contact	2014-07-09 14:43:01	Marketing Automation Club Launch Day Copy
Anicca's Marketing Automation Club - join us at the launch event?	11	Staff List	2014-07-08 16:51:02	Marketing Automation Club Launch Day Copy
Anicca's Marketing Automation Club - join us at the launch event?	11	Staff List	2014-07-08 16:49:01	Marketing Automation Club Launch Day Copy
{firstname}, Anicca Have Some Exciting News for You...	908	High Scores (dynamic)	2014-07-08 09:05:02	What's New With Anicca
{firstname}, Anicca Have Some Exciting News for You...	969	Known contact	2014-07-08 09:00:02	What's New With Anicca

Email stats



Send email to lead







Social media publishing and listening

Social media publishing and listening

Problem	Common Solutions	MAS solution
<ul style="list-style-type: none">• Schedule posts and broadcasting across various platforms• Manage all listening and broadcasting through one platform• Monitor competitor activity	<ul style="list-style-type: none">• Hootsuite• Tweetdesk• Oktopost	<ul style="list-style-type: none">• Some MAS solutions offer HootSuite-like functionality, so you can broadcast your social posts• Link and monitor competitors

Examples of Social publishing functionality

 **Social Publish**

Publish To

1 Twitter Location(s) Selected
0 Facebook Location(s) Selected
1 LinkedIn Location(s) Selected

Schedule

☐ Publish Immediately
☒ Publish At The Following Time

Date: 06/04/2014
Time: 9:30 AM
British Summer Time

Content to Publish


URL to be Shared

<http://www.eventbrite.co.uk/e/meet-mingle-june-tickets-11658056561>

Content For Facebook & LinkedIn

Comment

Ann Stanley is talking about Marketing Automation and how it can help your business! Meet and Mingle at the Exchange Bar Leicester - June 6th 5.45pm



Title

Meet and Mingle at the Exchange Bar Leicester - June 6th 5.45pm


Description

Ann Stanley will be talking on Marketing Automation at the monthly Meet and Mingle event organised by Leicester for Business.

Content For Twitter


Ann Stanley is talking tonight about Marketing Automation Software at the Meet & Mingle Exchange Bar Leicester 5.45pm <http://bit.ly/sample>

Preview




Posting: 06/04/2014 9:30 AM
Posting To:

Facebook: --
LinkedIn: Ann Stanley
Twitter: Ann Stanley (@AnnStanley)




Your Name @username
Ann Stanley is talking tonight about Marketing Automation Software at the ... <http://marketing.anicca.co.uk/acton/sp/10070/sm-0001-1406/T/-1>

LinkedIn (sample share)






Your Name
Ann Stanley is talking about Marketing Automation and how it can help your business! Meet and Mingle at the Exchange Bar Leicester - June 6th 5.45pm <http://lnkd.in/XyxUzG>



Meet and Mingle at the Exchange Bar Leicester - June 6th 5.45pm

eventbrite.co.uk · Ann Stanley will be talking on Marketing Automation at the monthly Meet




Reporting on social publishing

Published Thu Jun 5 1:18 AM
 Listing

Title The Drum Search Top 50: What a surprise - so please vote for me?
Channels Facebook (1) | Twitter (1) | LinkedIn (47)
Share Link <http://www.thedrum.com/news/2014/06/04/drum-search-top-50-vote-decide-most-influential-individuals-search-marketing-and-seo>


Review Report Visits

Twitter (sample tweet)




Your Name @username
 I have been nominated for the #TheDrumSearch50 - what an honour:-) So ple... <http://marketing.anicca.co.uk/action/sp/10070/sm-0002-1406/T/-1>

Facebook (sample share)



Your Name
 I have been nominated for the #TheDrumSearch50 - what an honour:-) Please vote for me - or share this post to spread the word.




The Drum Search Top 50: What a surprise - so please vote for me?
 thedrum.com
 I have been nominated for the #TheDrum...

Published Thu Jun 5 1:18 AM
 Listing

Title The Drum Search Top 50: What a surprise - so please vote for me?
Channels Facebook (1) | Twitter (1) | LinkedIn (47)
Share Link <http://www.thedrum.com/news/2014/06/04/drum-search-top-50-vote-decide-most-influential-individuals-search-marketing-and-seo>

Review Report Visits



Total Views: 216

Clickthroughs

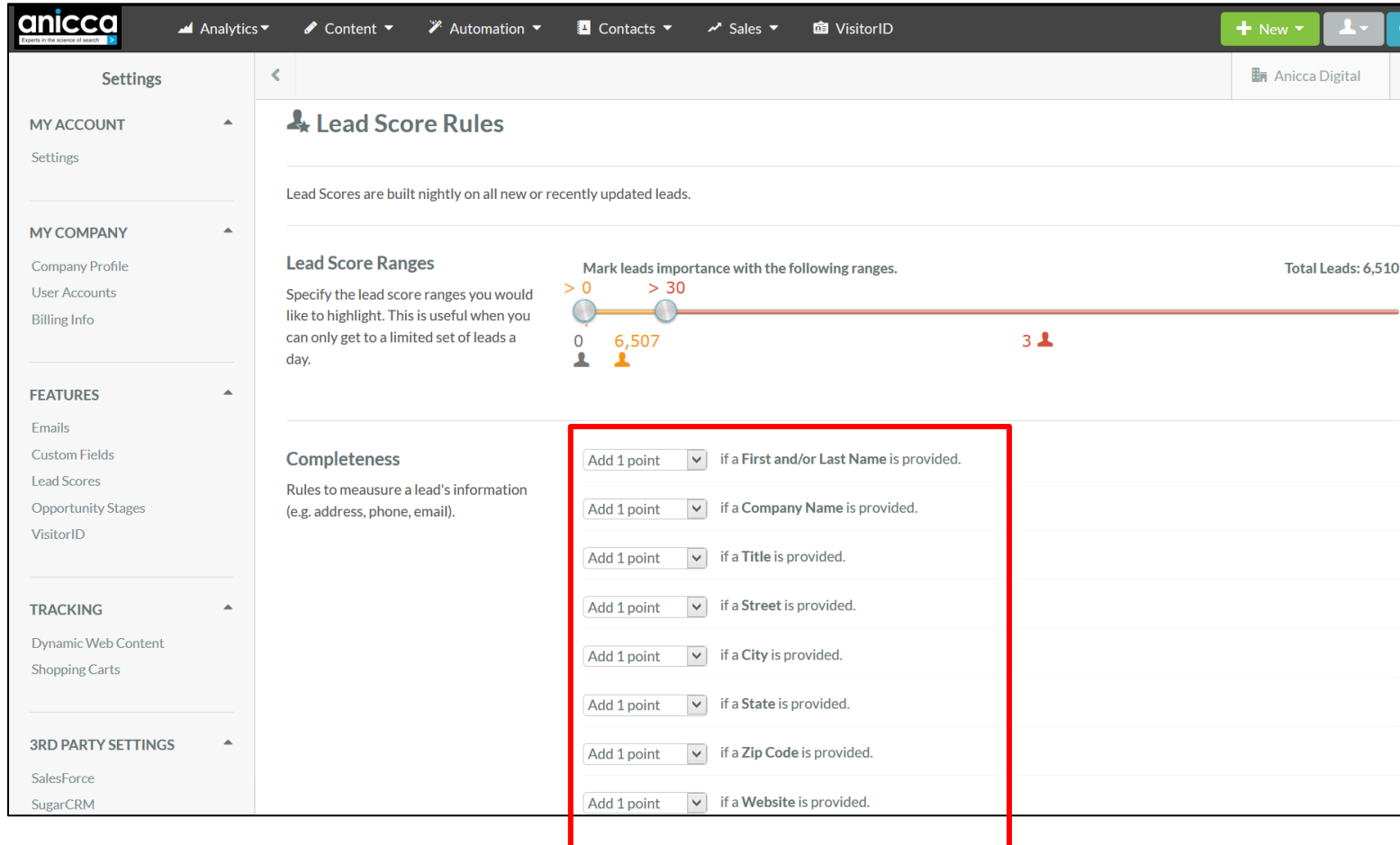
Channel	Clicks
Twitter: Ann Stanley	26
LinkedIn: Ann Stanley	26
LinkedIn: Ann Stanley on Non-Profit Marketing	19
LinkedIn: Ann Stanley on Anicca Digital Ltd	19
Facebook: Ann Stanley	13
LinkedIn: Ann Stanley on Digital Marketing	9
LinkedIn: Ann Stanley on eMarketing Association	7
LinkedIn: Ann Stanley on PPC Marketing	7
LinkedIn: Ann Stanley on Google Adwords Certifi	7
LinkedIn: Ann Stanley on LinkedSEO	6

