

WHITEPAPER

Integrating Email, CRM, and Web Analytics

How to Build a One-to-One Marketing Machine that Strengthens Relationships and Boosts ROI

Setting the Stage

Imagine a world without cars, sewing machines, or iPods. (Okay, many of us can remember a world without iPods, but what a quiet and dull world it was!) By nature, machines are designed to make our lives easier and more enjoyable, while increasing efficiency and productivity. Similarly, the integration of email, CRM (Customer Relationship Management), and web analytics can help you create a powerful marketing machine that will change the way you think about digital communications.

If you're interested in improving your marketing metrics, enhancing employee productivity, increasing sales effectiveness, and forging stronger relationships with your customers and prospects, then it's time to consider a powerful integration between email, CRM, and web analytics. But before you start pulling levers, buying new parts, or plugging leaky hoses, it's wise to take a serious look under the hood of your current one-to-one marketing program.

Let's begin by defining three key parts every marketing machine should include:

- 1. Email Marketing:** Using an email marketing system like ExactTarget helps you communicate with customers and prospects in a timely and personalized manner.
- 2. CRM:** A CRM system captures and tracks your prospect and customer information in a centralized location. Chances are you're using a home-grown system or you've invested in a commercial CRM system. In addition to integrating with most CRM systems, ExactTarget has two productized integrations with leading CRM vendors Salesforce.com and Microsoft Dynamics™ CRM.
- 3. Web Analytics:** Web analytics programs help you monitor and report on website traffic metrics and visitor behavior. Entry-level and low-cost web analytics solutions include Google Analytics, and ClickTracks. Additionally, ExactTarget has productized integrations with higher-end vendors like Omniture, WebTrends, and Coremetrics.

According to "The Convergence of Sales and Marketing Technologies" (2007 Aberdeen Report), 60% of surveyed organizations indicated the top pressure driving their sales and marketing integrations was increased top-line revenue. By establishing, analyzing, and integrating sales and marketing technologies, the following results were observed:

- 36% of "best-in-class" participants increased marketing effectiveness
- Sales productivity increased by 26%
- A 16% decrease occurred in the time it took to close a sales initiative

What's Inside?

Page 1

Setting the Stage

Page 2

Self-Identification Quiz

Page 4

Where You Stand

Page 4

Finding the Perfect Fit

Page 5

Beginning Marketers

Page 10

Intermediate Marketers

Page 16

Advanced Marketers

Page 20

Conclusion

When sales and marketing technologies are integrated, marketers are able to identify the effectiveness of their website copy, whitepapers, webinars, and other online efforts through conversion rates. Enhanced prospect segmentation and targeting results in increased personalization, targeted relevancy, and deeper visibility into conversion rates and campaign return.

So where do you reside on the “marketing machine” integration spectrum? Whether the information above sounds entirely familiar or completely foreign, answering this question is critical to understanding how to maximize your current integrations—and take the next step forward.

Take our quick quiz below to identify your current email, CRM, and web analytics levels. Once we know where you stand, we can help guide you to the next level with new opportunities and recommendations.

Self-Identification Quiz

Choose the answer that best describes you and your organization. Keep track of your total points to determine where you are on the integration continuum.

1. My email marketing communications:

- Are linked, tracked, and measured in conjunction with my web analytics package (2 points)
- Are automated and provide me with complete closed-loop reporting on every individual that is engaged with my company (3 points)
- Drive traffic to my site, but don't provide much analytical insight (1 point)

2. My website statistics:

- Provide detailed reports about individual site visitors (3 points)
- Are aggregate statistics of my website's popularity and performance (1 point)
- Measure my website's popularity and performance by segments or groups of visitors (2 points)

3. My web analytics tools can be described as:

- A standard implementation of a major web analytics software package such as Omniture, WebTrends, or Coremetrics (2 points)
- A web analytics package such as Google Analytics or ClickTracks (1 point)
- A customized implementation of a high-end an Omniture, WebTrends, or Coremetrics web analytics software package (3 points)

Pop Quiz!

This whitepaper is organized a bit differently. Our observations and recommendations are broken down by where you rest on the integration continuum. So take our quiz, then find the section that best applies to you!

4. My marketing metrics and reporting resemble:

- An out-of-the-box solution that includes information like website visitors, page views, top pages, and referring traffic sources (1 point)
- A complete individual customer profile report, including number and frequency of website visits, campaign responses, and areas of interest (3 points)
- A customized report tailored to my specific business requirements and Key Performance Indicators (KPIs) (2 points)

5. After a marketing campaign, I:

- Reflect on a specific period of time within the campaign, what happened during this time, and why (1 point)
- Study past consumer behavior to prioritize and optimize future marketing campaigns (2 points)
- Establish automated remarketing campaigns to reengage prospects that abandoned the buying cycle (3 points)

6. I find sales and marketing integration challenging because:

- The data I need is in disparate systems, I need more technical expertise to make my integration worthwhile, and I don't have the automation required to take action on my web analytics data (2 points)
- I'm trying to find the most effective way to synchronize my data and maintain a database of record, and I'm committed to continuous program monitoring and improvement (3 points)
- It's time consuming to learn new technologies in addition to my other responsibilities, my budget is tight and integrated technologies can be expensive, I'm not an online marketing expert, and I don't have a complete view of my consumer engagement (1 point)

For the Over Achievers

No matter where this quiz puts you on the continuum, feel free to read the material for other levels, too. After all, the sophistication of your programs may span different levels.

