

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

by Ann Stanley, Managing Director



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?



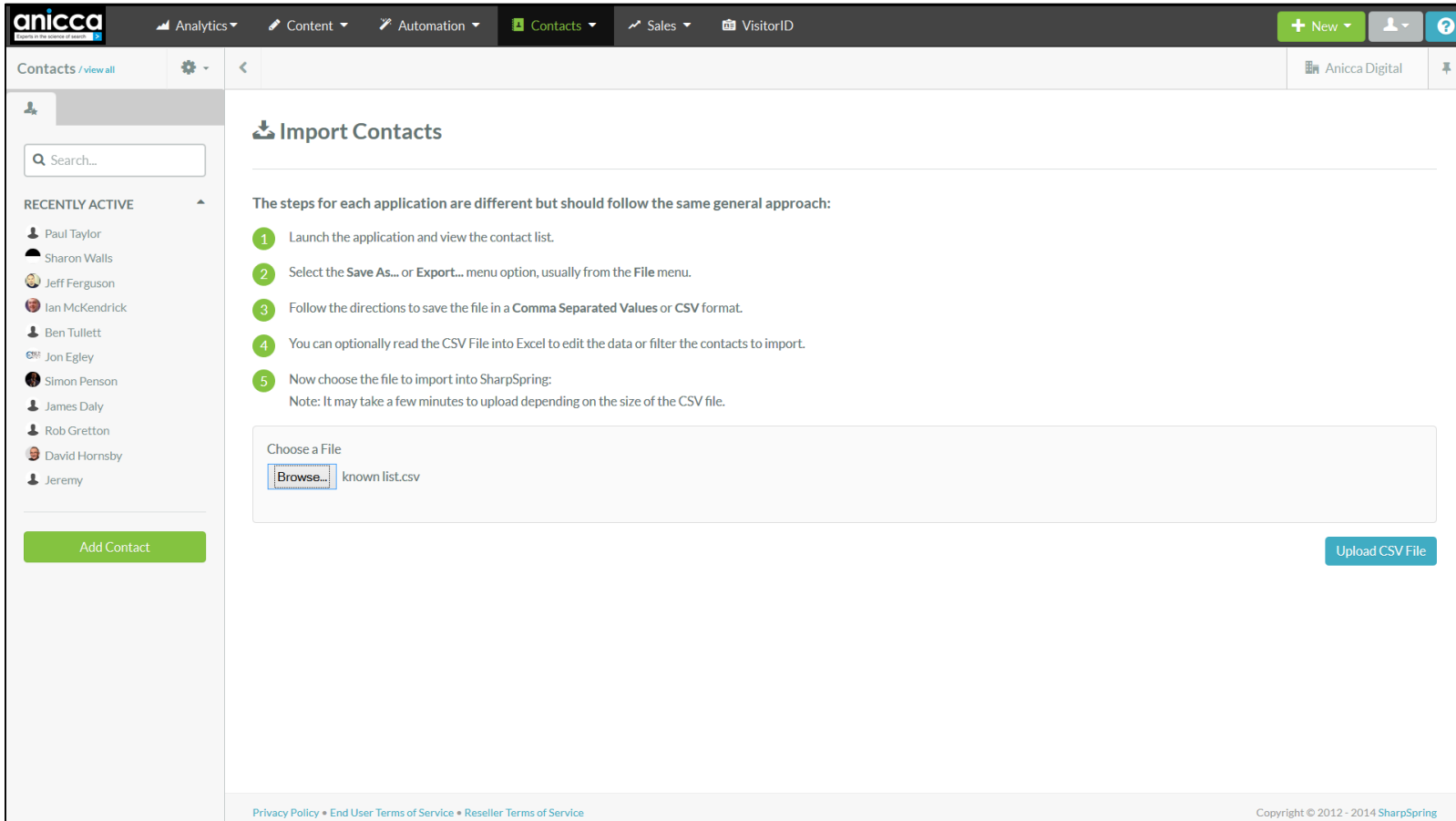
Use of MAS
to solve common sales
and marketing problems

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• Use of Excel for your customer contacts• Multiple lists in each department• No central or correct list• Contacts out of date• Creation of segmented lists	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 shows the Anicca MAS web application interface. The top navigation bar includes links for Analytics, Content, Automation, Contacts (active), Sales, and VisitorID. A sidebar on the left lists 'RECENTLY ACTIVE' users and an 'Add Contact' button. The main content area is titled 'Import Contacts' and provides a five-step guide for importing a CSV file. Below the guide is a file selection area with a 'Browse...' button and a file named 'known list.csv'. An 'Upload CSV File' button is located at the bottom right of the main content area.

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.

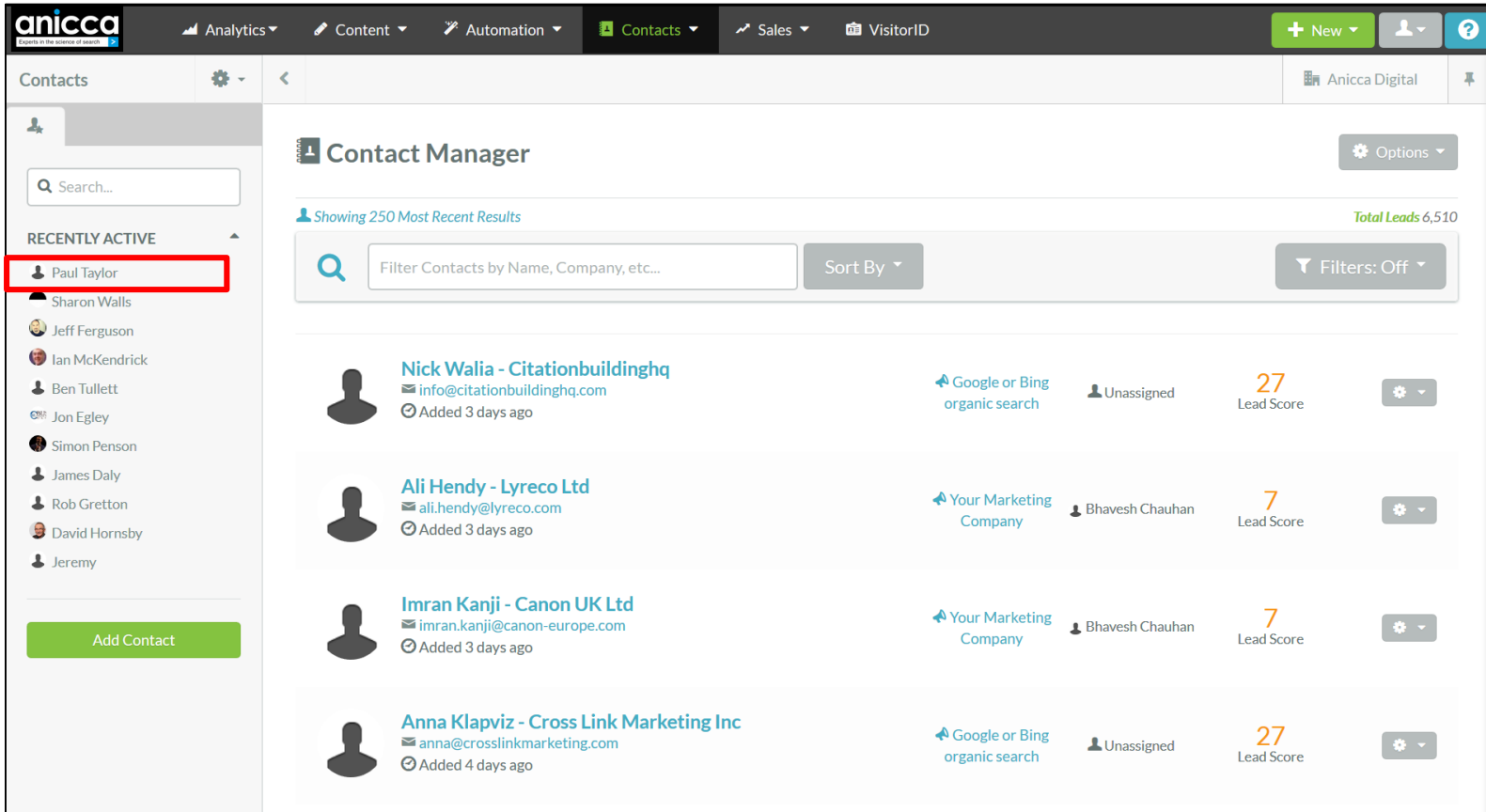
Choose a File

known list.csv

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Contact manager



The screenshot shows the Anicca Contact Manager interface. The top navigation bar includes tabs for Analytics, Content, Automation, **Contacts**, Sales, and VisitorID. A '+ New' button and user profile icons are on the right. The left sidebar shows a 'RECENTLY ACTIVE' list with names like Paul Taylor, Sharon Walls, Jeff Ferguson, Ian McKendrick, Ben Tullett, Jon Egley, Simon Penson, James Daly, Rob Gretton, David Hornsby, and Jeremy. Paul Taylor is highlighted with a red box. The main area is titled 'Contact Manager' and shows 'Showing 250 Most Recent Results' and 'Total Leads 6,510'. It features a search bar, 'Sort By' dropdown, and 'Filters: Off' dropdown. Below is a list of contacts:

Contact Name	Email	Source	Assigned To	Lead Score	Added
Nick Walia - Citationbuildinghq	info@citationbuildinghq.com	Google or Bing organic search	Unassigned	27	Added 3 days ago
Ali Hendy - Lyreco Ltd	ali.hendy@lyreco.com	Your Marketing Company	Bhaves Chauhan	7	Added 3 days ago
Imran Kanji - Canon UK Ltd	imran.kanji@canon-europe.com	Your Marketing Company	Bhaves Chauhan	7	Added 3 days ago
Anna Klapviz - Cross Link Marketing Inc	anna@crosslinkmarketing.com	Google or Bing organic search	Unassigned	27	Added 4 days ago

