

Marketing with Microsoft CRM Idea eBook



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ClickDimensions

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About this eBook

Over the last year we've written a lot of material on how to make marketers who use Microsoft CRM more effective. Our [Microsoft CRM Marketing blog](#) has become a destination for marketers and we've enjoyed putting ideas out there as well as sharing them in our monthly [Microsoft CRM Marketing newsletter](#).

We've compiled some of our articles into this eBook to give you some ideas for how you might use Microsoft CRM in your marketing efforts. We've grouped the articles into a few broad categories to help organize the content for you. Some of the articles involve our own Marketing Automation solution for Microsoft CRM which you can learn about by taking our [product tour](#).

We hope you enjoy this and we'd welcome your feedback or questions. You can contact us at ebook@clickdimensions.com

Thanks for downloading this and happy marketing!

The ClickDimensions team

Email Marketing

Is email dead? Not by a long shot. In fact, done right, sending effective permission-based emails to your prospects, partners and customers can be a highly effective way of keeping your message in front of them. Here are some articles to give you ideas on making your emails more effective and measuring their impact.

Publish a great newsletter every month

We get a lot of positive feedback on our monthly marketing newsletter and with every edition we watch as the subscriber list grows. We monitor the unique open rate as well as the click rate and it is great to see the distribution and interest growing. So it is natural that people ask us about the process we go through of assembling it every month. Here is how we do it:

The screenshot shows the October 2011 edition of the ClickDimensions newsletter. The header features the ClickDimensions logo and the text "The newsletter for Marketing with Microsoft CRM". Below the header, the title "Marketing with Microsoft CRM: October 2011 Edition" is displayed. The main content area is divided into several sections, each with a title, a brief description, and a "Full story..." link. The sections include: "Using Microsoft CRM with an outsourced telemarketing firm", "Newsletter analysis: subscriber growth vs. 3 day visit total" (accompanied by a bar chart), "Introducing the block editor. Does email creation get any easier than this?" (accompanied by a screenshot of the block editor interface), "Merge any custom or standard entity data into ClickDimensions emails", "Photos from the Extreme CRM party with Sorbie, Experlogix, Vocalody and InsideView", "Create either Leads or Contacts with ClickDimensions web forms", and "ClickDimensions to sponsor CRMUG Summit: November 9 - 11 in Las Vegas, Nevada". The footer contains the ClickDimensions LLC address and a note about the newsletter being sent once monthly.

ClickDimensions
The newsletter for
Marketing with Microsoft CRM
Register for our Marketing Automation Webinar

Marketing with Microsoft CRM: October 2011 Edition

Fall is upon us and ClickDimensions has been busy. We are now the [top ranked marketing solution on the Microsoft Dynamics Marketplace](#). Heck, we're actually the top ranked solution overall. But enough about us, read below for some great marketing ideas.

Using Microsoft CRM with an outsourced telemarketing firm
If you've ever thought of using an outside telemarketing firm to do some prospect calling for you Microsoft CRM makes this very easy and measurable. [Full Story...](#)

Newsletter analysis: subscriber growth vs. 3 day visit total
We put a lot of effort into our monthly Microsoft CRM Marketing newsletter. We want it to be the definitive source of information for marketers who use Microsoft CRM. [Full story...](#)

Introducing the block editor. Does email creation get any easier than this?
Are you an HTML guru? If so you may not need our latest feature: the block editor. What we have found is that most users struggle with email template creation. [Full story...](#)

Merge any custom or standard entity data into ClickDimensions emails
Recently we had a prospect that wanted to have standard email templates which could bring in data from standard and custom entities. But there was a twist: they also wanted to be able to bring in multiple records for some entities. [Full story...](#)

Photos from the Extreme CRM party with Sorbie, Experlogix, Vocalody and InsideView
Thank to everyone who came out to our Extreme CRM party with Sorbie, Experlogix, InsideView and Vocalody. It was a great time. [Photos here](#)

Create either Leads or Contacts with ClickDimensions web forms
When you integrate a form on your web site to Microsoft CRM using either ClickDimensions' forms you can now specify that new visitors be created as either Leads or a Contacts. [Full Story...](#)

ClickDimensions to sponsor CRMUG Summit: November 9 - 11 in Las Vegas, Nevada
Join ClickDimensions November 9 - 11 in Las Vegas Nevada for the CRMUG Summit. The event will be held at Caesar's Palace so it should be a great time for all. [Details...](#)

ClickDimensions LLC
6949 Peachtree Dunwoody Rd
Bldg B-1, Ste 200
Sandy Springs, GA 30328

The ClickDimensions email newsletter is sent once monthly. Click to [unsubscribe](#) or change your [Subscription Preferences](#)

We start by blogging throughout the month so we'll have good original content to put in the newsletter. We've had marketing consultants advise us to email our subscribers more often and to use recycled content from other sources but we just can't bring ourselves to do that. Simply repeating or paraphrasing something someone else did does not provide our subscribers the value that original content does. Thus, creating a discipline of writing new and original blog posts is important to creating something that people want to read. Of course, we also blog on company events like an office move, new hires or awards but we generally have more original marketing content in every newsletter than news about the company. We hope that our readers are interested in what is going on with the company but we also want to deliver marketing ideas and inspiration and not just self-promotion.

When the time rolls around to create the newsletter we start by creating a Microsoft Word document listing the various articles we will include in the newsletter...

1- Using Microsoft CRM with an outsourced telemarketing firm

<http://blog.clickdimensions.com/2011/10/using-microsoft-crm-with-an-outsourced-telemarketing-firm.html>

If you've ever thought of using an outside telemarketing firm to do some prospect calling for you Microsoft CRM makes this very easy and measurable. The Microsoft CRM security and customization model allow you to give your outside workers access to only the data you want them to see. Further, the ability to have different CRM forms for different security roles make it easy to give outside workers a streamlined user experience.

2 - Newsletter analysis: subscriber growth vs. 3 day visit total

<http://blog.clickdimensions.com/2011/09/newsletter-analysis-subscriber-growth-vs-3-day-visit-total.html>

We put a lot of effort into our monthly Microsoft CRM Marketing definitive source of information for marketers who use Microsoft opportunity to add subscribers so please, sign up here <http://www.clickdimensions.com/newsletter/> if you are not already receiving it.

<http://www.clickdimensions.com/newsletter/>
Ctrl+Click to follow link

3 - Introducing the ClickDimensions block editor. Does email creation get any easier than this?

<http://blog.clickdimensions.com/2011/09/introducing-the-clickdimensions-block-editor-does-email-creation-get-any-easier-than-this.html>

For each article (i.e. blog post, etc.) we will have a headline, a bit of text and a URL to link the reader to if he/she wants more information. Since we use our own web tracking solution we make it a point that all of our articles link back to our blog or site. We can then gauge the interest level of the reader once he/she clicks back on the site. If we were to include all the text of each article in the newsletter itself it would be too long and would push the content below the fold (i.e. preview area) of the email and we'd lose our readers' interest.

When you sign up for the ClickDimensions newsletter you will be immediately sent the most recent copy of our newsletter. We then ask if you want older editions. [Full story...](#)

With the Word document ready we can then arrange the priority of the articles so we know how we want to lay them out in the newsletter. Once we have decided on the total count of articles in the newsletter and the sequence of each one we gather images to associate with each article. Images more naturally attract the reader and, as covers of books do, draw us into reading certain pieces.

Using Microsoft CRM with an outsourced telemarketing firm



If you've ever thought of using



ClickDimensions expands sales and Partner Account management team, names Director of Sales

ClickDimensions is pleased to announce yet another expansion to our Partner Account Management team with the Arrival of David Inman. David comes to us from c360 Solutions where he worked as a Partner Account Manager for six years. [Full story...](#)

With our article summaries, images, headlines and URLs we are ready to build the newsletter. In the graphic of our October newsletter you can see that we had seven articles so we went with a layout that placed the first three just below the header and edition overview. The header itself is actually a key component and we make it a point to include a call to action in it since it occupies prime real estate. For example, in the October edition the call to action read "Register for our Marketing Automation Webinar" and linked to our webinar sign up page. We always see that the call to action in the header generates clicks.

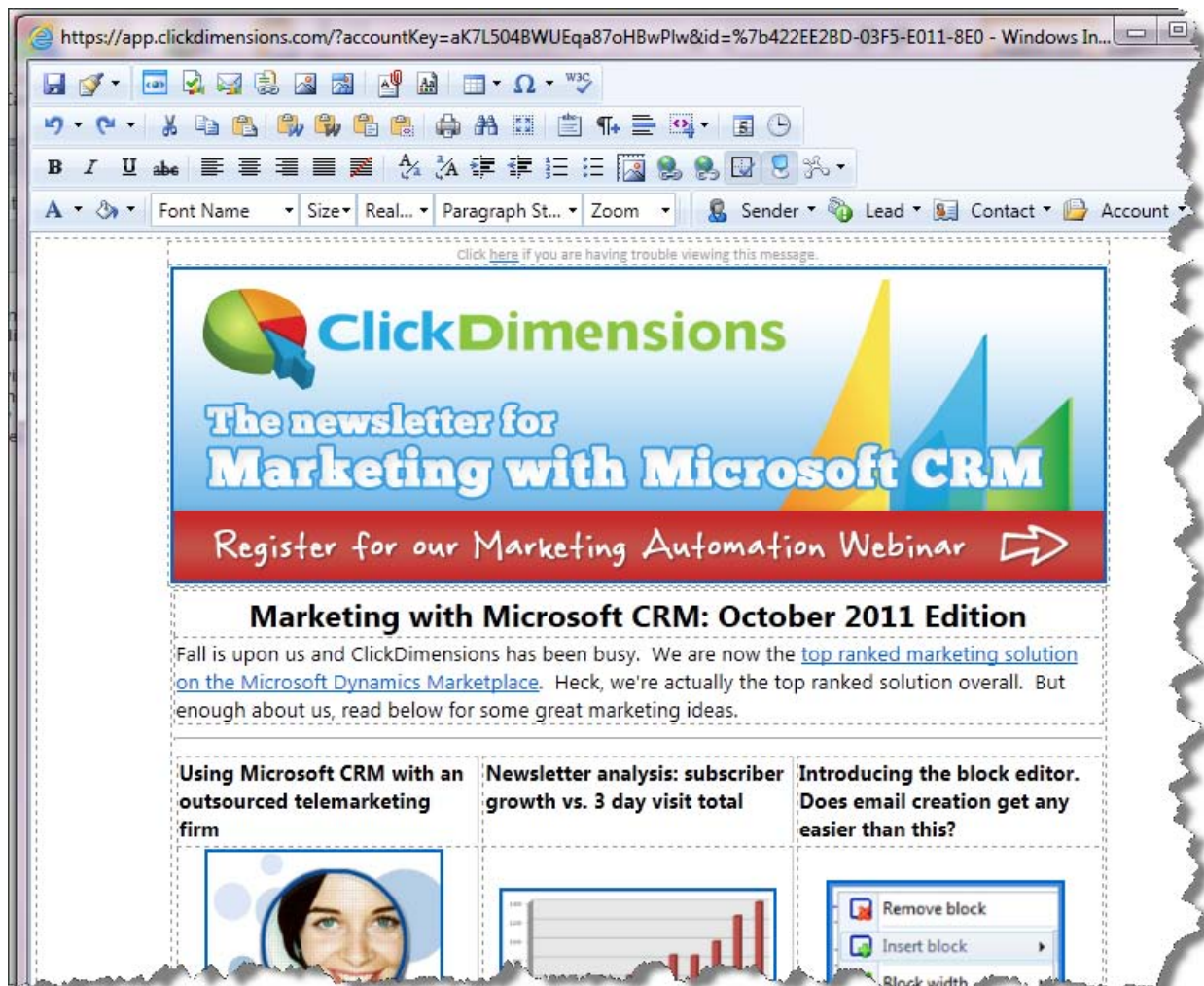


The 'from' address of the newsletter is a critical component. We always use a real person's name and email address since this is the #1 factor in determining whether an email will be opened and read. Depending on your list size this may not be feasible as any replies to the email will actually go to the email address from which the

email came. We also try to have a compelling subject line but are advised that the first 35 characters or so of it are the most critical.



We use the ClickDimensions web editor to layout the newsletter, always starting from one of our standard email layouts. Once we have done that we test for spam content (a feature of our solution) and then send ourselves the email and check every link to make sure it works and goes to the intended landing page.

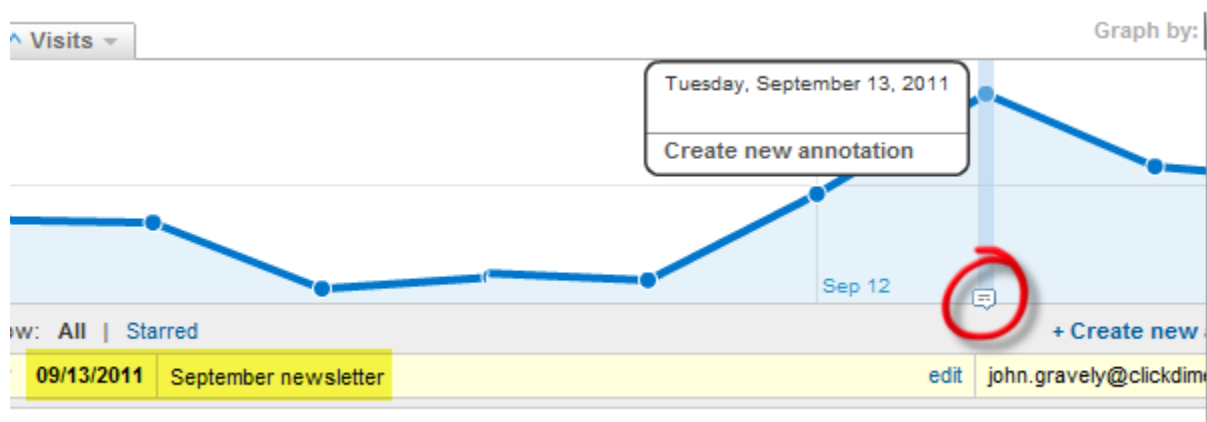


Now we're ready to send and analyze how the newsletter is received. It is always interesting to see which topics get the most attention. It is also interesting to see how the newsletter performs in terms of unique opens and visits to the site. Take a look at [this blog post](#) for more on that topic.

Analyze your newsletter performance: subscriber growth vs. 3 day visit total

In the first article we wrote about how to create a great newsletter every month. Now let's look at some ideas for analyzing its performance.