Tracking leads and sales opportunities

Tracking leads and sales opportunities

Problem	Common Solutions	MAS solution
<ul style="list-style-type: none">• Use of Excel to track and qualify leads in order to focus on hot leads• Change stage of sales opportunities• Use percentages to calculate pipeline and likely revenue	<ul style="list-style-type: none">• CRM software allow tracking of sales opportunities but rarely have lead tracking based on user behaviour	<ul style="list-style-type: none">• MAS allow you to score leads based on users' activities and behaviour• Integration with CRM system so that the sales team only focus on hot leads• Some MAS also have opportunity tracking

Lead scoring rules - basic



The screenshot shows the Anicca Lead Score Rules configuration page. The left sidebar contains navigation links for Settings, MY ACCOUNT, MY COMPANY, FEATURES, TRACKING, and 3RD PARTY SETTINGS. The main content area is titled 'Lead Score Rules' and includes a description: 'Lead Scores are built nightly on all new or recently updated leads.' Below this, there are two sections: 'Lead Score Ranges' and 'Completeness'.

Lead Score Ranges

Specify the lead score ranges you would like to highlight. This is useful when you can only get to a limited set of leads a day.

Mark leads importance with the following ranges.

Total Leads: 6,510

The range slider shows a scale from 0 to 30. The first range is marked from 0 to 6,507 with a person icon, and the second range is marked from 6,507 to 30 with a person icon. There are 3 people icons shown on the right side of the slider.

Completeness

Rules to measure a lead's information (e.g. address, phone, email).

The following rules are listed, each with a dropdown menu set to 'Add 1 point':

- Add 1 point if a First and/or Last Name is provided.
- Add 1 point if a Company Name is provided.
- Add 1 point if a Title is provided.
- Add 1 point if a Street is provided.
- Add 1 point if a City is provided.
- Add 1 point if a State is provided.
- Add 1 point if a Zip Code is provided.
- Add 1 point if a Website is provided.

Lead scoring rules - customised

anicca

Experts in the science of search

Analytics

Content

Automation

Contacts

Sales

VisitorID

+ New

?

Settings

MY ACCOUNT

Settings

MY COMPANY

Company Profile

User Accounts

Billing Info

FEATURES

Emails

Custom Fields

Lead Scores

Opportunity Stages

VisitorID

TRACKING

Dynamic Web Content

Shopping Carts

3RD PARTY SETTINGS

SalesForce

SugarCRM

Engagement

Rules to measure a lead's actions (e.g. visits, form submissions).

Add 1 point

for each page visit (excluding bounces).

Add 5 points

if a Landing Page for a campaign is visited.

Add 15 points

if a form is completed.

Add 5 points

for each email click.

Tracking

+ New Page Rule

Add 5 points

if a lead visits the page

Fit

+ New Fit Rule

Add 5 points

when Budget

greater than or equal to

1000

Lead Score Decay

4 weeks

after the lead's last activity date they will appear half as important.

The amount of time it should take for a lead to be half as important as it used to be.

Save Changes and Rebuild All Lead Scores

Save Changes

Viewing the leads

Analytics
Content
Automation
Contacts
Sales
VisitorID
New
User Icon

Campaigns

Campaign Reports

Search Reports


ALL REPORTS

TotalsLeadsSecondary LeadsOpportunitiesSalesOpps Lost


View AllExport

	tekglance - Rishabh Singh ⌚ 4 hours ago 📞 958-292-1573 ✉ rishabhlove@gmail.com	31 Lead Score	
	Iron Web - Claire Jolyot ⌚ 20 hours ago ✉ claire.ironweb@gmail.com	6 Lead Score	
	Betway - Haris Malik ⌚ 21 hours ago ✉ haris.malik@betwaypartners.com	7 Lead Score	
	Bubele - Vivien De Tusch-Lec ⌚ 21 hours ago ✉ vivien@bubele.co.uk	7 Lead Score	
	Sviatlana Liubetskaya ⌚ 22 hours ago 📞 +375 29 768 48 35 ✉ sliubetskaya@scnsoft.com	10 Lead Score	
	Veeroll - JC Bougle ⌚ 4 days ago 📞 656-774-6971 ✉ jc@veeroll.com	26 Lead Score	

Life of a lead



Diane Beck
at Health-Success

in | Connect  Options ▾

Added 7 days ago

Overview

Life of a Lead 4

Memberships 4

Lead Score 32

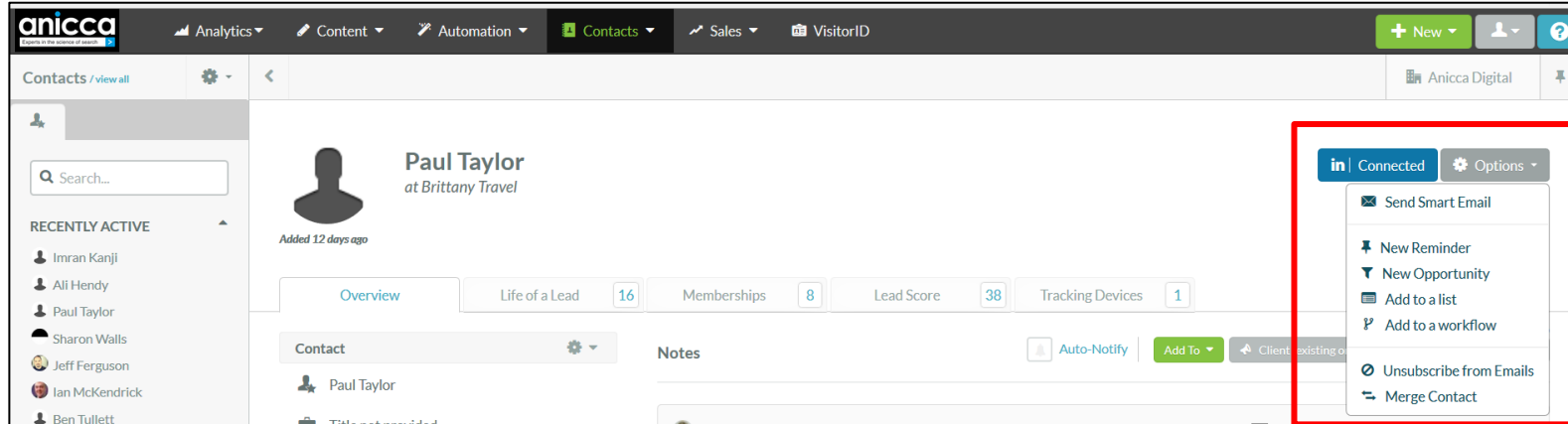
Tracking Devices 1

✓ City Provided	1
✓ Phone Provided	5
✓ Company Name Provided	1
✓ First and/or Last Name Provided	1
✓ Email Provided	5
✓ Website Provided	1
✓ Forms Completed	15
✓ Email Clicks	0
✓ Pages visited	9
<hr/>	
Total	38
<hr/>	
Score with Decay	32

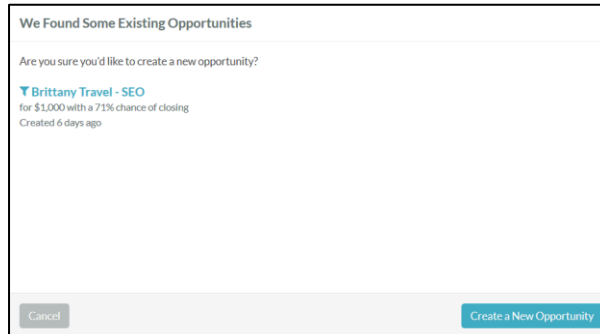
Creating Opportunity stages for sales process