Contact record

anicca

AnalyticsContentAutomationContactsSalesVisitorID

NewUserHelp

Contacts / view all

Anicca Digital

Person icon

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

Profile picture

Paul Taylor

at Brittany Travel

Added 12 days ago

Overview

Life of a Lead16

Memberships8

Lead Score38

Tracking Devices1

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-NotifyAdd ToClient (existing or previous)Ann StanleyAssigned to

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 agoAssigned to Ann Stanley

Custom Fields

Save

Monthly Marketing Budget

Act-On Lead Score

Mailchimp Score

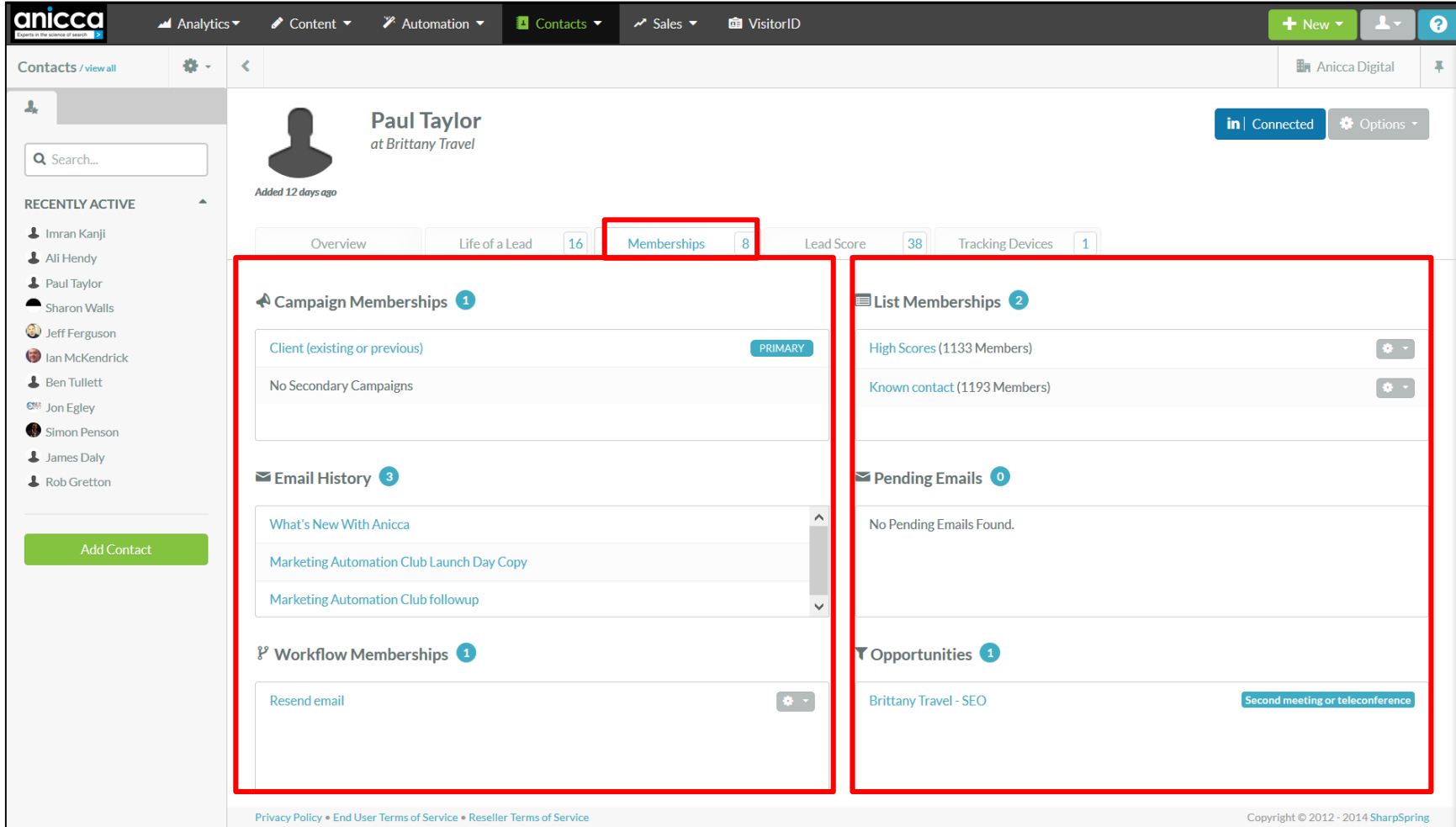
£500 - £10003630

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

in Connected Options

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

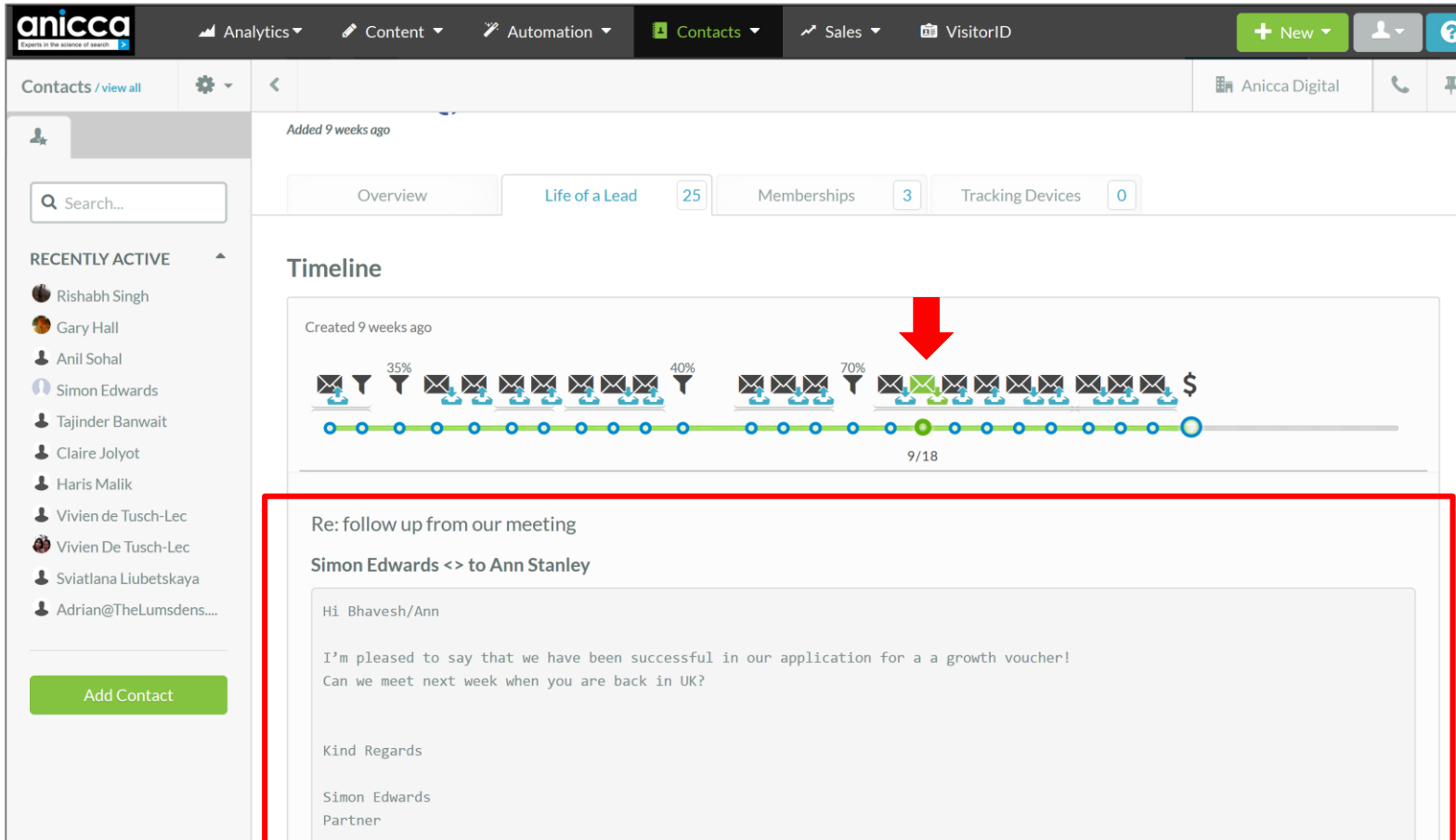
- Imran Kanji
- Ali Hendy
- Paul Taylor
- Sharon Walls
- Jeff Ferguson
- Ian McKendrick
- Ben Tullett
- Jon Egley
- Simon Penson
- James Daly
- Rob Gretton

Add Contact

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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 shows a contact's profile with 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 on the timeline, which is highlighted in green. Below the timeline, the email correspondence is displayed, showing a message from Simon Edwards to Ann Stanley. The email content is highlighted with a red box.

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 a growth voucher!
Can we meet next week when you are back in UK?

Kind Regards


Simon Edwards
Partner




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









 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







 A general Reminder



 Make a phone Call




 Send an email




 Tasks and Reminders

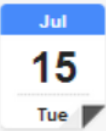
 **Brittany Travel - send meeting notes**
 Due 9 hours from now  Assigned to Ann Stanley

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

 **Anicca Digital** <notification@sharpspring.com>
to me 

07:53 (1 minute ago)   



 Categorise this message as: **Updates**  [Never show this again](#) 



Brittany Travel - send meeting notes
When Tue 15 Jul 2014 17:30 (BST)
[Add to calendar >](#)

Agenda
Tue 15 Jul 2014
14:00 [Darren Lorene and Sukh Operations mee...](#)
17:30 **Brittany Travel - send meeting notes**
No later events

Task invite.

