Introduction to marketing automation software (MAS)

Ann Stanley Founder & CEO

4th February 2022

Introductions

Ann Stanley

- 20 years in digital marketing
- Founder & CEO of Anicca
- 15 years running Anicca





Supporting your digital ambitions.

No Ego and No Bull, we invest in relationships with businesses and brands to drive growth and succeed in what we do.

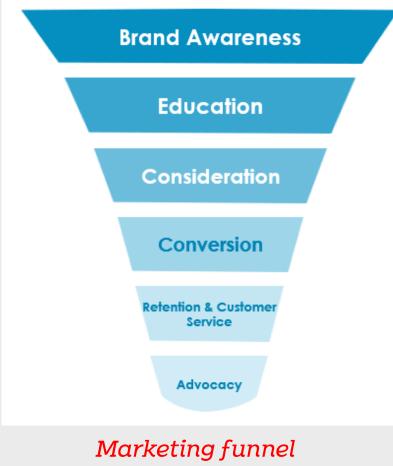
Our multi award winning agency in the heart of Leicester speaks for itself.

Agenda

- Background to sales and marketing funnels
- What is marketing automation software (MAS)?
- Tour of our SharpSpring MAS platform
- Use of MAS for marketing
- Use of MAS for sales
- Other functionality
- Choosing a Supplier

Background to sales and marketing funnels

Marketing vs sales funnels (differences in terminology)



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Marketing vs sales funnels (differences in terminology)

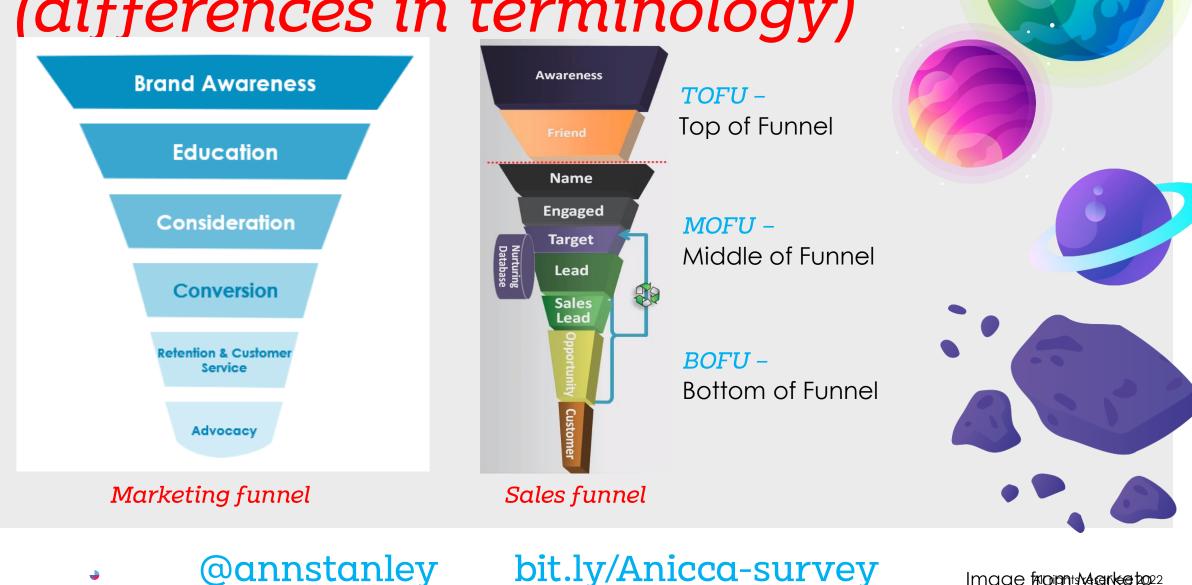
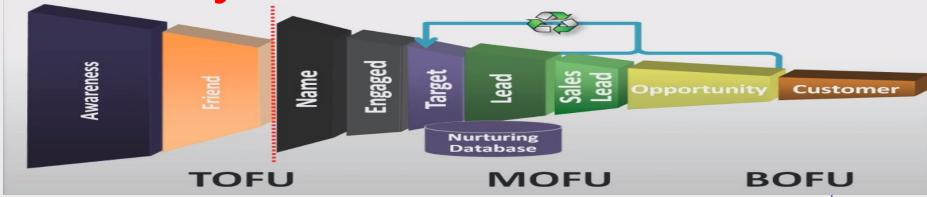


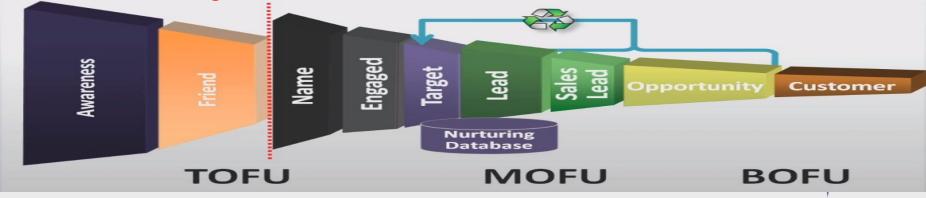
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Role of marketing & sales teams in the sales funnel



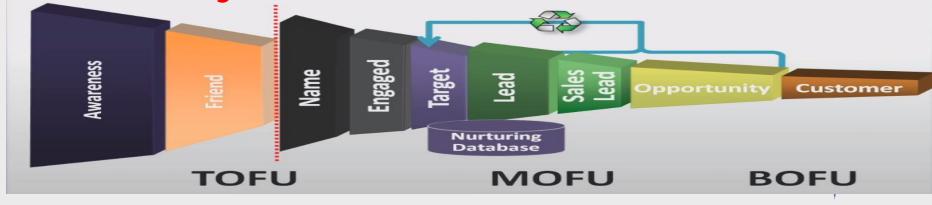
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Role of marketing & sales teams in the sales funnel



Role of marketing Visibility, awarenessEstablishing credibilityOngoing customerand traffic& nurturingeducation & advocacy

Role of marketing & sales teams in the sales funnel

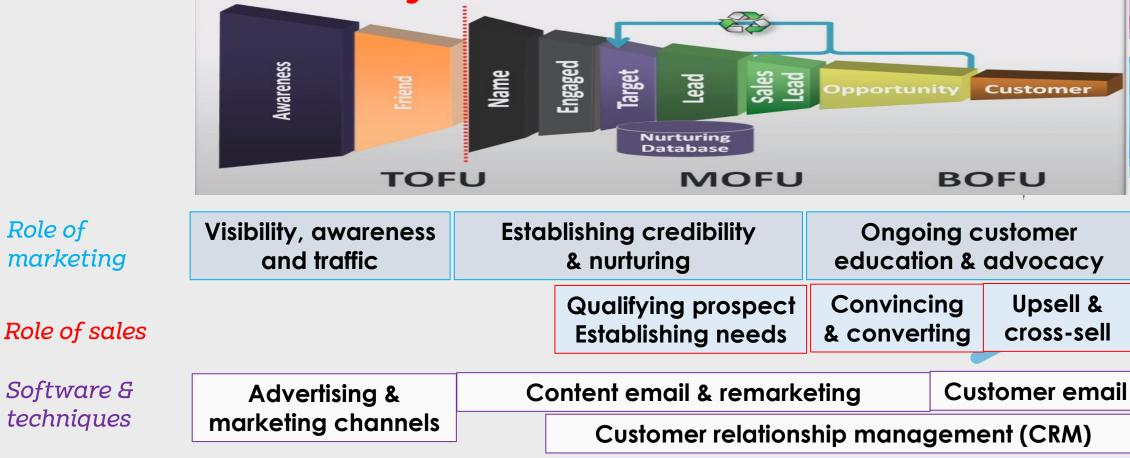


Role of marketing

Ongoing customer Visibility, awareness **Establishing credibility** education & advocacy and traffic & nurturing Upsell & Qualifying prospect Convincing *Role of sales* **Establishing needs** & converting cross-sell

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Role of marketing & sales teams in the sales funnel



	Does not want to buy	Wants to buy now or in the future	
Already knows			
and trusts you			
			17
Doesn't know or			
trust you			+ •
			•

		your bite
	Does not want	Wants to buy now
	to buy	or in the future
Already knows		
and trusts you		CONVERT
		Make the buying process easy
		Do not put them off!
Doesn't know or		
trust you		

	Does not want to buy	Wants to buy now or in the future	
Already knows and trusts you		CONVERT Make the bring process easy Do not put them off!	
Doesn't know or trust you			

	Does not want to buy	Wants to buy now or in the future	
Already knows and trusts you			
Doesn't know or trust you	NO ACTION REQUIRED Just looking for information Unlikely to buy in the future but may recommend others		•

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Doesn't know or trust you	NO ACTION REQUIRED Just looking for information Unlikely for the future but may recommend others		

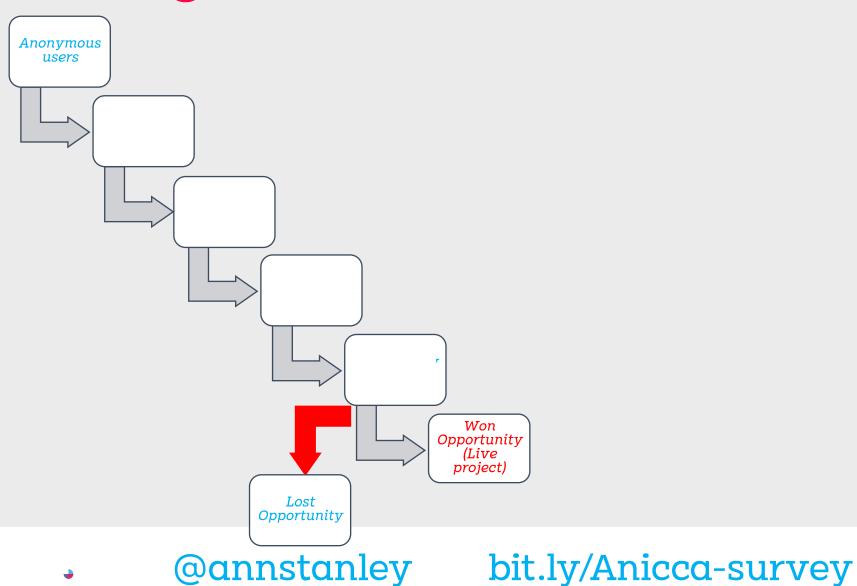
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Already knows and trusts you		
Doesn't know or trust you		NURTURE Not ready to buy yet Provide useful information or help them to become ready to buy Reassure with trust signals