Where You Stand

Now that you've taken the quiz, it's time to see where you fall on the integration continuum:

1-6 Points: Beginning Marketers *(section begins on page 5)*

You've looked beyond the traditional route of print and media advertising. You understand the value of email marketing and the benefit it can bring to your organization. You might even have your customer and prospect information stored in a database. But web analytics still seems mysterious to you, and you're eager to learn what a deeper integration can offer.

7-12 Points: Intermediate Marketer *(section begins on page 10)*

You've mastered the basics of email marketing and are exploring ways to improve your campaigns and streamline your marketing efforts. Your homegrown CRM system is bursting at the seams, or you've already purchased a more robust CRM platform. You are comfortable with web analytics and are probably looking at ways to further streamline and leverage the large amounts of marketing campaign data you've gathered.

13-18 Points: Advanced Marketer *(section begins on page 16)*

You practice true close-looped marketing by automating your marketing processes and streamlining your business procedures. You experience deeper customer engagement through highly relevant and timely communications, and you're constantly exploring ways to improve and refine your marketing campaigns.

Finding the Perfect Fit

But what if you don't really fit into any of these categories? Don't worry. These classifications are based upon common marketing scenarios. Your current processes may not fit neatly into a prescribed "bucket." Various elements of your campaigns may span from one classification to another. That simply means that you have additional considerations—and increased options—for nurturing different parts of your program.

Situations can also vary by industry and lifecycle. For example, web analytics might be a crucial component during the prospecting or acquisition phase, but a reliable CRM solution might be the critical piece of a customer retention phase. Of course, CRM and web analytics have functionality that is useful independently—but in this case, the sum really can be greater than the parts.

The key to a good email marketing, CRM, and web analytics integration is the ability to act on your data. As we reaffirmed in our *2008 Channel Preference Survey*, email marketing is still the most effective communication channel for using your data. **So no matter where you are on the spectrum, one thing remains the same: regardless of the CRM and web analytics tools you may—or may not—use within your organization, email is the common thread that is ever-present and essential to one-to-one digital marketing success.**

Always Room for Improvement

We took the quiz, too. And not surprisingly, we found ourselves at different levels depending on the business system. If you're like us and didn't quite fit into any one level, start by making incremental improvements to your biggest problem area.

Beginning Marketers

Believe it or not, you should be pretty excited about the road ahead. Why? **Because by making only a few small improvements to the way your email, CRM, and web analytics systems work together, you can create tremendous growth opportunities for your one-to-one marketing program.**

Maybe you're just starting the transition from traditional print and media advertising to online marketing. Or perhaps your company has already purchased email, CRM, and/or web analytics solutions—but you've never had the human resources to make the most of them. Or it may be that your email marketing program is completely separated from any CRM and web analytics data you have—data which may be held in the hands of IT or Sales.

Whatever the case may be, it's time to start using all of your tools to advance your business. So pull out your instruction manual (this whitepaper), and start building the one-to-one marketing machine you (and your boss) have been dreaming of.

CURRENT APPROACH

As with any well-executed project, it's best to measure twice and cut once. For those new to integrating email, CRM, and web analytics, that means taking an honest look at the way you currently use these systems before trying to jump straight to the most complex level of integrations.

If your quiz score identified you as a beginning marketer, your current approach to email, CRM, and web analytics probably looks a bit like this:

Email Marketing

Some of you—like those in manufacturing and other industries typically slow to adopt online marketing—may be entirely new to email marketing. But most beginners already have access to an email marketing solution and have sent some form of user-initiated (a.k.a. not automated) messages to opt-in subscribers.

Preferring to keep costs low and ease-of-use high, this group often purchases entry-level email marketing solutions. These solutions typically have a lower price tag, basic functionality and features, and WYSIWYG email editors (Figure 1). More adventurous beginners may have also tried some simple audience segmentation. But chances are they have not leveraged more advanced email personalization tools like Dynamic Content to tailor messages based on individual subscriber data or behaviors.

CRM

Beginning marketers may already capture some customer and prospect data in a central, home-grown database or commercial CRM system like Microsoft Dynamics™ CRM or Salesforce.com. They may need to work with other teams like IT or sales to access their CRM data, but sales pipeline, customer service, and existing client data are often accessible if they're willing to do a little digging.

However, beginners tend not to have tried using CRM data to power more relevant, timely email communications. At most, they use their CRM system to pull lists of subscriber email addresses for sends. Email messages tend to be manual and do not feed performance metrics back into individual subscriber records in their CRM systems.

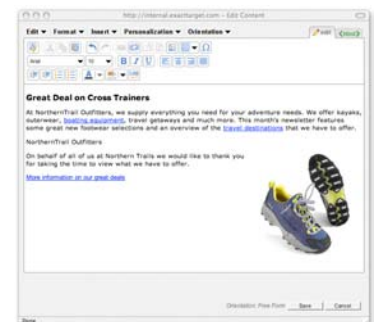


Figure 1: Beginners tend to lean towards email marketing solutions with high ease-of-use—like those with WYSIWYG email editors.

Web Analytics

Inexpensive (or free!) web analytics tools like Google Analytics or ClickTracks are frequently chosen by beginners (Figure 2). Others may use more robust solutions from providers like Coremetrics, Omniture, or WebTrends. Regardless, those new to integrating systems tend to gravitate towards the most basic web analytics solution offered, thus avoiding higher costs and sometimes overwhelming complexity associated with more advanced products.

These marketers commonly use web analytics solutions to monitor simple website traffic metrics and behavior. Out-of-the-box reports provide a baseline look at overall metrics like website visits, page views, popular pages, and traffic sources. They focus on aggregate site performance and popularity as they ask, “what happened on my site, why, and when?”