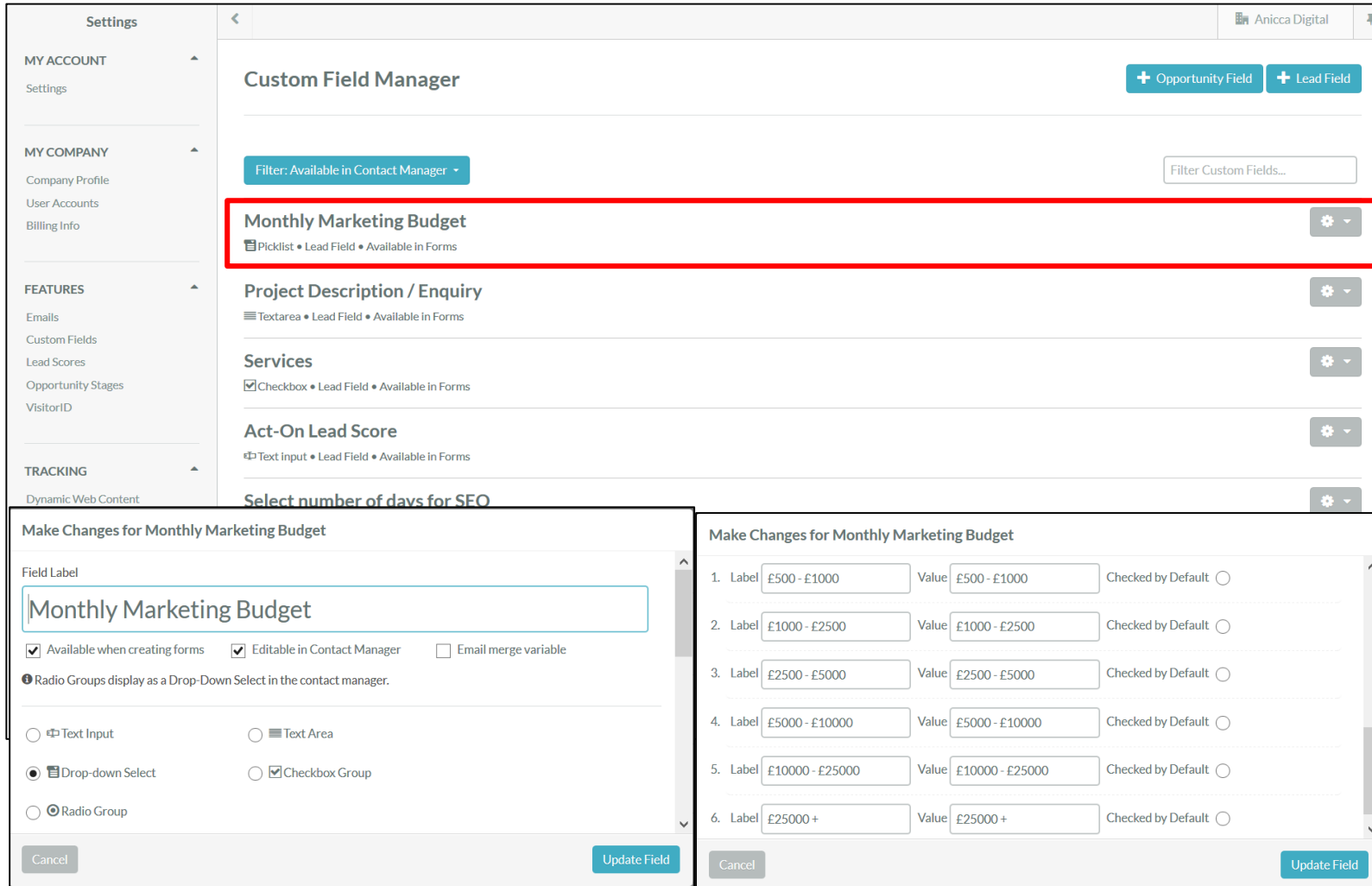

 inv-1405407213-1...

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 Digital CRM. The left sidebar contains navigation menus for 'Settings' (MY ACCOUNT, MY COMPANY, FEATURES, TRACKING), 'MY ACCOUNT' (Settings), 'MY COMPANY' (Company Profile, User Accounts, Billing Info), 'FEATURES' (Emails, Custom Fields, Lead Scores, Opportunity Stages, VisitorID), and 'TRACKING' (Dynamic Web Content). The main area lists custom fields: '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), and 'Select number of days for SEO'. The 'Monthly Marketing Budget' field is highlighted with a red box. Below the main area, two modal windows are open for editing this field. The left modal, titled 'Make Changes for Monthly Marketing Budget', shows the 'Field Label' as 'Monthly Marketing Budget' and includes checkboxes for 'Available when creating forms' (checked), 'Editable in Contact Manager' (checked), and 'Email merge variable' (unchecked). It also has radio buttons for 'Text Input', 'Text Area', 'Drop-down Select' (selected), 'Checkbox Group', and 'Radio Group'. The right modal, also titled 'Make Changes for Monthly Marketing Budget', shows a list of six radio button options for budget ranges: '£500 - £1000', '£1000 - £2500', '£2500 - £5000', '£5000 - £10000', '£10000 - £25000', and '£25000 +'. Each option has a 'Value' field and a 'Checked by Default' radio button.

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

Custom Field Manager

Filter: Available in Contact Manager

Filter Custom Fields...

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

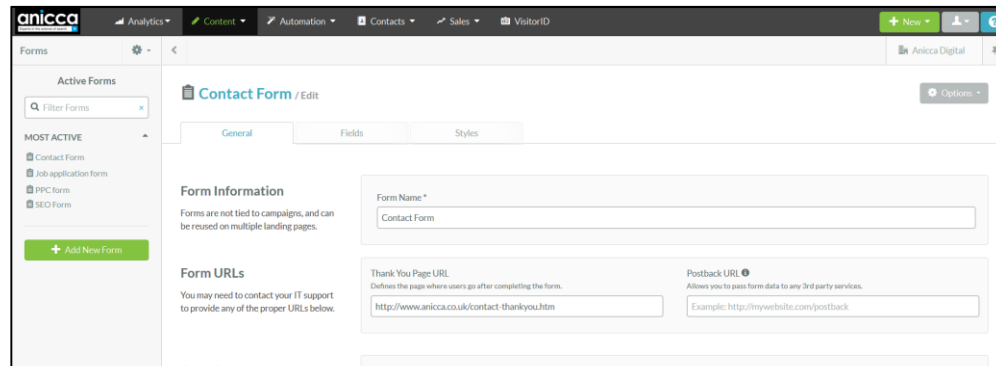
Cancel Update Field

Make Changes for Monthly Marketing Budget

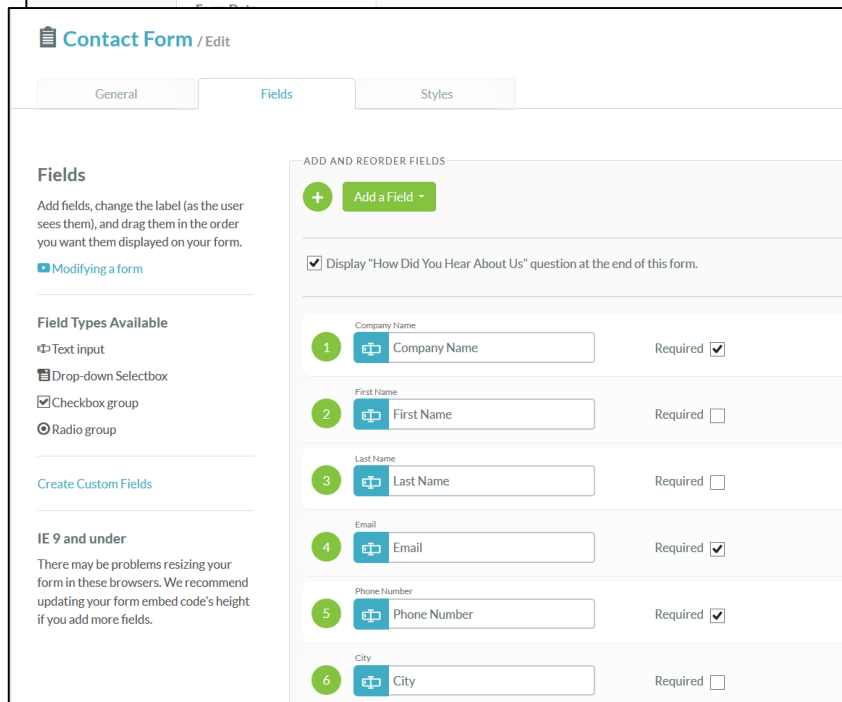
1. Label	£500 - £1000	Value	£500 - £1000	Checked by Default	<input type="radio"/>
2. Label	£1000 - £2500	Value	£1000 - £2500	Checked by Default	<input type="radio"/>
3. Label	£2500 - £5000	Value	£2500 - £5000	Checked by Default	<input type="radio"/>
4. Label	£5000 - £10000	Value	£5000 - £10000	Checked by Default	<input type="radio"/>
5. Label	£10000 - £25000	Value	£10000 - £25000	Checked by Default	<input type="radio"/>
6. Label	£25000 +	Value	£25000 +	Checked by Default	<input type="radio"/>