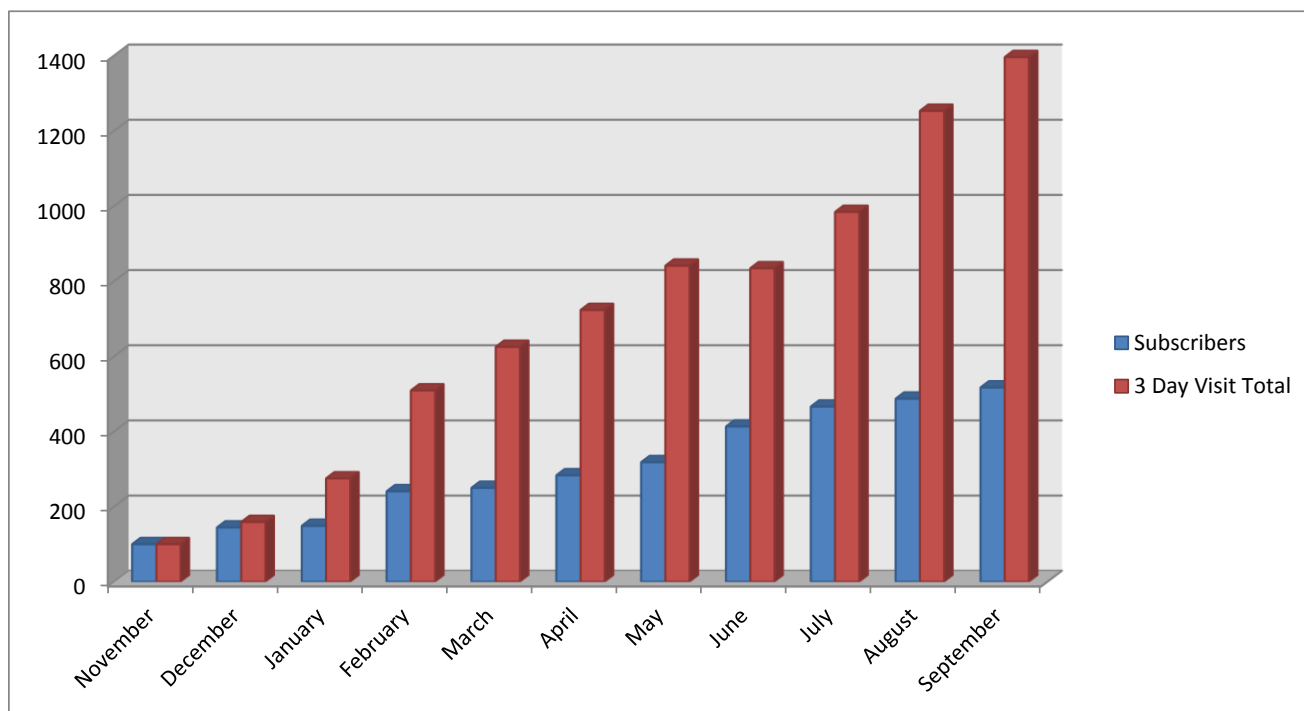
To analyze how the newsletter is being received we look at a number of variables. Clicks, opens, unique opens and newsletter sign-ups are obvious measures. However, the number of visits the newsletter generates in the three day period starting with the day it is sent is equally important to us. We call this the **three day visit total**. We want to know that our newsletter is generating traffic back to our site and, since we are a global provider, we need to look at visits for at least three days to get a clear picture of the impact of the newsletter. Since Google analytics allows you to easily make annotations on your web tracking you can use this as a way to mark when you sent your newsletter so you won't forget.



We like to contrast the three day visit total to the number of subscribers (i.e. the number of people on our newsletter list). Below we have provided this data in abstract format with our first month starting at a basis of 100. We can see that over this time period our list has increased fivefold but our three day visit total has increased nearly 14 fold.

Newsletter	Subscribers	3 Day Visit Total
November	100	100
December	144	159
January	149	275
February	241	509
March	250	625
April	283	723
May	318	841
June	413	834
July	466	984
August	487	1,253
September	517	1,396

Graphing this data shows us a trend. As our list grows each month the visit total grows proportionately larger. This tells us our content is working and the newsletter is driving more and more traffic to the site each month. Our conclusion is to find ways to sign up more subscribers since our data shows that the newsletter is doing an increasingly effective job at bringing traffic to our site.



Benchmark yourself: What is your newsletter response rate?

We're big on metrics over here at ClickDimensions so we look at just about everything we can measure in terms

Month	Unique Open Rate	Click Rate
January	28%	16%
February	30%	15%
March	31%	14%
April	33%	16%
May	36%	18%

of marketing and sales growth. Some important metrics for us are around our monthly newsletter. We pride ourselves on putting together an informative newsletter every month so we want to make sure people are opening and clicking it. We also measure the growth of our subscriber base from month to month to make sure our list is

growing at a healthy rate. In fact, we have more than doubled our newsletter list in the past months so join our [True Stories of Marketing with Microsoft CRM](#) to learn how we did that.

Back to response rates now; it is important to verify that your subscribers are opening your mailings. To do this you really need to look at 'unique' email opens. You may also hear of this referred to as 'distinct' email opens but it is the same thing. Since people often open your emails more than once (or forward them to others that open them) it is important to know the number of unique/distinct people who open the email. For example, you may send your email to three people and one of them may open the email four times while the other two open it only once. In this example you would see a total of six opens but only three different people opened the email so you see three unique opens.

Another important measure is the click rate. Clicks let you know that your content was compelling enough for the reader to actually want to read more of it. With clicks we tend to look more at overall clicks knowing that some people will click more than one link. Clicks tell us that we have designed the email in such a way that entices people to click links and that, of course, the recipients found the links/content compelling enough to click.

As you can see by the embedded graphic we have steadily increased our unique open rates (unique opens/total emails) since our first newsletter in January. We have also increased our click rate (total clicks/total emails) although it dropped a bit from January to March before rising again. Based on everything we have read and seen elsewhere unique clicks and opens at this level are very good. In fact, for the average technology company, either of these metrics in the double digits (i.e. over 9%) is very positive.

Oh, and now a nice tip for your newsletter; always take the most advantage possible of the area 'above the fold'. By above the fold we are referring to the area that is generally visible in email preview panes. Since most newsletters have a header, this is a great place to embed a call to action. For example, all our newsletters now contain a button and link to take some action. The one below invites people to register for our weekly webinar. The technique works because the header is the first thing that people see when the newsletter appears in their inbox.



ClickDimensions

the newsletter for

Marketing with Microsoft CRM

Register for our Marketing Automation Webinar ➡

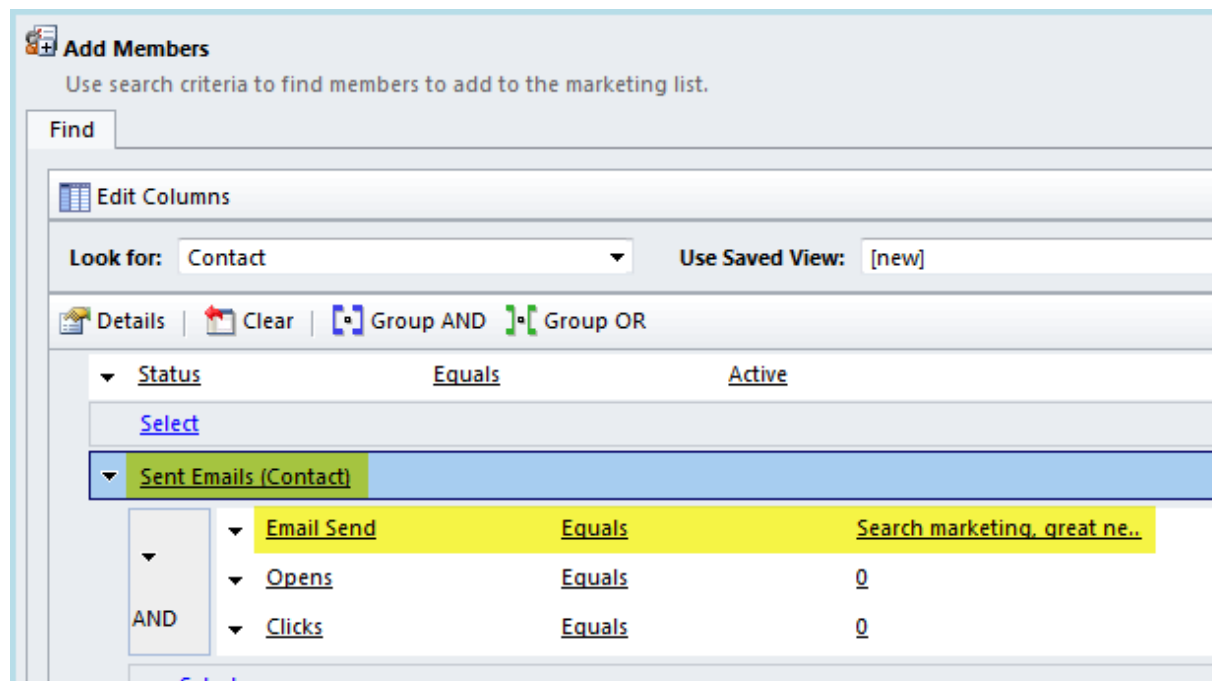


ClickDimensions

Resend your newsletter to recipients who neither clicked nor opened it the first time

Ever worked hard to make a great newsletter only to find that you didn't get the opens and/or clicks you were expecting? It happens to the best of us. ☺ Sometimes your timing is just bad and you can't predict it. If you use ClickDimensions it is easy to resend an email to people who did not respond the first time around. Here's how...

Create a marketing list to segment everyone who was sent your email but didn't click or open it. In building the list you'll want to use CRM's Advanced Find to query members. Your query should look like the one below where you are searching for recipients who were sent the original email but neither clicked nor opened it. Hence the highlighted condition below where we are looking for contacts with a linked 'Sent Email' record that was linked to the original 'Email Send' record. When you send a ClickDimensions you do so by creating what we call an Email Send record. As each individual email is sent out our solution creates individual 'Sent Email' records linked to the Leads/Contacts to whom the emails were sent. By querying the 'Sent Email' records that belong to the original 'Email Send' and have no clicks or opens you know exactly who did not respond to your email.



The screenshot shows the 'Add Members' window in ClickDimensions. The 'Find' tab is active. The 'Look for' dropdown is set to 'Contact'. The 'Use Saved View' dropdown is set to '[new]'. Below this, there are buttons for 'Details', 'Clear', 'Group AND', and 'Group OR'. The main query area shows a tree structure of conditions. The first condition is 'Status' equals 'Active'. The second condition is 'Sent Emails (Contact)' which is expanded to show three sub-conditions: 'Email Send' equals 'Search marketing, great ne..', 'Opens' equals '0', and 'Clicks' equals '0'. The 'Email Send' condition is highlighted in yellow.

Field	Operator	Value
Status	Equals	Active
Sent Emails (Contact)		
Email Send	Equals	Search marketing, great ne..
Opens	Equals	0
Clicks	Equals	0

Once you've created your marketing list you might want to think about other factors that caused your email not to achieve the expected result. Was your subject line not compelling? Did you run it through a spam filter? Perhaps you just got unlucky and sent your email when people were busy or out of the office. By resending the email only to those who didn't respond you give your message a second chance.

Online Advertising

It is simply amazing what can be done these days with online advertising and tracking. Combine that with integration to your CRM and you can truly refine your message, ensure it is reaching the right people and understand how to most effectively spend money to broadcast the message. The articles that follow discuss using online advertising in conjunction with your CRM.

Measure your visit quality to assess advertising effectiveness

In our recent blog post on the [ClickDimensions Social Dashboards](#) we ended with an analysis of the quality of visits to our site based on the source of the traffic. Prior to having a tool like ClickDimensions we had always tried our best to analyze our traffic sources and invest in those that, we thought, yielded the highest quality traffic. However, this resulted in guesswork at best. We would end up trying to reconcile what our web site analytics said vs. what our pay-per-click said vs. what our web site form submissions told us. We never could see the whole truth.

Now that we can tell the exact origination of each visit, we know which visits came from which sources. The only question our system (or any system) doesn't answer is related to direct traffic (or search traffic that used our name in the search keywords and is effectively direct traffic). With these visits we have learned to ask the prospect 'how did you hear about ClickDimensions'. More often than not it will have been a partner or Microsoft who referred us.

The trifecta of visit quality is very easily measured: lead score, number of page views and duration. Our [Social Dashboard post](#) compared three traffic sources using these metrics and the results clearly indicated where we should invest our advertising resources.

Referrer	Score	Duration (secs)	Pageviews
Dynamics Marketplace	35.4	225	4.9
LinkedIn Ads	21.9	134	3.3
Google Adwords	16.4	59	3.5

Our visit quality analysis doesn't end there however. Because our solution shows you the keywords your visitors use to get to your site, you can then analyze which keywords lead to the highest quality visits. For example, if you have a product that is higher quality than one of your competitors, you may find that visits from people who searched on the competitor's name will lead to an above average conversion rate. This is because your visitors search on the name of the competitive product, see your ad and then click through to your site. Once they realize that your product is better they stay on your site (and never go back to your competitor's site). But how would you ever know this if you didn't tie the visit into your CRM and web site so you could see the duration, score and number of page views alongside the keywords, referring search engine and conversion (i.e. web form completion) information?

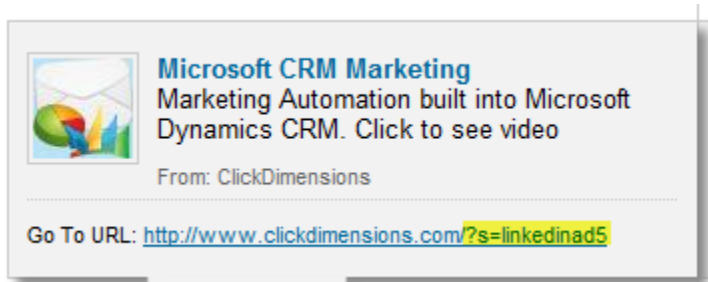
Monitor the effectiveness of paid search with a search marketing dashboard

If you use paid search then you most likely have a number of different campaigns running across a number of different providers. You might use Google AdWords, Microsoft AdCenter, LinkedIn, Facebook, private blogs, etc. With each one of these ad platforms you can login to their respective dashboards and see how many clicks they have sent you and what you've spent. But that requires you to go to a lot of web sites and it doesn't tell you anything about the quality of the visits you're getting.

Wouldn't it be better to login to one dashboard and see all the visits from each source along with an indicator of the visit quality? Of course it would, so let's see how you can do that with ClickDimensions and Microsoft Dynamics CRM.

To start, we need some background. When you place an online ad you have the opportunity to specify the URL that the visitor will be directed to when he/she clicks on the ad. LinkedIn refers to this as the 'go to URL' while other platforms call it the 'destination URL'. You can make this URL unique by adding a parameter to the end of it. Then it will be easy to locate visits from that ad inside Microsoft CRM if you are using ClickDimensions. Here's an example:

For the LinkedIn ad below I want the visitor to be directed to our home page at <http://www.clickdimensions.com/>. However, I also want to know that they visitor came from that LinkedIn ad so, to make the URL identifiable, I add the text **?s=linkedinad5** to the end of it.