Often little to no integration between the systems exists for novices. Some may use basic web analytics reporting for specific email marketing campaigns, but aren’t tracking their email campaigns and web analytics performance holistically. Others may use email to drive traffic to their websites, but they’re often unaware of what happens after click-through from an email to their sites.

COMMON CHALLENGES

If those scenarios sounded familiar, take heart. We understand how difficult it can be to boost your score and leave those beginner days in the dust. Here are just a few of the challenges you—and a ton of other beginning marketers—face daily:

- **Time Constraints:** You’re swamped, right? From last-minute projects to your chatty cube-neighbor, the incessant demands of your day job make it hard to find a moment to yourself. Much less, to carve out time to learn how to better use your existing systems or research the ones you might like to purchase.
- **Limited Human Resources:** Dedicated data analysts and technical resources are rare at this level. In fact, you’re probably juggling the creation and deployment of your email messages, along with whatever data you use to power and track them.
- **Tight Budgets:** Investing in the proper email marketing, CRM, and web analytics technology takes money. Sadly, crisp Benjamin Franklins don’t exactly grow on trees outside our office windows (especially if you’re in a marketing department!) Your budget’s tighter than ever, and you have to constantly find ways to do more with less.
- **Low Technical Expertise:** If you had ample time and money to integrate your systems, would you technically be able to? Chances are, you’re trying to play catch-up and figure out how all the new online marketing channels impact your business. Beginners’ limited technical expertise often makes them wary of attempting more advanced integrations.
- **Incomplete Information:** Making marketing decisions based on incomplete information is dangerous. Not only do you risk wasting valuable time and money, but you have no way to measure *why* things go wrong. When email marketing, CRM, and web analytics systems aren’t fully integrated, you only see part of the puzzle. Without a 360-degree view of subscriber engagement, you’re left throwing darts in the dark.



Figure 2: Google Analytics is just one of several web analytics platforms commonly chosen by beginning marketers.

OPPORTUNITIES & NEXT STEPS

Those who aren't afraid to make some well-informed changes to their email marketing, CRM, and web analytics programs will benefit in the long run.

Make the Most of Your Email Marketing Solution:

Here are a few ideas to help you make the most of your email marketing investments:

- Free up valuable time by **streamlining your email marketing processes**. Attend online training classes to learn how to use your email marketing solution's creation, subscriber management, tracking and reporting tools, and more. Or seek out web-based tutorial training options to learn at your own pace.
- Start **segmenting your subscriber base** and delivering more relevant content that drives website traffic. See if your email marketing vendor offers segmentation tools like ExactTarget Groups which allow you to easily create subsets of subscribers based on profile information and various sampling techniques.
- Try some **simple email personalization techniques** like using substitution strings for pre-set subscriber attributes. Or go a step farther by upgrading to a more advanced edition of your email marketing solution, and start personalizing your messages with subscriber-specific content and offers using tools like Dynamic Content and Dynamic Subject Line.
- Experiment with do-it-yourself website tools like **ExactTarget Microsites and Landing Pages** that can help save time and money as you stop relying on your IT department or a technical agency for webpage development (Figure 3).

Take Your Time

On-demand tutorials, like those offered at ExactTarget University, can help you hone in on specific topics and questions. Check with your email, CRM, and web analytic providers to see if they offer a similar training resource.

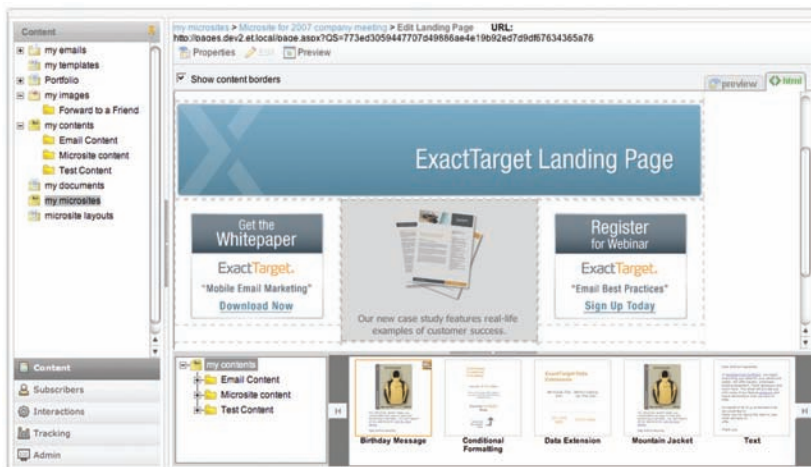


Figure 3: ExactTarget's Landing Pages Layout Generator lets marketers build a consistent, branded web presence—no matter their level of expertise.

Expect More from Your CRM System:

It's time to get organized. Find out what data you already have. Then find out where it's stored and if you have access to it. Here are a few ideas to help get your CRM system running smoothly:

- **Monitor data cleanliness.** Your emails are only as powerful as the data powering them. Work with internal key players to streamline CRM system access and processes so your data stays clean.
- **Think about what subscriber data you need** for your email program. Always wanted to start a birthday club? Make sure you're gathering the data you need to make it happen. A well thought-out communication plan will help organize your goals and data needs.
- If you haven't already, **research more robust CRM platforms** like Microsoft Dynamics CRM or Salesforce.com. See if your email vendor offers productized integrations with leading CRM systems that allow you to get up and running quickly and smoothly.

