

sage

E-Marketing



Email Marketing Excellence from the heart of your Sage CRM Application



E-Marketing

Contents

Introduction to Sage E-Marketing	Page 1
Analysing your E-Marketing Results	Page 2
Building your Audience	Page 4
Creating a Campaign	Page 5
Email Design	Page 6
Spam Filters and Bounce management	Page 7
Delivering the Call to Action	Page 8
HBFS: Case study	Attached



Sage E-Marketing

Email Marketing Excellence from the heart of your Sage CRM Application

Introduction

Sage E-Marketing is a fully functional email marketing application available with direct integration to each of the 3 Sage CRM applications. Historically, email marketing has been handled by a 3rd party email application where data would be extracted in CSV format from your CRM application and fed into the email package. Once a campaign was concluded, at best the unsubscribe's would be updated manually in CRM, but none of the actions of the audience would ever be written back to the contact record in CRM - making it impossible to generate secondary activities based on the tracked results of the email campaign.

Welcome to Sage E-Marketing, by integrating tightly with Sage CRM products, the contact record becomes the source of all activities on-line or off-line, because of this campaign audiences can be built using all the contact criteria, including whether they have previously opened, clicked through or responded to a survey.

What does Sage E-Marketing Provide

- HTML email design, including templates
- Bounce management
- Spam checking
- Click-through analysis and post click activities on websites
- Surveys
- Preference engine
- Auto unsubscribe

Note: This brochure is a general overview; some of the functions vary in each of the 3 Sage CRM products



Analysing your E-Marketing Results

The complexity and depth of a campaign's results will always depend on the complexity of the campaign and the different calls to action used, however, the campaign overview page focuses on the key metrics.

Open Rates

Sage E-Marketing reports open rates in 2 key metrics, 1) The total number of times the email is opened 2) The total number of distinct individuals who have opened the email.

- 1) The total number of times the email is opened gives a good indication of the relevance of the email as it includes repeat openings and forwarded emails.
- 2) Distinct email opens is a more accurate reflection of the number of people who have been influenced as a result of your campaign and can also be displayed as a percentage of the total audience, thus giving your campaign open rate.

The screenshot shows the Sage E-Marketing interface. On the left is a vertical navigation menu with options like Recent, Calendar, Campaign, Email, Landing Zone, Survey, Templates, Tools, Bounce Mgr, Reporting, Events, Admin, Logoff, and Online Help. The main area is titled 'Campaign Results' and displays the following information:

Campaign Status: Live
Launch Date: 13/05/2007
Close date: 15/07/2007
Expected audience: 190 (100% Segmented)
View Email

Total Emails Opened: 28
Total Emails Not Opened: 175
Total Distinct Emails Opened: 15 (8%)

Current Audience: 190
Expected audience: 190 (100% Segmented)

Email Statistics:

Emails successfully sent: 190	Emails failed to send: 0
Emails sent with Hard Bounce: 0	Emails sent with Soft Bounce: 0

Landing Zone Hits: 7
Web+Download Hits: 0

Total Hits: 7

Hit or Click-through Rate

Sage E-Marketing records all of the calls to action available as separate entries and each one can be measured to see its relative effectiveness. However, the overview page totals the activities as hit rates. In a similar way to open rates, these are summarised in 2 key metrics 1) Total number of hits in a campaign 2) Total number of individuals who have carried out one or more of the calls to action available.

- 1) The total number of clicks in a campaign accumulates activities and, again, is a sign of the level of interest generated by the content and the effective layout of the calls to action.
- 2) Distinct hits shows how many individual people carried out one or more calls to action in a campaign, i.e. what level of influence your campaign had. This is then shown as a % of the total audience giving you an effective campaign click-through rate.

Landing Zone	Total	Distinct	Distinct %	Avg Rating	Category Name
More Info	4	3	1.5%	4	ACT Promotion 1
Ring Me	1	1	0.53	Not Rated	Not Rated
Buy Now	1	1	0.53	Not Rated	Not Rated
ACT Promotion 1 Email	1	1	0.53	Not Rated	Not Rated

Now select from one of the options below.