	6.	Initial meeting / teleconference	50	✕
		First meeting or teleconference to discuss audit findings and discuss costs		
1.	7.	Proposal	60	✕
		Proposal prepared, checked and sent		
2.	8.	Second meeting or teleconference	70	✕
		Second meeting or call to discuss proposal or contract details		
3.	9.	Revised proposal sent	75	✕
		Following second meeting or call revised proposal or quote required		
4.	10.	Order confirmation sent	80	✕
		Order confirmation prepared, approved and sent		
5.	11.	Order signed	90	✕
		Order confirmation signed and returned		
6.	12.	Project started	100	✕
		Project started		

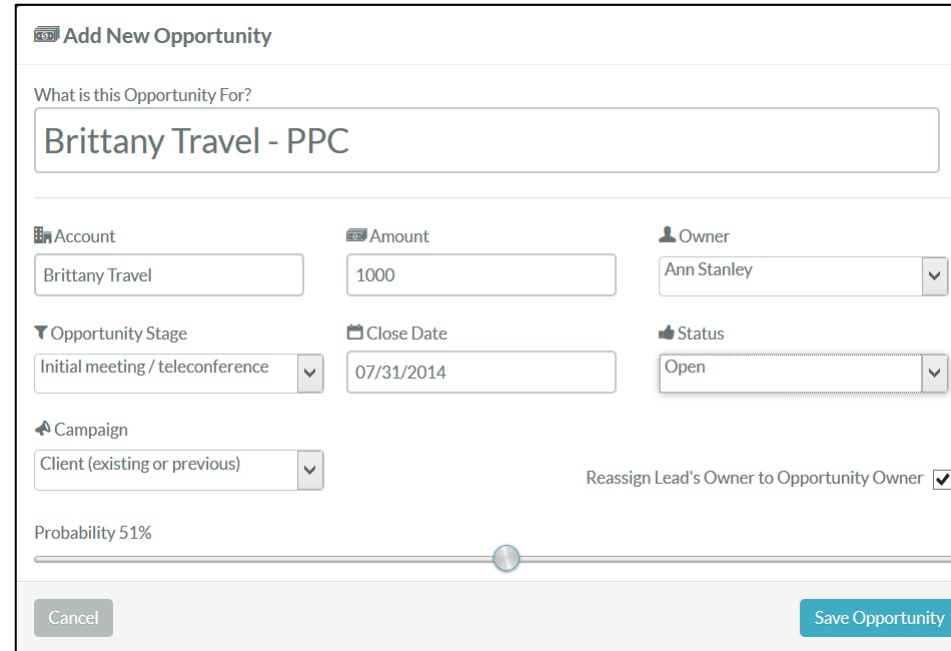
Creating an opportunity



The screenshot shows the Anicca CRM interface. The top navigation bar includes Analytics, Content, Automation, Contacts, Sales, and VisitorID. The main header shows 'Contacts / view all' and a search bar. The left sidebar lists 'RECENTLY ACTIVE' contacts: Imran Kanji, Ali Hendy, Paul Taylor, Sharon Walls, Jeff Ferguson, Ian McKendrick, and Ben Tullett. The main content area displays the profile for Paul Taylor at Brittany Travel, added 12 days ago. The profile includes tabs for Overview, Life of a Lead (16), Memberships (8), Lead Score (38), and Tracking Devices (1). The 'Options' dropdown menu is open, showing options: Send Smart Email, New Reminder, New Opportunity, Add to a list, Add to a workflow, Unsubscribe from Emails, and Merge Contact. The 'New Opportunity' option is highlighted.



The dialog box titled 'We Found Some Existing Opportunities' asks 'Are you sure you'd like to create a new opportunity?'. It lists an existing opportunity: 'Brittany Travel - SEO' for \$1,000 with a 71% chance of closing, created 6 days ago. The dialog has 'Cancel' and 'Create a New Opportunity' buttons.



The 'Add New Opportunity' form is shown. The title is 'Brittany Travel - PPC'. The form fields include:

- Account: Brittany Travel
- Amount: 1000
- Owner: Ann Stanley
- Opportunity Stage: Initial meeting / teleconference
- Close Date: 07/31/2014
- Status: Open
- Campaign: Client (existing or previous)
- Reassign Lead's Owner to Opportunity Owner: ☒
- Probability: 51%

The form has 'Cancel' and 'Save Opportunity' buttons.

Linking an opportunity with all contacts

US

Brittany Travel - PPC

Expected Value of \$510

Total Value of \$1,000 with 51% Chance to close 27 minutes old

Open Opportunity

Save

Brittany Travel

\$ 1,000

7/31/2014

Attributions

Ann Stanley

Client (existing or previous)

Opp State & Stage

Open

Initial meeting / teleconference

Probability of Closing

51%

Status

Save

Please Provide a Status

Contacts

Assign Opp Owner to Contacts

Add a Contact

Edit All

1 Total

Paul Taylor

at Brittany Travel

ptaylor@fcvillas.co.uk

38

Lead Score

We found some contacts that may be related to this opportunity. Check any that you would like to add.