Cancel Update Field

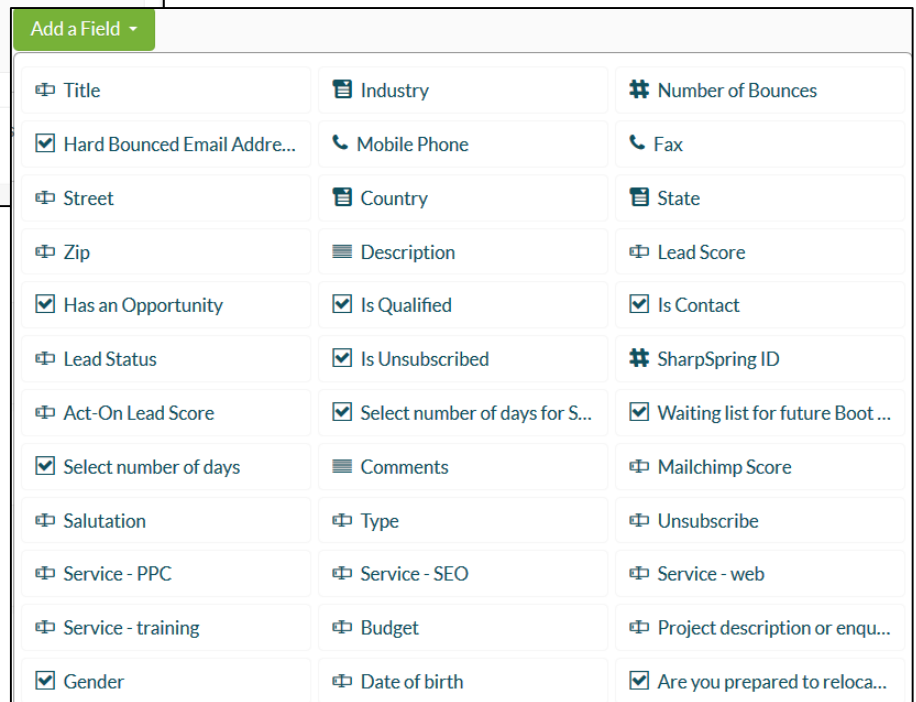
Create (or edit) contact form using pre-existing fields or new custom fields



The screenshot shows the 'Contact Form / Edit' page in the Anicca Forms interface. The 'General' tab is selected. On the left, there's a sidebar with 'Active Forms' and a list of 'MOST ACTIVE' forms including 'Contact Form', 'Job application form', 'PPC form', and 'SEO Form'. The main area has sections for 'Form Information' (Form Name: 'Contact Form'), 'Form URLs' (Thank You Page URL, Postback URL), and 'Form Fields' (empty).



The screenshot shows the 'Contact Form / Edit' page with the 'Fields' tab selected. On the left, there's a sidebar with 'Fields' information and 'Field Types Available' (Text input, Drop-down Selectbox, Checkbox group, Radio group). The main area has a section for 'ADD AND REORDER FIELDS' with a list of fields: Company Name, First Name, Last Name, Email, Phone Number, and City. Each field has a 'Required' checkbox.



The screenshot shows the 'Add a Field' dropdown menu. It contains a grid of field options:

Title	Industry	Number of Bounces
<input checked="" type="checkbox"/> Hard Bounced Email Address	Mobile Phone	Fax
Street	Country	State
Zip	Description	Lead Score
<input checked="" type="checkbox"/> Has an Opportunity	<input checked="" type="checkbox"/> Is Qualified	<input checked="" type="checkbox"/> Is Contact
Lead Status	<input checked="" type="checkbox"/> Is Unsubscribed	SharpSpring ID
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	Comments	Mailchimp Score
Salutation	Type	Unsubscribe
Service - PPC	Service - SEO	Service - web
Service - training	Budget	Project description or enqu...
<input checked="" type="checkbox"/> Gender	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

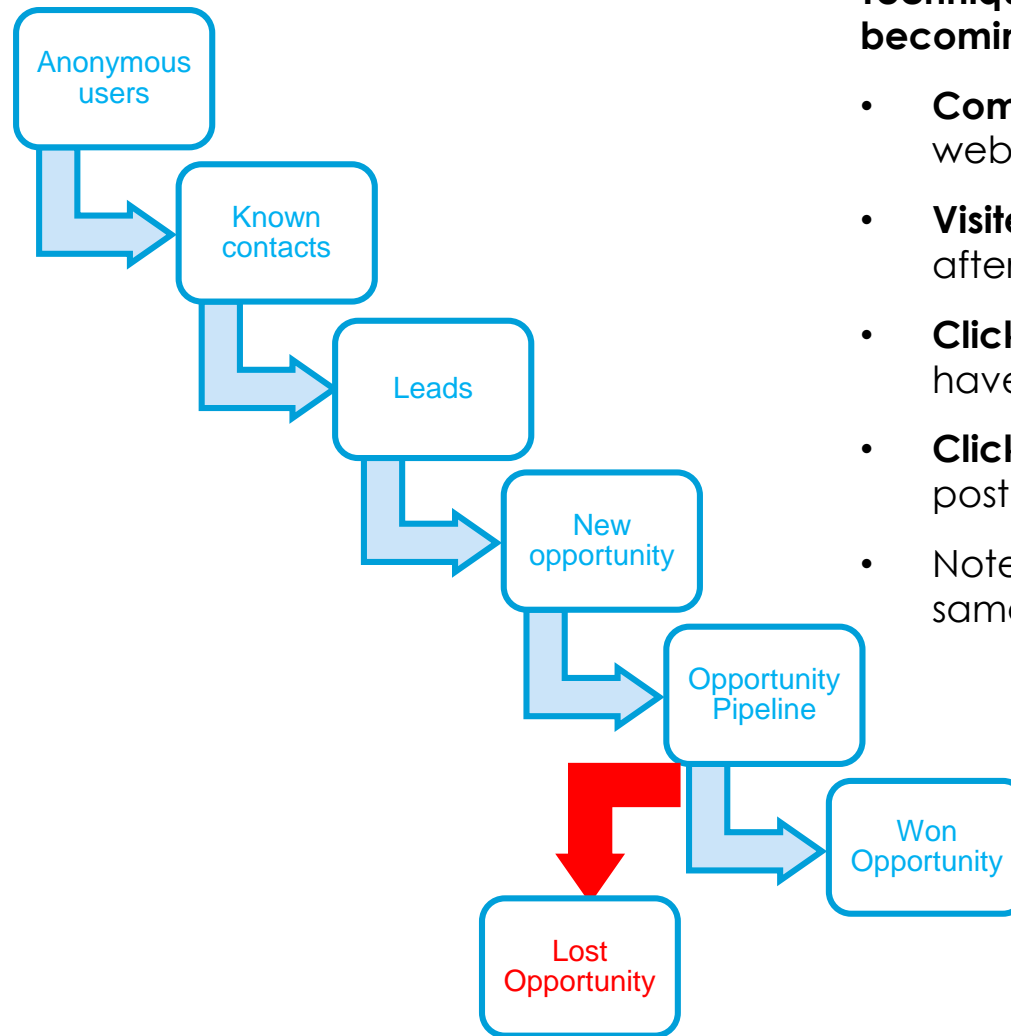
£25000 +

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

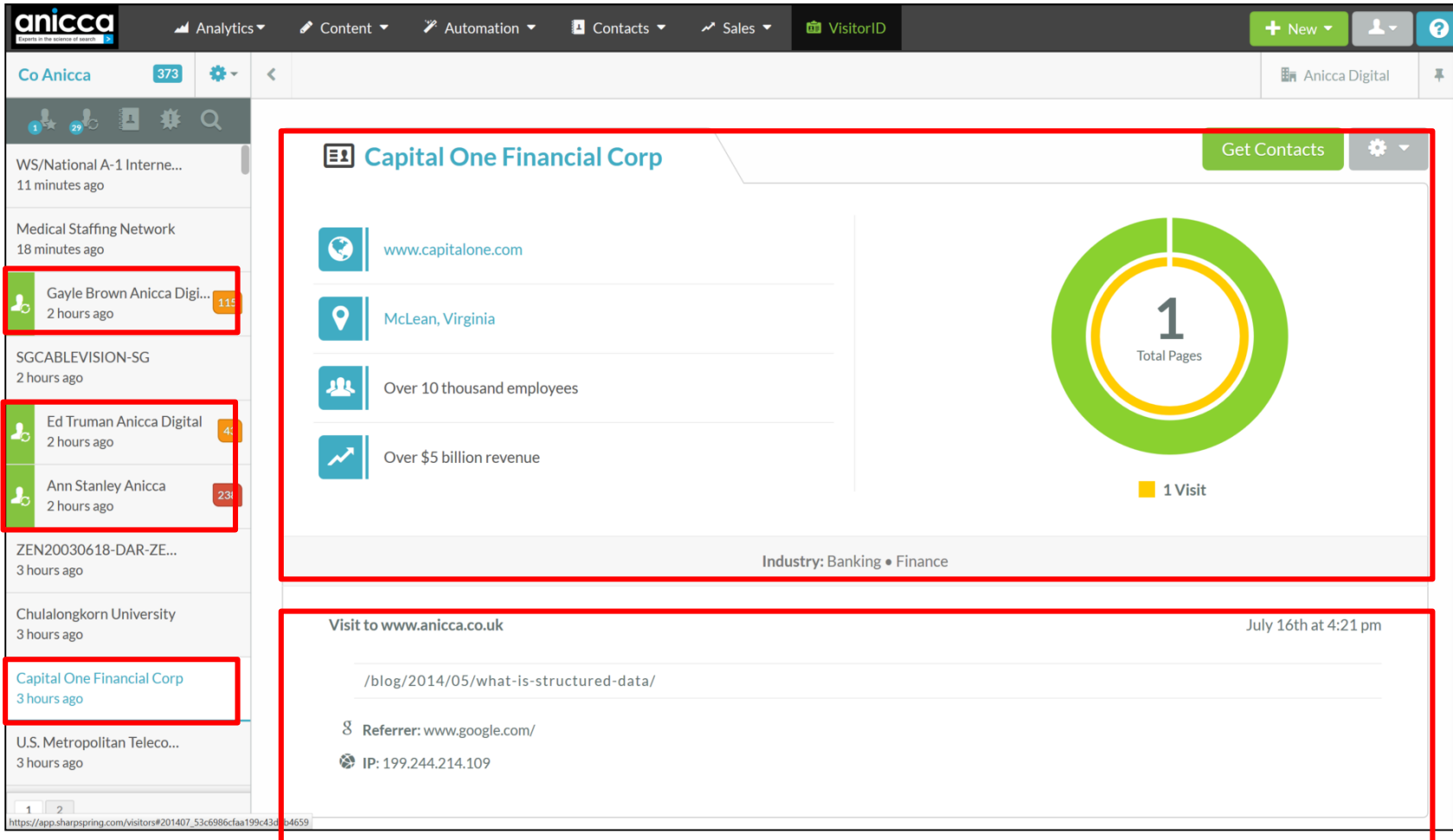
Naming convention



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: 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), and revenue (Over \$5 billion). 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 from www.google.com/ and IP address 199.244.214.109.