Display the users who clicked through to the selected landing zone.
 Create a group using the contacts who clicked through to the selected landing zone.

Distinct hits on all landing zones: 1

Landing Zone Hits

Surveys

On campaigns where a survey is used as one of the calls to action the number of survey responses is reported on the results overview page. Dropping down to the survey tab we can easily see the number of surveys completed, yet to be completed and also, very importantly, those abandoned. A high abandon rate can mean the survey is too long or that a certain line of questioning is too intrusive.

In addition to the activities in a campaign, the results window allows you to assess the relative effectiveness of your campaign content. Where the rating option has been used, each content source served up is also given an average rating achieved. Thereby showing you what the people who visited the page thought of what you were saying!

Against the statistics in the overview window, a person symbol appears next to data allowing you to automatically create a group of the people who match the reported criteria. These groups can then form the audience of a follow-up campaign.



E-Marketing

Building your Audience

Each Sage CRM application is delivered with the ability to select based on various contact criteria and to generate a group. Sage E-Marketing is designed to target either an individual member of the public (consumer marketing) or an individual member of an organisation (business to business marketing). With this in mind, all groups should be built at the contact level.

On install, Sage E-Marketing makes additions to the contact records in CRM so it can write back the on-line activities of that contact in an email marketing campaign.

The screenshot shows a Sage CRM interface with a list of 10 records found. The columns include: Record Name, Activity Type, User Name, and Date. The data shows various interactions such as Email Sent, LZ Hit, Survey Accessed, and Download (PDF,DOC).

Record Name	Activity Type	User Name	Date
ACT Promotion 1 - May 2007	Email Sent	[redacted]	13/05/2007 21:14
ACT Promotion 1 - May 2007	LZ Hit	Home Info	14/05/2007 14:19
ACT Promotion 1 - May 2007	LZ Hit	Home Info	14/05/2007 14:20
ACT Promotion 1 - May 2007	Survey Accessed	E-Marketing Survey	13/05/2007 13:46
ACT Promotion 1 - May 2007	Email Opened	-	13/05/2007 13:50
ACT Promotion 1 - May 2007	LZ Hit	Buy Now	13/05/2007 13:51
ACT Promotion 1 - May 2007	Survey Completed	E-Marketing Survey	13/05/2007 13:54
ACT Promotion 1 - May 2007	Web Site Hit	http://www.sage-emarketing.com	13/05/2007 13:54
ACT Promotion 1 - May 2007	Web Site Hit	http://www.econsultancy.com	13/05/2007 13:54
ACT Promotion 1 - May 2007	Download (PDF,DOC)	http://localhost/mmlm/documents/ACT%20Promotion.doc	13/05/2007 13:46

Sage E-Marketing fully integrates with Sage CRM, Sage CRM SalesLogix and Act! by Sage

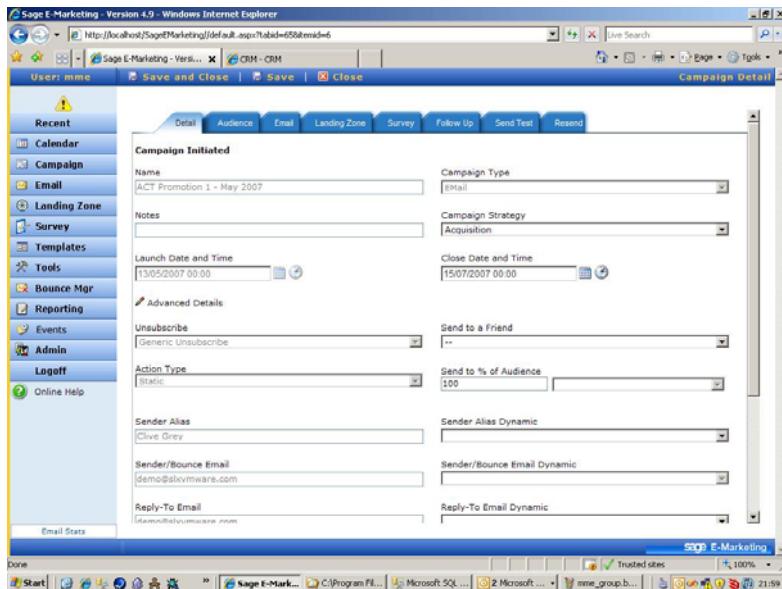
By holding traditional CRM data, such as location and size, or organisation worked for, in the same place as online activity data the marketer now has the ability to build specific groups where criteria now match interest, relevance and location.