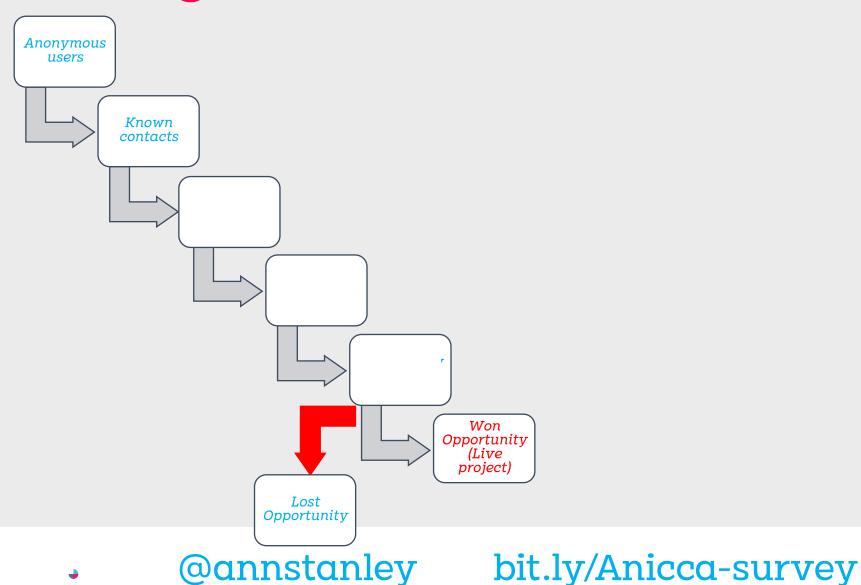
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Already knows and trusts you		CONVERT Make the buying process easy Do not put them off!
Doesn't know or trust you		NURTURE Not ready to buy yet Provide useful information or help them to become ready to buy Reassure with trust signals

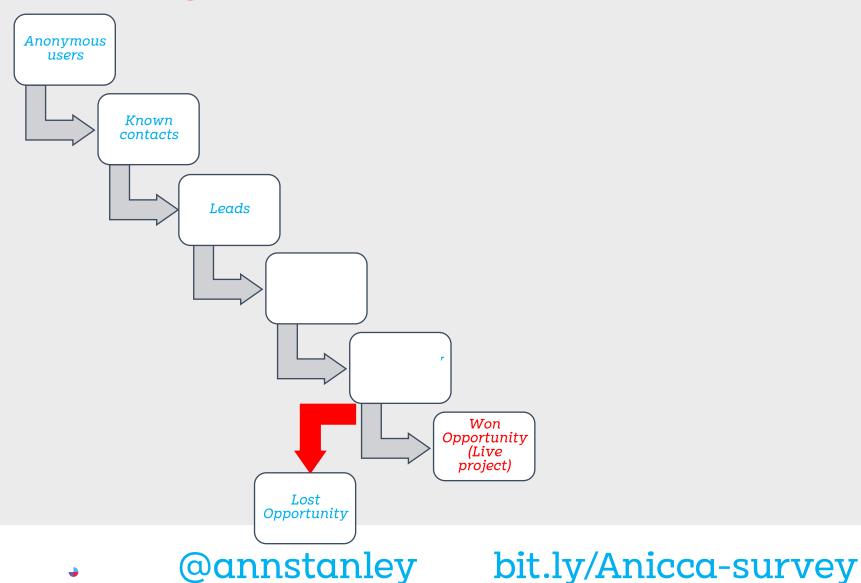
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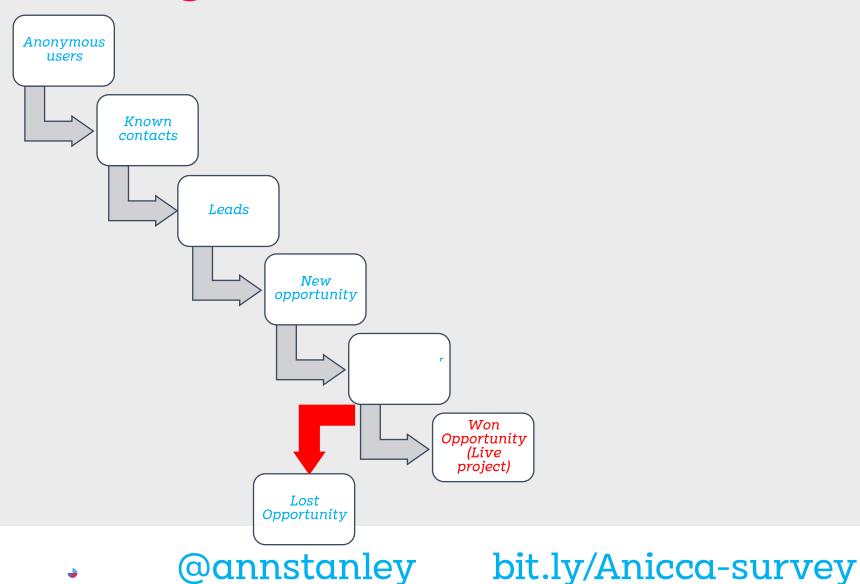
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	Does not want to buy	Wants to buy now or in the future
Already knows and trusts you	CONVINCE May want to buy in the future Provide useful information to convince them to buy	CONVERT Make the buying process easy Do not put them off!
Doesn't know or trust you		

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	Does not want to buy	Wants to buy now or in the future
Already knows and trusts you	CONVINCE May want to buy in the future Provide useful information to convince them to buy	CONVERT Make the buying process easy Do not put them off!
Doesn't know or trust you	NO ACTION REQUIRED Just looking for information Unlikely to buy in the future but may recommend others	NURTURE Not ready to buy yet Provide useful information or help them to become ready to buy Reassure with trust signals

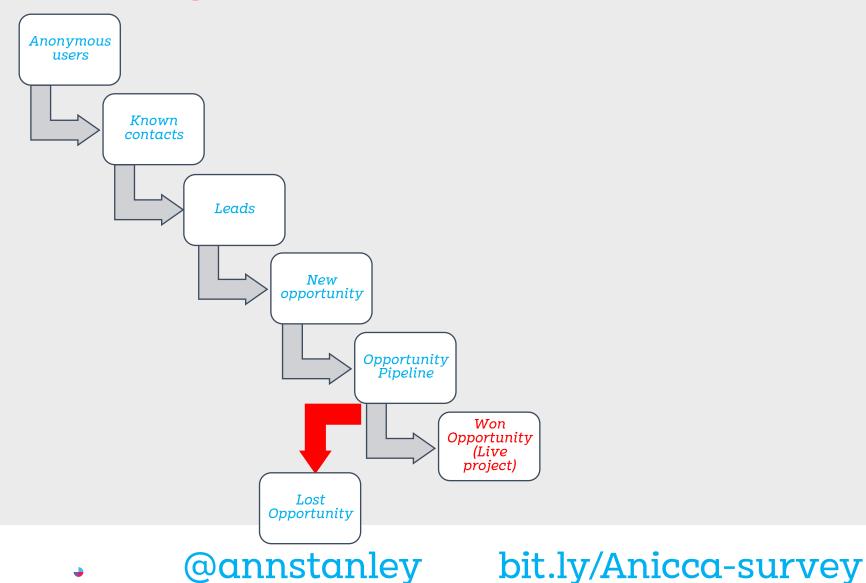


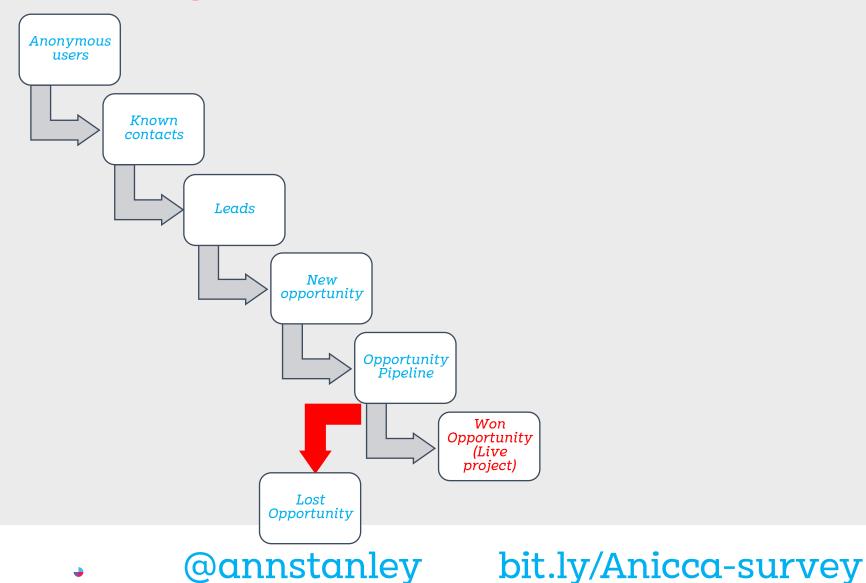


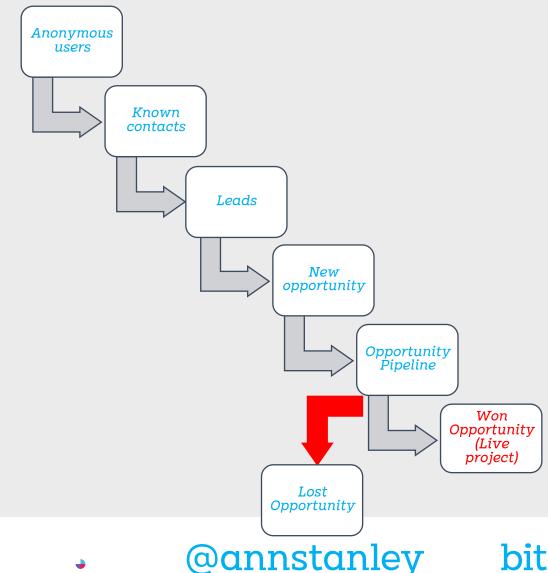












How does an anonymous visitor become a "known" contact or lead?