anicca
Experts in the science of search

Analytics Content Automation Contacts Sales VisitorID + New

Co Anicca 373

WS/National A-1 Interne... 11 minutes ago

Medical Staffing Network 18 minutes ago

Gayle Brown Anicca Digi... 2 hours ago

SGCABLEVISION-SG 2 hours ago

Ed Truman Anicca Digital 2 hours ago

Ann Stanley Anicca 2 hours ago

ZEN20030618-DAR-ZE... 3 hours ago

Chulalongkorn University 3 hours ago

Capital One Financial Corp 3 hours ago

U.S. Metropolitan Teleco... 3 hours ago

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

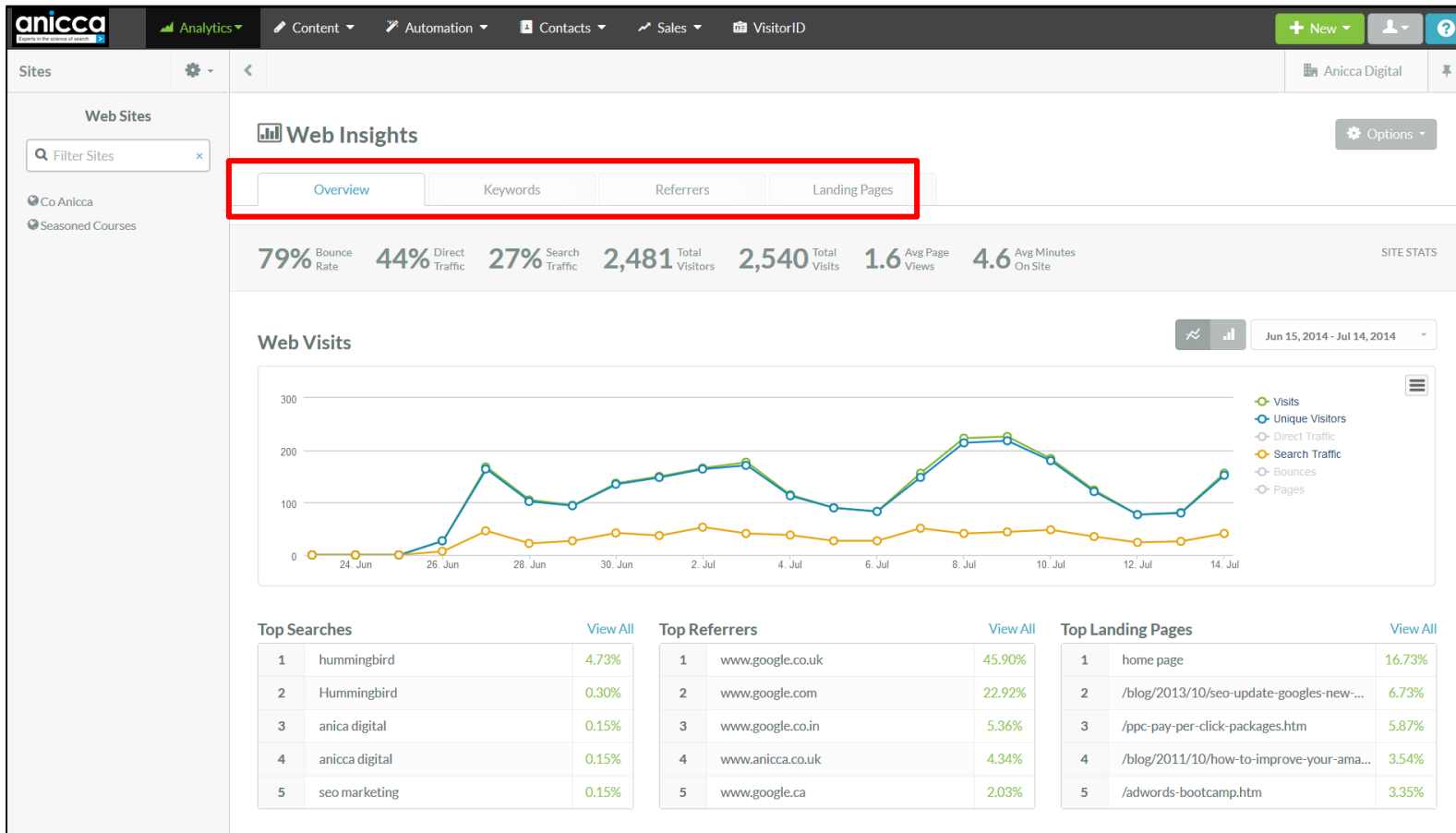
/blog/2014/05/what-is-structured-data/

Referrer: www.google.com/

IP: 199.244.214.109

https://app.sharpspring.com/visitors#201407_53c6986cfaa199c43b04659

Website analytics

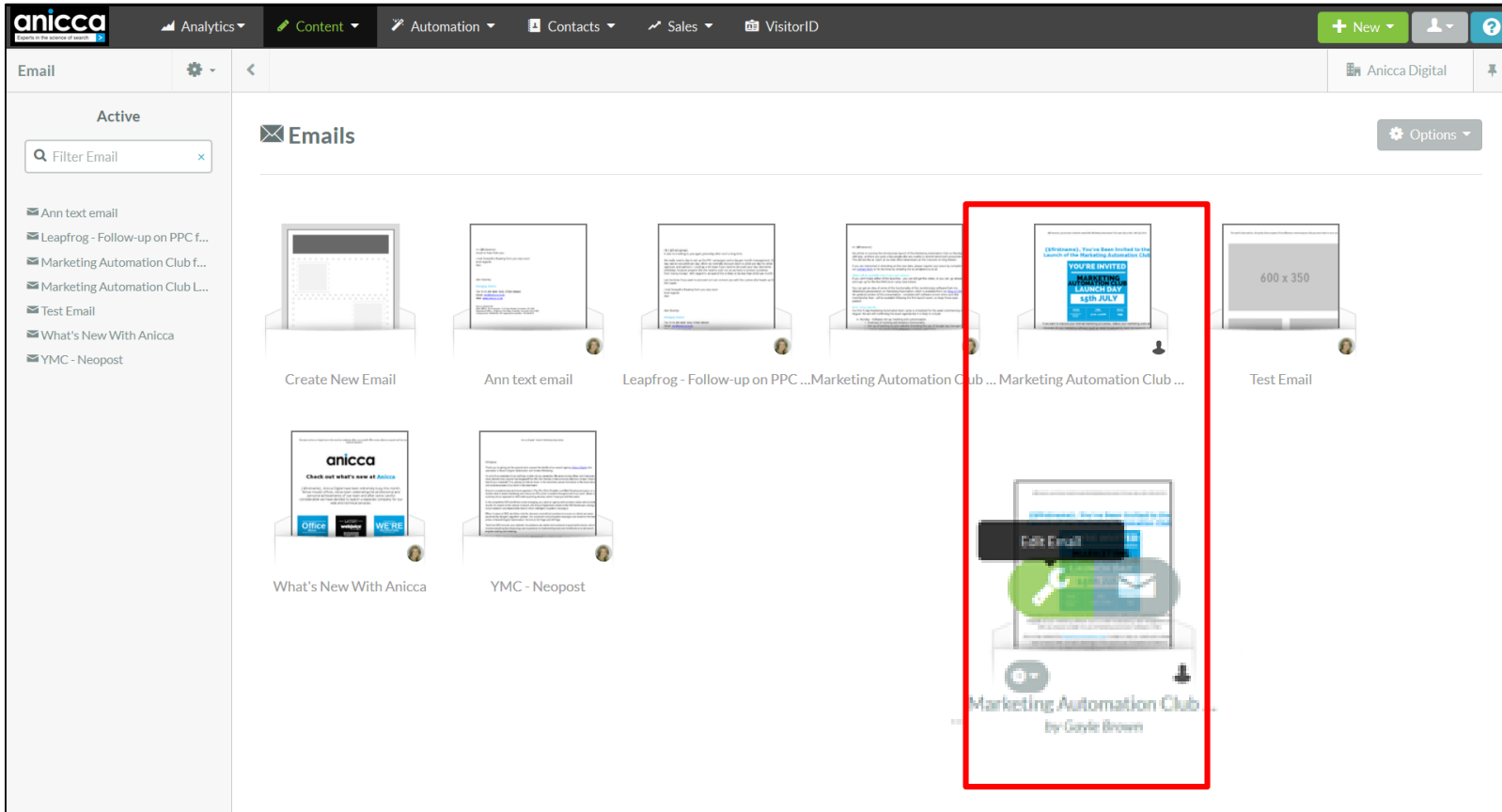


Email broadcasting and reporting

Email broadcasting and reporting

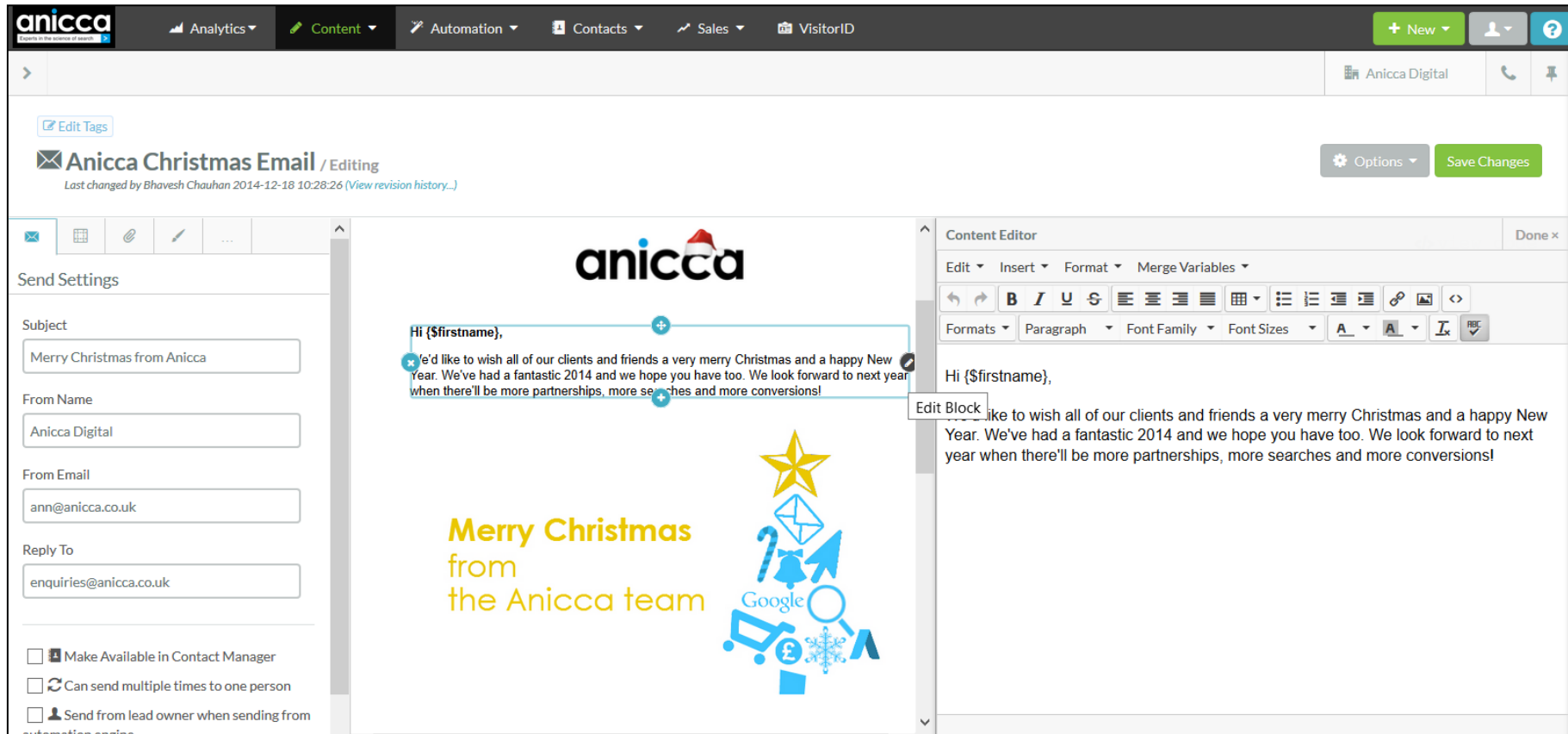
Problem	Common Solutions	MAS solution
<ul style="list-style-type: none">• Ability to email using own templates• Ability to upload your own list• Blocking of an account if it contains info@ or sales@ addresses• No tracking of customers history	<ul style="list-style-type: none">• MailChimp and web-based 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



The screenshot displays the Anicca email management dashboard. 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, titled 'Active', contains a search bar and a list of email templates: 'Ann text email', 'Leapfrog - Follow-up on PPC f...', 'Marketing Automation Club f...', 'Marketing Automation Club L...', 'Test Email', 'What's New With Anicca', and 'YMC - Neopost'. The main content area, titled 'Emails', shows a grid of email templates. A red rectangle highlights the 'Marketing Automation Club' template, which features a 'POPS INVITED' banner and a 'MARKETING LAUNCH DAY' announcement for '14th JULY'. Below this template, a 'Marketing Automation Club' template by 'Gyle Brown' is also visible. The interface includes various icons for editing, deleting, and pinning emails.