For example, as a result of a recent newsletter a marketer in a travel company can now build a group of all people who live in Italy, but have recently read about London hotels and cultural information. Armed with this data in CRM a group can be created to launch a specific promotional offer about London culture. This activity would generate a much higher return than traditional methods which would typically be a random email sent to everyone on the distribution list.



Creating a Campaign

In Sage E-Marketing the campaign defines more than which email goes to which group. A single campaign can be a process in which several emails or TXT messages are delivered in a sequence based on a series of activity or inactivity in a previous email.



Campaigns can be set up to run in the future to allow for forward planning, as well as defining who individual replies should be routed to. The emails can be sent from a single address, yet the Account Manager for a contact in CRM can be merged in as the sending email address to ensure the best chance of the email being opened in businesses where the Account Manager is known and respected.



Sage E-Marketing provides marketers with the flexibility to tailor and personalise emails, thus delivering a unique experience to the recipient

Email Design and Using Templates

For the more HTML aware user, the editor offers tremendous power for building emails either in WYSIWYG mode, or through pure HTML. If the design is likely to be reused, a template is created and can be modified for each campaign. The image and document libraries are easily accessed to achieve the most appropriate look and feel. All document downloads are automatically recorded and noted in the contact details. They are then available for future audience selection.

A personalised email increases the chances of success. These are simple to create by picking from a list of personal and/or company information. This logic is even extended to the subject line of the email. Studies continue to show that the likelihood of an email being opened is increased if you use the recipients' personal data in the subject line.

Where it is appropriate, dynamic content can be placed into the design of your email, thus the content changes subtly or substantially according to data parameters without having to send multiple campaigns.



Sage E-Marketing serves up dynamic content according to preferences expressed in earlier campaigns; each email or landing zone can be unique to the individual reader. Information gathered from each campaign delivered enables marketers to send increasingly intelligent communications.

Spam Filters and Bounce management

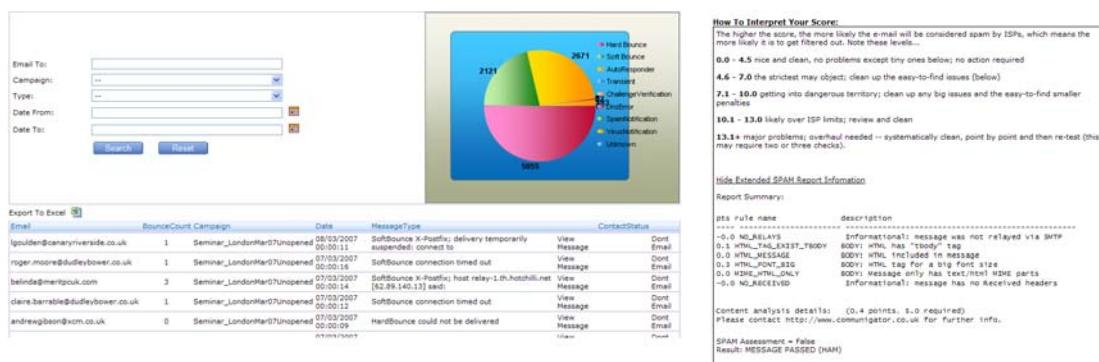
A proportion of email marketing often does not even reach the audience as the email is “Bounced Back”. Understanding the reason for the bounce is fundamental to reducing the constant rate of undelivered email by improving the data quality. Not forgetting that serious penalties (black listing) can be incurred by an email marketer who continually tries to communicate with an email address that does not exist.

The bounce manager in Sage E-Marketing not only reports on bounce backs, but analyses the reason in a series of standard categories.

Soft Bounces (e.g. out of office and mail box full) are reported on so that they can be taken into account in campaign results, because although the recipient exists as a target they have currently not taken up any calls to action.