Understand Subscriber Behavior Using Web Analytics:

No marketer should be without a baseline web analytics solution to report on the performance of online marketing programs. In fact, don't let another email go out the door or bid on another paid search term without setting up some level of tracking on your website. The data you gather today will help justify important marketing investment decisions in the future.

- **Identify Key Performance Indicators** for your online marketing activities. What determines campaign success? What metrics do you need to capture and review to determine performance? Web analytics products typically have pre-defined or customizable dashboards to analyze the performance of KPIs. Start by looking at trends on a weekly or monthly basis and compare against previous time periods.
- Determine if your **current web analytics vendor can provide the metrics** you've deemed necessary to evaluate performance. If not, it's time to research leading web analytics providers like Coremetrics, Omniture, and WebTrends.
- **Set up a basic integration** between your web analytics system and your email marketing vendor so you can consolidate metrics into a single system. For example, your email provider may offer a tool like ExactTarget's Web Analytics Connector which lets you integrate quickly and seamlessly with virtually any web analytics package. If you're already using Coremetrics, Omniture, or WebTrends, a productized integration can make this process even easier.

"WebTrends Marketing Lab provides the analytics power and flexibility that marketers need to extract maximum value from their online customer data. Marketers can uncover visitor preferences and trends across a broad array of online activities, identify and target customers who visit their websites and determine the visitors that offer the most potential value to their business."

These and other analytics insights can then be integrated throughout the enterprise, utilizing WebTrends open data-sharing architecture."

—Aaron Gray
Director of Open Exchange
Partnerships, WebTrends

- If you're only gathering aggregate data, **starting laying the foundation for behavioral analysis on a segment level.** Eventually, you'll need this more granular data to predict behavior and response to your marketing campaigns. Look for pre-defined or customizable visitor segmentation reports and begin analyzing how different segments of your audience react to different offers or areas of your website.
- Create a set of unique reports and metrics for each of your marketing and sales initiatives. More specific reporting will let you compare the performance of campaigns across different mediums like email, website, paid search, organic search, and more.

BUILDING THE FOUNDATION & REAPING THE REWARDS

No matter how small your progress may seem along the way, remember that setting up functional email, CRM, and web analytics systems is a tremendous accomplishment. Now set your sights on moving to the intermediate level. You have the tools. You have the knowledge. All you need now is a little experience with your refurbished one-to-one marketing machine.

Intermediate Marketers

If you grew up in a large family, you've probably heard that it's hard to be in the middle. Intermediate marketers are often caught in a similar situation. They've mastered novice email marketing, CRM, and web analytics, and they feel fairly comfortable using the tools at their disposal. They're often tempted to try some advanced techniques, but it's hard to know where to start.

Additionally, organizational pressure is often lacking because intermediate marketers do a 'good enough job' with their online marketing programs that management doesn't notice any red flags. Valuable human resources and capital are often routed to parts of the business that are more clearly in need. Sound familiar?

If you've self-identified as one of these 'middle children,' press on. Sure, you may not be getting as much internal pressure to improve, but we know you have the drive to tackle even more complex marketing initiatives. The advanced marketer category is just around the corner, and it's yours for the taking.

CURRENT APPROACH

If you're an intermediate marketer, your current approach to email, CRM, and web analytics probably looks something like this:

Email Marketing

Intermediate marketers are common across most verticals, armed with enough email marketing experience to tackle new campaigns, tools, and features. They've mastered simple user-initiated, list-based sends to their subscriber bases, and are looking for new ways to improve existing email campaigns and streamline their processes.

Intermediate marketers steer away from the most basic level email marketing solutions, preferring instead to use systems that give them 'room to grow.' For example, they often choose solutions with more powerful segmentation, personalization, and integration tools.

These marketers may have experimented with content syndication, landing pages, and Dynamic Content to reach new levels of email marketing sophistication. Though they've taken many steps in the right direction, most intermediate marketers haven't tried triggering email campaigns based on rich subscriber data or gotten the most out of their edition's advanced tracking and reporting tools.

Itching for Advancement?

Ready to take your email program to the next level? Want to upgrade from your Core Edition? Get a copy of the *Advanced Edition Data Sheet* from your ExactTarget Representative to learn more.

CRM

Intermediate marketers actively capture customer and prospect data in a centralized CRM system, and are probably comfortable pulling subscriber reports by segment, pipeline status, and other business determinants.

Though some may still use a home-grown CRM solution, many marketers at this level have purchased (or at least researched) a more well-known CRM platform like Microsoft Dynamics CRM or Salesforce.com Enterprise Edition.

Web Analytics

Intermediate marketers actively collect website tagging data through their web analytics solution, are comfortable working with this data, and want to further optimize their communications using this rich behavioral information. **They've outlined their one-to-one marketing program KPIs and know their systems can gather the necessary information to measure them.**

Marketers at this level typically use customized implementations of Omniture SiteCatalyst, the industry's leading web analytics software solution (Figure 4). Coremetrics Online Analytics, and WebTrends Analytics are other solutions that offer intermediate marketers additional tracking and tools without sacrificing ease-of-use. Using data-driven audience segmentation, intermediate marketers track all links in their messages to measure campaign performance through their email marketing and web analytics packages in a single, aggregated interface.