Let me break down the **?s=linkedinad5** part...

? – this indicates that a parameter will be next

s – this is the name of the parameter. I could have written out the word 'source', or any other word, but all I need is something short

linkedinad5 - this is the parameter value. It is the part that tells me that this is one of my LinkedIn ads

Every time someone clicks on this ad the ClickDimensions visit record created inside my Microsoft CRM will show this URL in the entry page field...

Visit
11-10-2011 19:12:52 (UTC)

▼ **General**

Time * Ended

Started On Score

Domain Duration

Bounce ☐ No ☒ Yes Total P

First Visit ☐ No ☒ Yes

Entry Page

Exit Page

With this information it is easy for me to create a CRM view to show all visits from LinkedIn ads...

Microsoft Dynamics CRM

File Advanced Find

Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML Debug

Look for: Visits Use Saved View: Visits from LinkedIn Ads

▼ Status Equals Active

▼ Entry Page Contains s=linkedinad

Select Enter Text

So, if I follow this same technique for my LinkedIn ads, my Google ads, my Bing (AdCenter) ads, etc. it is easy for me to create a CRM 2011 dashboard with cells to show me the visits from each different ad source. I can look at this one dashboard to see the quality of each visit as indicated by the visit's score, duration and number of page views. My view can also show me the keywords used (where relevant) so I can then understand which keywords lead to the highest quality visits. When I see that one of my ad campaigns is leading to a series of 1 page visits I adjust accordingly to improve the visit quality so I know that, instead of just getting visits to my site, I am getting visits from people who stick around to learn more.

Can you see the effectiveness of all your paid search visits in one place?

Dashboard: **Search Marketing Visit Dashboard** ▾

Visits: **Visits from LinkedIn Ads - Today** ▾

<input type="checkbox"/>	IP Organization	IP Country	Pages	Duration	Score	Entry Pa	<input type="checkbox"/>
<input type="checkbox"/>	UPIC	United States	5	354	33	http://www	<input type="checkbox"/>
<input type="checkbox"/>	AT&T Worldnet Services	United States	1	0	8	http://www	<input type="checkbox"/>
<input type="checkbox"/>	Virgin Media	United Kingdom	2	603	15	http://www	<input type="checkbox"/>
<input type="checkbox"/>	Bedrock Ventures LLC	United States	1	0	8	http://www	<input type="checkbox"/>
<input type="checkbox"/>	Telefonica de Espana	Spain	1	0	8	http://www	<input type="checkbox"/>
<input type="checkbox"/>	BellSouth.net	United States	2	65	13	http://www	<input type="checkbox"/>
<input type="checkbox"/>	RIPE Network Coordination Centre		2	13	15	http://www	<input type="checkbox"/>
<input type="checkbox"/>	concentrix (via HighSpeed Office Limi	United Kingdom	6	15	23	http://www	<input type="checkbox"/>

1 - 8 of 11 (0 selected) Page 1

All # A B C D E F G H I R S T U V W X Y Z

Visits: **Visits from Google Text Ads - Today** ▾

<input type="checkbox"/>	IP Organization	Lead	Total Pages	Duration	Score	<input type="checkbox"/>
<input type="checkbox"/>	Road Runner		7	164	26	<input type="checkbox"/>
<input type="checkbox"/>	Netelligent Hosting Services		1	0	8	<input type="checkbox"/>
<input type="checkbox"/>	Netelligent Hosting Services		1	0	8	<input type="checkbox"/>
<input type="checkbox"/>	France Telecom		3	15	14	<input type="checkbox"/>
<input type="checkbox"/>	Rogers Cable		1	0	8	<input type="checkbox"/>
<input type="checkbox"/>	MTS Allstream		6	38	23	<input type="checkbox"/>
<input type="checkbox"/>	TalkTalk		1	0	8	<input type="checkbox"/>
<input type="checkbox"/>	RIPE Network Coordination Centre		1	0	8	<input type="checkbox"/>

1 - 8 of 11 (0 selected) Page 1

All # A B C D E F G H I R S T U V W X Y Z

Visits: **Visits from AdCenter Ads** ▾

<input type="checkbox"/>	IP Organization	Lead	Referring Host	Duration	<input type="checkbox"/>
<input type="checkbox"/>	Level 3 Communications		www.bing.com	0	<input type="checkbox"/>
<input type="checkbox"/>	Comcast Business Communications		www.bing.com	49	<input type="checkbox"/>
<input type="checkbox"/>	PPPoX Pool se13.chcgil 121007 1003		www.bing.com	0	<input type="checkbox"/>
<input type="checkbox"/>	Comcast Cable		www.bing.com	3	<input type="checkbox"/>
<input type="checkbox"/>	SBC Internet Services		search.yahoo.com	0	<input type="checkbox"/>
<input type="checkbox"/>	Road Runner		search.yahoo.com	6	<input type="checkbox"/>
<input type="checkbox"/>	Qwest Communications		www.bing.com	0	<input type="checkbox"/>
<input type="checkbox"/>	Enventis Telecom		search.yahoo.com	54	<input type="checkbox"/>

1 - 8 of 10 (0 selected) Page 1

All # A B C D E F G H S T U V W X Y Z

Visits: **Visits from Dynamics Marketplace** ▾

<input type="checkbox"/>	IP Organization	Score	IP State	IP Country	Sta	<input type="checkbox"/>
<input type="checkbox"/>	Newgsator (via Qwest Communication	97	Colorado	United States	11/10	<input type="checkbox"/>
<input type="checkbox"/>	Level 3 Communications	63		United States	11/10	<input type="checkbox"/>
<input type="checkbox"/>	RIPE Network Coordination Centre	13	J		11/10	<input type="checkbox"/>

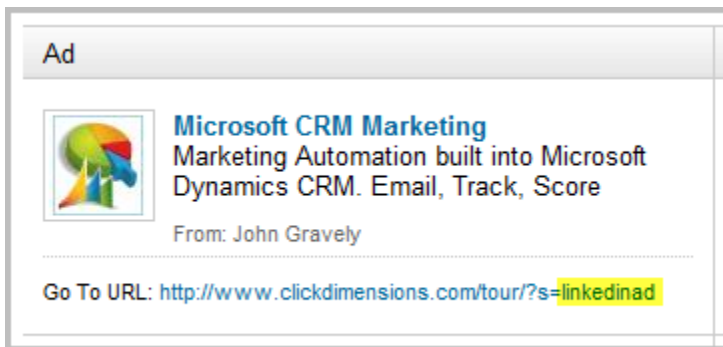
1 - 3 of 3 (0 selected) Page 1

All # A B C D E F G H S T U V W X Y Z

Easily track the effectiveness of your online ads

When you decide to pay for an online ad with Facebook, LinkedIn, Bing or Google AdWords you shouldn't have to wonder if it is bringing any traffic. With ClickDimensions you don't. In fact, you can know exactly which visits were generated by each ad. To do this, just follow this simple process.

Online advertising systems typically allow you to enter two URLs. One will be the URL the person sees (the display URL) and the other will be the URL the person is redirected to when they click on your ad (the 'go to' URL). Just add any identifying parameter to the end of the 'go to' URL in your ad. For example, below we added ?s=linkedinad to the end of our go to URL (note; the '?' denotes that a variable is being added and the variable name is 's' and its value is 'linkedinad')



With the parameter in place, any visits from your ad will be easily identifiable by their entry page.

A screenshot of the ClickDimensions 'Visit Information' form. The form has a blue header with the text "Visit: 01-06-2011 12:43:39 (UTC)" and "Information". Below the header are two tabs: "General" and "Notes". The "General" tab is selected. The form contains several fields: "Time *" with a value of "01-06-2011 12:43:39 (UTC)", "Ended On" with a value of "1/6/2011", "Started On" with a value of "1/6/2011" and a time of "7:43 AM", "Score" with a value of "123", "Domain" with a value of "clickdimensions.com", "Duration" with a value of "2,404", "Bounce" with radio buttons for "No" (selected) and "Yes", "Total Pages" with a value of "21", "First Visit" with radio buttons for "No" and "Yes" (selected), and "Entry Page" with a value of "http://www.clickdimensions.com/tour/?s=linkedinad". The "Entry Page" field is highlighted in yellow.

Now, in the Visits area of ClickDimensions create an Advanced Find view to look for visits where the entry page 'contains' your parameter (e.g. 'linkedinad')

Look for: Use Saved

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Entry Page</u>	<u>Contains</u>	<u>linkedinad</u>

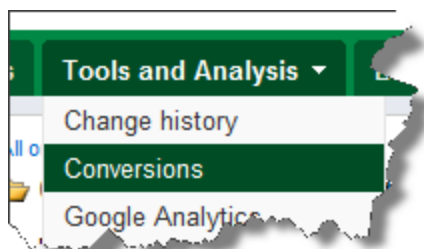
Finally, when you select your Advanced Find view, you will be able to see exactly all visits that came from your ad!

Visits View: Visits from LinkedIn Ads

Search for records

<input type="checkbox"/>	Time	IP Organization	Lead	Duration	Score	Started On
<input type="checkbox"/>	01-06-2011 17:49:28 (UTC)	RIPE Network Coordination Centre		26	25	1/6/2011 12:49
<input type="checkbox"/>	01-06-2011 12:43:39 (UTC)	RIPE Network Coordination Centre	ClickDimensions	2,404	123	1/6/2011 7:43
<input type="checkbox"/>	01-05-2011 20:50:12 (UTC)	RIPE Network Coordination Centre		334	40	1/5/2011 3:50

Use Google AdWords Conversion Tracking with ClickDimensions web forms



If you advertise online using Google AdWords you may want to take advantage of their conversion tracking feature. Let's start by discussing this feature and why you would want to use it. Below is an example taken directly from Google's web site [here](#)...

Example

You have a website for your cheese shop, and when customers submit their orders online, they see a "Thank you for your purchase!" page.

You want to see which of your keywords -- "Smelly cheese" or "Holiday cheese" -- leads to more purchases, so you set up Conversion Tracking. First, you get a little snippet of code from AdWords. Then, you paste that code snippet in the HTML for the "Thank you for your purchase!" page.

Soon, you start to see that customers who click on "Smelly cheese" buy a lot of cheese. Meanwhile, you see that a few people click on "Holiday cheese," but none of them make a purchase. So, you decide to stop investing in "Holiday cheese" and put more money toward "Smelly cheese," resulting in more purchases and a better return on your investment.

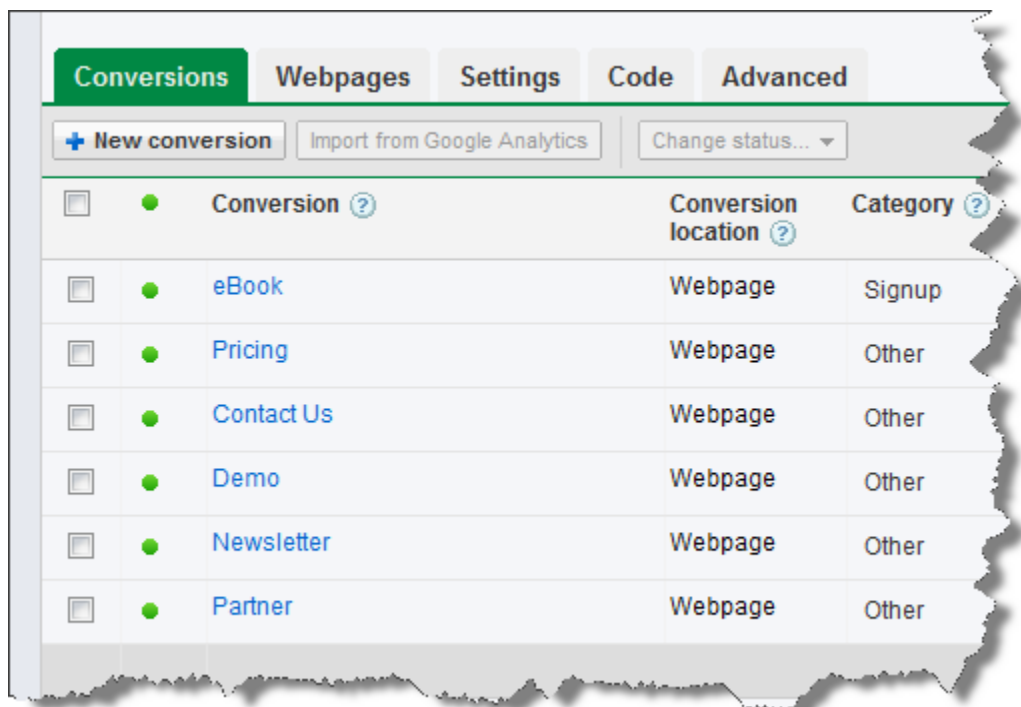
OK, so that makes sense, right? [Conversion tracking](#) lets you see which ads, keywords and campaigns are bringing in the visitors that actually 'convert'. In the case of a ClickDimensions web form the conversion is when the visitor completes the form.

In the case of the ClickDimensions web site, we have several web forms that someone can fill out. These are:

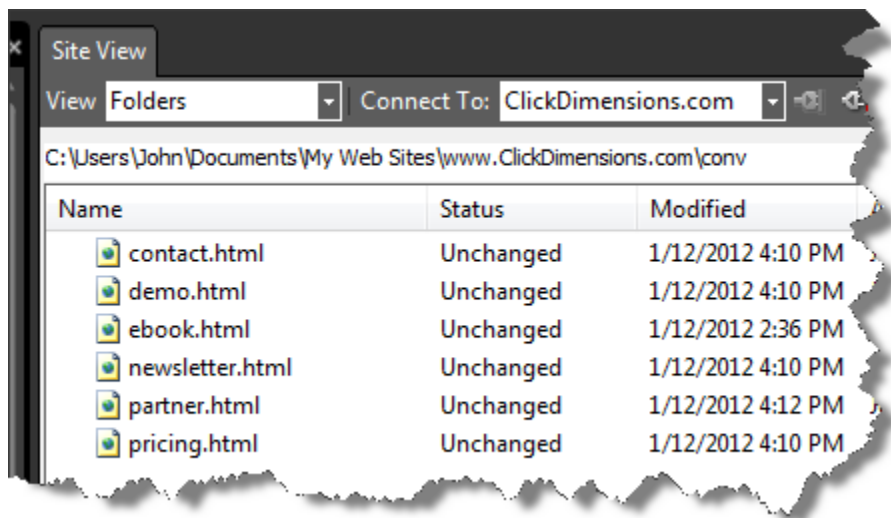
- Contact Us form
- Partnership information form
- eBook download form
- Newsletter sign-up form
- Demonstration request form

For each of these we used the ClickDimensions drag and drop form designer to build a web form. You can read more about our form builder [here](#). The form builder makes it easy to create a form and then embed the iFrame code for the form into any web page. But, to make Google AdWords conversion tracking work you need to place the conversion tracking code that Google gives you into a confirmation page that the visitor sees after he/she has completed your form. To do this you will want to create a simple web page for each conversion. These simple web pages need only contain your confirmation message and the Google conversion tracking code. Then, in the ClickDimensions web form confirmation text area you can redirect the visitor to that simple web page once they have completed the form. This will cause the Google conversion code to run which will log the conversion in Google AdWords. This is what will then allow Google to 'connect the dots' and tell you which ad/keyword/campaign brought that visitor to you in the first place. Let's walk through the steps...