- 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 MAS software uses the same method; however, they all involve tracking cookies or tracked links

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What is marketing automation software (MAS)?

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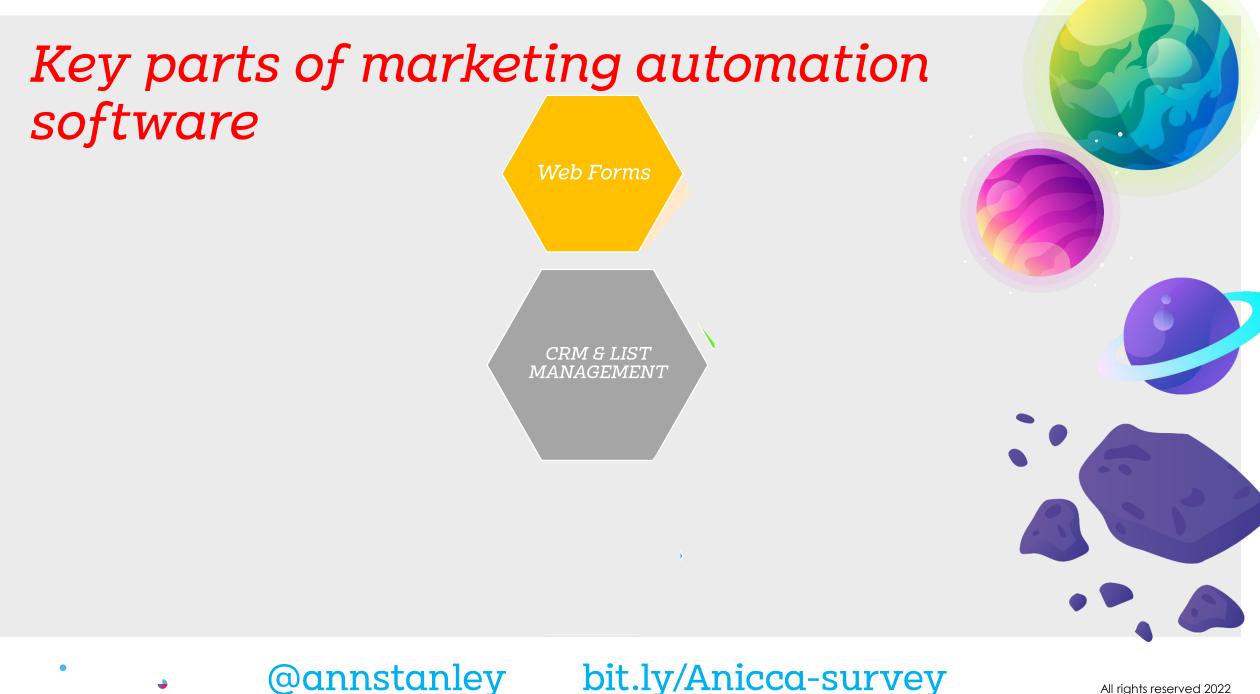
What is Marketing Automation?

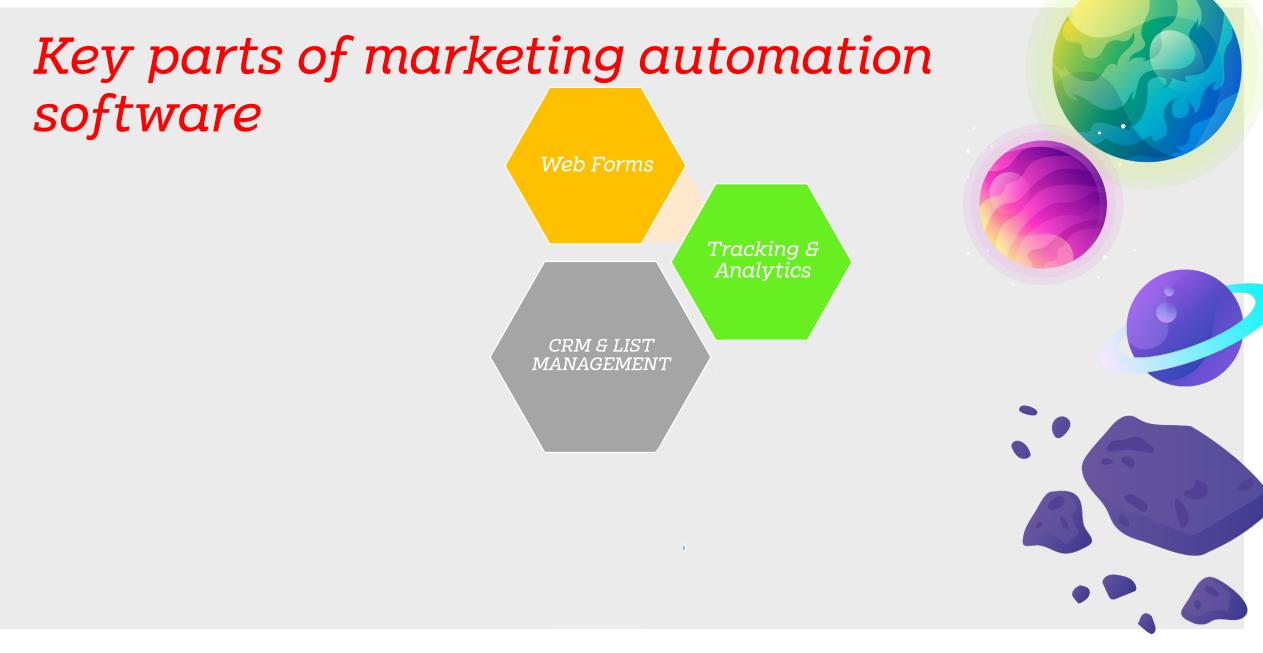
- A software platform used for automation and integration of marketing (and sales) tasks
- Mainly used for lead generation and nurturing by B2B companies, particularly where there is a long buying cycle

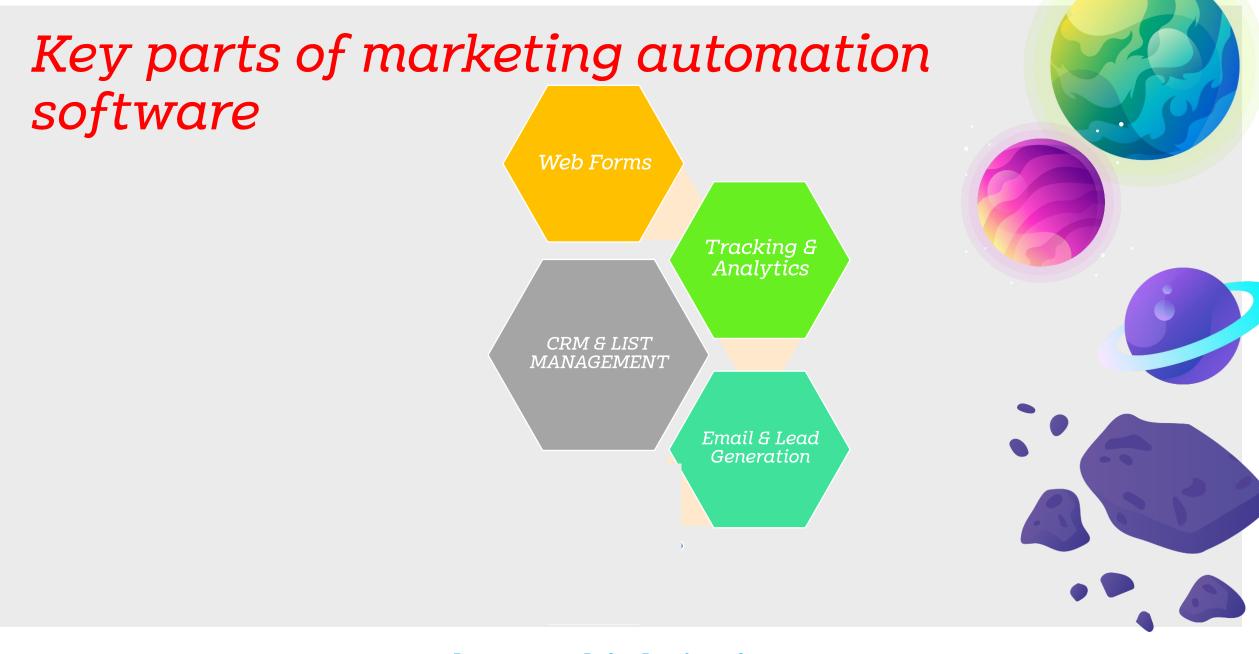
Key parts of marketing automation software