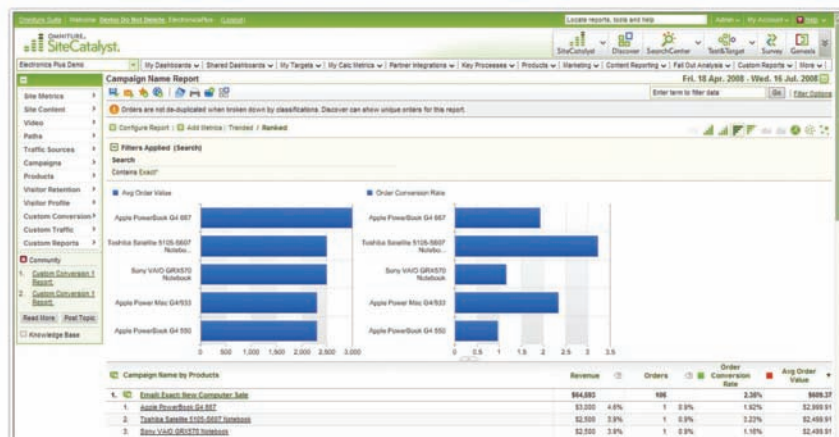


Figure 4: Intermediate marketers often use web analytics solutions like Omniture SiteCatalyst to track conversions and further segment audiences.

Whether they're tracking new versus returning visitors, customers versus prospects, or geographic segments, intermediate marketers understand the importance of deep-dive analytics. The reports and dashboards in their web analytics platform are customized to specific business needs, individual marketing campaigns, and pre-defined program KPIs.

Though the sheer volume of available data can be overwhelming at times, the intermediate marketer is comfortable analyzing data by segment in the hopes of one day prioritizing and optimizing future marketing decisions based on website visitor behavior.

COMMON CHALLENGES

If you recognized some of the items above, the challenges below will sound even more familiar. Intermediate marketers are in a unique place—straddling between beginner and advanced marketers, and wondering how to bridge the gap:

- **Complex Decision Trees:** The intermediate marketer's environment typically includes more decision makers and company processes than at a beginner level. As such, it can be harder than ever to make quick marketing decisions based on data.
- **Increased Time Demands:** Intermediate marketers work with multiple systems and powerful integrations. It can become time-consuming and cumbersome to figure out how to pull together all their data into actionable pieces.
- **Incomplete Technical Expertise:** Even the most experienced Online Marketing Manager or database guru can't know everything there is to know about every single online marketing system. Intermediate marketers still need some guidance to help them effectively capture and access the right data at the right time.
- **Missed Automation Opportunities:** At this level, systems are running near full-speed, providing marketers with more rich data than ever before. But without a means to automate email communications based on that information, the data can quickly become a hindrance to marketers' daily processes. Intermediate marketers are often still learning how to automate communications based on CRM and web analytics data.

Use Your Network

If you don't have the technical expertise to handle a piece of your integration framework, don't give up. Use your network to identify others within your organization who may be able to help.

OPPORTUNITIES & NEXT STEPS

Intermediate marketers have built a strong foundation for sophisticated communication automation and data aggregation across their systems. Implementing changes at this level can take a little longer, but the results are well worth it.

Get Even MORE from Your Email Marketing Solution:

Have you fully explored the standard features of your email marketing solution? Here are a few ideas to help intermediate marketers make the most of their email marketing investments:

- Take some online training classes to see how your email marketing tools can **streamline daily processes**. And you know what that means. More time and energy to work towards advanced automation and data aggregation.
- Think about which **manual campaigns you can convert to triggered email**. From remarketing campaigns to price drop alerts, triggered messages allow intermediate marketers to get more value from every customer interaction—automatically.

A New Breed of Email

Download ExactTarget's *Field Guide to Triggered Email*, and learn about all the different species of triggered messages marketers have discovered. Get your copy at www.exacttarget.com.

- **Use relational data to send highly-targeted email messages.** Intermediate marketers can build one-to-many relationships between subscribers and contextual data like website behavior and purchase history. Delivering those one-to-one messages is easy with the profile attribute, segmentation, and targeting tools like Dynamic Content.
- Invest in tools like ExactTarget's **Automated Interaction Management (AIM) framework**, and start automating your data aggregation and multi-channel digital messaging processes through a single platform. Specify recurring data imports, refreshes, and sending activities. Then define, schedule, modify, and save complex programs—once. After your program is saved, you can rely on automation technologies to execute, freeing you from tedious tasks and letting you focus on strategy and optimization.

Fully Integrate Your CRM System:

Intermediate marketers have likely already established a CRM game plan and ensured that their system is capturing the necessary data. They should have also addressed any data cleanliness issues and be ready to fully integrate their CRM system.

- Unless you have a very robust homegrown CRM system, it's probably time to **invest in a proven vendor** like Microsoft Dynamics CRM or Salesforce.com. Email providers often have productized integrations you can use to integrate with CRM systems. If a productized integration isn't offered, use an open API to create a custom integration.
- Don't just focus on integrating email and CRM—ensure your integration of CRM and web analytics can provide a full 360-degree view of customer behavior, too. A lot of valuable segmentation and analysis can be done using just these two systems.
- *For Microsoft Dynamics CRM 4.0 Users*
 - Start creating, delivering, and tracking compelling digital communications leveraging your CRM system's Lead, Contact, and Account data.
 - Explore advanced business process automations based on Microsoft Windows Workflow Foundation to streamline your marketing tasks. Start creating multi-step date and event-based Workflows that automatically execute your marketing programs. Maybe start with a drip campaign for new leads that can be executed without any manual intervention.
 - Track your email activity back to specific Campaign Activities to see which elements of your marketing initiative drove the most traffic and which pieces can be optimized further.
 - Try creating Microsites and Landing Pages that capture subscriber information and automatically feed it back into your Microsoft CRM account.
 - Use Microsoft Reporting Services to evaluate Campaign performance—even at a granular level. Drill down to individual responses from aggregate tracking to determine a subscriber's level of engagement. Then try using the Quick Copy to Marketing List feature to easily send a follow-up message to an engaged group by sorting subscribers by behavioral data, copying them to a new list, and sending.