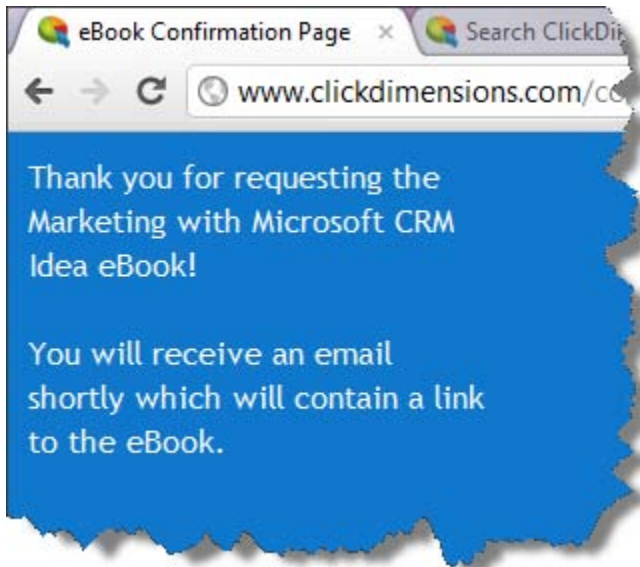
Step 1 – Follow [this article](#) to set up your conversions in Google AdWords. You can see below that our conversions match the forms on our web site...



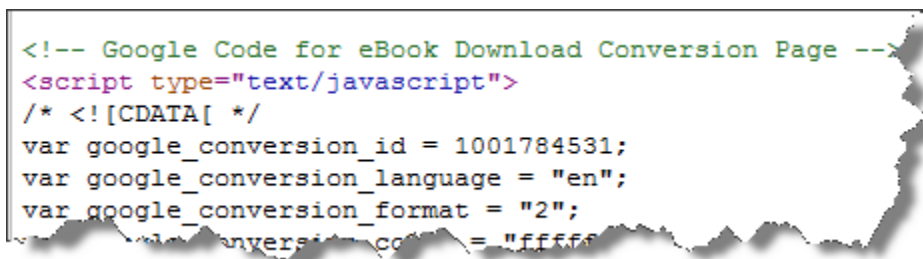
Step 2 – For each conversion you set up create a simple web page on your site with the confirmation text you want the user to see as well as the conversion code you got from Google when you set up the conversion (each conversion has a unique Google tracking code)...



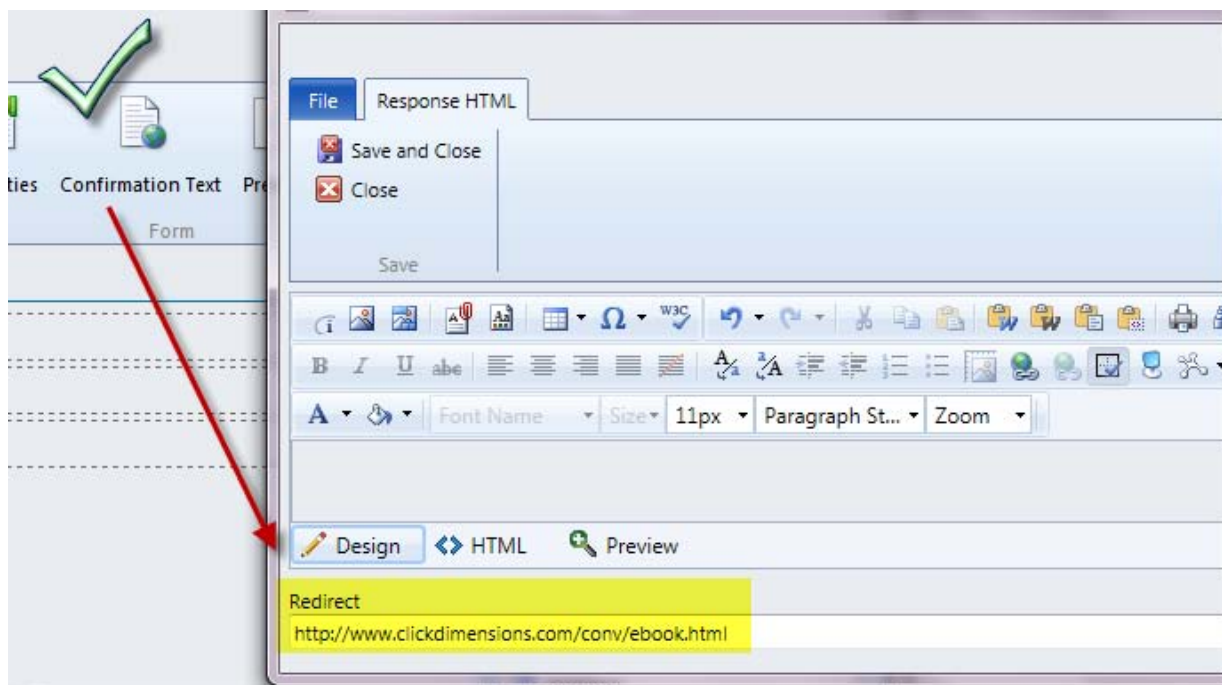
When viewed in a web browser these pages will look fairly plain since their purpose is simply to replace the space where your web form appeared...



But, they should contain the Google conversion code behind the scenes...



Step 3 – Go to the confirmation text area of your ClickDimensions web form to redirect the form to your new confirmation page once the form is submitted. This will replace the space where your form appeared with your new page when the form is submitted...



That's it. You will now have the insight to more effectively evaluate your Google ads. With this insight you can start to really see which keywords, ads and campaigns are bringing conversions.

Use LinkedIn ads to target group members

In 2011 LinkedIn made a change to their ad platform to allow targeting by group membership. Yes, that is right, targeting by **group membership**. Think about what that means. The LinkedIn advertising platform (LinkedIn Ads) has always been interesting but this takes it to another level. Previously you could target based on geography, company, job title, gender and age. That was OK but, if you're like me and you want to target everyone with a specific interest in Microsoft CRM, how did you do it? You had to guess.

Now, you can go in and find all the groups related to Microsoft CRM and choose them as targets. Below are the target groups I select (I also filter on certain geographies base on where I know Microsoft CRM sells the best)...

Target Audience 9,756 [Change](#)

Group: Microsoft CRM Online and Partner-Hosted
Microsoft Dynamics CRM Sales Professionals
My CRM - Microsoft CRM AppStore (950+)
Dynamics CRM New Zealand Community
MS Dynamics CRM
Microsoft Dynamics Professionals in Suomi / Finland
Microsoft Dynamics CRM Forum
Dutch Dynamics CRM Community
Dynamics CRM User Group
Dynamics CRM 4.0 & 2011 Experts
Dynamics CRM 2011 Experts
Dynamics CRM Add Ons
Dynamics CRM Consultants UK
Dynamics CRM 2011 Consultants
Microsoft Dynamics CRM.
[less...](#)


It is hard to imagine that anyone would join one of these groups if they didn't have an involvement in Microsoft CRM. So, the traffic is bound to be relevant.

But, how do I know if the traffic is relevant? I simply place unique URLs in my ads (see my post on [online ad tracking](#) for more detail on how to do this) and then, using the ClickDimensions marketing solution, query which visits come from those URLs. The entry page field on the ClickDimensions visit record contains the 'go to' URL from my ad and the 'go to' URL contains a unique parameter I place at the end. I can then easily eyeball the visit scores, durations and number of page views to see if these visitors from my LinkedIn ads are staying on my site.


Entry Page	Duration	Score	Total Pages	
http://www.clickdimensions.com/?s=linkedinad2	236	32	9	
http://www.clickdimensions.com/?s=linkedinad2	0	8	1	
http://www.clickdimensions.com/video.html?s=linkedinad5	11	25	2	
http://www.clickdimensions.com/?s=linkedinad3	2	35	2	
http://www.clickdimensions.com/?s=linkedinad2	1,253	29	8	

Further, since I like to have multiple ad variations (which I let LinkedIn rotate), I can number each of them and then see which ones lead to the most engaged visits on my site.

Ad

**Microsoft CRM Marketing**
Marketing Automation built into Microsoft Dynamics CRM. Email, Track, Score
From: John Gravely

Go To URL: <http://www.clickdimensions.com/?s=linkedinad2>

**B2B Marketing Automation**
Built into Microsoft Dynamics CRM. Web Tracking, Email, Score/Forms/Social
From: John Gravely

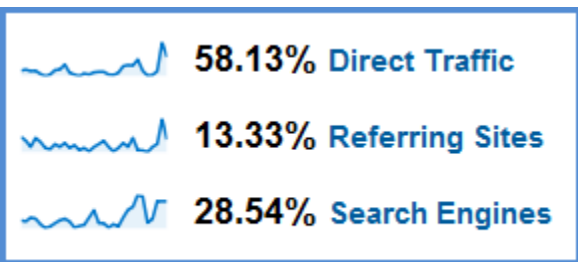
Go To URL: <http://www.clickdimensions.com/?s=linkedinad3>

So, the combination of better targeting capabilities from LinkedIn and end to end tracking from ClickDimensions means you can clearly evaluate what is working and what is not.

Web Tracking and Optimization

If your marketing efforts have primarily centered around blast emails and traditional marketing you might be surprised with how your web site can easily work with your CRM. It is very helpful to know who's visiting your site, how they got there and what they're doing. The following articles talk about some ways to think about your web presence and the value it can have for your business.

Is it really search engine traffic? The power of knowing how someone found your site



Most of us have seen this graphic before. It is from Google analytics and shows the breakdown of your traffic based on whether it came from search engines, direct (i.e. the visitor typed in your URL or used a bookmark) or referring sites.

Well, this is deceiving at best because most of use our search engines as a substitute for typing in the URL.

Instead of bookmarking www.clickdimensions.com, we go

to our Google or Bing search boxes on our browsers and type in clickdimensions or something similar.

Using our own solution we can see the keywords that are used when people visit us from search engines. Since we classify each visit based on whether it came from a search engine, social site (we keep an extensive list), email link click or direct/bookmark link we are able to query all visits classified as coming from search engines and then inspect the keywords.

The result of this analysis is that we see a lot of visits that are technically search engine visits but, since they used **branded keywords** (i.e. our name or our product name) we can really think of them as direct traffic because the visitor clearly knew about us.

This is great because it allows us to clearly see visitors that came upon us from **non-branded keywords** like 'marketing automation' or 'dynamics crm marketing'. When we see a combination of a growing lead score from a visitor that used non-branded keywords we can quickly assess their value as a prospect. Below is a great example. We have one visitor that came to us from a search on 'powered by windows azure'. Now, while our solution is powered by windows azure, people buy it because it provides marketing automation functionality. So, there's probably no point in spending time on this visitor and, as you can see, he/she didn't accumulate a high score.

Keywords	Referrer Type	Referring Host	Score
'powered by windows azure'	Search Engine	www.bing.com	10

In contrast, the visitor below came to us from keywords that related perfectly to our solution and, thus, was very interested and built a high lead score. In addition, because ClickDimensions aggregates all traffic from IP addresses, once we identified one person from this prospect, we could see that several others had also been on

the site expressing strong interest. At that point, we knew our odds were good and this tempered the sales cycle. They are now a satisfied customer.

Keywords	Referrer Type	Referring Host	Score
crm dynamics campaign tracking	Search Engine	www.google.com	120

Combine live chat and web tracking

At ClickDimensions we use live chat on our web site so that people visiting our site can quickly connect with us while they are on the site. The chat solution we use, web site alive, is inexpensive and gives us all the features we need. However, you can use any chat solution and you will be able to 'integrate' it to your ClickDimensions web tracking using at least one of these two methods:


- **Method 1: Place our tracking script on the live chat pop up window:** When a web site visitor clicks our chat button on the web site a pop up window launches where they may ask one of our sales people a question. We were able to place our solution's tracking code on that page so that when someone initiates a chat we are able to locate the most recent page view and see the visitor it is coming from. Here is how it works:

Visitor clicks the chat button on our web site...



Pop up window loads and runs our web tracking script...

Page view entry is created in CRM so you can see who the visitor is... (hint; it will be the most recent visitor to have opened the chat window)

Page Views: Active Page Views ▾					Search for records
<input type="checkbox"/>	IP Organization	Page Title	Type	Viewed On ▾	
<input checked="" type="checkbox"/>	 Static Allocation to DSL Customers	AliveChat Session	Page	6/20/2011 7:47 PM	

...and what else they have done on your site...

Visit

06-20-2011 23:37:52 (UTC)

Visits

Page Views: Page View Associated View ▾

Search for records

<input type="checkbox"/>	Time	Page Title
<input type="checkbox"/>	06-20-2011 23:51:34 (UTC)	ClickDimensions: Email Marketing and Marketing Automation for Microsoft Dynamics CRM
<input type="checkbox"/>	06-20-2011 23:48:44 (UTC)	Partners: ClickDimensions is committed to working with partners
<input type="checkbox"/>	06-20-2011 23:46:15 (UTC)	Contact Us: Contact ClickDimensions via web, phone or email
<input type="checkbox"/>	06-20-2011 23:45:50 (UTC)	Product Tour: Take a tour of ClickDimensions Marketing Automation
<input type="checkbox"/>	06-20-2011 23:44:48 (UTC)	Email Templates: ClickDimensions Email Templates

- **Method 2: Search for the visitor's IP address when a chat begins:** This is the easier method of correlating what you see on live chat with your ClickDimensions web tracking. This method also gives an even bigger picture view of the prospect. This solution also works with chat solutions that don't allow you to customize their pop-up chat window with a tracking script. Here is how it works.

Just as in the first example, the visitor initiates a chat and asks a question. Your sales person will normally see the visitor's IP address in their chat client solution...