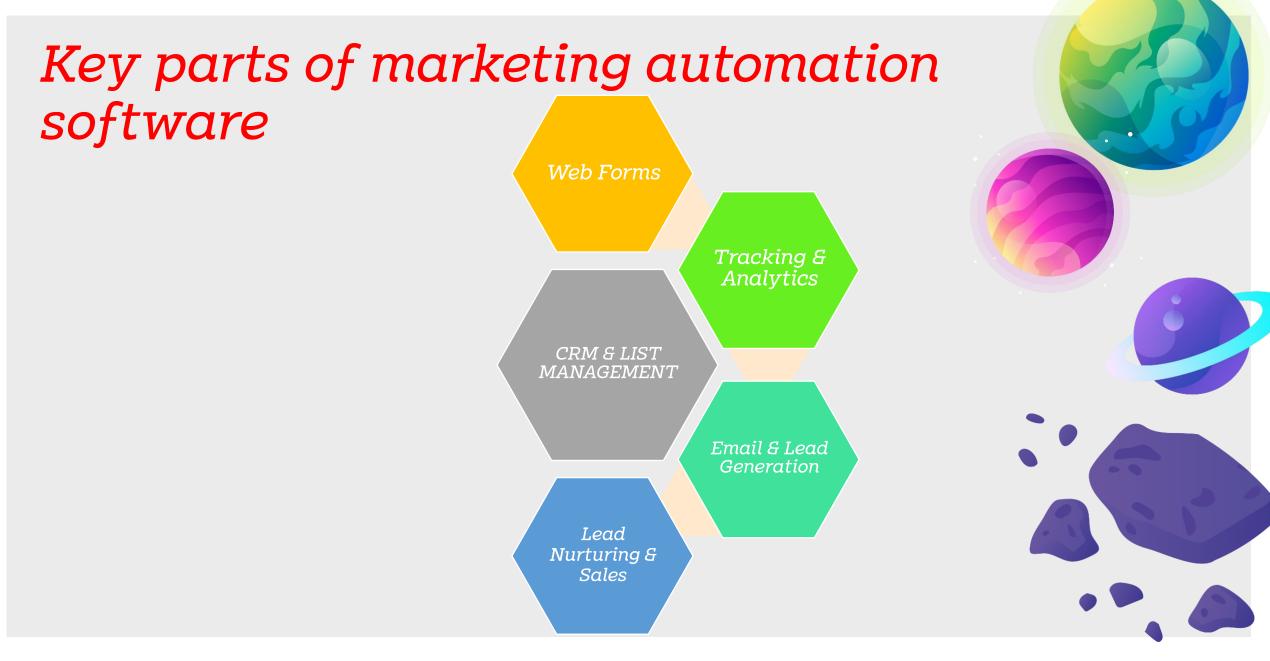
CRM & LIST MANAGEMENT

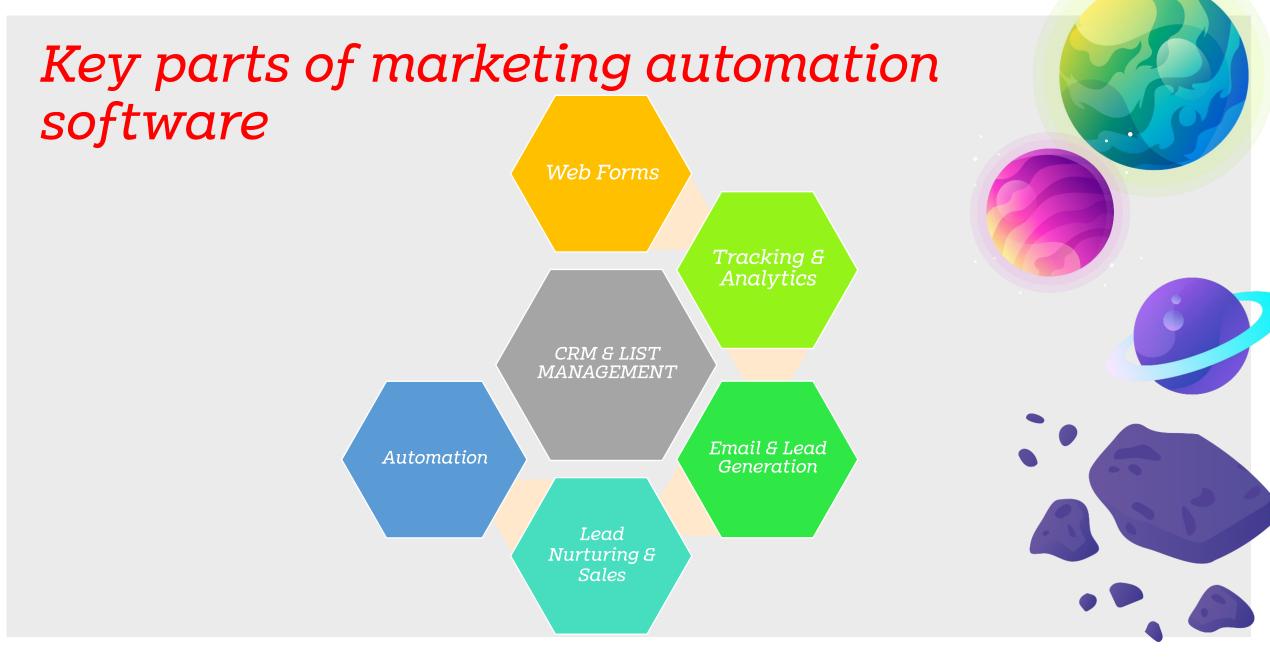
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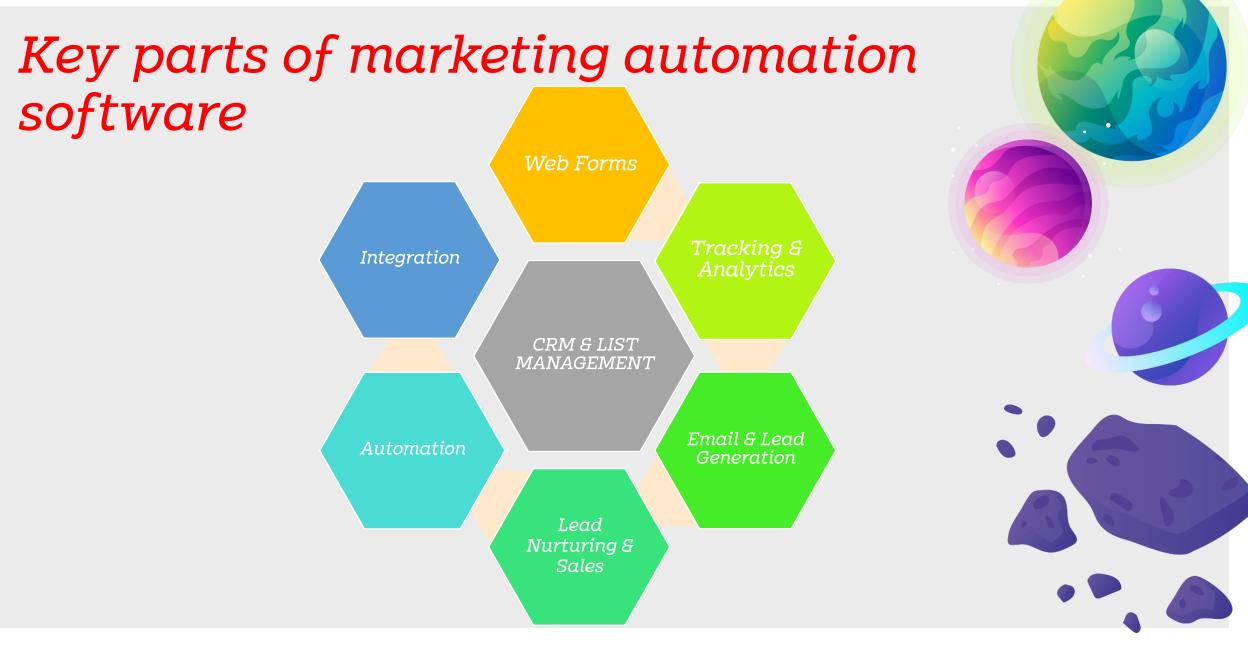












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Initial set-up of marketing automation software (1)

Account setup

- 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, Google Ads, Gmail/Outlook

Initial set-up of marketing automation software (2) Customise settings

- Upload your logos and branding
- Create Opportunity stages (for the sales process)
- Set up campaigns (where did you hear about us?)
- Link Social Profiles e.g. Twitter, LinkedIn (if applicable)

Data collection

- Create custom fields
- Create website forms
- Import lists (via CSV), map field names, add unsubscribes



Tour of our SharpSpring MAS platform

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Sharpspring Dashboard

GCCC Sales ~ Marketing	✓ Contacts ✓ Ads Team Calling <		🖽 Anicca 🛙	Digital 👩 AS	Q +
Contacts 🔹 ~	« Contact Manager	Cł	neck out the new Custom	izable Contact Manaį	ger 🗢 💌
RECENTLY ACTIVE	Search Contacts by Name, Company, etc Sort By 🔻			Advan	ced Search
 Anna Burt Ricki Gogna 			ſ	Displaying 25 of 34,05	0 Total Contact
Mark Sale	Name/Company/Email	Campaign	Lead Owner	Lead Score	
 Emma Keen Becky Gilbert-Wood Melanie Waggett 	2	€ Unassigned	Lunassigned	_	¢ •
Sam Blanks Thanuja Nawarathne Emma Farley Chris Wake	2	⊄ Direct Traffic	LUnassigned	22 Lead Score	¢ •
Add Contact	2	≮ Direct Traffic	Lunassigned	20 Lead Score	¢ •
		≮ Direct Traffic	Lunassigned	19 Lead Score	¢ •
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	Privacy Policy • SharpSpring Ads Terms • General Terms of Service • Partner Terms • Professional Services Terms • Sy	stem Status and Uptime Report		Copyright © 2012	- 2022 SharpSprir



Menus - Sales

Sales \checkmark	Marketing $_{\!$	Contacts 🗸 🛛 Ads Tear	n Calling 🔇		
is SALE	S	REPORTS			
Opp	ortunities	Pipeline Value	Opp Health	Conversion Analysis	0
Opp	ortunity Manager	Won/Lost	Sales Performance	Sales Optimizer Tasks	
Acco	ounts	Sales Dialer Activity	Call Recordings	Saved & Scheduled Reports	
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Visit	or ID				

Menus - Marketing

			P REPORTS		
Visual Workflows	Forms	Emails	Custom Reports	Traffic Sources	Web Insights
Chatbot Workflows	Email Templates	Pages	Campaign Insights	Google Ads	Email Jobs
Action Groups	Page Templates	Blogs	Email Reports	Email Tests	Chatbot Report
Scheduled Events	Media	Social Listening			
Personas	Content Calendar		Campaigns	Conversion Goals	Saved & Scheduled

Menus - Contacts

Contacts 🔻
Contact Manager
₩ Lead Scoring
🌲 Import
Lists



Use of MAS for marketing – Forms and leads

Creation of new forms and landing pages on your website

Problem	Common Solutions	MAS solution
 Ability to create and add new forms onto your website Create landing pages for specific promotions Create landing pages for A:B testing 	 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 	 Custom field creator Form creator (where standard and custom fields can be added) Add form to website via an i-frame or by data- syncing Creation of landing pages or integration with 3rd party software

Example pop-ups (calls-to-action using plug-in) and gated content

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Download our extensive guide to help you analyse, plan implement and manage your digital marketing strategy.