"Integrating our email marketing and CRM system gave us a common platform for segmenting and communicating with our audience. We now send highly-relevant messages based on unique subscriber information, and click rates have doubled in response. We look forward to integrating our web analytics platform in the future to get a 360-degree view of our subscribers."

—Christelle Flahaux
Senior Marketing Manager
Demand Generation & Field
Marketing, Ariba, Inc.

Get the Most From Your Systems

Request the *ExactTarget for Microsoft CRM Data Sheet* to learn how you can integrate your best-in-breed email and CRM systems for maximum results.

- *For Salesforce.com Users*

- Salesforce.com users can also start creating, delivering, and tracking compelling digital communications leveraging their Lead and Contact data. Messages can also be sent on behalf of Lead, Contact, and/or Account Owners to drive one-to-one relationships.
- Examine your open, bounce and click-through data at individual Lead and Contact levels, as well as an aggregate level. Then make sure your results are integrated into customized Reports and Dashboards that let you evaluate and analyze the effectiveness of your Campaigns.
- Use the ExactTarget for AppExchange API to programmatically send messages to Salesforce Reports, Campaigns, Contacts or Leads from ExactTarget. The web services API lets you schedule sends, exclude records from a send, set From Names, designate population of tracking results, and more.
- Salesforce Web-to-Lead lets marketers gather online information that automatically generates new Leads. Using ExactTarget's Landing Page functionality in conjunction with Web-to-Lead lets intermediate marketers seamlessly redirect data into their Salesforce accounts—without IT involvement. Configure Web-to-Lead in Salesforce, copy the code that's generated, and paste it into your ExactTarget Landing Page. Then watch as newly-captured web leads automatically populate your Salesforce account and enters the sales process.

Power Stems From Automation

Request the *ExactTarget for AppExchange* Data Sheet to learn more about Web-to-Lead and other features that can help you automate once-manual processes.

Fully Integrate Your Web Analytics System::

There's simply no better way to drive relevant, personal, timely communications than by combining web analytics and email marketing.

- Implement a web analytics system that can **capture and report your KPIs** and unique visitor behavior. Start by mapping out the critical points of interaction for your web presence. Avoid trying to capture everything; focus on the most important things first.
- Instead of focusing on webpage hits and overall visits, **concentrate on capturing and analyzing unique visitors**. It's ok to organize information by pre-defined audience groups or segments at first, but make sure you eventually start drilling down to an individual visitor level. Otherwise you'll never have a true picture of how individuals are interacting with your company's marketing resources.
- Identify at least **three marketing tasks or programs you perform on a recurring basis** and begin planning to automate them. For example, you could automate a process that pulls all website visitors who abandoned their shopping cart in the last 24 hours—along with the items in their cart at the time. Then automate the movement of that information to a custom report that feeds directly into your email marketing system.
- After you've captured the most important pieces of information about your unique visitors, **identify all the points of conversion on your site**. When someone doesn't convert, you have an opportunity to remarket to them. Scenario or Funnel analysis reports can typically tell you who is making it through your online processes—and who is bailing out early. Locate these key tipping points, and develop a remarketing communication plan to save the conversion.
- Move on to more **advanced integrations** between your web analytics system and other mission-critical data depositories like CRM, financial databases, on-site search, and point of sale systems. By combining multiple data sources, you can optimize each consumer touch point and improve the relevancy of your communications across the board.

IMPROVING ON A STRONG FOUNDATION AND REAPING THE REWARDS

Intermediate marketers who charge ahead to the advanced level can anticipate high returns as their once-manual programs are automatically created, delivered, and tracked through multiple systems. So work through your goals one by one—always making sure your data processes are streamlined and reliable so there are no false starts when you turn on your new one-to-one marketing machine for the first time.

“By integrating Omniture Genesis and ExactTarget, marketers can achieve true closed-loop marketing as they integrate web analytics data with email, CRM, point of sale, and countless other critical business systems.”

—Christopher A. Parkin
Sr. Director, Genesis Solutions
Omniture

Advanced Marketers

If our quiz pegged you as an advanced marketer, you've already built a solid foundation for email marketing, CRM, and web analytics. You're a pro at close-looped marketing and frequently automate routine processes to save time and money. Your communications are highly relevant, timely, and often based on individual subscriber behaviors.

Digging into your data has become second nature. You're comfortable in your marketing systems, and you're pretty sure you could run a customized website behavior report in your sleep. Because of your dedication to data-driven marketing, your audience is becoming more engaged over time. Their subsequent actions have boosted your bottom line and drawn the attention of major players in your organization.

And it's no wonder. You don't make decisions on a hunch—you have a 360-degree view of your online marketing activity performance, and you make decisions based on carefully analyzed data and trends. Yet, despite your progress and perseverance, you constantly look for new ways to improve and refine your marketing campaigns.

CURRENT APPROACH

If you're like many of our advanced marketers, you're probably encouraged by your current online marketing approach. You've set up your email marketing, CRM, and web analytics systems to automatically aggregate data into actionable results, and your 360-degree view helps you create appropriate communications to all segments of your audience.