AliveChat Desktop for Windows

AliveChat LITE Operator Console

Operator Chat willard

willard Madrid, Madrid Spain

79.147.117.252

E-mail: n/a Phone Number: n/a Web Site: Default Web Site Department: Sales

willard: do you also have examples of customers using click dimensions

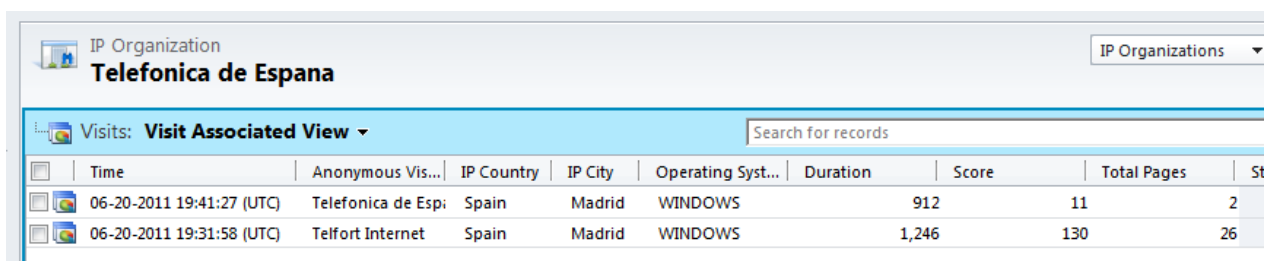
The sales person can then simply copy the IP address from the chat client and search for it in the ClickDimensions IP Organization entity in CRM (you will need to make the IP field searchable)...



The screenshot shows a CRM interface with a search bar at the top. The search results are displayed in a table with columns for Name and Created On. The first result is 'Telefonica de Espana' with a creation date of '6/20/2011 3:32 PM'. The IP address '79.147.117.252' is highlighted in a yellow box in the top right corner of the search results area.

IP Organizations: Search Results ▾	
Name ▲	Created On
Telefonica de Espana	6/20/2011 3:32 PM

Open the matching IP Organization record and you will see a history of EVERY visitor, visit and page view from that IP address. You will know exactly how much total interest there is from everyone at coming from that IP address...



The screenshot shows the 'Telefonica de Espana' IP Organization record in CRM. The 'Visits: Visit Associated View' is selected, showing a table of visitor history. The table has columns for Time, Anonymous Vis..., IP Country, IP City, Operating Syst..., Duration, Score, Total Pages, and St. Two records are visible: one from 'Telefonica de Espana' and another from 'Telfort Internet'.

Time	Anonymous Vis...	IP Country	IP City	Operating Syst...	Duration	Score	Total Pages	St
06-20-2011 19:41:27 (UTC)	Telefonica de Espi	Spain	Madrid	WINDOWS		912	11	2
06-20-2011 19:31:58 (UTC)	Telfort Internet	Spain	Madrid	WINDOWS		1,246	130	26

Either way you decide to use live chat with Microsoft CRM and the ClickDimensions solution you will have amazing intelligence about the visitors who initiate a chat with you.

Quantify your prospects' interest: Lead Grading and Scoring

Terminology Check

The term Lead Scoring in the marketing automation space can be a bit confusing for CRM users. This is because CRM systems like Microsoft Dynamics CRM have records for individuals named Leads and Contacts. For the purposes of this post, we'll just talk about scoring and it will refer to any individual. That works a lot better when talking about ClickDimensions because our solution actually scores Leads, Contacts and Anonymous

Visitors, the latter being a ClickDimensions custom entity.

 Grading	 Scoring
<ul style="list-style-type: none">* Fit<ul style="list-style-type: none">* Role involves marketing* High-Tech company* Uses Microsoft CRM	<ul style="list-style-type: none">* Interest<ul style="list-style-type: none">* Multiple visits* Took our product tour* Score > 100

Scoring

Scoring specifically refers to the interest level of the individual (i.e. Lead, Contact or Anonymous Visitor). This is because the score is calculated based on email clicks, web form submissions, visits, page views, link clicks and

file downloads. The more someone clicks on your emails and visits your site, the more interested they probably are. However, their level of interest doesn't mean they are a good prospect for you. That is where grading comes in.

Grading

Lead grading is the right term for the 'fit of the individual. You can define fit in a number of ways. Depending on the complexity of your product/service line, someone who is a fit for one product/service may not be a good fit for another. Fit can be based off of both demographic (e.g. a person's title) and firmographic (e.g. a firm's industry) attributes. Referring to the graphic in this post, for our prospects a good fit is someone whose company uses Microsoft CRM and whose role involves marketing. In addition, if the company is a high-tech company, then it'll tend to be even more suited to our solution because high-tech companies are early adopters of marketing technology. So, when we see someone with these attributes and a high lead score, we drop everything we're doing and sell. If you have a lot of prospect volume, CRM's Advanced Find tool can be a great way to pull out which Leads/Contacts fit your criteria. Sort by score (i.e. interest) and you've got a nice, prioritized list.

How we use our scoring

Internally, we've tweaked our default scoring values to a weight that is right for us. Email link clicks are high value so they get 10 points each by default. Likewise, form submissions are worth 25 points. Each visit is worth 5 points. Page views are worth 3 points each but all of our product tour pages are custom set to 5 (except for the main tour page which is 10) and our overview video is worth 15. When someone passes 50 points, they are interested. When they hit 100, it is time to really give them attention.

Summarizing interest at the organization level

If you are a B2B company, which most CRM users are, then you might be asking yourself if we should look at the score at the overall organization level. Well, we do. Since our solution also scores Anonymous Visitors and since we correlate all visits (anonymous and identified) at the organization level (i.e. at the IP address level), we can often see a bigger picture of interest being generated from a single organization. For example, there may be 5

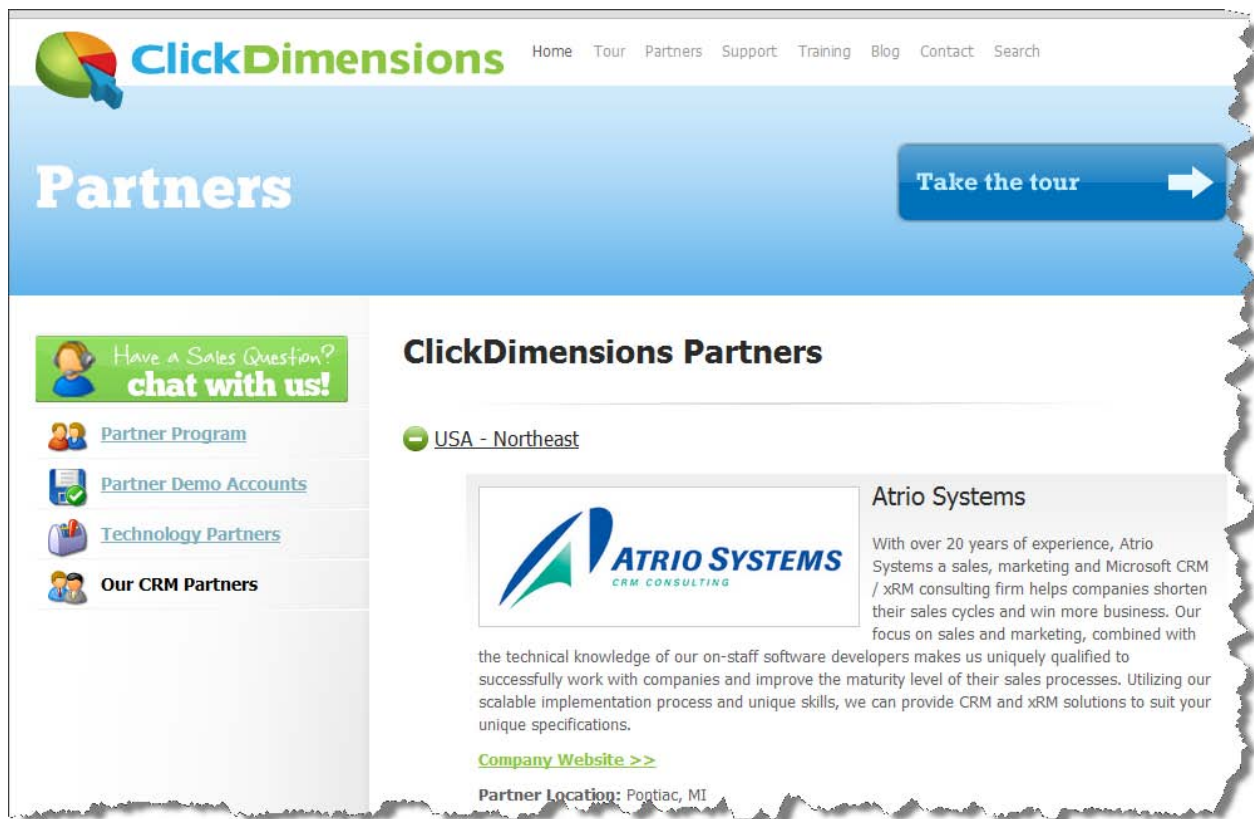
different people interacting with us (i.e. with our emails, web site and blog) from one organization but we'll see that activity grouped in a single place (i.e on our IP Organization records). So, we can sell with confidence knowing the overall organization is clearly interested. This is informative and encouraging. We are no longer flying blind wondering who is interested, what they are interested in and how interested they may be.

Increase your search rankings with off-page search engine optimization (SEO)

SEO, or Search Engine Optimization, can be divided into two categories; on-page and off-page SEO. On-page SEO involves things you can do to your web site to make it easier for search engines to find. Google has long published a [Search Engine Optimization Starter Guide](#) that provides great information on this topic.

Off-page SEO involves getting other sites to link to your web site in a credible manner. Properly constructed links to your site from other credible sites make your site look authoritative on a subject and, thus, raise your site's search rankings. At ClickDimensions we achieve powerful off-page SEO by asking our CRM partners to link to us. However, we are clear in specifying how we want those links constructed so as to provide us off-page SEO benefit. It is important that the link to us include anchor text (the text of the link itself) with terms that we want to associate with what we do. In our case those terms are 'Email Marketing and Marketing Automation for Microsoft Dynamics CRM' and we have created a program whereby we will prominently link to our partners from our [interactive partner directory](#) in exchange for asking them to following our [partner linking guidelines](#). If you do not specify how you want a link to your site created many web sites will simply link to your from your logo graphic and that will not have the end result you want in terms of associating important terms to your site.

Our [interactive partner directory](#) (screen shot below) lists our CRM partners but makes the listings more prominent for the partners that have followed our partner linking guidelines and linked to our site in the manner that is most helpful to our search rankings...



Our [partner linking guidelines](#) (screen shot below) specifies how the partner should link to our site. Having clear linking guidelines makes it easy for our partners to properly construct the link to our site...

Below are examples of what a typical ClickDimensions listing on a partner site might look like:



ClickDimensions [Email Marketing and Marketing Automation for Microsoft Dynamics CRM](#) empowers marketers to generate and qualify high quality leads while providing sales the ability to prioritize the best leads and opportunities. Providing Email Marketing, Web Tracking, Lead Scoring, Social Discovery, Form Capture, Surveys, Landing Pages, Nurture Marketing, Subscription Management, Campaign Tracking and more, ClickDimensions allows organizations to discover who is interested in their products, quantify their level of interest and take the appropriate actions.



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Do you have partners or other organizations with credible sites that you could get to link to your site? If so, it is an asset worth investigating. In addition to the off-page SEO benefit, you get the obvious benefit of being found by visitors from the other sites that will click the links and come to your site. Happy marketing!

Link your landing pages to Microsoft CRM campaigns and analyze what is driving traffic to your campaign

If you are promoting an event, product launch or other initiative it is helpful to create a landing page that contains content specific to that event to drive your visitors to a singular call to action like registering for the event, downloading collateral or watching a video. If you can link that landing page to a campaign in CRM using ClickDimensions then you can see in one place all visits to the landing page. Since a big part of any campaign involves driving traffic to the landing page this technique will allow you to understand which traffic sources bring the most traffic. Let's look at an example:

For our True Stories webinar campaign we created a landing page which gave an overview of the event and invited people to register...



The screenshot shows a landing page for a webinar titled "True Stories of Marketing with Microsoft CRM". The page features a blue header with a 3D pie chart icon on the left and a bar chart icon on the right. The main text reads "True Stories of Marketing with Microsoft CRM" in large white letters, followed by the subtitle "Real life use cases for generating and managing high quality leads." in blue. Below this is a small black and white photo of John Gravely, founder of ClickDimensions, with a text block describing his experience with Microsoft CRM. At the bottom, there is a blue banner with the text "Wednesday, June 22nd @ 8 am, EDT (GMT -5)" and a large "Register" button with a right-pointing arrow. The entire page is framed with a decorative, torn-edge border.

Using ClickDimensions we linked the landing page to a campaign record we created in CRM. This is a native feature of ClickDimensions own landing pages but, just in case you created a landing page on your own you can still link to a Microsoft CRM campaign by placing the campaign code in inside the landing page...

```

39 <script type="text/javascript">
40     var cdScore = 15;
41     var cdPriority = true;
42     var cdCampaignKey = 'CMP-01052-J8Y1C9';
43 </script>
44

```

Note that the campaign code in the landing page body matches the campaign code from CRM...

Campaign
True Stories Webinar - June 2

▼ General

Name * True Stories Webinar - June 2

Campaign Code CMP-01052-J8Y1C9

With this in place all visits to the landing page become linked to the CRM campaign record and we can easily group them together in CRM using an Advanced Find view...