Hard Bounces occur for lots of reasons (e.g. Spam filter rejection, invalid domain, contact no longer exists etc.) Sage E-Marketing automatically monitors hard bounces and under a series of user configurable rules will automatically mark offending email addresses as undeliverable and exclude them from future campaigns. The status of undeliverable is then automatically updated in CRM at the contact record allowing CRM processes to initiate contact via another means to renew the email address and thus contact.

A large proportion of emails are often bounced by Spam filters put in place to prevent unwanted email communication. However, a Spam filter can also catch out those emails which have been requested or opted into. To help prevent this Sage E-Marketing will check the Spam score of your outbound email BEFORE you send it. If the score is interpreted as too high, Sage E-Marketing will tell you why and help you reduce it to a more acceptable level.



Delivering the Call to Action

Traditional email marketing has been about click-throughs to a website or specific pages in a website which is, of course, a standard feature of Sage E-Marketing. If, however, that was all that was available to you, this would limit your options as a marketer. Sage E-Marketing offers the following calls to action:

Click-throughs and Web bug



One of the early requirements of email marketing was to drive traffic to websites. A click-through to a specific web page can easily be embedded at any point in your email campaign allowing you to see who went where, and when. The clever part is to see what else they did when they got to the website. The Sage E-Marketing web bug is available to place on website pages where your click-through directs traffic. With the bug installed, not only can you see who clicked to which pages, but you can also see what else they did when they got there! For those with transactional websites, the click-through can also pass a tracking token so you can monitor shopping basket activities and, ultimately, purchases.

Landing Zones



Web click-throughs offer a degree of tracking in a campaign, but the experience generated for the recipient can be bland and exactly the same for each click. A Landing Zone is a tactical web page hosted within Sage E-Marketing allowing not only specific messaging and branding for individual campaigns, but also the ability to produce dynamic and personalised content within a single campaign. The tone of voice on Landing Zones can switch, as well as promotional content based on the identity of the person who is viewing the page. All of the design for the Landing Zones can be carried out with the same editor used to build the email, or by templates created in external products.

Document Download



Email campaigns are commonly sent with a file attachment as the method of passing on information. Attachments to emails often fall foul of virus checking inside of corporate IT infrastructures and thus decrease deliverability. In addition, there is no history of whether or not a recipient opens the document and what elements are of interest. If a file needs to be made available as part of a campaign, Sage E-Marketing offers it as a download within the email. This best practice methodology increases deliverability, but also tracks who downloaded the document and when.



Virtual Catalogues



Email campaigns are commonly sent with a file attachment as the method of passing on information. Attachments to emails often fall foul of virus checking inside of corporate IT infrastructures and thus decrease deliverability. In addition, there is no history of whether or not a recipient opens the document and what elements are of interest. If a file needs to be made available as part of a campaign, Sage E-Marketing offers it as a download within the email. This best practice methodology increases deliverability, but also tracks who downloaded the document and when.

PDF files are commonly a source of information in a campaign, however, sending your whitepapers and brochures this way means you miss out on the intelligence of what pages were most interesting and which articles in a page were most read. A virtual catalogue can be quickly created from a pdf file and distributed as a click-through in a campaign, with the added benefit of being able to track amount of time spent on a page and also when and where a reader has zoomed into read particular content.

Let's not also forget that a virtual catalogue significantly improves the user experience as they are easy to navigate and display information in a familiar format. Where time is spent designing virtual catalogues, multimedia can be introduced to enhance the whole experience.

NB Virtual catalogue creation is not included in the purchase of Sage E-Marketing, but is available separately at £2 per page, per annum.

Surveys



Sage E-Marketing offers a quick and easy interface to build questions and answers in a survey, including controls that allow for later questions to be different in response to answers already given. The survey is then displayed in a campaign using the same templates created for the Landing Zone, thus keeping the brand experience consistent. Each question and answer is written back to CRM in the contact record.