Email Marketing

Advanced marketers act as their organizations' email marketing gurus. They use relational data to deliver dynamic and highly-relevant email content. They may have also joined the triggered email fan club, enjoying the financial and monetary benefits of automation. Commonly, marketers at this level have invested in tools like ExactTarget's AIM and are using their email service provider's open API to achieve additional flexibility. With these tools, they can seamlessly integrate their email marketing programs with web analytics, CRM, content management, and other proprietary systems to truly automate their digital communication efforts.

Advanced marketers have long-graduated from basic email marketing applications, instead looking for more robust and highly flexible solutions. Not surprisingly, these marketers often maintain brand and messaging consistency across an enterprise, or send personalized messages on behalf of sales representatives, franchisees, or business units with an enterprise-level solution.

CRM

At this level, marketers have fully integrated their email marketing and CRM platforms. This most often involves a custom integration to a home-grown CRM database or a productized integration with a leading CRM vendor. **Advanced marketers are comfortable pulling targeted subscriber lists based on behavioral data and stored attributes, and they seamlessly populate their email marketing account with the data necessary to deliver unique content in their communications.** Each marketing campaign or workflow tracks properly, helping them distinguish between high performers and resource drains.

Do More With Your Data

Whether you want to market to high-value consumers or promote high-margin products based on customer engagement, ExactTarget's Relational Data Management Tools empower you to consolidate, relate, and act on your data.

Web Analytics

Advanced marketers have also equipped their one-to-one marketing machines with top-of-the-line web analytics systems and have fully integrated them into their email marketing and CRM systems. Advanced marketers typically use customized integrations of Omniture's high-end web analytics packages including SiteCatalyst, Genesis, and Discover. Coremetrics Online Analytics and Explore and WebTrends Analytics and Visitor Intelligence are additional solutions that may be seen at this level. **If they're particularly ambitious, advanced marketers have taken their integration a step farther to include other mission-critical systems like financial databases, on-site search, and point of sale systems.**

Advanced marketers typically have detailed web analytics reports and dashboards for their general audience, specific visitor segments, and frequently dig down to the individual level. They can profile each site visitor based on their number and frequency of visits, campaign responses, content and product interests, and more.

Advanced marketers have planned or started executing automated remarketing campaigns to reengage prospects who have left the buying cycle. Remarketing emails are highly relevant and timely, and closed-loop reporting on a subscriber level helps these marketers know who is truly engaged.

COMMON CHALLENGES

Advanced marketers may be on the fast-track to success, but many of the same challenges facing beginners and intermediate marketers can still be problematic. From time constraints to tight budgets, marketers at this level must remain vigilant about common integration stumbling blocks. In addition, advanced marketers may face these challenges:

- **Data Flow and Synchronization:** The more systems you integrate, the more important it becomes to streamline processes and ensure data flows into one central database of record. For some organizations, this central repository may be a CRM system, a web analytics system, or a completely different database. It's also necessary to ensure all team members understand the flow of data through each system and can test processes for accuracy without jeopardizing other pieces of the puzzle.
- **Patience:** Advanced marketers often get frustrated when programs or applications don't show results immediately. Remember that the more complex your marketing activities become, the longer you may have to wait for reliable metrics or visitor response. Monitoring sophisticated automated programs and external databases can be time consuming, but the results are well worth the wait.
- **Organizational Skepticism:** As they reach the upper levels of automation and data aggregation, advanced marketers may have trouble getting organizational buy-in for their proposals. High-level integrations can require substantial investments (both monetary and time), and many companies may be reluctant to move their data from existing silos.

"Coremetrics provides business executives at all levels with the real-time marketing analytics they need to maximize ROMI (Return on Marketing Investment) and drive repeatable business results in a complex and competitive online market.

When seamlessly integrated with ExactTarget's email platform through Coremetrics Connect, marketing communications can be targeted using the richest set of behavioral data available to a marketer."

—John Squire
Chief Strategy Officer, Coremetrics

OPPORTUNITIES & NEXT STEPS

If you're an advanced marketer, you've already worked hard to build a powerful one-to-one marketing machine. In fact, you've raised the bar so much it's logical to ask, "what next?" You might be wondering if you should just sit back, relax, and let your machine hum along on its own.

Absolutely not. At this level, it's actually more important than ever to focus on cross-platform continuous improvement. Have you automated all the programs you can? Is your data flow as seamless as it could be? Have you pushed your drip marketing and lead nurturing programs to the limits? Have you extended your integration network by linking multiple business applications or databases? The point is, there's always more to do—even for an advanced marketer. There are countless new opportunities to increase your marketing ROI, and there's always room for a deeper analysis into customer and prospect behavioral data.

Here are several additional ideas to help improve your marketing programs inside and outside the realm of integration:

- Optimize Your Email Design:** While common design standards would be nice, the reality is that marketers need to work in a complex environment and optimize rendering across the most pervasive email clients. So take the time to analyze your audience's top email clients, and make sure your designers follow the best practices for those clients (Figure 5). Even once best practices are in place, make sure to rigorously test your emails to ensure everything appears as expected. You can have the best email marketing strategy in the world, but if your email creative renders poorly in the inbox, customers will be less engaged and conversion rates will falter.

Looking Good

Download ExactTarget's *Email Design & Rendering* Whitepaper to learn how your emails can look their best each and every time. Get your copy at www.exacttarget.com.