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Please complete all required fields below to get your exclusive A10 guide packed full of strategy advice, platform tips and free planning tools.

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Advantages & disadvantages of gated content

Open content

Has SEO benefits but you know little about the user (unless they
previously complete a form or have come to your site via email i.e.
you already know them). However, you can still target these users
with remarketing ads

Gated content

• Only suitable for premium content - which the user values enough so they will give their details

"Lead magnets"

 Premium and high value content designed to attract new users and to get them to leave their contact details

Creating custom fields

Create a Custom Field			×
Field Label			
Example: Client Hobbies			
Visible in Contact Manager Availab Editable in Contact Manager	ole when creating forms 🛛 Email merge variable		
Field Type			
○ 🖷 Text input	○ ≡ Text Area	⊖ Hidden	
○ ■ Drop-down Select	○	○ ■ States	
○ ☑ Boolean	🔿 🗹 Checkbox Group	○ • Radio Group ●	
○ J Phone number	○ 🗰 Date picker	○ 🛱 DateTime picker	
○ ⊕ URL	○ 🗹 Bit	🔿 🖺 File Upload	
○ @ Attachment URL			
Cancel			Create Field

Creating a form by selecting fields

ademy Request Free Access	View	v Submissions	Save Changes
Fields Styles Settings			
Fields Create a Custom Field	Drag and drop fields to reorder or create multiple columns.		
tandard and custom fields such as email or company.	First Name		
🚨 Add Field 🗸	First Name		× ~
Elements	Last Name		
HTML elements such as headers or rules.	a Last Name		× ~
■ Add Element -	Email		
Referral Fields	Email		× ~
Fields designed to accept information about other leads.	Phone Number		
r Add Field ←	2 Phone Number		× ~
	Company Name		
Special Fields Non-standard fields such as integration or GDPR fields.	Company Name		× ~
Add Special Fields	Description		
Add Special Fields	Description		× ~

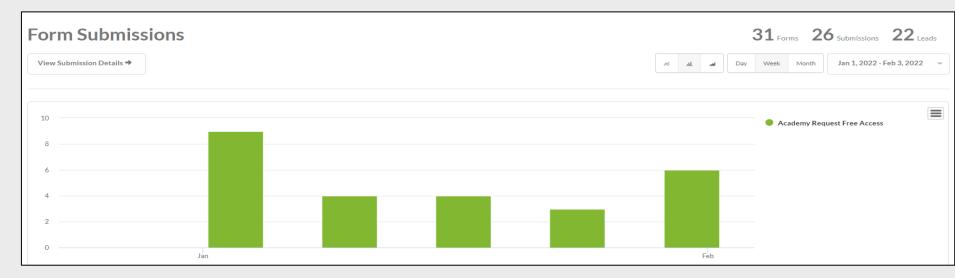


Simple form on the website

anicca academy practice what we teach				CLICK HE FOR FREE A		0116 29897	'56 Login
A: Anicca Slides	B: Background & Free Resources	C: CIM slides	D: DMI Slides	Test Yourself (Quizzes)	Webinar	rs	Q
Request	Free Access						
You will receive email First Name * Last Name * Email *	I confirmation and login details once yo	u're request has bee	n processed and	approved			
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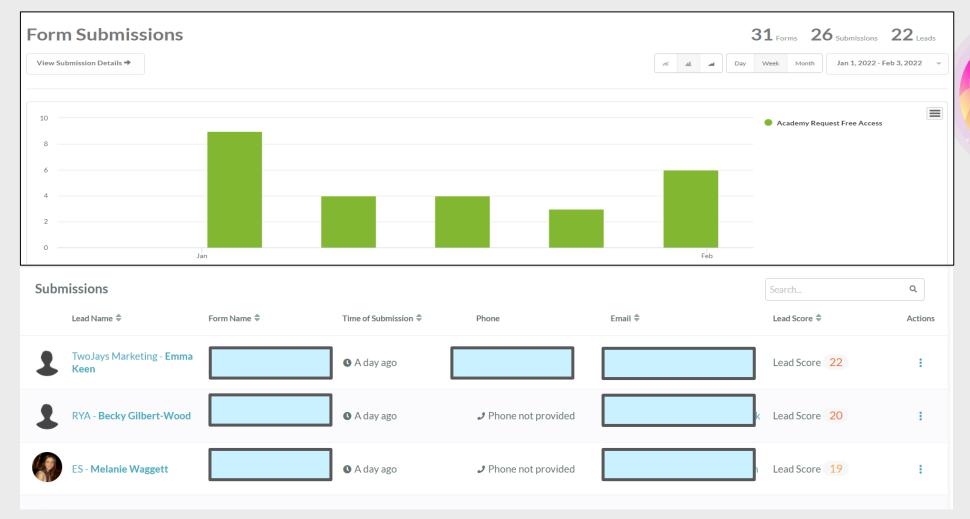
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Who completed the form?



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Who completed the form?





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Use of MAS for marketing – Anonymous visitors, tracking of individuals & creating contacts

Anonymous visitors, tracking of individuals and creating contacts

Problem	Common Solutions	MAS solution
 Understanding user behaviour on your website Who has been to your website and not contacted you? History of each individuals' visits to your site 	 Google Analytics (tracks trends and averages) Reverse DNS Look-up to identify company name of visitors Software from Lead Forensics, Canddi, Alwebstats, Ruler Analytics, Who Is Visiting etc. 	 MAS also uses DNS look- up to track anonymous visitors Some can refer to a central database to provide additional company information History of each user is saved, and added to customer card once they become a "known visitor" Complete history of individual is retained

Anonymous and known visitor tracking

No.21,Financial Street 28 minutes ago	Public IPs & NAT	Convert to Lead	
Google LLC • 25 minutes ago	No Website Found		
No.21,Financial Street 28 minutes ago	No Location Provided		
Whirlpool Corporation • 1 hour ago	Unknown Company Size	Total Pages	9
Network Administrator • 1 hour ago	Unknown Revenue		
Public IPs & NAT • 1 hour ago		1 Visit	
Wallis Short Q 2 hours ago			
J Barnes – Stive 2 hours ago 69	Web Visit 1 hour ago	DATE January 20, 2020 12:14 PM VISITOR IP 111.119:185.32	
Reis Network Solutions 2 hours ago	SOURCE www.google.com/	VISITORIP 111.119.165.52	25
Reliance Jio Infocomm Li © 2 hours ago	Pages visited on anicca.co.uk		
Sify Limited, ③ 3 hours ago	1. /blog/free-social-audit-tools/	(evited site)	
Brad Longman – RIPE N Shours ago			

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Contact manager

The digital marketing Sales V Marketing Contacts	 Contacts Ads Team Calling 	🖩 Anicca Digital 🌘 AS 🗨 🛨
Search RECENTLY ACTIVE Jac Deacon Anna Burt Ricki Gogna Mark Sale Emma Keen Becky Gilbert-Wood Melanie Waggett Sam Blanks Thanuja Nawarathne Emma Farley Chris Wake	Contact Manager	Check out the new Customizable Contact Manager
Jac Deacon	Q Search Contacts by Name, Company, etc Sort By 🔻	Advanced Search
Anna BurtRicki Gogna		Displaying 25 of 34,050 Total Contact
 Mark Sale Emma Keen 	Name/Company/Email	Campaign Lead Owner Lead Score
 Becky Gilbert-Wood Melanie Waggett Sam Blanks 	2	rt Unassigned – 🗘 ▼
 Thanuja Nawarathne Emma Farley Chris Wake 	2	✓ Direct Traffic ▲ Unassigned 22 Lead Score
Add Contact	2	✓ Direct Traffic ▲ Unassigned 20 Lead Score
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	2	✓ Direct Traffic ▲ Unassigned 22 Lead Score
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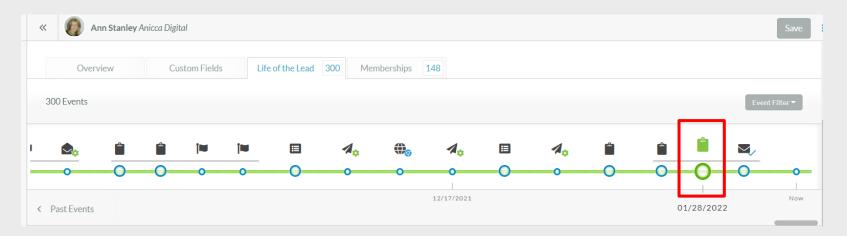


Contact record

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Overview Custom	n Fields Life of the Lead 300 Memberships 148					
Marketing Profile 308	🖹 New Note 🦪 Log Call	👸 Book Time	🕻 🖤 Call 🔻	💌 Email	🖌 Smart Mail	New Task
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Life of a lead