Information

- General
- Financials
- Administration
- Notes

Related

Common

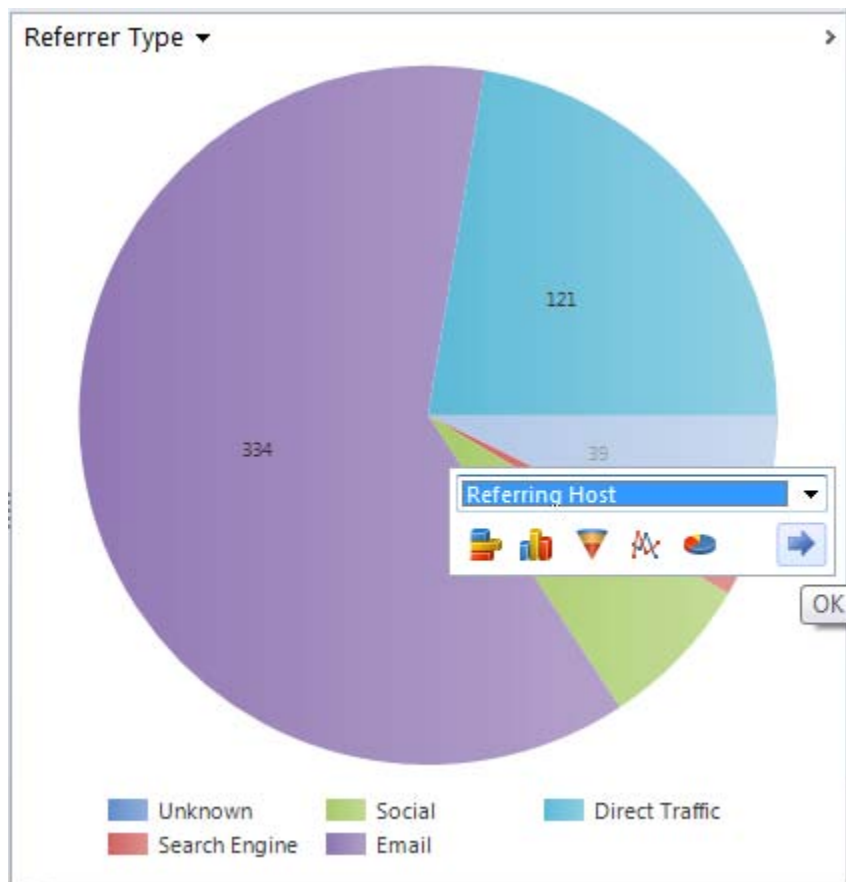
- Planning Activities
- Campaign Activities
- Campaign Responses
- Connections
- Audit History
- Form Captures
- Page Views
- Posted Forms

Campaign
True Stories Webinar - June 1

Visits: Visit Associated View ▼

<input type="checkbox"/>	Time	Anonymous Vis...	Contact
<input type="checkbox"/>	06-06-2011 21:32:40 (UTC)		John Gravely
<input type="checkbox"/>	06-06-2011 18:57:43 (UTC)		Mike Delisa
<input type="checkbox"/>	06-06-2011 17:50:21 (UTC)		Lauren Walker
<input type="checkbox"/>	06-06-2011 17:26:37 (UTC)	RICHARD CHAI LLC	
<input type="checkbox"/>	06-06-2011 16:19:23 (UTC)	Beam Telecom Pvt	
<input type="checkbox"/>	06-06-2011 13:52:03 (UTC)		John Gravely
<input type="checkbox"/>	06-06-2011 13:34:13 (UTC)		Lauren Walker
<input type="checkbox"/>	06-06-2011 12:21:13 (UTC)		John Gravely
<input type="checkbox"/>	06-06-2011 07:44:41 (UTC)		Sonja Puffer
<input type="checkbox"/>	06-06-2011 06:09:42 (UTC)		

Using CRM's inline charts we can look at a pie chart of how the traffic was referred to the landing page...

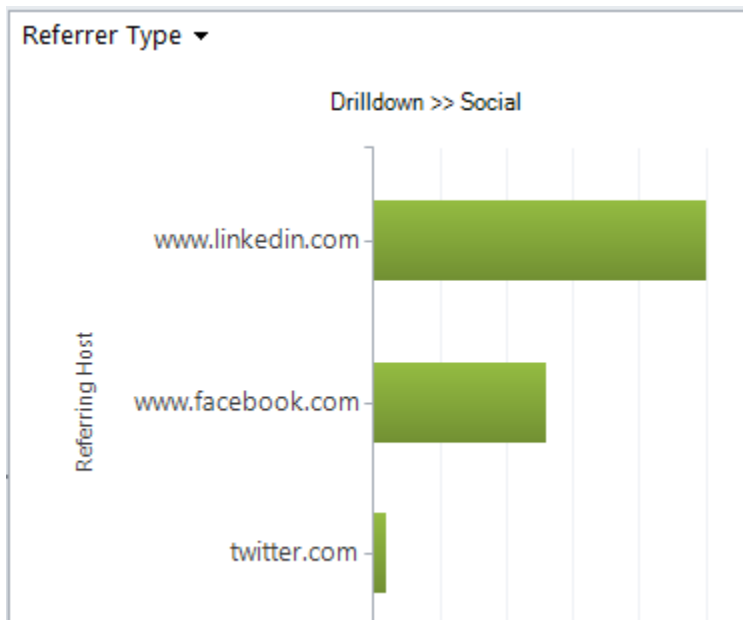


Drilling into the 'unknown' segment we can see which referring sites brought the most traffic...



This makes it clear to us that certain blogs drive more visitors than others. With that in mind we will know who to focus on for help promoting our events in the future. Clearly three bloggers exert much more influence than the rest. The results were unexpected to us but very helpful.

We can also see which social channels brought the most traffic...



This one is no surprise to us as we have a business oriented audience. However, it is helpful to see that many people do view our content via our Facebook page.

Conclusion

It pays to measure everything you can as long as the cost of measuring doesn't outweigh the value. This is where we come in. We make it easy to measure and track so you can really understand how your ideas and efforts translate into results.

Present a survey after a web form has been completed

When you go to the ClickDimensions web site and click the orange button to sign up for our monthly marketing newsletter you are taken to a short newsletter sign up form that was built using our [drag and drop form designer](#).



Click the button above and you will land on the form displayed below...

Newsletter Opt In

The ClickDimensions newsletter is delivered only **once a month**, normally on the first Tuesday of the month. Topics range from best practices in email marketing, marketing automation and social CRM to ClickDimension's company and product announcements. Each edition of the newsletter has a clearly marked unsubscribe link which is respected. Please also [follow us on Twitter](#) and ['like' us on Facebook](#).

Email *

First Name

Last Name

Company or Organization

When you sign up for the newsletter you will immediately receive a copy of our most recent newsletter. Previously, when you clicked the submit button on the form you then saw a message telling you that the newsletter was on the way and thanking you for signing up. However, we realized that, with [our new survey capability](#), it would be easy to create a one question survey that the visitor would see when they sign up for the newsletter. The question would ask the visitor if they would like to receive any past issues of the newsletter and would then trigger a workflow to immediately send those past issues once the survey question was submitted.

We simply created a one question survey...

Which past ClickDimensions newsletters would you like to be emailed to you upon completion?

☐ February

☐ March

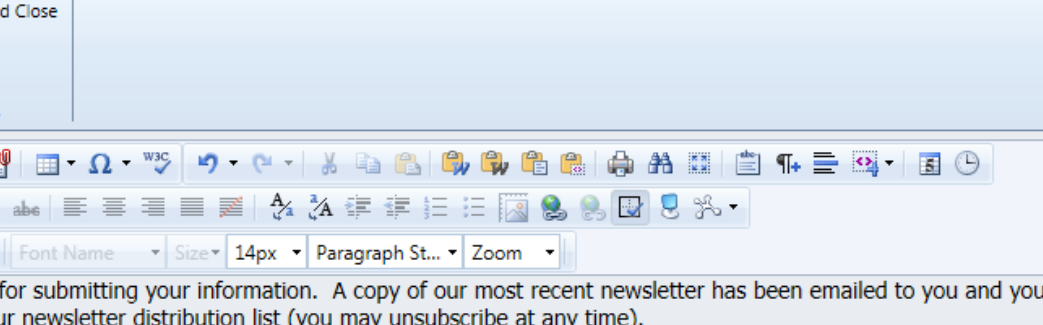
☐ April

☐ May

☐ June

☐ July

And then embedded it into the confirmation message of the newsletter sign up form...



The screenshot shows a web browser window with a light blue header bar containing a 'File' menu and a 'Response HTML' tab. Below the header is a toolbar with icons for 'Save and Close' and 'Close'. The main content area displays a confirmation message: 'Thank you for submitting your information. A copy of our most recent newsletter has been emailed to you and you have been added to our newsletter distribution list (you may unsubscribe at any time).' Below this message is a section titled 'Which past ClickDimensions newsletters would you like to be emailed to you upon completion?' with a list of months (February, March, April, May, June, July) each preceded by an unchecked checkbox. At the bottom of the form is a 'Submit' button.

File Response HTML

Save and Close
Close

Save

Thank you for submitting your information. A copy of our most recent newsletter has been emailed to you and you have been added to our newsletter distribution list (you may unsubscribe at any time).

If you wish to receive past copies of our newsletter please select them below.

Which past ClickDimensions newsletters would you like to be emailed to you upon completion?

☐ February

☐ March

☐ April

☐ May

☐ June

☐ July

Submit

Now when someone signs up for the newsletter they are presented with the survey question where the form was previously displayed...

Newsletter Opt In

The ClickDimensions newsletter is delivered only **once a month**, normally on the first Tuesday of the month. Topics range from best practices in email marketing, marketing automation and social CRM to ClickDimension's company and product announcements. Each edition of the newsletter has a clearly marked unsubscribe link which is respected. Please also [follow us on Twitter](#) and ['like' us on Facebook](#).

Thank you for submitting your information. A copy of our most recent newsletter has been emailed to you and you have been added to our newsletter distribution list (you may unsubscribe at any time).

If you wish to receive past copies of our newsletter please select them below.



Which past ClickDimensions newsletters would you like to be emailed to you upon completion?

- ☐ February
- ☐ March
- ☐ April
- ☒ May
- ☒ June
- ☒ July

And for any past newsletters the visitor requested a Microsoft CRM workflow immediately sends the emails ...

The screenshot displays a Microsoft CRM workflow diagram. At the top, a step is labeled 'Contact - Check for the newsletter question'. Below this, a conditional logic path is shown: 'If Survey Answer:Survey Question equals [Newsletters] AND [Survey Answer:Contact contains data], then:'. This leads to two parallel branches for 'February' and 'March'. Each branch contains a 'Send [Month] newsletter' action, followed by a 'Create: Send ClickDimensions Email' action. The 'Send March newsletter' step is highlighted with a yellow box. The final 'Create' step for March includes a descriptive text: 'ClickDimensions March Update: Social Profiles in CRM, a cool LinkedIn trick and a new team member'.

And, of course, all this is documented in Microsoft CRM and linked to the visitor's lead or contact record...

 Contact John Gravely		
 Survey Answers: Survey Answer Associated View ▼		
<input type="checkbox"/>	Question	Value
<input checked="" type="checkbox"/>	Which past ClickDimensions newsletters would you lik...	March
<input checked="" type="checkbox"/>	Which past ClickDimensions newsletters would you lik...	Jun

[Click here and give it a try.](#) Now that's marketing automation!

Data and Research

Today's possibilities for pulling relevant data from the web and keeping your data in top shape are amazing. From leveraging the power of the crowd to help you keep data clean to using automation to help you find new data. Here are a few ideas.

Automate your data work with Amazon's Mechanical Turk



As marketers we are often faced with a list of data that needs to be improved. In this example, we will take a list of organization names, find their URL's and determine their locations. But my list is long and I have better things to do so

I am going to go to Amazon's Mechanical Turk for help.

Amazon's Mechanical Turk is a web site located at <https://www.mturk.com> where you can design a job that various people can do for you. For example, my job is to have people search on a company name (and optionally an individual's name) to find the company URL and location. In Amazon's terms I am a 'requester' of work and the people that will do my tasks (called HITs – human intelligence tasks) are 'workers'. The workers can be stay at home moms/dads, students or anyone else with a computer, internet and a desire to earn a few dollars. Anyone can sign up and become a worker but Amazon even allows you to only expose your work to people they deem certified. Let's get started.

We'll begin by creating a HIT template. This is effectively a web form where a worker will read the description of your task, see the input information you provide him/her and enter the output information you expect them to find. In my case my form/template will describe the task, list a person's name and a company name and ask for the company URL, country and, if the company is in the USA, its' state. We begin by describing the HITs

A screenshot of the 'Describe your HIT' form in Amazon Mechanical Turk. The form has a grey header with the text 'Describe your HIT'. Below the header, there are three sections: 'Title', 'Description', and 'Keywords'. Each section has a text input field and a small instructional text below it. The 'Title' field contains the text 'Given a person's name and an organization name find the URL, country and state (if United States)'. The 'Description' field contains the same text. The 'Keywords' field contains the text 'data collection, addresses, listings'. The form is presented with a torn paper effect on its right side.

Then we use our HTML skills to design the web form your workers will use. Amazon has starting templates for you and plenty of help resources to guide you in setting this up.

Find the URL, country and state (if USA) this company/organization

- Perform a Google search on the company name optionally using the individual name to ensure you are finding the right company
- Determine the correct URL for the company and enter it below beginning with the protocol (i.e. Include the http://)
- Go to the URL and locate the company/organization's main mailing address (usually on the "Contact Us" page)
- Enter the URL of the main home page below
- Enter the country and state (if USA) below
- Include any comments you feel necessary

Individual Name:

Company/Organization Name:

URL:

Country:

State (if USA):

Comments

Once my form is designed I can download a .csv file that will accept my input data. I am going to supply an individual and an organization name for each HIT. As the HITs are completed I will receive a URL, country and state (if USA) for every HIT I upload.

's, any variables in the HIT will be replaced v
out acceptable file formats [Download sample](#)

	A	B
1	IndiviudalName	OrganizationName
2	Hit1_IndiviudalName_data	Hit1_OrganizationName_data
3	Hit2_IndiviudalName_data	Hit2_OrganizationName_data
4	Hit3_IndiviudalName_data	Hit3_OrganizationName_data
5		
6		
7		

I populate the .csv file, upload it to Amazon and publish the job. As workers begin to accept and complete our HITs we can check the progress of the job in the 'manage' section of the Amazon interface. This shows me the average hourly rate I am paying as well as the number of HITs that have been completed. I can inspect and review the HITs to make sure the quality is good. I have elected to use 'certified' workers so I'm paying \$.20/per HIT to make sure I get the best quality. You can bid whatever amount you want so I could perhaps bid lower and

get the work done. However, I started at \$.10/HIT and had no takers for several hours so I decided to increase the rate.

Status

Cancel this batch

Status: In Progress

37% submitted

100% published

Assignments Completed: 52 / 141

Average Time per Assignment: 29 seconds

Average Hourly Rate: \$24.828

Creation Time: December 10, 2011 5:16 AM PST

Estimated Completion Time: December 11, 2011 1:27 AM PST (Sunday)

Settings

Find URL, country, state 2

Description:

Given a person's name and an organization name find the URL, country and state (if United States)

Keywords:

data collection, addresses, listings

Qualification Requirement:

Categorization Masters has been granted
HIT approval rate (%) greater than or equal to 95

Number of Assignments per HIT: 1

Reward per Assignment: \$0.200

Input File: MT.csv

HIT expires on: December 17, 2011 5:16 AM PST (Saturday)

[Extend this batch](#)

Assignment duration: 1 hour

Auto Approval Delay: 7 days

Results

Assignments pending review: 52

Assignments approved: 0

Assignments rejected: 0

Cost Summary

Estimated Total Reward: \$28.200

Estimated Fees to Mechanical Turk: \$8.460 ([fee details](#))

Estimated Total Cost: \$36.660

These costs are only an estimate until all of the assignments have been submitted and reviewed.

I have used mechanical turk to do many mundane data jobs and I find the quality to be OK. For something like locating the URL and location of companies it is good and cheap.

Harness internet automation for powerful prospect research

In 2011 we began using a tool called BroadLook to research prospective customers. For example, our targets tend to be Marketing VP's or Directors. So, when we find that a company is using Microsoft CRM and want to make a connection BroadLook will find a list of contacts for that company. The way it works is particularly interesting; it goes to the web in real time and gathers information from a number of sources. When it presents this information it also provides a confidence score to give you an idea of how accurate data on the contacts might be.



Here's how it works; with only an account name and URL you tell BroadLook to 'profile' the company using a Microsoft CRM workflow that the BroadLook solution

adds to your CRM.