Jeremy Waldron

at ABTOF

jwaldron@fcvillas.co.uk

7

Lead Score

+

Jeremy Waldron

at Brittany Travel

Jeremy@brittany.co.uk

6

Lead Score

+

Reminders

New

0 Total

Notes

0 Total

Add a Comment

Opportunity pipeline

anicca

AnalyticsContentAutomationContactsSalesVisitorID

+ New














































Filter by Owner

Forecast (9/1 - 9/30): EV \$44,272 • 65 Total Opps • \$9,500 won

Anicca Digital

AUDIT/ESTIMATES COMPLETED	INITIAL MEETING / TELECONFEREN...	PROPOSAL REQUESTED	PROPOSAL SENT	SECOND MEETING OR TELECONFER...	ORDER CONFIRMATION SENT
<div>Alchemy - SEO</div> <div>Alchemy</div> <div>Closes Aug 31, 2014</div> <div>6 Contacts</div> <div>\$1,800</div> <div>40% chance of closing</div> <div>Past Close</div>	<div>Bulb Studios - Checkland Kin...</div> <div>Bulb Studios</div> <div>Closes Sep 12, 2014</div> <div>Mat Bartram</div> <div>\$1,500</div> <div>50% chance of closing</div> <div>Past Close</div>	<div>J B Kind Ltd - WEB</div> <div>J B Kind Ltd</div> <div>Closes Sep 30, 2014</div> <div>James Cadman</div> <div>\$10,000</div> <div>36% chance of closing</div> <div>9 weeks old</div> <div>Past Close</div>	<div>Ascender - Foster Denovo - ...</div> <div>Ascender Digital</div> <div>Closes Jul 31, 2014</div> <div>Jeremy Dunmore</div> <div>\$1,200</div> <div>60% chance of closing</div> <div>Past Close</div>	<div>The London Silver Company ...</div> <div>The London Silver Company</div> <div>Closes Sep 12, 2014</div> <div>Mark Taylor</div> <div>\$4,000</div> <div>31% chance of closing</div> <div>Past Close</div>	<div>Civani Ltd - Tissu Fabrics - SE...</div> <div>Civani Ltd</div> <div>Closes Aug 29, 2014</div> <div>Sriya Thakrar</div> <div>\$1,200</div> <div>36% chance of closing</div> <div>Past Close</div>
<div>Ascender Digital - SEO - Fost...</div> <div>Ascender Digital</div> <div>Closes Jul 31, 2014</div> <div>Jeremy Dunmore</div> <div>\$1,200</div> <div>36% chance of closing</div> <div>Past Close</div>	<div>JCB - SEO</div> <div>JCB</div> <div>Closes Aug 29, 2014</div> <div>Laura Wright and Craig Jefry</div> <div>\$3,500</div> <div>50% chance of closing</div> <div>Past Close</div>	<div>Mayridge.com - SEO, PPC</div> <div>Marketing ESP Ltd</div> <div>Closes Sep 26, 2014</div> <div>Emma Swales</div> <div>\$1,000</div> <div>56% chance of closing</div> <div>20 hours old</div> <div>Past Close</div>	<div>Ascender - Property Serve - ...</div> <div>Ascender Digital</div> <div>Closes Jul 31, 2014</div> <div>Jeremy Dunmore</div> <div>\$1,200</div> <div>56% chance of closing</div> <div>Past Close</div>	<div>Outdoor Knitwea/Kempton...</div> <div>Outdoor Knitwea/Kempton...</div> <div>Closes Sep 9, 2014</div> <div>Gurdir Singh</div> <div>\$8,500</div> <div>51% chance of closing</div> <div>Past Close</div>	
<div>Neen - SEO</div> <div>Patterson Medical Group</div> <div>Closes Sep 12, 2014</div> <div>2 Contacts</div> <div>\$900</div> <div>41% chance of closing</div> <div>Past Close</div>	<div>Marston's Careers - SEO</div> <div>Marston's Careers</div> <div>Closes Aug 25, 2014</div> <div>4 Contacts</div> <div>\$1,800</div> <div>36% chance of closing</div> <div>Past Close</div>	<div>Reveal.cz - Web, SEO, PPC</div> <div>Marketing ESP Ltd</div> <div>Closes Sep 26, 2014</div> <div>Emma Swales</div> <div>\$1,000</div> <div>56% chance of closing</div> <div>20 hours old</div> <div>Past Close</div>	<div>Ascender Digital - SEO - Pro...</div> <div>Ascender Digital</div> <div>Closes Jul 31, 2014</div> <div>Jeremy Dunmore</div> <div>\$1,200</div> <div>36% chance of closing</div> <div>Past Close</div>		
<div>Voyage - PPC - Flexyfoot</div> <div>Voyage</div> <div>Closes Aug 15, 2014</div> <div>2 Contacts</div> <div>\$900</div> <div>35% chance of closing</div> <div>Past Close</div>	<div>Voyage - SEO (own site)</div> <div>Voyage</div> <div>Closes Aug 31, 2014</div> <div>2 Contacts</div> <div>\$1,000</div> <div>50% chance of closing</div> <div>Past Close</div>	<div>Smithfield Agency - i-Worko...</div> <div>Smithfield Agency</div> <div>Closes Sep 2, 2014</div> <div>Adam Shoeifeld</div> <div>\$900</div> <div>55% chance of closing</div> <div>Past Close</div>	<div>Iron Web - PPC</div> <div>Iron Web</div> <div>Closes Oct 31, 2014</div> <div>Claire Jolyot</div> <div>\$900</div> <div>61% chance of closing</div> <div>21 hours old</div> <div>Past Close</div>		
<div>Voyage - SEO - Flexyfoot</div> <div>Voyage</div> <div>Closes Aug 8, 2014</div> <div>2 Contacts</div> <div>\$900</div> <div>40% chance of closing</div> <div>Past Close</div>		<div>Smithfield Agency - i-Worko...</div> <div>Smithfield Agency</div> <div>Closes Sep 2, 2014</div> <div>Adam Shoeifeld</div> <div>\$900</div> <div>56% chance of closing</div> <div>Past Close</div>	<div>Lourdes Oliva - SEO, SOCIAL</div> <div>Lourdes</div> <div>Closes Aug 29, 2014</div> <div>Lourdes Oliva</div> <div>\$900</div> <div>61% chance of closing</div> <div>Past Close</div>		

Change Opportunity Stage

<div>  <div> Analytics Content Automation Contacts Sales VisitorID </div> <div> + New </div> </div>					
<div> Filter by Owner Forecast (9/1 - 9/30): EV \$44,272 • 65 Total Opps • \$9,500 won </div>					
AUDIT/ESTIMATES COMPLETED	INITIAL MEETING / TELECONFEREN...	PROPOSAL REQUESTED	PROPOSAL SENT	ORDER CONFIRMATION SENT	
Alchemy - SEO  Closes Aug 31, 2014 6 Contacts \$1,800 40% chance of closing 	Bulb Studios - Checkland Kin...  Closes Sep 12, 2014 Mat Bartram \$1,500 50% chance of closing 	J B Kind Ltd - WEB  Closes Sep 30, 2014 James Cadman \$10,000 36% chance of closing 9 weeks old 	Ascender - Foster Denovo - ...  Closes Jul 31, 2014 Jeremy Dunmore \$1,200 60% chance of closing 	Civani Ltd - Tissu Fabrics - SE...  Closes Aug 29, 2014 Sriya Thakrar \$1,200 36% chance of closing 	
Ascender Digital - SEO - Fost...  Closes Jul 31, 2014 Jeremy Dunmore \$1,200 36% chance of closing 	JCB - SEO  Closes Aug 29, 2014 Laura Wright and Craig Jefry \$3,500 50% chance of closing 	Mayridge.com - SEO, PPC  Closes Sep 26, 2014 Emma Swales \$1,000 56% chance of closing 20 hours old 	Ascender - Property Serve - ...  Closes Jul 31, 2014 Jeremy Dunmore \$1,200 56% chance of closing 	Outdoor Knitwea/Kemptions...  Closes Sep 9, 2014 Gurdeep Singh \$8,500 31% chance of closing 	
Neen - SEO  Closes Sep 12, 2014 2 Contacts \$900 41% chance of closing 	Marston's Careers - SEO  Closes Aug 25, 2014 4 Contacts \$1,800 36% chance of closing 	Reveal.cz - Web, SEO, PPC  Closes Sep 26, 2014 Emma Swales \$1,000 56% chance of closing 20 hours old 	Ascender Digital - SEO - Pro...  Closes Jul 31, 2014 Jeremy Dunmore \$1,200 36% chance of closing 	The London Silver Company ...  Closes Sep 12, 2014 Mark Taylor \$4,000 31% chance of closing 	
Voyage - PPC - Flexyfoot  Closes Aug 15, 2014 2 Contacts \$900 35% chance of closing 	Voyage - SEO (own site)  Closes Aug 31, 2014 2 Contacts \$1,000 50% chance of closing 	Smithfield Agency - i-Worko...  Closes Sep 2, 2014 Adam Shoeield \$900 55% chance of closing 	Iron Web - PPC  Closes Oct 31, 2014 Claire Jolyot \$900 61% chance of closing 21 hours old 		
Voyage - SEO - Flexyfoot  Closes Aug 8, 2014 2 Contacts \$900 40% chance of closing 		Smithfield Agency - i-Worko...  Closes Sep 2, 2014 Adam Shoeield \$900 56% chance of closing 	Lourdes Oliva - SEO, SOCIAL  Closes Aug 29, 2014 Lourdes Oliva \$900 61% chance of closing 		

Won Opportunities (in the last 30 days)