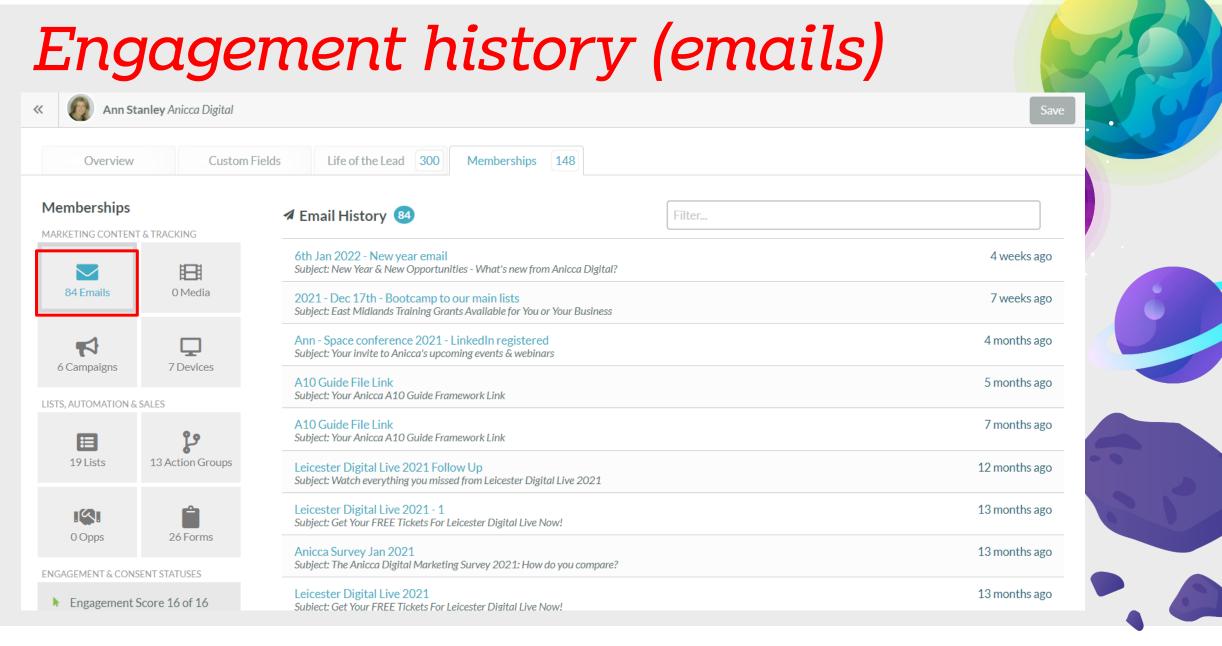




Life of a lead

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Use of MAS for marketing – CRM and List Management

CRM and List Management

Problem	Common Solutions	MAS solution
 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 	 Use of Customer Relationship Management (CRM) Zoho, Sugar CRM, Salesforce, Microsoft Dynamics 	 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 Creation of lists based on behaviour

CRM and List Management

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Note – not all MAS system have CRM functionality – some are designed to integrate with Salesforce and other programmes. Others do both

Importing a CSV list of contacts

Contacts 🔻

🖀 Import Contacts 🗊

Before you begin, export your contacts

to a .CSV UTF-8 file and include email

address and unsubscribe data.

Import Instructions

Looking to migrate your CRM instead? Click here to use our CRM Migration Tool

Contact Manager

- # Lead Scoring
- 🜲 Import

Lists

Can be mapped to any acceptable email address.

Email Address:

- Ensure the formatting of your .CSV UTF-8 file is correct. Learn More
- Prepare any necessary Custom Fields. Learn More
- Additional contact data can be mapped to any previously created Custom
 Fields, Learn More
- Upload your CSV and follow the instructions on the next page.

Your CSV file must meet the following criteria:

- Has a column count less than 100.
- Has a cell count less than 1,000,000.
- Has a file size less than 35mb.

Required Fields

In addition to the required fields, contact data can be mapped to our system fields. Learn More

Unsubscribe Data:
Accepts values of 1 and 0. Contacts that are unsubscribed should be set to a
value of 1.

Example:	
Email	Is Unsubscribed
Cat@example.com	1
Dog@example.com	0

CSV Upload

Multiple date formats are supported. A delimiter, date format, and time format must be selected before choosing a CSV. Learn more

lect the .CSV file's delimiter 🕕	Select the .CSV file's date	e format 🕚	Select the .CSV file's ti	ime format 🕚	
Comma (,)	DD-MM-YYYY	~	24 Hour	~	
aco onguro your filo lo a losy oncodo	dio LITE 9				
ase ensure your file is a .csv encode	d In UTF-8				



Mapping field names

€ Mappings

Map the following column names to a field in SharpSpring. By default, unassociated fields will not be mapped. To create a new custom field from the column, select "Make Custom Field".

CSV Columns	Sample Data		Fields	
First Name	Kate	Make Custom Field	First Name	
Last Name		Make Custom Field	Last Name	
Email		Make Custom Field	Email	
BMID	722faa5f1539	Make Custom Field	Don't Import	
Coupon		Make Custom Field	Don't Import	
Sector/Industry:	Retail /hospitality	Make Custom Field	Industry	
Company Name	The Old Stables	Make Custom Field	Company Name	
ls unsubscribed		Make Custom Field	Is Unsubscribed	



Use of MAS for marketing – Email broadcasting

Email broadcasting and reporting

Problem	Common Solutions	MAS solution
 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 	 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 	 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

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Email templates

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🖾 Bhav text email template	Legacy	Legacy		anicca		Legacy
🖾 Darren Email			La city for the bill bills the state because	0.50		
🖽 Bhavesh - Text Email Template						Four Weeks Until E-Commercial 20181
🖽 Ed - Text Email Template Copy			Carry Carry	OF		Takets for the part subfracts on satisfying
🖽 Sukh Email Template				50% off Premium Analytics Dashboards		EXCON NOW
🖽 Left hand square image	1	1	1	8	4	(4)
Email template - rounded boxes	Pall-Ex Email	February 2018 Template	E-Commercial 18 ticket sales	Tech SEO services template	Sitewide Form Follow Up	E-Commercial Conference 2
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Signed Order Confirmation T			WIN			
🖽 Email template - PPC bootca						
PPC bootcamp and Structure	Anicca News Template (Oct	2021 - bootcamp promo	2022 Newsletter Template			
🖽 Test						
III E Commorcial Conference 20						

Editing an existing email template



Editing email content



You could **WIN £100** worth of vouchers plus MORE!

We'd be very grateful if you could take 10-15 minutes to complete the questionnaire. As well as receiving a copy of our findings, you can also enter our prize draw with the chance of winning a day with our experts (Consultancy, audit or 1-2-1 training) or £100 vouchers for yourselves or a chosen charity.

Thank you for your time.



Broadcasting an email to your list(s)

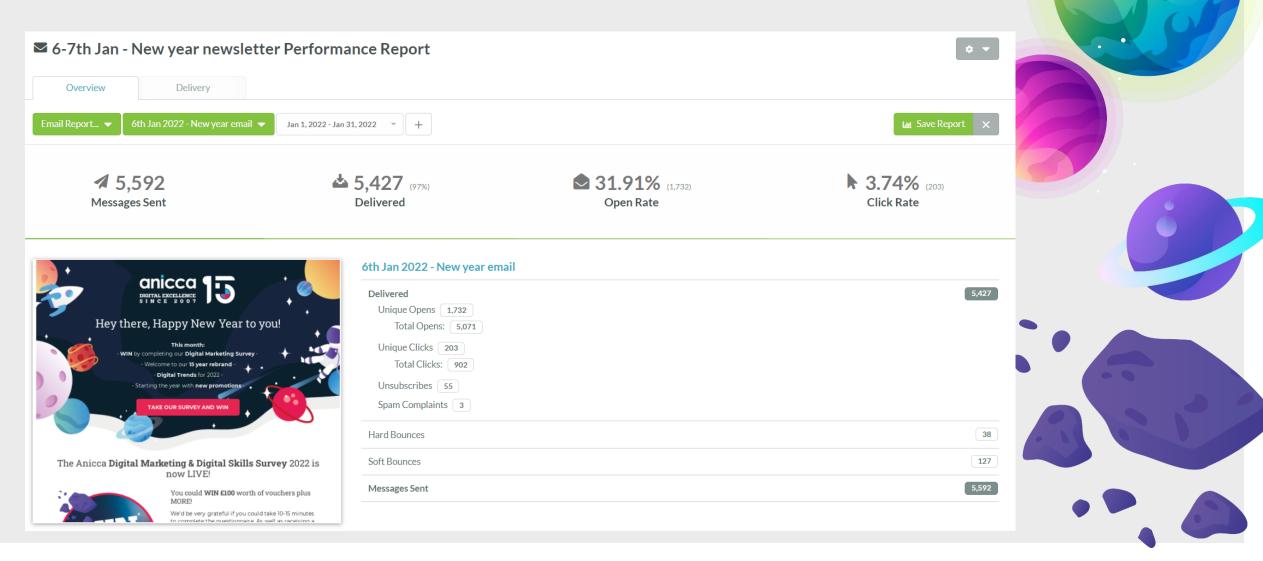
Send 6th Jan 2022 - New year email	Х
Scheduling	
 ● As soon as possible ○ 02/03/2022 ● 9:45 pm ③ GMT 	
Email	
6th Jan 2022 - New year email - Anicca Digital "New Year & New Opportunities - What's new from Anicca Digital?"	
Recipients	
Client - current Oct 2021 ×	
Exclusions	
Do not send to the following:	
Select Exclusion Lists or Tags	
 Exclude recipients who have already received this email. Exclude recipients with low engagement. 	
Cancel 🖌 S	end

Broadcasting an email to your list(s)

Send 6th Jan 2022 - New year email	×
Scheduling	Current Email Job Details
As soon as possible 02/03/2022 9:45 pm GMT	Email Name: Anicca Digital Newsletter January 2020 Email Subject: Anicca Digital News January 2020 Lists & Tags: 1 List Email Subject: Anicca Digital News January 2020 Recipients: 4 Email Subject: Anicca Digital News January 2020
Email	Send Time: As Soon As Possible
6th Jan 2022 - New year email - Anicca Digital Thew Year & New Opportunities - What's new from Anicca Digital?"	
Recipients	Your overall email status is healthy.
Client - current Oct 2021 ×	Healthy Vour sender status breakdown
Exclusions	
Do not send to the following:	Close Send Email
Select Exclusion Lists or Tags	Join us for our DMI & CIM Training Course
 Exclude recipients who have already received this email. Exclude recipients with low engagement. 	Open Evening
Cancel	• •