This screenshot shows the "Account" form for "ClickDimensions" within the Microsoft Dynamics CRM interface. The form is divided into sections, with the "General" section expanded. Fields include "Account Name" (filled with "ClickDimensions"), "Primary Contact", "Parent Account", "Relationship Type", "Web Site" (filled with "http://www.clickdimensions.com"), "Payment Terms", and "CRM System". The "Accounts" dropdown menu is visible in the top right corner.This screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes "Customize", "New", "Workflow", and "Reports". The "Workflow" section is active, showing a "Run Workflow" button. A "Look Up Record -- Webpage Dialog" is open, displaying search criteria for "Process" and "View: On Demand Workflows". The search results table shows a single record: "Profile Account (BroadLook)" with a status of "Activated".

Process Name	Created On	Modified On	Status
Profile Account (BroadLook)	9/30/2011 2:40 ...	9/30/2011 2:49 ...	Activated

The workflow sends the company name and URL to the BroadLook servers (in the cloud) that then scour the web for information on the company. BroadLook is not keeping a database of this information and giving you a copy

of that information; it is literally going to the web at that moment and finding up to date information. This point has been particularly relevant for our usage. A lot of our prospects are smaller companies whose data may not have made it into private databases. However, BroadLook will look at the company web site, blog, domain registration, social networks, even your own CRM (obvious yes, but so easy to miss) and more. It always finds data and it always tells you how confident it is in the data.

Account

ClickDimensions

Broadlook Profiler

Company Profile

Company

ClickDimensions (clickdimensions.com)

Status

Completed

Account

ClickDimensions

User

John Gravely

Phone

8882144228

Industry

Computer Software

Edit

Profile

Fill

Convert To Lead

Convert To Contact

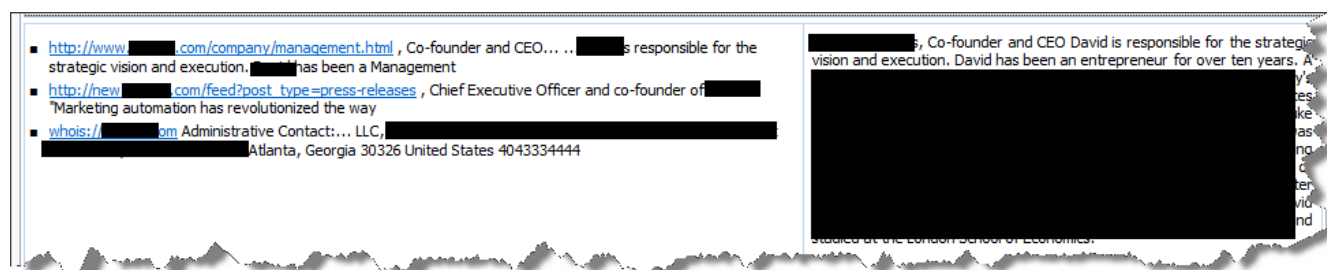
Delete

Sources	Status	Score	Name	Title	Email	Phone	City	St	Connections	Context	Company
	Update	1001	John Gravely	Chief Executive Officer	johngravely@gmail.com	404-494-0515 (f)	Atlanta	GA		ClickDimensions	ClickDimensions
	Update	1001	Koren Tako	History of Building Applications	koren.tako@clickdimensions.com					ClickDimensions	ClickDimensions
	Update	1000	Tony Cannizzo	Senior Partner Account Manager	tony.cannizzo@clickdimensions.com	6786580156				ClickDimensions	ClickDimensions
	Update	1000	Tony Cannizzo	Senior Partner Account Manager	tony.cannizzo@clickdimensions.com	6786580156				ClickDimensions	ClickDimensions

For my record BroadLook found data in four places; our CRM, whois, LinkedIn and our blog.

- 
- whois://clickdimensions.com ravely@gmail.com... 24 F
johngravely@gmail.com... 24 French Dr... Administra
 - <http://www.linkedin.com/in/johngravely> Social
 - <http://blog.clickdimensions.com/corporate/> to spea

For many records BroadLook will even bring in extra, descriptive information.

- 
- <http://www.████████.com/company/management.html> , Co-founder and CEO... , ██████s responsible for the strategic vision and execution. ██████ has been a Management
 - http://new.████████.com/feed?post_type=press-releases , Chief Executive Officer and co-founder of ██████
"Marketing automation has revolutionized the way
 - whois://████████.com Administrative Contact:... LLC, ██████
████████ Atlanta, Georgia 30326 United States 4043334444

Case Study

Recently I had the perfect use case for why this technology is so powerful. I had a prospect come to our site and initiate a web chat with some questions. Unfortunately, the chat dropped or the chatter got busy with other things. From the chat I only had first name and IP address from where the chat initiated. Using the IP address I was able to get the company name from the ClickDimensions solution so I was able to run the BroadLook profiler. BroadLook found 81 individuals from the prospect including the full name and contact information of the person who had chatted with me. As suspected, the individual is in the marketing department. BroadLook provided the LinkedIn URL of the individual so I reached out and made a connection via LinkedIn. Unbelievable!

Company [REDACTED] **Account** [REDACTED] **Phone** [REDACTED]
Status Completed **User** John Gravely **Industry** E-Learning

Edit Profile Fill Convert To Lead Convert To Contact Delete

Sources	Status	Score	Name	Title	Email	Phone	City	S	Connection	Context Company
[REDACTED]	New	141	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	New	141	Heather [REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	New	141	[REDACTED] ber	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

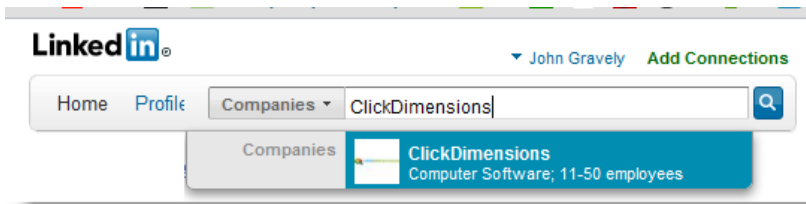
BroadLook has a number of other features that I haven't detailed here including the ability to help standardize your data (i.e. data cleanliness) and to take free form data such as email signatures and import them into CRM Leads/Contacts. All in all, a pretty amazing real-time research tool. You can check it out at <http://broadlook.com/crmsuite/microsoftdynamics/>

Use social media metrics to size up your competition

Do you have that pesky competitor that tells prospects they are much bigger than they are or that they have more customers than you know they do? Annoying, eh? Well, don't be tempted to play that game. It will catch up with them and you'll be better off for taking the high road. Plus, with social media people can see right through the lies.



Here are some tools to compare yourself to your competitor. First, go to [LinkedIn](https://www.linkedin.com) and use the company search to see how many people have listed your competitor as their employer. People do not lie about where they work. When someone lists your company as their employer, LinkedIn will show that person listed on your company LinkedIn page. LinkedIn pages are auto-generated by LinkedIn itself so companies cannot tamper with who appears as an employee (unless they get their mom to create a profile ☺). You can see our LinkedIn company page at <http://www.linkedin.com/company/clickdimensions>.



On a similar note, if you have a competitor telling the market that they have a certain number of customers look at these items from the social world:

- The number of online reviews that have been written on them
- The number of people that follow them on Twitter
- The number of people that like them on Facebook

If your competitor's stats are lower than yours than you most likely have more customers than they do. Below are our social links that you can use to compare us to our competition.

LinkedIn: <http://www.linkedin.com/company/clickdimensions>

Twitter: <http://twitter.com/clickdimensions>

Facebook: <http://www.facebook.com/ClickDimensions/>

Online reviews: <http://dynamics.pinpoint.microsoft.com/en-us/applications/email-marketing-and-marketing-automation-for-microsoft-dynamics-crm-4295023511>

One additional tool is to compare yourself to your competitor using tools like www.compete.com, www.alexacom and <http://websitegrader.com/>. Have fun!

Microsoft CRM Features

Many books have been written on this topic but here we'll share a few things that we like. By the way, if you haven't upgraded to Microsoft CRM 2011 yet, there is a lot to look forward to. It represents a huge leap forward in terms of what it allows marketers to do.

Leverage the new marketing features in Dynamics CRM 2011 and real life examples of how to use them

At Microsoft Convergence last year (2011) I was asked by Microsoft to do a presentation on the new marketing features in Dynamics CRM 2011. Now, it is debatable as to what we might refer to as a marketing feature but I looked at everything new in the product that helped marketers do their job better. In this multi-part series we'll look at new features in CRM 2011 that help marketers.

- Dynamic marketing lists
- Data Import Templates
- Bulk Qualify Leads
- Data export/re-import

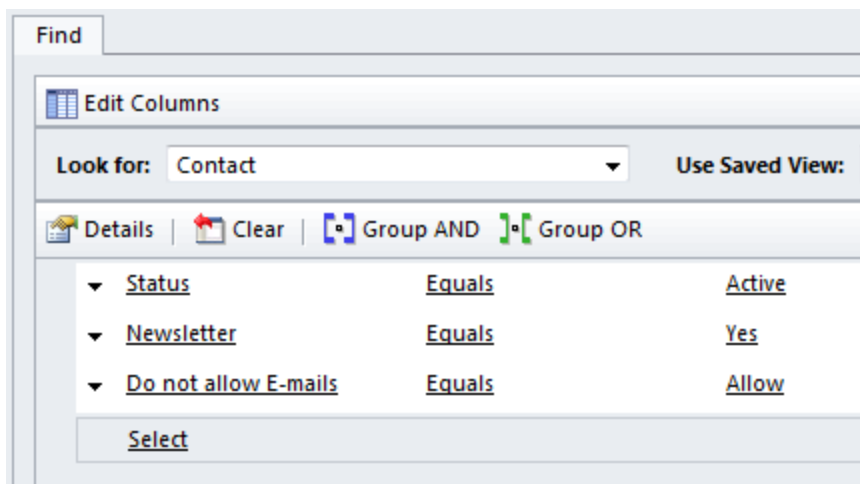
Dynamic Marketing Lists

This is probably the single most obvious helpful marketing feature in CRM 2011. In previous versions of CRM when you created a marketing list you used the Advanced Find query tool or lookup search tool to add people to the list. Once you add your list members the list was set (or static) until you went back and manually added or removed people.

With dynamic marketing lists you create a query and each time the list is used CRM runs the query and pulls back those records that match its criteria. Our monthly newsletter is a good example. We have dynamic marketing lists for both leads and contacts and both lists pull everyone whose 'newsletter' field (a custom field we added) is set to yes and whose status is open (for leads) or active (for contacts). No more manually refreshing our lists. Bravo!



The screenshot shows the 'Marketing List' form in Microsoft Dynamics CRM 2011. The title bar indicates 'Marketing List' and 'Marketing Lists'. The main title is 'Newsletter - Contacts (Dynamic)'. A yellow banner message states: 'This marketing list is based on a query and the members of this marketing list will change dynamically.' Below this, the 'General' tab is selected. The 'Name' field is 'Newsletter - Contacts (Dynam)' and the 'Member Type' is 'Contact'. The 'Type' is set to 'Dynamic' (radio button selected).

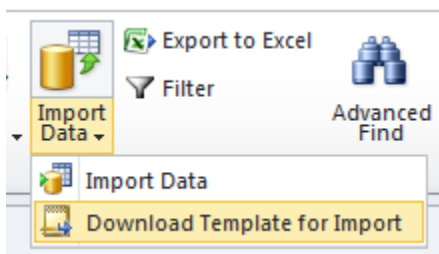


Data Import Templates

If like me you agree that marketing should really 'own' the CRM database (after all it is your main tool) then you will like this feature. CRM 2011 gives you a feature to download an Excel file that is formatted so you can populate it with data on a specific entity and then easily import the data into CRM. The process is simple;

- 1 – Go to any list view of any entity in CRM
- 2 – Go to the Import Data option on the ribbon and select the Download Template for Import option
- 3 – Save the Excel file to your hard drive, add data and import

What I like about the feature is that they didn't just do the minimum when implementing it. For example, the template file you download has bolded column headings for each required field so you know what data you must provide. Picklists are populated in the spreadsheet so you can select a valid value. And, for any field that is a lookup to another entity the CRM import will link it to the right record in CRM as long as the value you provide in the spreadsheet matches a record exactly. For example, if you use this feature to import contacts then you can link the contacts to their appropriate account records by adding the account names exactly as they appear in the CRM account records.

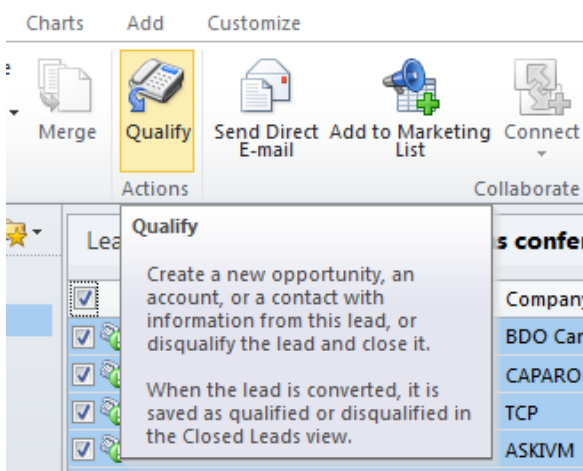


A	B	C	D	E	F
Topic	First Name	Last Name	Company Name	Rating	Lead Source
IMPORT DEMO	Jack	Stuart	ClickDimensions		CECRM 2010
					Convergence US 2011
					CRM 2011 Trial Account
					CRMUG 2010
					Event: Connections 2010
					ExactTarget: Sales Team
					Extreme 2010
					Extreme Prague 2011

Bulk Qualify Leads

In previous versions of CRM you could only qualify (i.e. convert) one lead at a time. In CRM 2011 you can select multiple leads and qualify them in a single operation. You may not face this scenario a lot but, when you do, you will appreciate not having to convert leads one by one.