Editing an existing email



The screenshot shows the Anicca email editor interface. The top navigation bar includes links for Analytics, Content, Automation, Contacts, Sales, and VisitorID. The main header displays the email title 'Anicca Christmas Email / Editing' and a 'Save Changes' button. The left sidebar contains 'Send Settings' with fields for Subject, From Name, From Email, and Reply To, along with checkboxes for contact management options. The central workspace shows the email preview with the Anicca logo, a personalized greeting, and a festive graphic. The right sidebar features a 'Content Editor' with a rich text editor toolbar and a block editor view.

Send Settings

Subject: Merry Christmas from Anicca

From Name: Anicca Digital

From Email: ann@anicca.co.uk

Reply To: enquiries@anicca.co.uk

☐ Make Available in Contact Manager

☐ Can send multiple times to one person

☐ Send from lead owner when sending from automation engine

Content Editor

Edit | Insert | Format | Merge Variables

Formats | Paragraph | Font Family | Font Sizes | A | A | I | B

Hi {Firstname},

We'd like to wish all of our clients and friends a very merry Christmas and a happy New Year. We've had a fantastic 2014 and we hope you have too. We look forward to next year when there'll be more partnerships, more searches and more conversions!

Merry Christmas from the Anicca team

Google

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

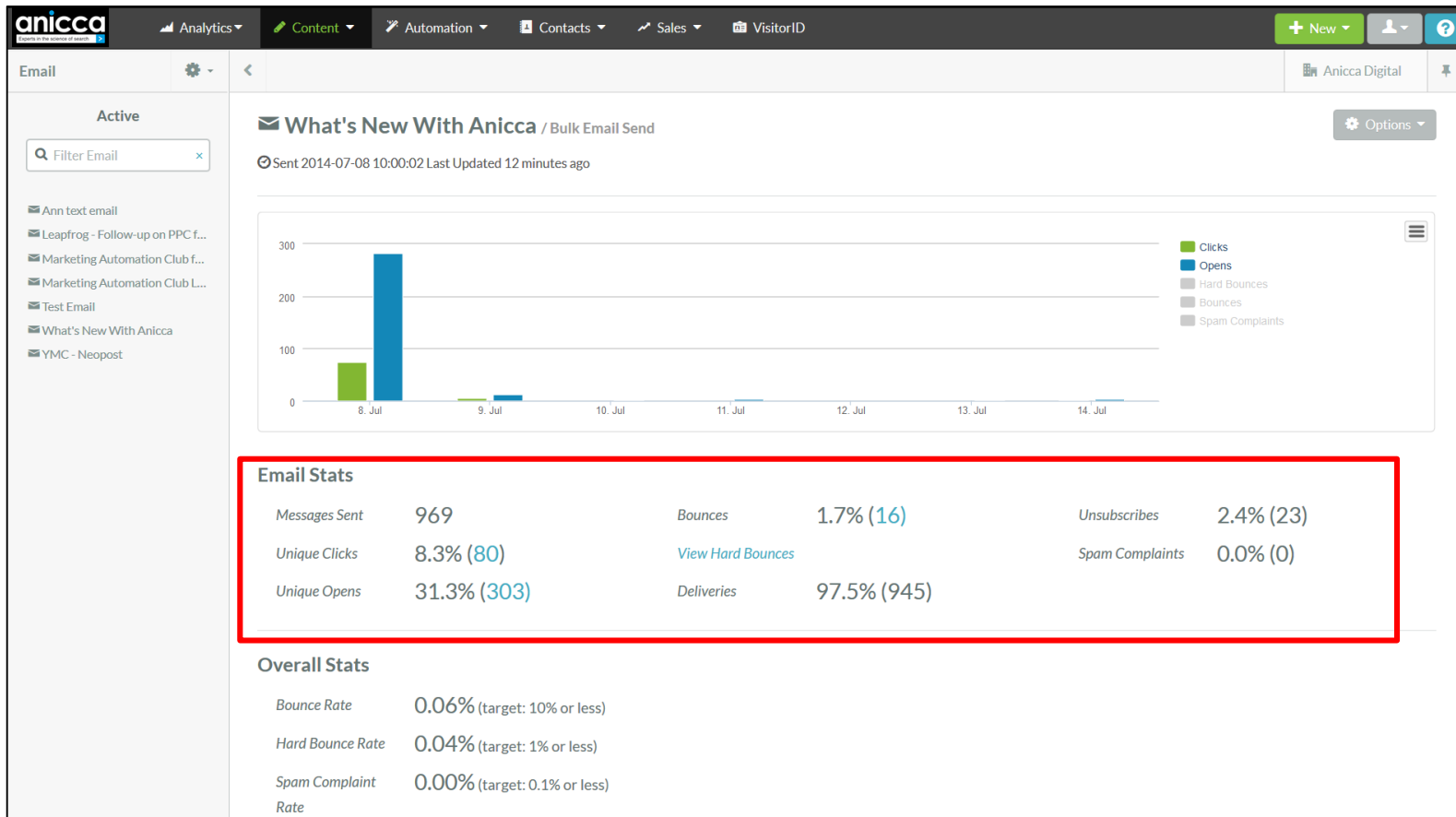
Select A List

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 stats




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



Analytics
Content
Automation
Contacts
Sales
VisitorID

+ New
User
Help

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

Anicca Digital

Engagement

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

How well a lead aligns to your target audience.