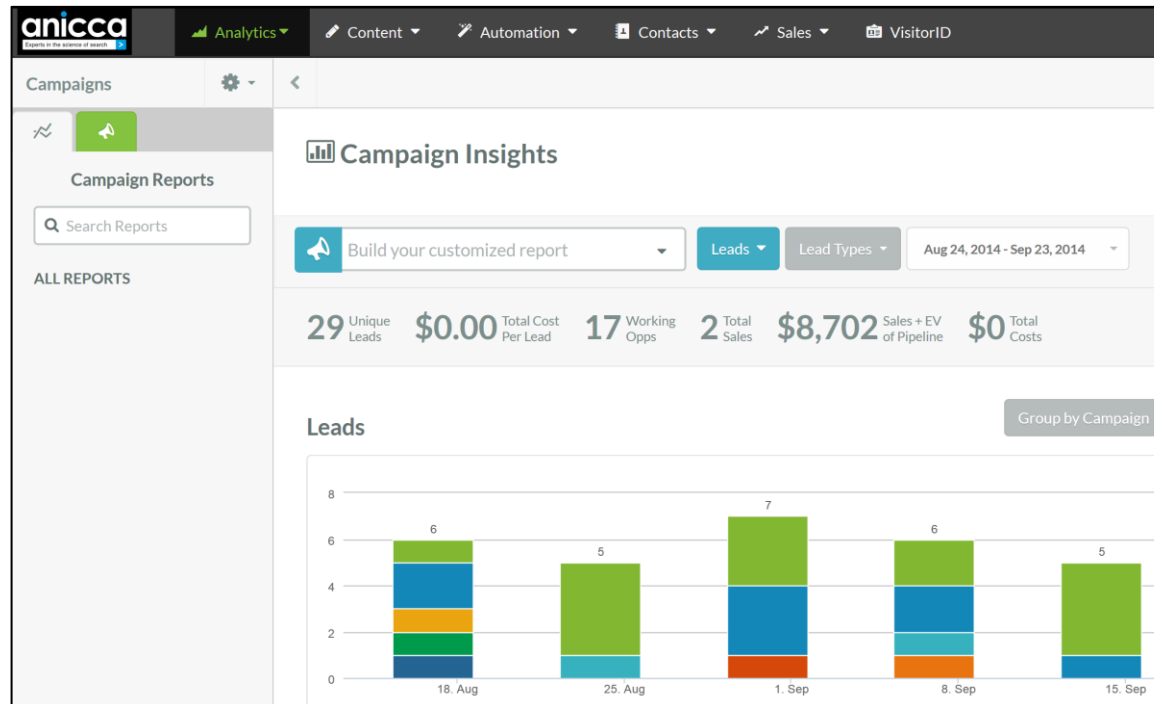
Filter Results...	Filter by Sales Rep ▾	Sort By ▾	Aug 24, 2014 - Sep 23, 2014 ▾
APT - SEO, Training		\$750	⚙️ ▾
Neil Hannam ⌚ Created: 4 weeks ago Closed: 3 weeks ago			
Brittany Travel - PPC Training		\$1350	⚙️ ▾
Ann Stanley ⌚ Created: 10 weeks ago Closed: 11 days ago			
Brittany Travel - WEB		\$2650	⚙️ ▾
Ann Stanley ⌚ Created: 9 weeks ago Closed: 11 days ago			
Narborough Hall - PPC/SEO/AFFILIATE		\$750	⚙️ ▾
Neil Hannam ⌚ Created: 9 weeks ago Closed: A day ago			
Razim Patel - Training		\$750	⚙️ ▾
Bhaves Chauhan ⌚ Created: 7 weeks ago Closed: 4 weeks ago			
Seasoned Courses SEO (2 Months, End Apr 2014 - work ongoing)		\$650	⚙️ ▾
Neil Hannam ⌚ Created: 5 weeks ago Closed: 4 weeks ago			
The London Silver Company - PPC		\$4000	⚙️ ▾
Ann Stanley ⌚ Created: 6 weeks ago Closed: 9 hours ago			
Urban Apothecary London - PPC, SEO, Training		\$4000	⚙️ ▾
Ann Stanley ⌚ Created: 12 days ago Closed: A day ago			

Tracking effectiveness of marketing campaigns

Tracking effectiveness of marketing campaigns

Problem	Common Solutions	MAS solution
<ul style="list-style-type: none">• Source of leads is not always known or tracked• No central place to store details of all leads and sales by marketing source or campaign• Ability to include costs of marketing to calculate cost per sale and profit	<ul style="list-style-type: none">• Some CRM systems will report on sales source• Use of Excel to collate sales vs. costs	<ul style="list-style-type: none">• MAS gives ability to view leads and sales by source• Some MAS also allow you to record the sales value as compared to costs

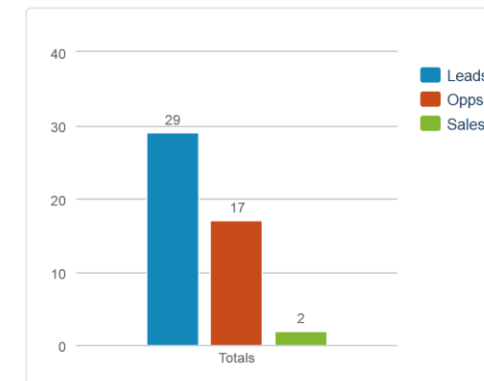
Week by week split by source/campaign



Campaign Breakdown



Campaign Totals



Campaigns reports

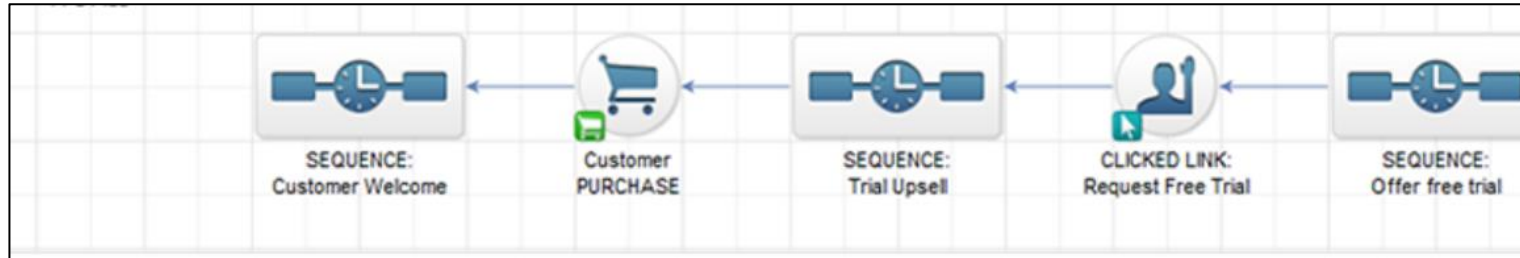
Totals	Leads	Secondary Leads	Opportunities	Sales	Opps Lost	View All					Export
Campaigns ⓘ	Total Costs	Leads	Cost/Lead	Sales	Revenue	Working Opps	Total Value	Expected Value	Sales + EV	Projected Rev/Lead	
AdWords	\$0	2	\$0.00	0	\$0	1	\$750	\$233	\$233	\$116.25	
Client (existing or previous)	\$0	0	\$0	0	\$0	1	\$1,000	\$560	\$560	\$0.00	
Conference/event	\$0	0	\$0	0	\$0	2	\$1,800	\$180	\$180	\$0.00	
Email	\$0	1	\$0.00	0	\$0	2	\$1,650	\$932	\$932	\$931.50	
Google or Bing organic search	\$0	8	\$0.00	1	\$750	6	\$6,450	\$908	\$1,658	\$207.19	
Other web or social media site	\$0	1	\$0.00	0	\$0	1	\$1,250	\$125	\$125	\$125.00	
Referral - agency	\$0	0	\$0	0	\$0	3	\$2,200	\$925	\$925	\$0.00	
Referral - client	\$0	1	\$0.00	0	\$0	0	\$0	\$0	\$0	\$0.00	
Training workshop	\$0	0	\$0	1	\$4,000	0	\$0	\$0	\$4,000	\$0.00	
Your Marketing Company	\$0	0	\$0	0	\$0	1	\$900	\$90	\$90	\$0.00	
Totals/Averages	\$0	29	\$0.00	2	\$4,750	17	\$16,000	\$3,952	\$8,702	\$1,379.94	