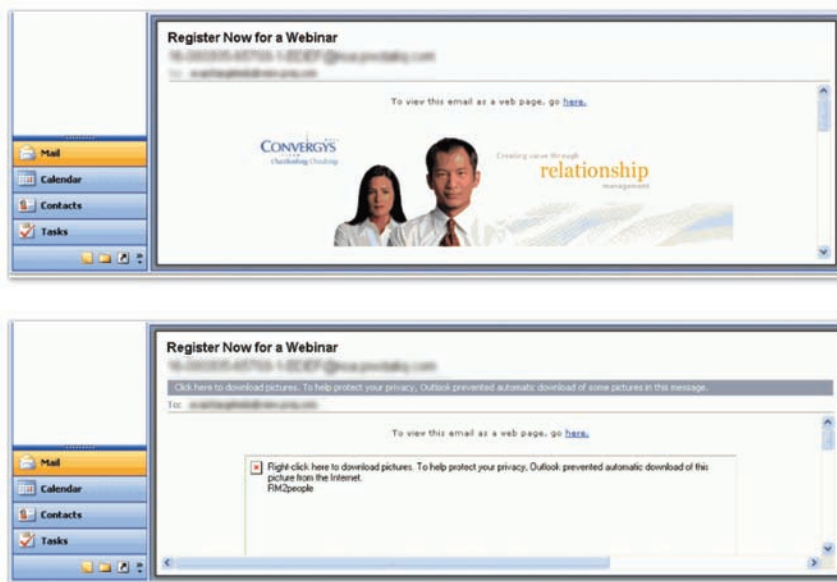


Figure 5: Design best practices vary by email client, so make sure your messages render properly in your subscribers' most popular clients.

- **Use Integrations to Create Sophisticated Drip Campaigns:** Try coordinating your systems to build an automated lead nurturing program to educate leads and move them through the buying cycle. You might try integrating billing data from your accounting system with contact information from your CRM system to place leads in the appropriate buckets. Then integrate browsing behavior from your web analytics platform to augment that data and automatically transfer subscribers into your email marketing solution. Monitor success of your new program and see how successful a drip campaign can be for sending very targeted and relevant messages that move leads through the funnel.
- **Conduct Advanced Email Testing:** It might be time to take a closer look at your email performance by using advanced testing techniques. Though simple A/B testing can be beneficial in some situations, advanced marketers should try to use more robust multi-variable testing. If time and resources allow, they can even conduct Taguchi testing, an advanced testing methodology which offers even greater insight by simultaneously combining a large number of factors to see how they impact each other—and overall email performance.
- **Explore New Messaging Mediums:** You may have a good handle on email marketing, but what about emerging messaging channels like SMS? To effectively communicate with increasingly transient consumer and business audiences, marketers must adapt with new techniques—while traditional mediums, such as email, remain constant. SMS lets marketers send communications that require high urgency or portability (Figure 6).

Test, Test, Test

Download the *CareerBuilder.com Case Study* to see how Taguchi testing helped them achieve an 88% lift in conversion. Get your copy at www.exacttarget.com.

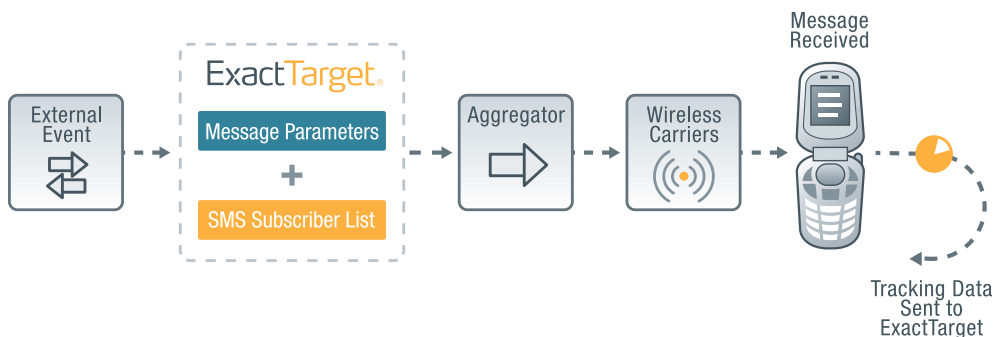


Figure 6: ExactTarget's Integrated One to One Platform makes it easy for marketers to manage SMS messages from the same robust platform they use for email marketing.

PUSHING THE LIMITS AND REAPING THE REWARDS

Advanced marketers' one-to-one machines are running smoothly, and automated processes and data aggregation allow them to pour saved time and energy into new projects. Whether they choose to focus on extending their current integration framework or venture into new focus areas like email design optimization, advanced testing, or emerging messaging channels like SMS, one thing is clear: advanced marketers are up to a challenge.

Conclusion

Whether you currently classify yourself as a beginner, intermediate, or advanced online marketer (or some combination of the three) there's always room to take your one-to-one digital marketing communications to the next level. But keep a few important considerations top of mind while plotting your next move.

- Without the means to effectively communicate your message, the data you house in your CRM and web analytics systems is difficult to act on and potentially unusable. This is why email is such a critical one-to-one marketing channel.
- You must have a firm understanding of your customers' business cycle to optimize your integrations and use them effectively.
- Solid thought and strategy are vital to the success of your digital marketing campaigns. The technologies themselves have proven results, but will be ineffective without a properly executed business plan.

Building your one-to-one marketing machine takes time, planning, and execution. But it's worth it in the end when the integration of email, CRM, and web analytics delivers new insight into your digital communications plan and ultimately improves your marketing ROI.

Looking Ahead

Set your sights on the next best thing—a higher level of integration proficiency. No matter your current status, make time to set goals for your email, CRM, and web analytics systems. Then use the recommendations in this whitepaper to help you reach them.