Lead Score Decay

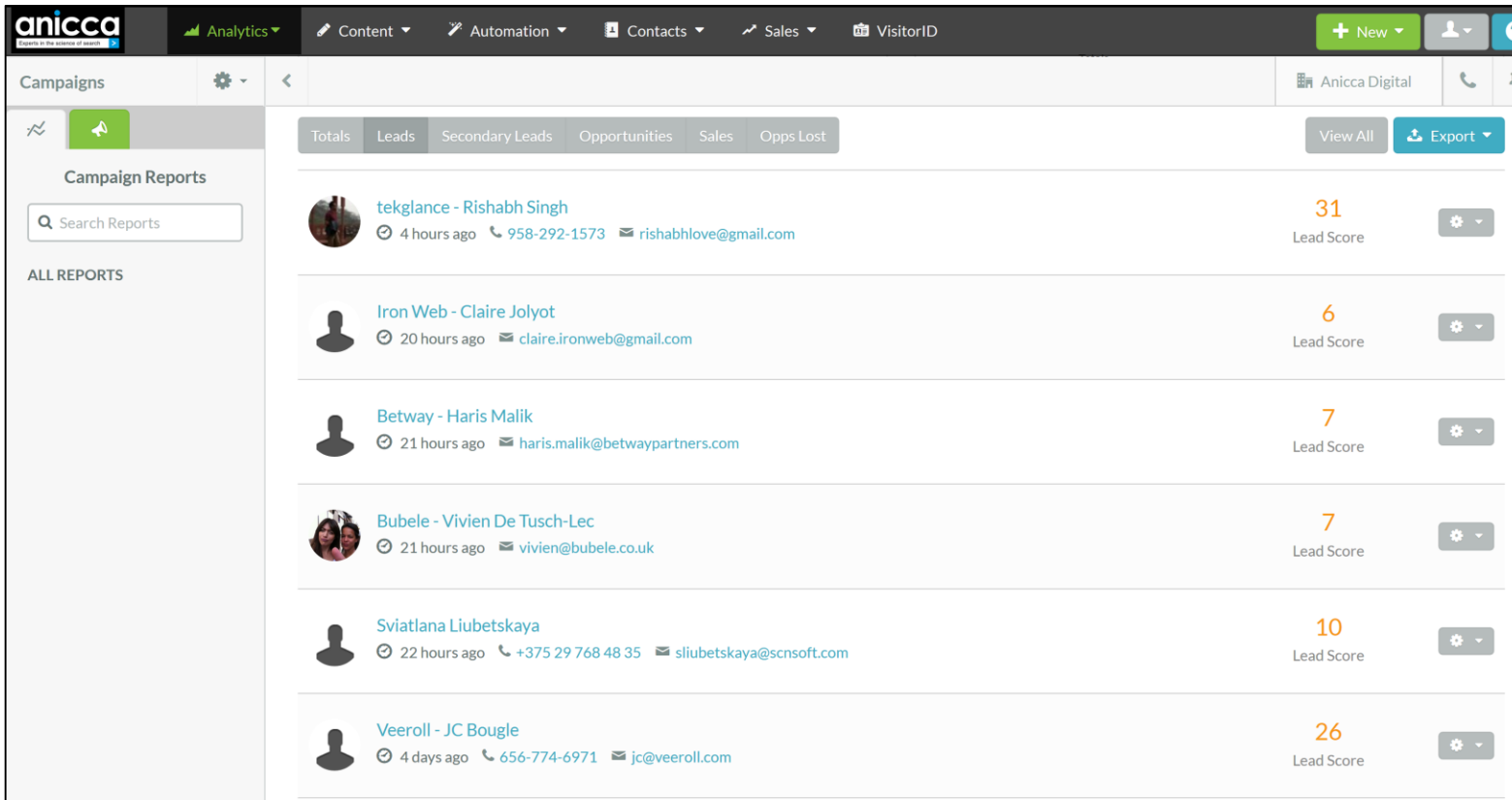
4 weeks
after the lead's last activity date they will appear half as important.

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

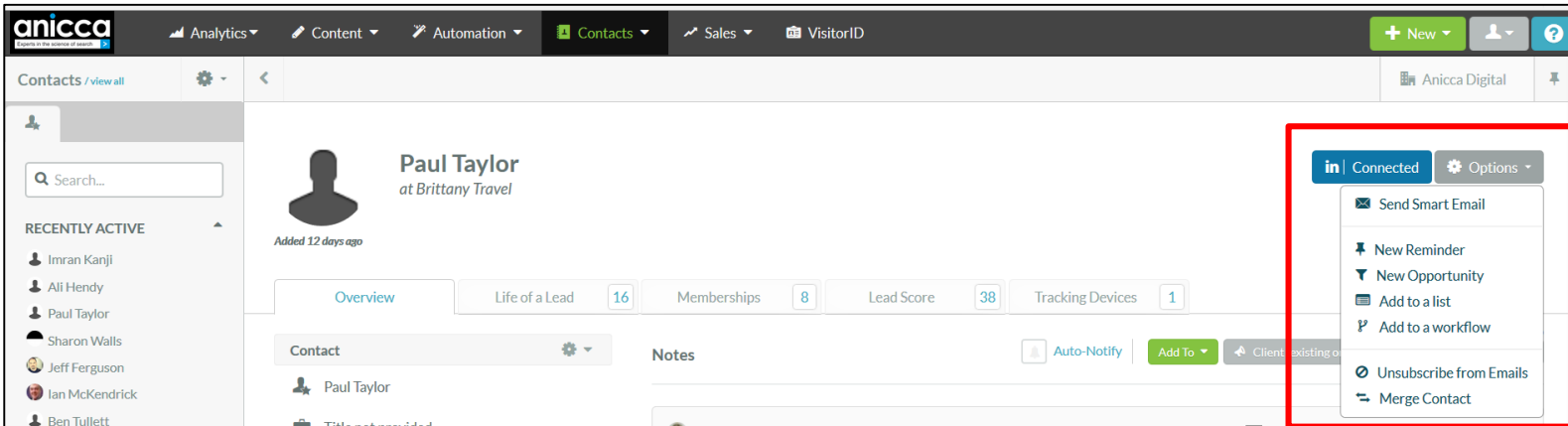
Viewing the leads



The screenshot shows the Anicca CRM interface. The top navigation bar includes the Anicca logo, a search bar, and several menu items: Analytics, Content, Automation, Contacts, Sales, and VisitorID. A 'New' button is also present. The main content area is titled 'Campaigns' and features a sidebar on the left with 'Campaign Reports' and a search bar. The main area displays a table of leads with columns for Totals, Leads, Secondary Leads, Opportunities, Sales, and Opps Lost. The table lists six leads with their names, contact information, and lead scores.

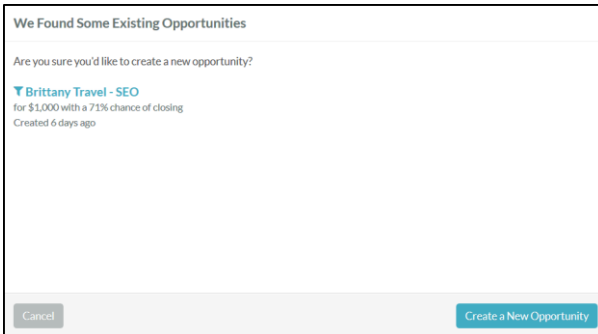
Totals	Leads	Secondary Leads	Opportunities	Sales	Opps Lost
View All	Export				
	tekglance - Rishabh Singh 4 hours ago 958-292-1573 rishabhlove@gmail.com				
					31 Lead Score
	Iron Web - Claire Jolyot 20 hours ago claire.ironweb@gmail.com				
					6 Lead Score
	Betway - Haris Malik 21 hours ago haris.malik@betwaypartners.com				
					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

Creating a sales opportunity

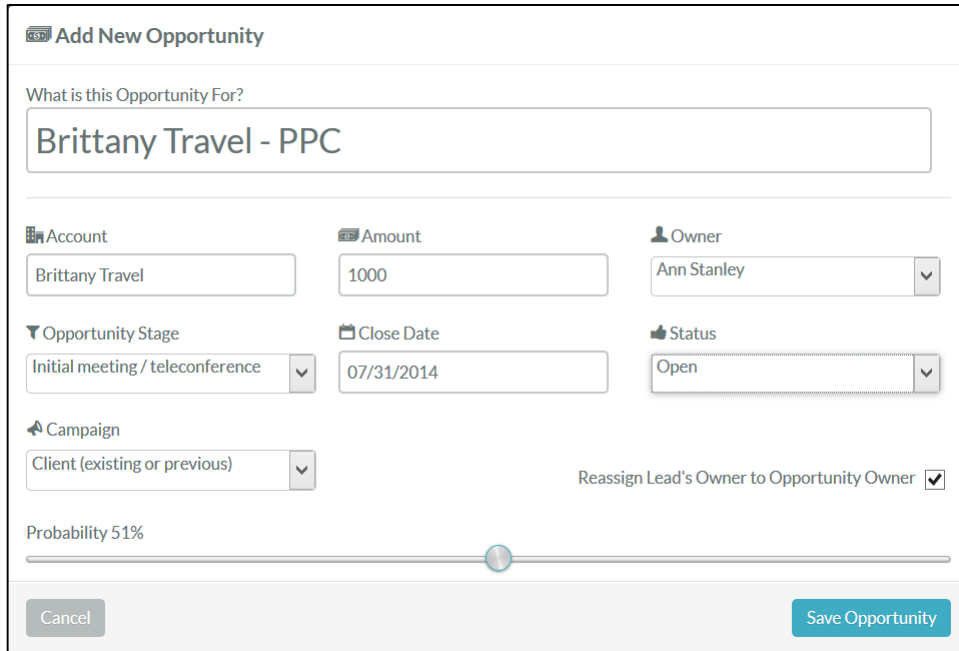


The screenshot shows the Anicca CRM interface. The top navigation bar includes Analytics, Content, Automation, Contacts, Sales, and VisitorID. The main content area displays the contact profile for Paul Taylor at Brittany Travel, added 12 days ago. The 'Options' dropdown menu is open, showing the following options:

- Send Smart Email
- New Reminder
- New Opportunity
- Add to a list
- Add to a workflow
- Unsubscribe from Emails
- Merge Contact



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 are as follows:

- 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.