Automated or drip campaigns

Automated or drip campaigns

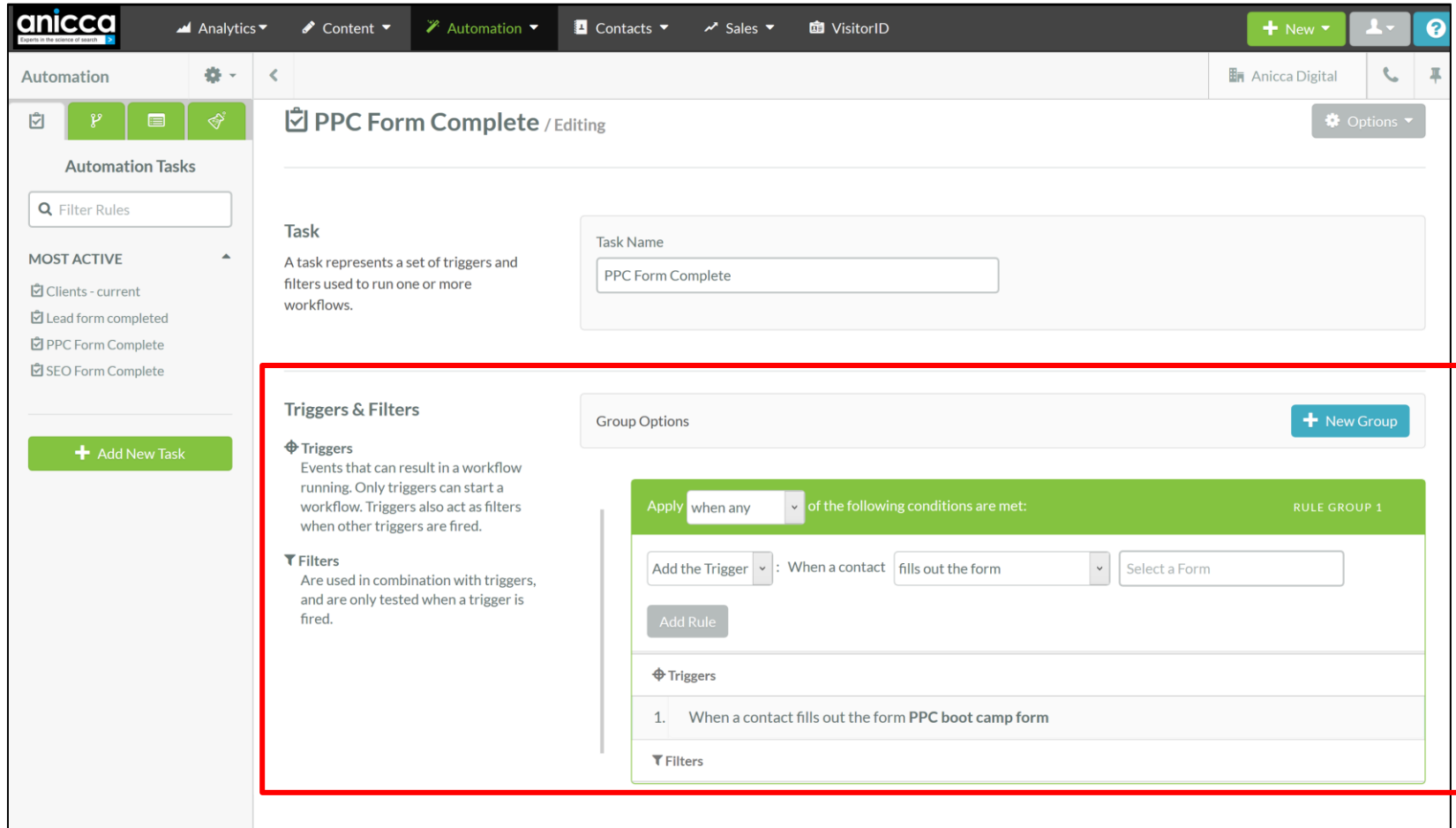
Problem	Common Solutions	MAS solution
<ul style="list-style-type: none"> • Ability to automate email responses to campaigns • Drip campaigns to assist in content marketing • Ability to follow-up shopping cart abandonment • Cross-sell spares and other products at timed intervals • Send annual or date triggered emails • Others as required 	<ul style="list-style-type: none"> • Some email broadcasting systems have automated or triggered emails • Specialist software for shopping cart abandonment 	<ul style="list-style-type: none"> • MAS software allows complex workflows based on filters and triggers • Workflow or task can happen immediately or be scheduled with a delay • Can be used purely for internal processes or as part of external communications

Planning a drip or automated email campaign



1. Requires a trigger or filter – to select segment
2. Followed by a task or workflow

Filter – visitor complete a form



anicca Analytics Content Automation Contacts Sales VisitorID + New

Automation < PPC Form Complete / Editing Options

Automation Tasks

Filter Rules

MOST ACTIVE

- Clients - current
- Lead form completed
- PPC Form Complete
- SEO Form Complete

+ Add New Task

Task

A task represents a set of triggers and filters used to run one or more workflows.

Task Name
PPC Form Complete

Triggers & Filters

Group Options + New Group

Triggers
Events that can result in a workflow running. Only triggers can start a workflow. Triggers also act as filters when other triggers are fired.

Filters
Are used in combination with triggers, and are only tested when a trigger is fired.

Apply when any of the following conditions are met: RULE GROUP 1

Add the Trigger : When a contact fills out the form Select a Form

Add Rule

Triggers

- When a contact fills out the form PPC boot camp form

Filters

Workflow – email staff

Workflows & Actions


Add an existing workflow or create one.

ⓘ Note: Only active workflows will be available to add to this task.

[Activate Workflows](#)

[+ New Workflow](#)

1. Send Alert to Training and Client Services
 - 1. just after start send a notification to **Neil Hannam** via email
 - 2. just after start send a notification to **Bhavesch Chauhan** via email
 - 3. just after start send a notification to **Darren Wynn** via email[View Workflow](#)

 ☐ Upon save apply workflows to any existing leads that fit these criteria.

[Save Changes](#)

Examples of automated workflows or tasks

Internal

- Visitor completes form or goes to a specific page – alert staff by email
- Customer reads content on a specific subject – change preferences or interest fields
- Lead score reaches specific number then alert staff and change status to “hot lead”

External

- Visitor completes form or sale and receives email requesting a Review or social share
- Visitor goes to cart but does not complete sale – customer sent voucher or offer to encourage sale
- Drip-feed blog content based on time and areas of interest
- Customer sent reminder to purchase maintenance or support contract (or other cross-sales)
- Send birthday or other time-triggered emails

Integration

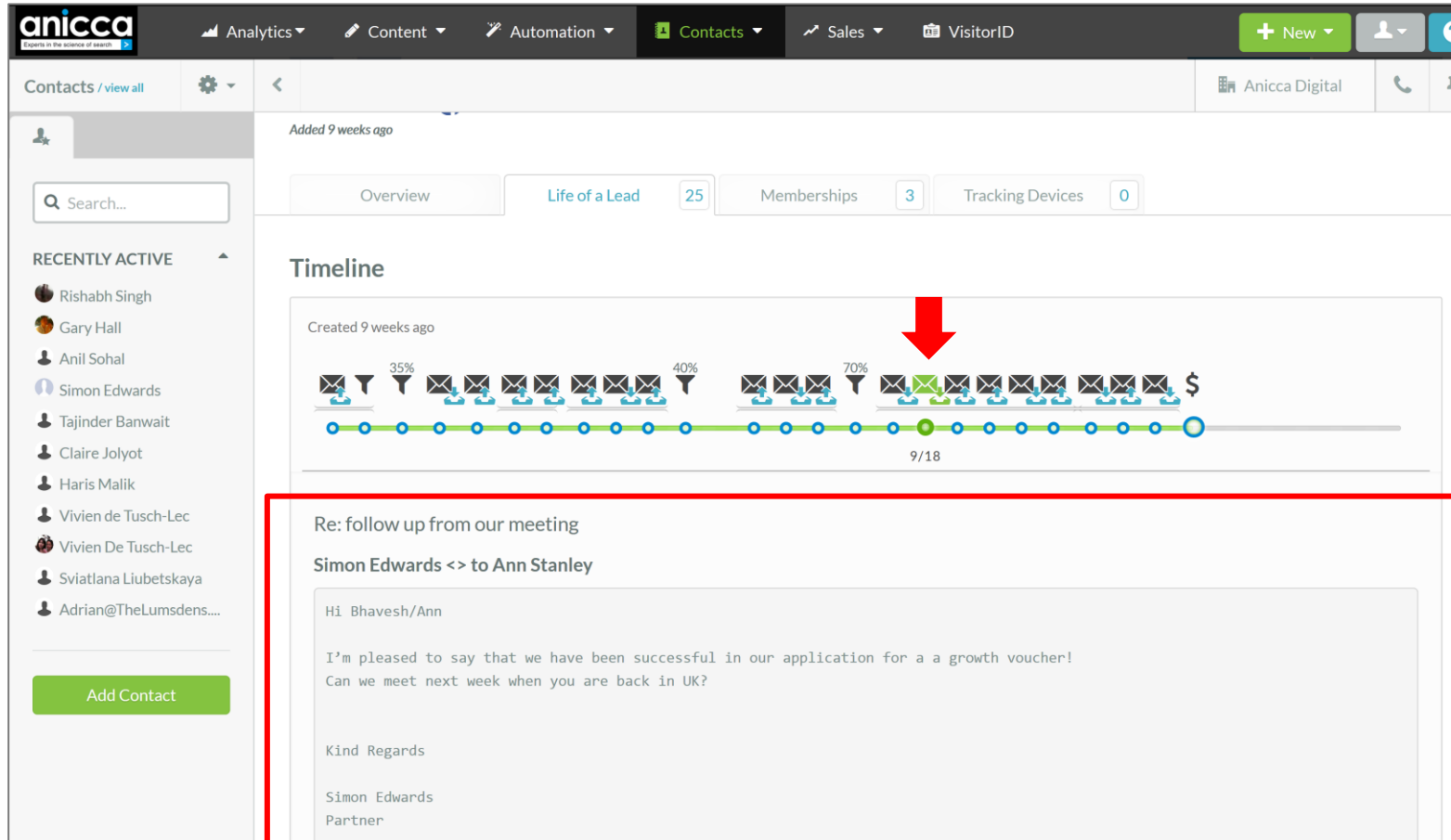
Integration within MAS

- All data and tracking retained for each customer
- Allows you to see complete history of activities e.g. email from MAS or other software such as Gmail
- Integrates all marketing software within sales software