• @annstanley bit.ly/Anicca-survey

Email stats





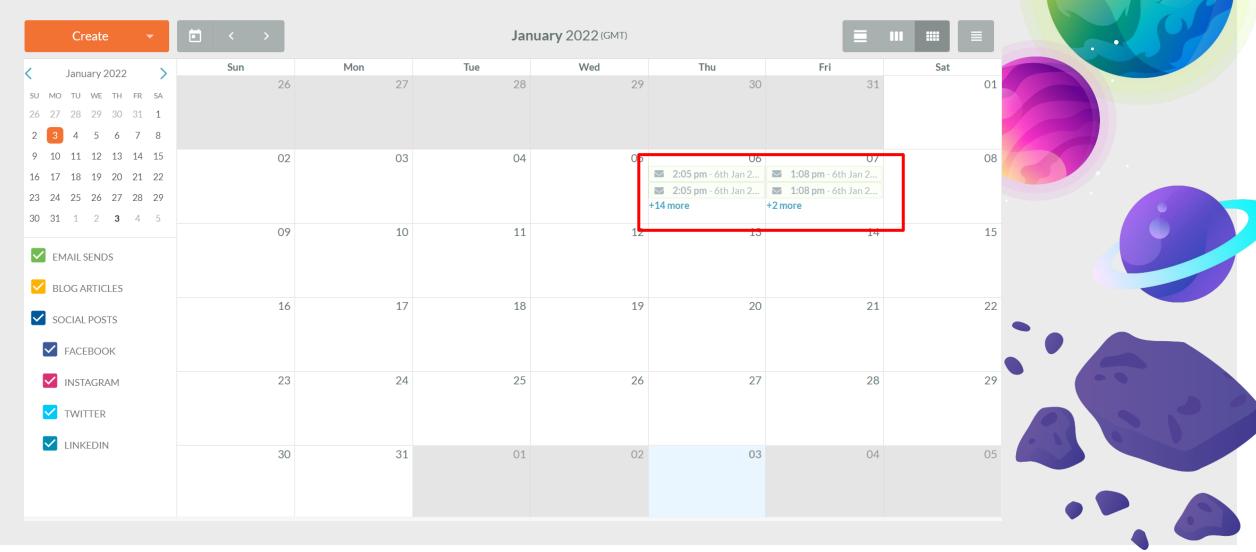
Use of MAS for marketing – Social media and content

Social media publishing & listening

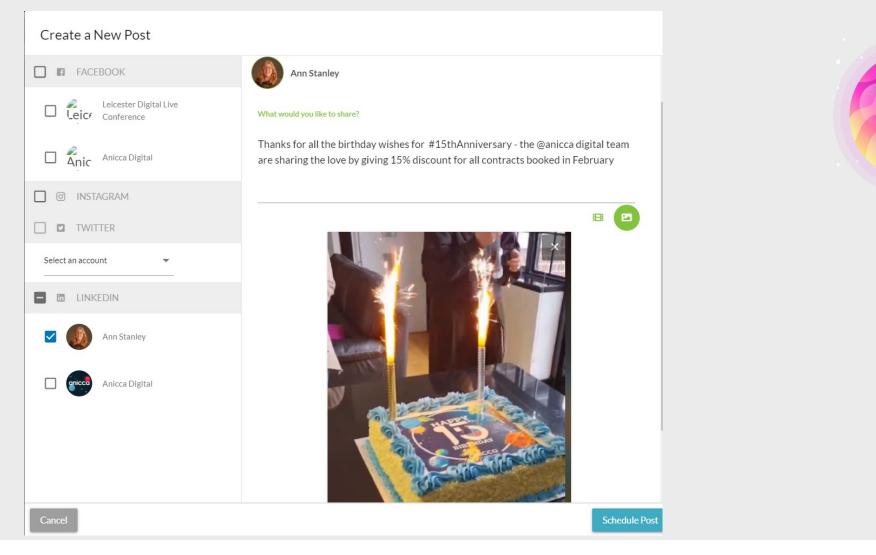
Problem	Common Solutions	MAS solution
Schedule posts and broadcasting across various platforms Manage all listening and broadcasting through one platform Monitor competitor activity	 Hootsuite Tweetdesk Oktopost 	 Some MAS solutions offer HootSuite-like functionality, so you can broadcast your social posts Link and monitor competitors

Social listening functionality _eicester Digital 🛛 Anicca Digital 📋 🛛 Tab 3 🛛 🕂 : in Page Anicca Digital Mentions @aniccadigital 🔰 likes @aniccadigital 🔰 Profile @aniccadigital SilvTechCluster @SilvTechCluster CIM Midlands @CIMinfo Mids aniccadigital retweeted Anicca Digital CIM Feb 03, 2022 at 3:01 PM Feb 02, 2022 at 4:52 PM Feb 03, 2022 at 7:12 PM Claire @BrizzleLass Feb 02, 2022 at 6:36 PM Want to find out what's new in marketing automation Great presentation today from @AnnStanley software? Founder & Managing Director, Anicca Digital, and Really enjoyed the talks from @DanielRowles and renowned expert on search engine marketing, who @AnnStanley at today's @TheCIM mark Digital There's still time to book onto #STCMember gave us a wealth of information on all that's new and Conference session. Some great ideas I've been able @aniccadigital's free #webinar tomorrow (4th Feb) at important in the digital field! to implement into our new website plan I'm working 9am. #CIMevents #digital #SEO #searchenginemarketing on. Thanks 🔥 https://t.co/deyVwmoZOa #SEO #ContentMarketing #DigitalMarketing Info & booking details here... https://t.co/3zI5sKzEA2 #CIMEvents https://t.co/PU0XANeET2 CIM #digitalmarketing #marketingautomationsoftware 0 11 0 11 ference (Dav-2) 🛱 @aniccadigital retweeted SilvTechCluster @SilvTechCluster Terry Nicklin @Terry_N 2 Feb 03, 2022 at 11:00 AM Feb 02, 2022 at 6:36 PM If you missed #STCMember @aniccadigital's latest $\bigcirc e$ Huge amounts of tips and insights from free #webinars on Social Media Tracking and 0 11 @DanielRowles and @AnnStanley at the 2nd day of Keyphrase Research for #SEO & #PPC, you can watch Digital Marketing Conference. #cimevents Thank Anicca Digital them on demand. Info in the links below... Claire @BrizzleLass you to all our speakers this year, reaching far more Feb 03, 2022 at 4:14 PM users through being online. Feb 02, 2022 at 3:00 PM https://t.co/7jf6OBTyEU 0 11 Really enjoyed the talks from @DanielRowles and https://t.co/7QbGpOj8YU @AnnStanley at today's @TheCIM_mark Digital $\mathcal{O} \mathbf{e}$ Conference session. Some great ideas I've been able #socialmedia #digitalmarketing #analytics @aniccadigital retweeted to implement into our new website plan I'm working Anicca Digital CIM Midlands @CIMinfo_Mids on. Thanks 🔥 0 11 -CIM

Content calendar



Social publishing functionality



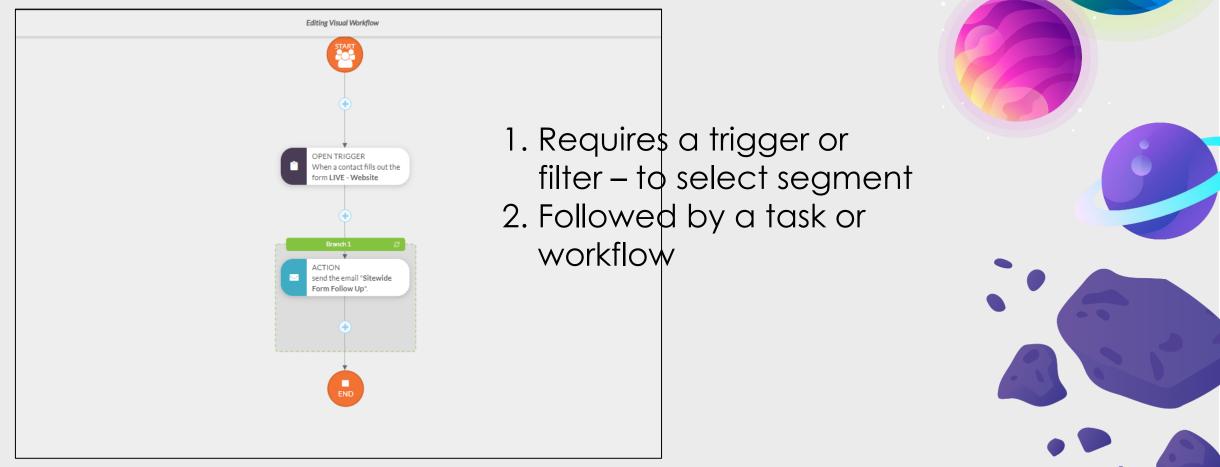


Use of MAS for marketing – workflows and automation

Automated or drip campaigns

Problem	Common Solutions	MAS solution
Troptent	Contractoris	
 Ability to automate email responses to campaigns Drip campaigns to assist in content marketing Ability to follow-up shopping cart abandonment Cross-sell consumables and promote other products at timed intervals Send annual or date triggered emails Others as required 	 Some email broadcasting systems have automated or triggered emails Specialist software for shopping cart abandonment 	 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



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"

Examples of automated workflows or tasks - 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

Use of MAS for sales-Lead scoring

Lead scoring rules - basic

CONTACTS V Ads Team Calling Contacts Ads Team Calling	🖩 Anicca Digital 🌍 AS 🗨 🕂 🎰
Lead Score Ranges pecify the lead score ranges you would like to highlight. Prioritizing leads based on score helps to make he best use of your time when you can only get to a limited set of leads per day.	Lead Score: 19 Lead Score: 64
	100% 0% 0% Cold Leads Hot Leads ■ 15044 ■ 0 ■ 0
Fit Rules	Engagement Rules
Fit: Contact Info Assign points based on known lead information, such as address, phone number, and email.	Engagement: General Activity Assign points for forms, pages, campaigns, emails and media.
Add 1 if a Company Name is provided.	Add 15 if a form is completed.
Add 1 if a First and/or Last Name is provided.	Add 1 for each page visit (excluding bounces).
Add 1 if a Title is provided.	Add 1 if a tracked page for a campaign is visited.
Add 1 if a Street is provided.	Add 5 for each email click.
Privacy Policy • SharpSpring Ads Terms • General Terms of Service • Partner Terms • Professional Services Terms	Copyright © 2012 - 2022 SharpSpring