Opportunity pipeline

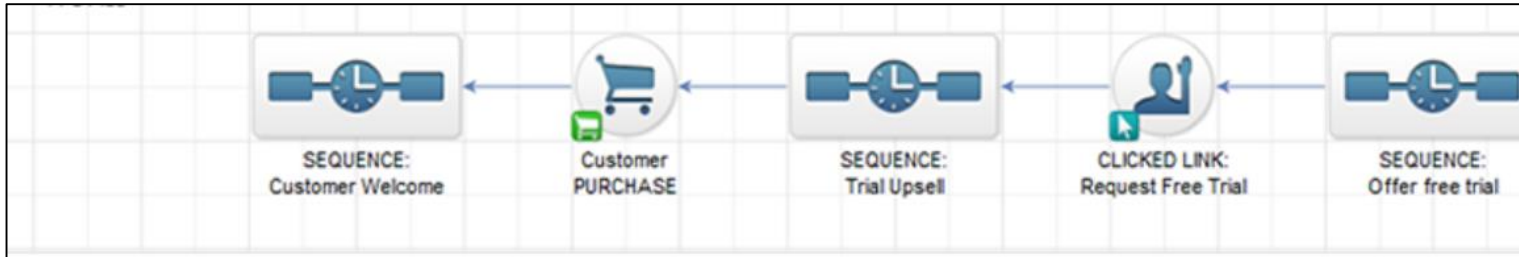
<div> <div>anicca</div> <div>Analytics Content Automation Contacts Sales VisitorID</div> <div>+ New</div> </div>					
<div> <div>Filter by Owner</div> <div>Forecast (9/1 - 9/30): EV \$44,272 • 65 Total Opps • \$9,500 won</div> </div>			<div>Anicca Digital</div>		
AUDIT/ESTIMATES COMPLETED	INITIAL MEETING / 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 Klin...</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>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 Shoefield</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 Shoefield</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>		
					<div>Outdoor Knitwea/Kemtons...</div> <div>Outdoor Knitwea/Kemtons</div> <div>Closes Sep 9, 2014</div> <div>Gurdip Singh</div> <div>\$8,500</div> <div>51% chance of closing</div> <div>Past Close</div>

Automated or drip campaigns

Automated or drip campaigns

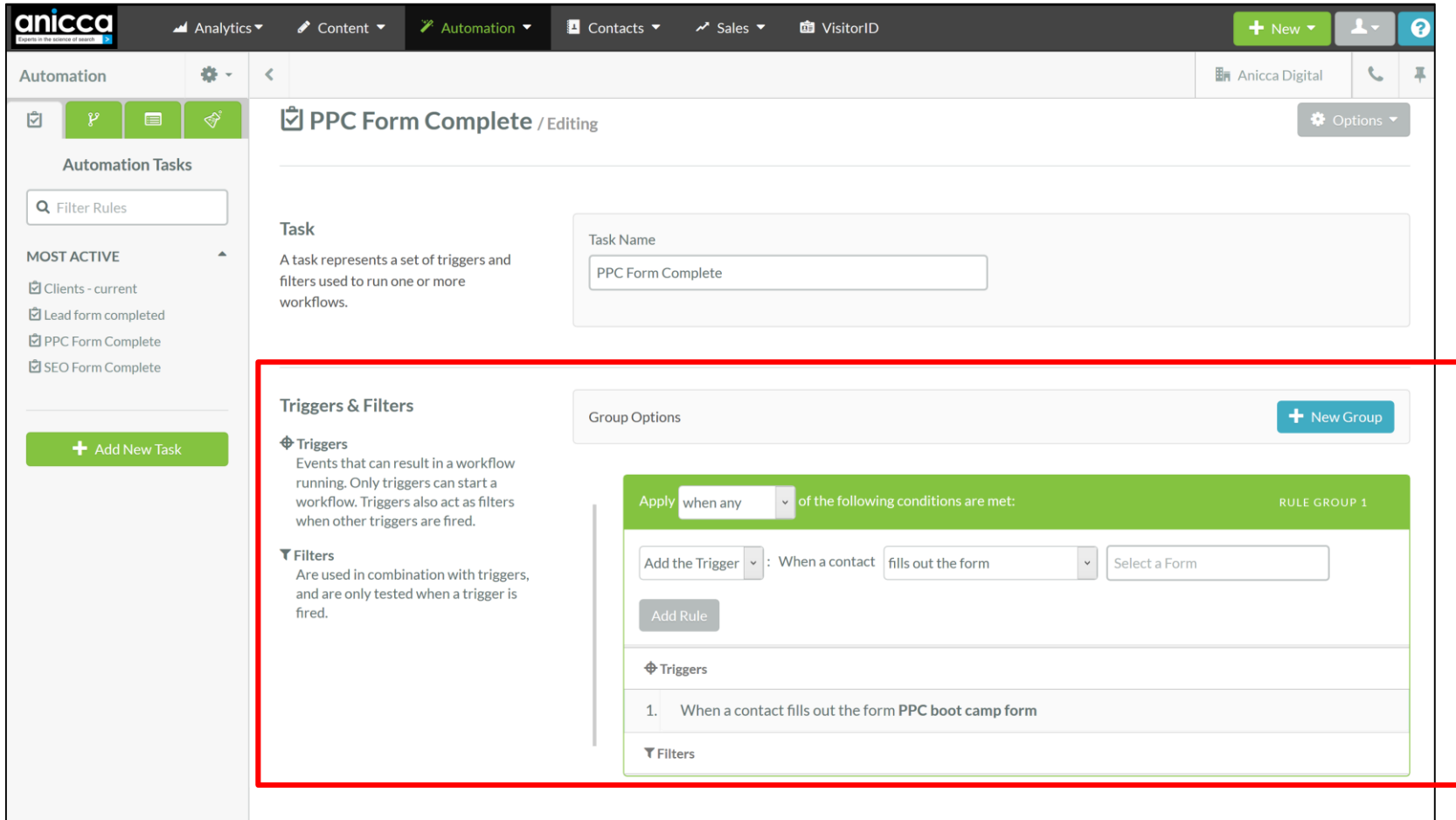
Problem	Common Solutions	MAS solution
<ul style="list-style-type: none"> • Ability to automate email responses to campaigns • Drip campaigns to assist in content marketing • Ability to follow-up shopping cart abandonment • Cross-sell spares and other products at timed intervals • Send annual or date 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 Automation Tasks

Filter Rules

MOST ACTIVE

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

+ Add New Task

PPC Form Complete / Editing Options

Task

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

Task Name

PPC Form Complete

Triggers & Filters

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.

Group Options + 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

- 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**

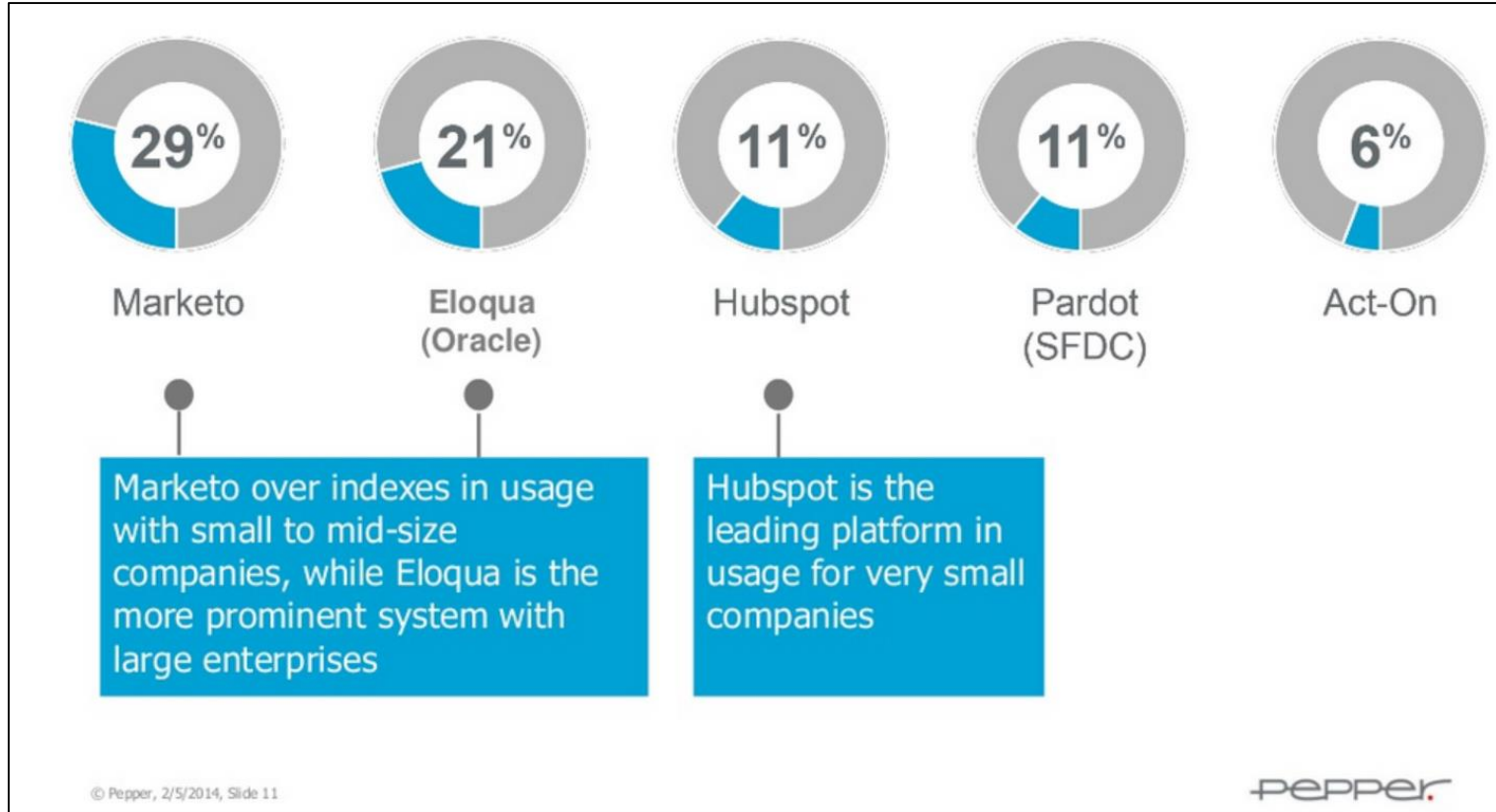
- Visitor completes form or goes to a specific page – alert staff by email
- Customer reads content on a specific subject – change preferences or interest fields
- Lead score reaches specific number then alert staff and change status to “hot lead”

- **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

Choosing a MAS Supplier

Most popular systems



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!

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