Integration with 3rd party software

- Use of standard connectors for linking with 3rd party software:
 - CRM connectors e.g. Salesforce
 - AdWords integration
 - WebEx and GoToMeeting
 - Gmail and other email systems
 - Call tracking software
 - Social integration
- Use of API and Zapier to enable custom integration with own systems and software

Timeline with all email correspondence (Gmail integration)



The screenshot displays the Anicca CRM interface. The top navigation bar includes tabs for Analytics, Content, Automation, Contacts, Sales, and VisitorID. The left sidebar shows a list of recently active contacts. The main content area is titled 'Contacts / view all' and features a search bar and tabs for Overview, Life of a Lead (25), Memberships (3), and Tracking Devices (0). The 'Life of a Lead' tab is selected, showing a timeline of events. A red arrow points to a specific event in the timeline, which is highlighted by a red box. This event is an email correspondence from Simon Edwards to Ann Stanley, dated 9 weeks ago. The email content is visible within the timeline entry.

Timeline

Created 9 weeks ago

35% 40% 70%

9/18

Re: follow up from our meeting

Simon Edwards <> to Ann Stanley

Hi Bhavesh/Ann

I'm pleased to say that we have been successful in our application for a growth voucher!

Can we meet next week when you are back in UK?

Kind Regards

Simon Edwards
Partner

AdWords integration – Campaigns and ad groups

anicca

Analytics

Content

Automation

Contacts

Sales

VisitorID

+ New

Campaigns





Campaign Reports

Search Reports

ALL REPORTS

2. AdWords management UK	7	152	\$0	0	0	\$0	\$0
2. SEM Management	15	78	\$0	0	0	\$0	\$0
SEM_Marketing	3	17	\$0	0	0	\$0	\$0
SEM_Services	3	11	\$0	0	0	\$0	\$0
SEM_Consulting	2	8	\$0	0	0	\$0	\$0
SEM_Strategies	2	8	\$0	0	0	\$0	\$0
SEM_Techniques	3	8	\$0	0	0	\$0	\$0
SEM_Specialists	2	7	\$0	0	0	\$0	\$0
SEM_Management	2	7	\$0	0	0	\$0	\$0
SEM_Marketing_London	1	2	\$0	0	0	\$0	\$0
Search_Engine_Marketing_Website	1	2	\$0	0	0	\$0	\$0
SEM_Expert	1	2	\$0	0	0	\$0	\$0
SEM_Website	2	2	\$0	0	0	\$0	\$0
SEM_Management_London	1	1	\$0	0	0	\$0	\$0
Search_Engine_Marketing_Specialists	1	1	\$0	0	0	\$0	\$0
Search_Engine_Marketing_Services	1	1	\$0	0	0	\$0	\$0
Search_Engine_Marketing_Techniques	1	1	\$0	0	0	\$0	\$0
3. SEO - grants Leicester	10	39	\$0	0	0	\$0	\$0
1. SEM Training	7	38	\$0	0	0	\$0	\$0




Ad groups and keywords

<div> Campaigns Keywords Content Network Leads </div>							
Name		Impressions ↕	Cost ↕	Clicks ↕	Leads ↕	EV ↕	Sales ↕
 Unmatched Search Terms 	30 ▼	-	-	-	2	\$0	\$0
 1. SEO course with dates	22 ▼	460	\$11.77	4	0	\$0	\$0
 Seo training	16 ▼	88	\$3	1	0	\$0	\$0
 SEO Training	2 ▼	51	\$0	0	0	\$0	\$0
 +SEO +Training		30	\$0	0	0	\$0	\$0
 [SEO Training]		21	\$0	0	0	\$0	\$0
 SEO Courses London	2 ▼	50	\$8.77	3	0	\$0	\$0
 +SEO +Courses + London		32	\$2.9	1	0	\$0	\$0
 [SEO Courses London]		18	\$5.87	2	0	\$0	\$0
 Seo Learn	8 ▼	46	\$0	0	0	\$0	\$0


Integration with WebEx and GoToWebinar


- MAS system can integrate via an API with your virtual meeting software
- You can create custom fields within the MAS using fields from the webinar software
- These fields are then used to create forms which can be added to your website
- You can email your prospects and get them to sign-up for the webinar using your form




ADD AND REORDER FIELDS


 **Add a Field**  **Add a Webex Topic**  **Add GoToWebinar Topics**


☒ Display "How Did You Hear About Us" question at the end of this form.