Its All About The Customer - Hilton-Baird Financial Solutions

Case Study



A better deal with digital marketing

Client Profile

Hilton-Baird Financial Solutions was established in 1997 by Alexander Hilton-Baird, and has helped over 2,000 UK companies raise extra capital to finance their businesses. HBFS are focused on achieving a better deal for their clients, by being independent and working with both high street lenders and specialist finance houses.

With 30 full time employees, HBFS are dedicated to helping businesses find the most appropriate working capital facility available in the market.

www.hiltonbaird.co.uk

The Challenge

HBFS depend on a high volume, high turnover approach to direct marketing, and have an internal team of telesales executives to follow up on all direct marketing activity. Previously dependent on fax, and then hard copy direct mail, HBFS have shifted their focus mainly to email marketing as the most effective means of communicating the services they offer.

The move towards e-marketing was accelerated by changes within the direct marketing industry. The establishment of the Telephone Preference Service (TPS) and Fax Preference Services (FPS) resulted in bigger challenges for fax and telemarketing campaigns. Direct mail became less effective across the board as suppliers fought for visibility amongst the 'noise' landing on desks and many financial solutions companies experienced tumbling response rates – sometimes as low as 1%.

Solution

HBFS appointed an email marketing provider which led to an immediate increase in campaign response rates. However, using a third party meant that reporting and analysis did not feedback directly into HBFS' CRM. HBFS craved the utopia of 'closed loop' marketing activity

within their organisation, and within their control. Ian Tramaseur, Operations Manager, explains why, "Handling our e-marketing externally meant that our sales teams didn't have the complete picture within our own CRM system. This was vital, so having seen how successful e-marketing could be, we decided to purchase a digital marketing solution that would fully integrate with our existing Sage SalesLogix software. That led us to Sage E-Marketing."

Rapid implementation and training as part of the Sage E-Marketing package allowed HBFS to send out their first campaign within weeks of purchasing the software. "Since then, we have sent thousands of emails using Sage E-Marketing." Ian continues, "We have an active target audience in our database and our aim is to send a personalised communication to this audience on a monthly basis. We combine this with a number of targeted direct mails/fax shots and, with our in-house telesales function, benefit from the high response rate generated by a truly integrated marketing campaign.

Benefits

Sage E-Marketing has made a substantial difference to the success of direct marketing activity at HBFS. Ian comments, "It is cheaper, distribution is quicker and response rates are higher and immediate. When you consider the average cost of sending a letter by direct mail is around 50 pence, sending out tens of thousands of communications via email represents a huge cost saving for us."

It isn't only substantial cost savings that have made an impression, however. Sage E-Marketing has allowed HBFS to become much more sophisticated in their methods. "Using this solution has allowed us to adopt a more intelligent approach – we can now tailor our messages as Sage E-Marketing will track and report how recipients have responded to an email. Having this insight into what information is being sought out means that we are building an accurate picture of the wants and needs of all our clients."

"Sage E-Marketing has enabled us to achieve above average open rates - some as high as 70%, we have also increased the productivity of our telesales operation by giving them warmer contacts to call," confirms Ian. Success comes not only in the form of opened emails, but HBFS also report rates of around 10% click throughs to landing zones and the unsubscribe rate is consistently low, at less than 1%.

The importance of digital marketing to HBFS has been reflected by the appointment of a Marketing Manager who will further develop their integrated marketing strategy. Ian explains, "A focused resource in this area will allow us to conduct further analysis on the information we gather with Sage E-Marketing and SalesLogix, so that we can develop in-depth profiles on our customer base and continue to deliver targeted and successful communications."

About Sage E-Marketing

Sage E-Marketing offers a web based E-marketing solution which places the power of intelligent personalised email communication, sophisticated tracking and accurate profiling in the hands of the marketer.

Sage E-Marketing Digital Marketing enables you to:

- Generate powerful personalised emails, landing zones and surveys
- Directly measure responses to an individual level
- Engage your audience in a personalised, interactive on-line sales experience
- Make large cost savings on traditional paper based communication
- Increase response rates to 20% or more (compared with 2% for paper based campaigns)
- Automatically update profiles of the audience with integration to existing CRM systems
- Provide pro-active, pre-emptive customer support

Throughout Australia:

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