Lead scoring rules - basic

	CC narketing	Sales 🗸	Marketing 🗸	Contacts 🗸	Ads	Team Calling	<				🔣 Anicca D	gital	🍈 AS	Q 4	94	
Sp	ecify the						on score helps to make	Lead Sci	ore: 19	Lead Sc	vre: 64 0%					
	Fit R	Jules						Cold L	_	_	≗ 0		Hot L	eads		
		ntact In	fo								ent Rules General Activity				-	
			ed on known lead	information, su	ich as addi	ess, phone numb	er, and email.				forms, pages, campaigns, emails and media.					
	Add	1	if a Company Na	ame is provided					Add	15	if a form is completed.					
	Add	1	if a First and/or	Last Name is pr	ovided.				Add	1	for each page visit (excluding bounces).					
	Add	1	if a Title is provi	ded.					Add	1	if a tracked page for a campaign is visited.					
	Add	1	if a Street is pro	vided.					Add	5	for each email click .					
Pr	ivacy Polic	cy • SharpS	pring Ads Terms • Ge	eneral Terms of Se	rvice • Parti	ner Terms • Profess	ional Services Terms					Сору	right © 2012/	- 2022 Sharps	Spring 💂	

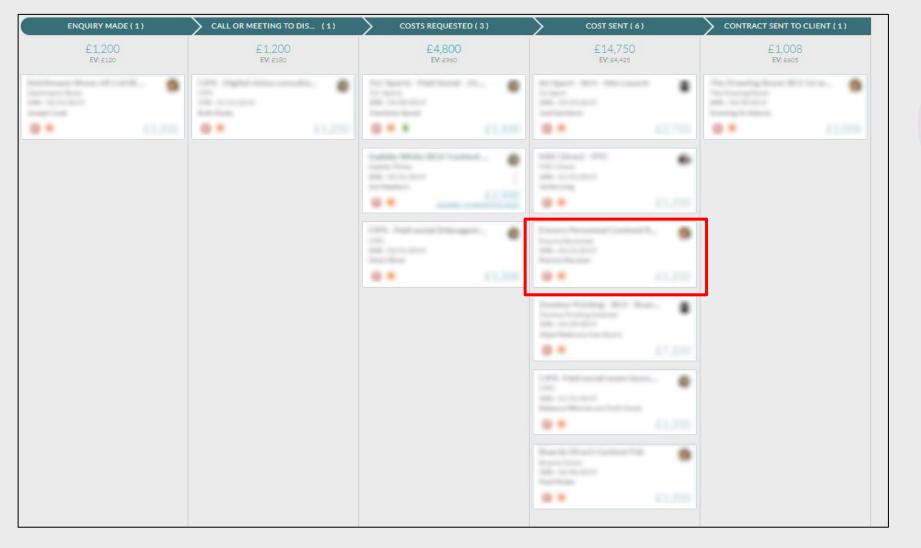
Use of MAS for sales-Opportunities and sales pipeline

Tracking leads & sales opportunities

Problem	Common Solutions	MAS solution
 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 	CRM software allow tracking of sales opportunities but rarely have lead tracking based on user behaviour	 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

Creatin	g an opportunity		
TING Contacts Content Soc	cial 🔻 Automation 🔻 Chatbots 🔻 Visitor ID Analytics 💌 Team Calling Anicca	Digital Q 🕢 New 🗸	
Tags ▼ Image: A provide the set of the set o	Anicca Digital	 Export to PDF Book Time Send Smart Mail View Unseen Media Log Call New Task New Opportunity New Account Add to List 	
Contact Information Ann Stanley md	Enter a note No upcoming tasks.	 Add to Action Group Unsubscribe from Emails Hide My Communication Remove Double Opt-In Status 	
 ann@anicca.co.uk 07930384443 ~ 	All Activity V July 2020	 ⊘ Remove Social Media Details ♣ Clone Lead ➡ Merge Contact 	

Opportunity pipeline





Other functionality

Other features not covered today

- Allocation of tasks to staff and client
- Integration with Google Ads
- Landing page tests
- Events and webinars link with GoToMeeting or WebEx
- Integration with other CRM systems such as Salesforce
- Shopping cart integration using different tracking code to link sales with contacts
- Perfect Audience remarketing ads



Choosing a MAS Supplier

Most popular systems in the UK (data from builtwith.com)

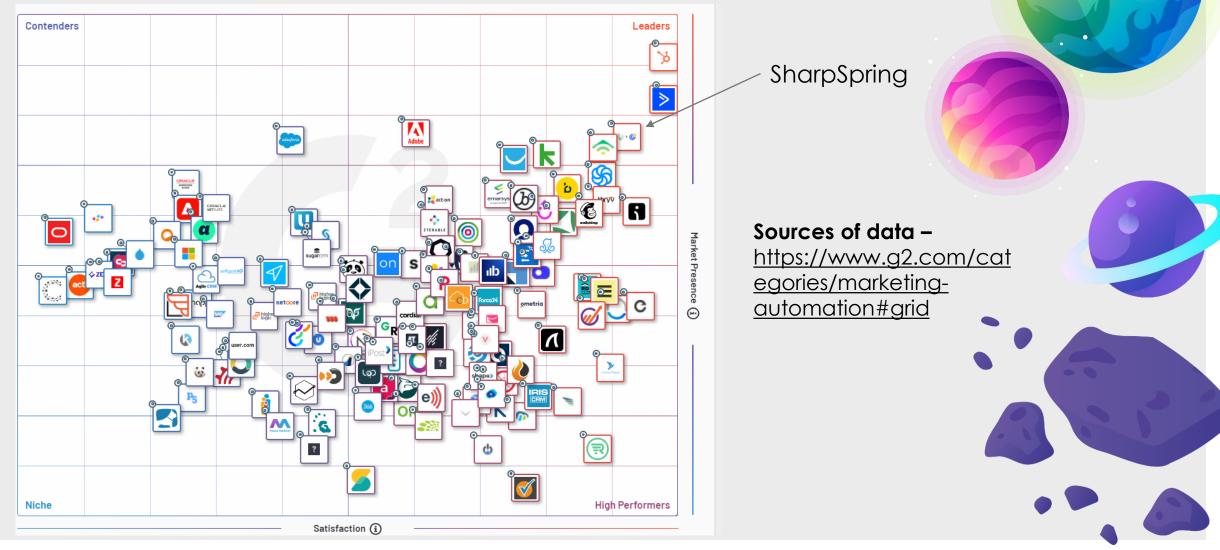
Top In Marketing Automation Usage Distribution in the United Kingdom

Technology	Websites	%
🞽 Hubspot	31,501	17.33
 Tidio 	17,951	9.87
🗢 Klaviyo	16,391	9.02
PayPal Marketing Solutions	8,399	4.62
Mailite Lite	8,017	4.41
Active Campaign	7,647	4.21
N Omniture SiteCatalyst	7,058	3.88
♥ SiteWit	5,867	3.23
Privy	5,861	3.22
Omnisend	5,667	3.12
loud	5,276	2.9
Adobe Marketing Cloud	5,219	2.87
🏲 Rapleaf	4,459	2.45
🚄 LiveRamp	3,469	1.91
Adobe Analytics	3,180	1.75
🕼 aWeber	3,054	1.68
🝷 Pardot	2,738	1.51

Top In CRM Usage Distribution in the United Kingdom

TechnologyWebsitesSalesforce2,426Infusionsoft2,063Agile CRM666Table CRM577	% 22.66 1.13 0.37
Infusionsoft 2,063 Agile CRM 666	1.13
Agile CRM 666	
	0.37
Zoho CRM 577	5.39
Ferfex 528	4.93
Freshworks CRM 395	3.69
• Freshsales 390	3.64
Graduway 338	3.16
Airship CRM 309	2.89
Image: Deploy ATS303	2.83
Groove.CM 270	2.52
© SuiteDash 258	2.41
• GetGist 236	2.2
Zoho Desk 173	1.62
• AutoConvert 165	1.54
• VTiger 135	1.26

Who are the main suppliers?



Criterion for 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

Our selection criteria

Deal breakers

- Price for Anicca and clients had to be less than £500/month per company
- Integrated CRM and contact management
- CRM connectors e.g. integration with Salesforce
- Google Ads integration
- Clients have full access to system
- Unlimited users per client
- >5000 contacts and >5000 emails per month per company
- Blog hosted on our/clients' site not through MAS

Nice to have

- API to connect with other software
- UK office?

SharpSpring packages

1,500 Contacts	10,000 Contacts	20,000 Contacts	Anicca Package	60
\$ 550 /mo	\$ 850 /mo	^{\$} 1,250 _{/mo}	£500/ Month	
Unlimited Users Unlimited Support Full Set of Features	Unlimited Users Unlimited Support Full Set of Features	Unlimited Users Unlimited Support Full Set of Features	Unlimited Users 100,000 Contacts 25,000 Emails 250,000 Page Impressions	

Onboarding, set-up, implementation (Includes 5-days of training & consultancy)

Consultancy and training your team:

- 1. Software set-up, tracking and customisation
- 2. Contact management and CRM (including data quality)
- 3. Email broadcasting
- 4. Workflows, sales processes and practical use
- 5. Advanced features and integration 3rd party software

Costs

Set-up and consultancy costs can be spread over 12 months at \pounds 500 +VAT per month

Thank You Ann Stanley ann@anicca.co.uk 0116 254 7224 07930 384443

Digital survey bit.ly/Anicca-survey



@annstanley bit.ly/Anicca-survey

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