1  Last Name Required ☐

2  Email Required ☐

3  Company Name Required ☐  

4  Website Required ☐

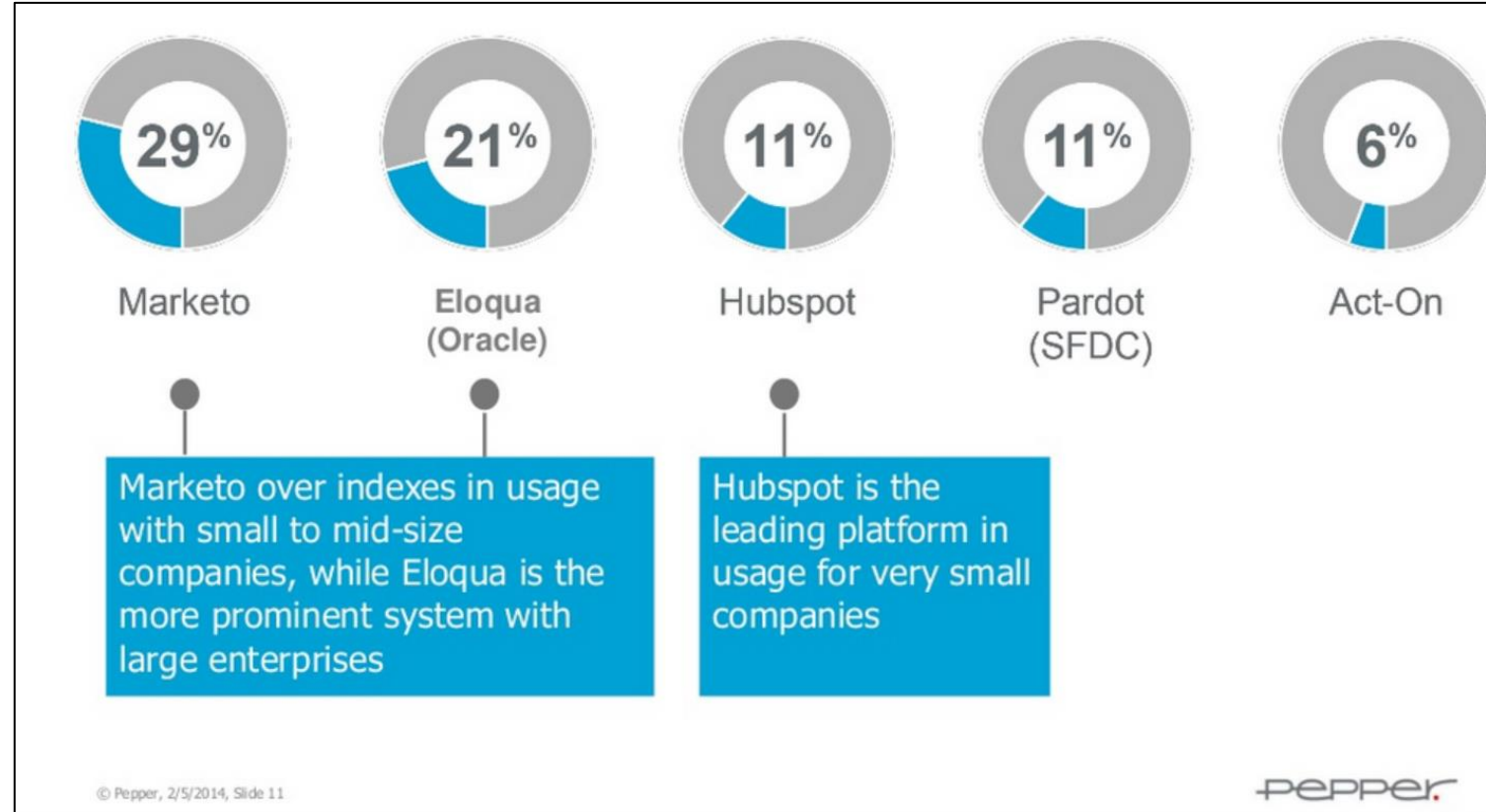
5  Internal Trainings Required ☒

Choosing a MAS Supplier

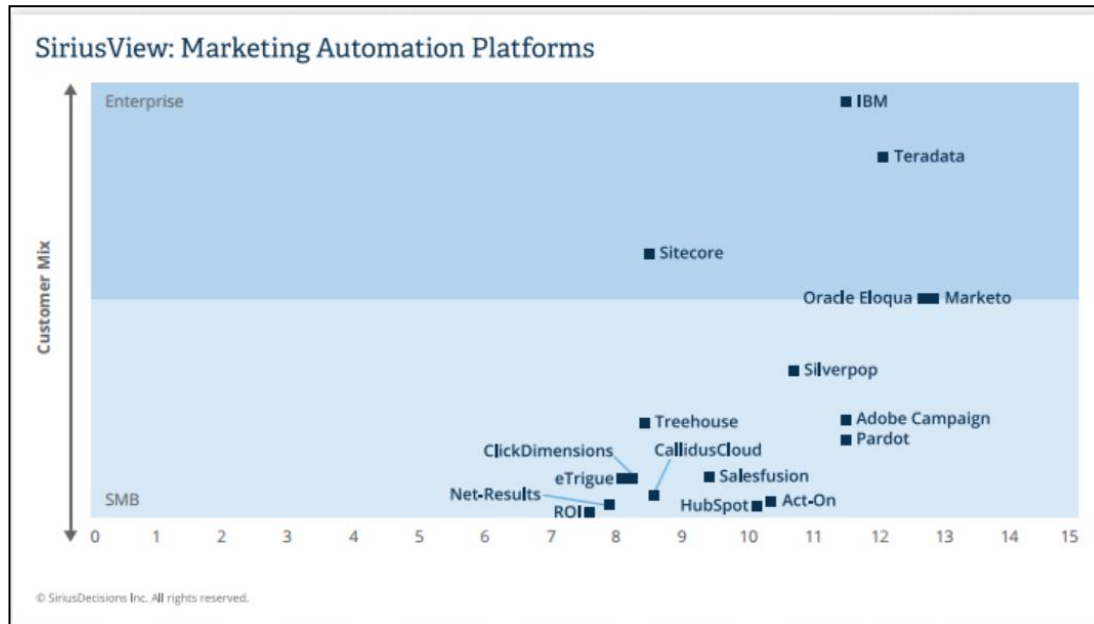
Choosing a supplier

- Your business objectives
- Third party reviews
- Feature lists
- Deal breaking criteria e.g. integration with existing CRM
- Price per user/month
- Scalability
- Demos

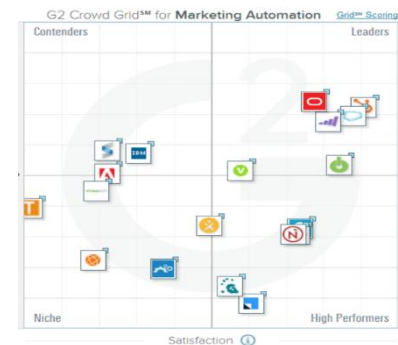
Most popular systems



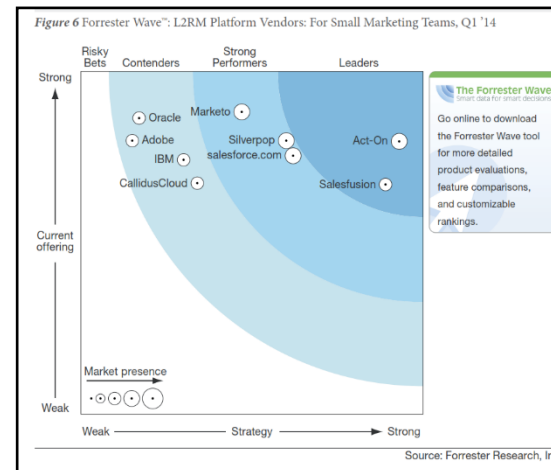
3rd Party reviews of MAS platforms



SiriusDecisions



G2 Crowd Grid



Forrester Report on suppliers for small businesses

How much does it cost?

Vendor	Pricing/ Month	Maximum # of Database Contacts	Notes/Additional Fees
Act-On Software	\$500 \$700 \$900	2,500 5,000 10,000	Pricing based on active database contacts. Unlimited emailings available for all pricing plans. Customized pricing for marketers with larger active contact databases
eTrigue	Ranges from \$1,000/month to \$3,500/month	Ranges from 10,000 to 250,000	Pricing based on the number of database email records. Customized pricing available for enterprise customers with databases of more than 250,000 email addresses
HubSpot	\$200 \$800 \$2,400	NA	Pricing levels based on number of database contacts. Services increase with each pricing tier. For example, \$200/month pricing includes hosting, blogging tools, and landing pages. \$800/month tier adds CRM integration, custom lead scoring, and smart content
Marketo	\$1,195	10,000	Reflects SMB pricing; enterprise pricing is customized
Oracle Eloqua	\$2,000 \$4,000	10,000 10,000	Pricing level based on number of users and database contacts. Customized enterprise pricing is available. Unlimited emailings included for all pricing plans
Pardot	\$1,000 \$2,000 \$3,000	30,000 30,000 30,000	Features increase with each spending tier. Clients pay an additional \$300/month for each additional 30,000 contacts up to 500,000, and \$200/month for each additional 30,000 contacts over 500,000
Salesfusion	\$750 \$1,500 \$1,800	All plans include 30,000	All plans include unlimited emailings and users. Customized pricing available for more than 30,000 contacts based on business size and services used

NA=not available

Source: Third Door Media

<£250/month:

- InfusionSoft
- Anicca MAS

£250 - £1000/month:

- Act-on
- Salesfusion
- Hubspot (lite versions)

£1000+

- Marketo
- Pardot
- eTrigue
- Eloqua

Alternative pricing info at :

<http://blog.capterra.com/2014-marketing-automation-software-pricing-guide/>

How Anicca can help you?

In-house sales and marketing teams

- Rental of MAS software (£200/month)
- Training courses and materials

Other agencies

- Refer you to our MAS supplier – which only sells software via agencies
- Training courses and materials
- Happy to partner with international agencies wanting to sell in the UK market

Useful resources

- <https://library.hubspot.com/marketing-automation>
- <http://uk.marketo.com/reports/siriusview-marketing-automation-platforms-2014/Forrester>
- <http://www.eloqua.com/content/dam/eloqua/Downloads/whitepapers/Forrester-Wave-L2R-Platform-Vendors-Q1-2014.pdf>
- http://www.marketo.com/_assets/uploads/SiriusView-Marketing-Automation-Platforms-2014.pdf?20140602173145
- <https://www.g2crowd.com/categories/marketing-automation>
- http://downloads.digitalmarketingdepot.com/rs/thirddoormedia/images/MIR_1303_MarketAuto.pdf
- <http://blog.capterra.com/top-marketing-automation-blogs/>
- <http://www.slideshare.net/PepperGlobal/pepper-webinar-final>
- <http://www.capterra.com/marketing-automation-software/>

Thank You!

Ann Stanley

ann@anicca.co.uk

07930 384443