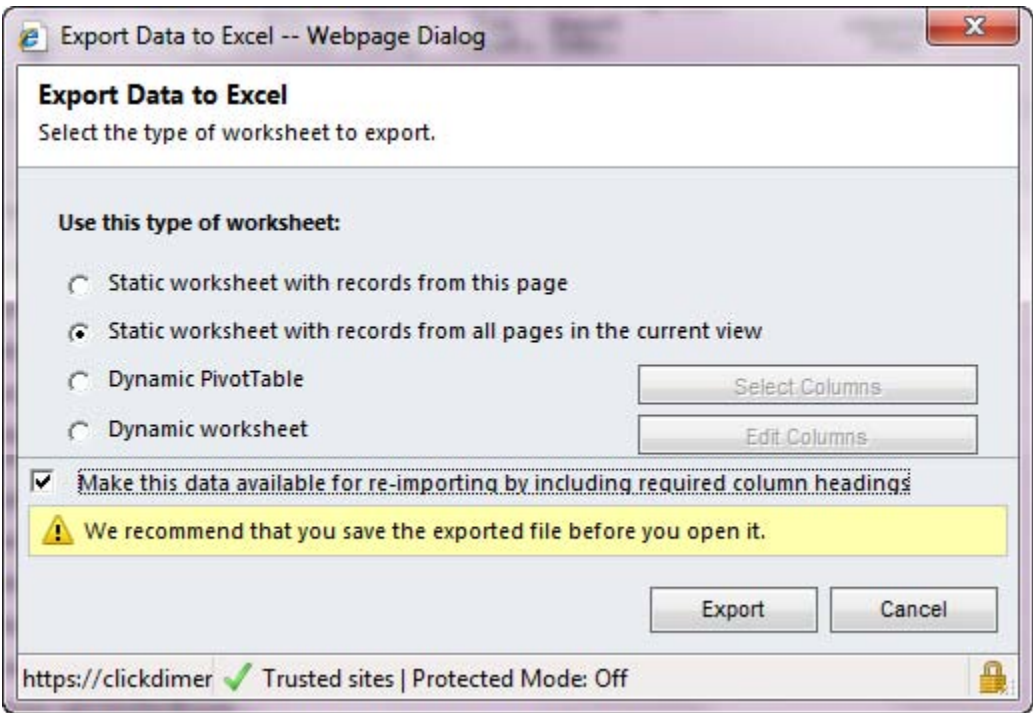
For example, there are times when you will have a list of people that visited your booth at a trade show. If you want to send them all an email quickly you are faced with the task of figuring out who is in your CRM, and who is not and which ones are in your CRM as leads and which are contacts. All of the sudden a simple task has become complex. One solution is to import the list as Leads (using the data import templates feature I just outlined) and email to them. Then de-dupe the list against existing leads and bulk qualify any records that match contacts and de-dupe those over on the contact side. Is there an easier way if you are a whiz with 3rd party data import tools, of course. But this works and gets the job done.



Data export/re-import

This may be my favorite feature because it really got me out of a pickle. Let me first explain the pickle and then the feature will make more sense. When CRM 2011 online was released I wanted to migrate over and didn't have a lot of time for data drama. So, I exported my leads, contacts and accounts from my CRM 4 on-premise deployment (good riddance server maintenance) and imported them into CRM 2011. Exporting data from CRM 4 was not an issue and importing into CRM 2011 was easy. However, linking contacts to accounts was the problem. This is where the data export/re-import came in handy.

The data export/re-import feature of CRM 2011 allows you to specify that you want to make data available for re-import. The screen below says ‘make this data available for re-importing by including column headings’ but the feature actually does more than that. It hides the CRM identifiers (GUIDs) and modified dates in the sheet you export so that you can update the records you exported and later re-import them so the data you have changed gets updated. It is very cool; you export some data that needs cleaning then you edit it in Excel then you import into CRM and your edits done in Excel are now captured in CRM.



In the case of my contacts, none of which had linked accounts, I simply exported them all then did a little Excel magic to parse the domains out of the email addresses. By magic what I did was to create a column that took just the clickdimensions.com part out of the email addresses so I could then sort on that and have everyone from the same company grouped together. By the way, to modify the spreadsheet for the magic part you must unprotect the sheet. However, that won't hurt anything as long as you are careful not to delete any columns.

Back to the example, once I had everyone sorted by their email domain I was able to copy in their account name so that, on re-import, all the contacts were now linked to partner accounts. Again, is this the best way to do a migration if you are a guru on data import tools; no. However, it got the job done with no extra expense and not a lot of time.

I	K	L	M
Parent Customer	Business I Domain		
CIBER	478.477.78	@ciber.com	
CIBER		@ciber.com	
CIBER		@ciber.com	
CIBER		@CIBER.com	
CIBER		@ciber.com	
CIBER		@ciber.com	
CIBER		@ciber.com	

Customize CRM for easy event tracking

Most marketers have the need to keep track of who attended a tradeshow booth, webinar, etc. Well, here's one way to accomplish that using fairly straightforward customization of Microsoft CRM. The idea is to create a custom entity type called 'Event' and then to import records into your CRM as you have data from your events. You will need CRM 2011 for this since it requires the ability to link an imported record (event) to another record (contact) upon import. CRM 4 did not have this feature. Here is how you'll do it...

Start by creating a custom entity called 'Event'. Below is the screen shot to show you how to complete the fields on your new custom entity. If you don't know how to create a custom entity, ask your CRM administrator or watch this handy video by the folks at [Zero2Ten CRM](http://www.youtube.com/watch?v=2wL44EfrpG8) <http://www.youtube.com/watch?v=2wL44EfrpG8>

The screenshot shows the 'New Information' form in Microsoft CRM 2011. The 'Entity Definition' section is active, showing fields for 'Display Name' (Event), 'Plural Name' (Events), 'Name' (cdi_event), and 'Ownership' (User or Team). The 'Areas that display this entity' section has checkboxes for Service, Workplace, Marketing, Sales, Settings, and Resource Center. The 'Options for Entity' section includes checkboxes for Notes, Activities, Connections, Sending e-mail, Mail merge, Document management, and Queues. The 'Communication & Collaboration' section has checkboxes for Notes, Activities, Connections, Sending e-mail, Mail merge, Document management, and Queues.

File | Save and Close | Help

New | Information | Working on solution: Default Solution

Common

- Information
- Forms
- Views
- Charts
- Fields
- 1:N Relationships
- N:1 Relationships
- N:N Relationships

General | Primary Field

Entity Definition

Display Name * | Event | Ownership * | User or Team

Plural Name * | Events | Define as an activity entity. |

Name * | cdi_event | Display in Activity Menus |

Description |

Areas that display this entity

☐ Service ☐ Workplace ☐ Marketing ☐ Sales

☐ Settings ☐ Resource Center

Options for Entity

Communication & Collaboration

☒ Notes (includes attachments) +

☒ Activities +

☒ Connections +

☐ Sending e-mail (If an e-mail field does not exist, one will be created) +

☒ Mail merge

☐ Document management

☐ Queues +

☐ Automatically move records to the owner's default queue when a record is created or assigned.

Once you have created your event entity you will need to create two custom fields...

The screenshot shows the 'Event Fields' form in Microsoft CRM 2011. The 'View: Custom' tab is selected, showing a list of custom fields. The table has columns for Name, Schema Name, Display Name, Type, State, and Audit Status. The table contains two rows: 'cdi_contact' and 'cdi_eventtype'.

Event | Fields

Solution: Default Solution

View: Custom

New | Edit | More Actions

Name	Schema Name	Display Name	Type	State	Audit Status
cdi_contact	cdi_Contact	Contact	Lookup	Unmanaged	Enabled
cdi_eventtype	cdi_EventType	Event Type	Option Set	Unmanaged	Enabled

The first custom field will be a lookup field to link a contact record to every event record. This will create the link between the contact who participated in the event and the event record.

General

Schema

Display Name * Contact

Name * cdi_contact

Requirement Level * Business Recommended

Searchable Yes

Field Security ☐ Enable ☒ Disable

Auditing * ☒ Enable ☐ Disable

Description Unique identifier for Contact associated with Event.

Type

Type * Lookup

Target Record Type * Contact

Relationship Name * cdi_contact_cdi_event_Contact

[Edit relationship detail\(advanced\)](#)

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics CRM SDK](#)

The second custom field is optional and is simply a type field if you want to categorize the types of events. You could also even add additional fields to note if someone registered, attended, etc. For now we will keep it simple...

General


Schema

Display Name * Requirement Level *

Name * Searchable

Field Security ☐ Enable ☒ Disable

Auditing * ☒ Enable ☐ Disable

 This field will not be audited until you enable auditing on the entity.

Description

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics CRM SDK](#)







Type

Type *

Use Existing Option Set ☐ Yes ☒ No

Default Value

Options

	Label *	Value *
     		
Conference		
Social		
Webinar		

You'll then add your new custom fields to the main form for the event entity. I also renamed the event name field to description since that sounded like a better label for the purpose...

Solution: Default Solution
Form: Event

Header

General

Description *

Contact +

Event Type

Owner *

Notes

Now we can publish our customizations and take a look at our new event entity...

Event New Events

General

Description *

Contact

Event Type

Owner * [John Gravely](#)

Notes

It is super-simple but will be effective at tracking contacts' participation in events. Below is how we envision a completed event record will look...

Event
Convergence 2011 - Visited Booth

General

Description *

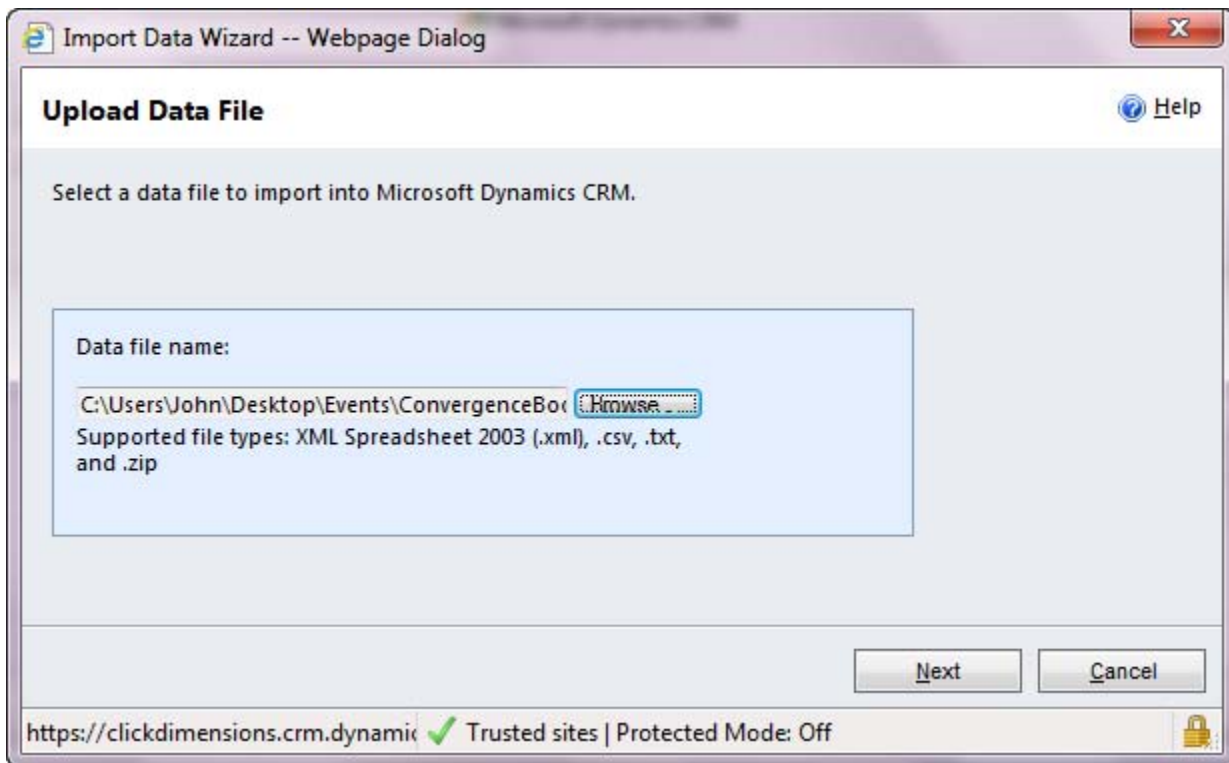
Contact + Owner *

Event Type

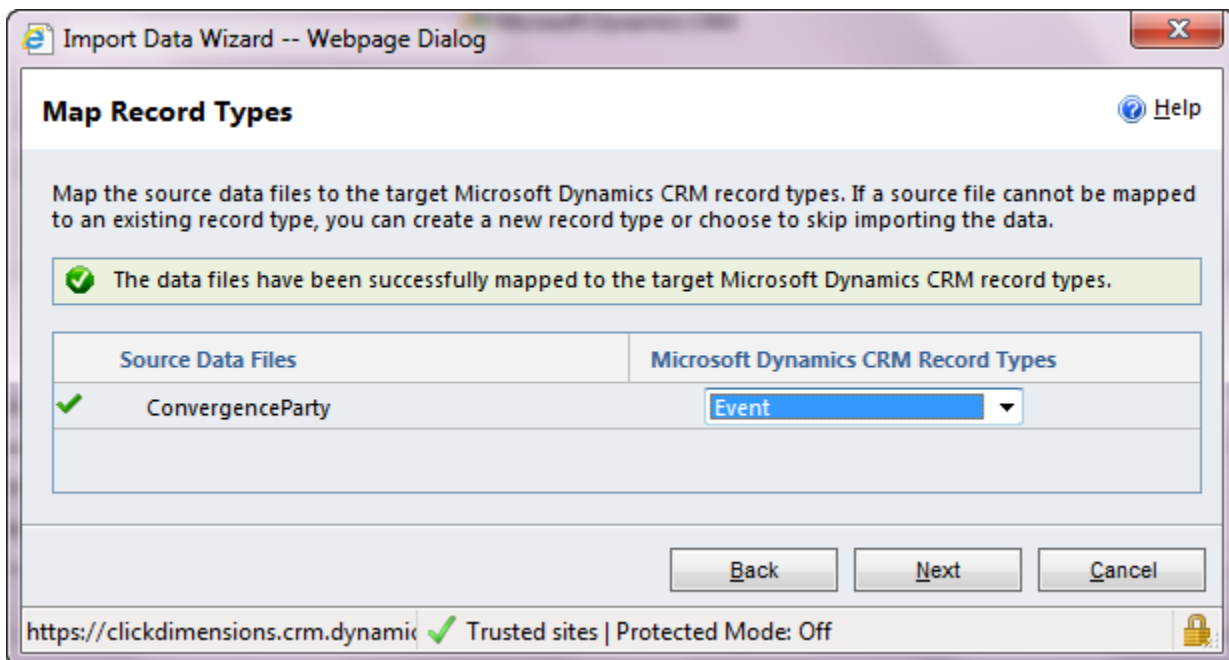
Now, the most important part is getting data into the events records so that they will be linked to the contact records and thus will allow your sales and marketing team to track who participated in what event. We will do this by creating a simple spreadsheet for data import. The sheet need only have three columns; description, contact email address and event type. Below is an example. Note that the sheet is in .csv (comma delimited) format so it will be ready for import using Microsoft CRM 2011's import feature...

	A	B	C
1	E-mail	Event Type	Description
2	a	Conference	Convergence 2011 Booth
3	a	Conference	Convergence 2011 Booth
4	a	Conference	Convergence 2011 Booth
5	a	Conference	Convergence 2011 Booth
6	a	Conference	Convergence 2011 Booth
7	a	Conference	Convergence 2011 Booth
8	a	Conference	Convergence 2011 Booth

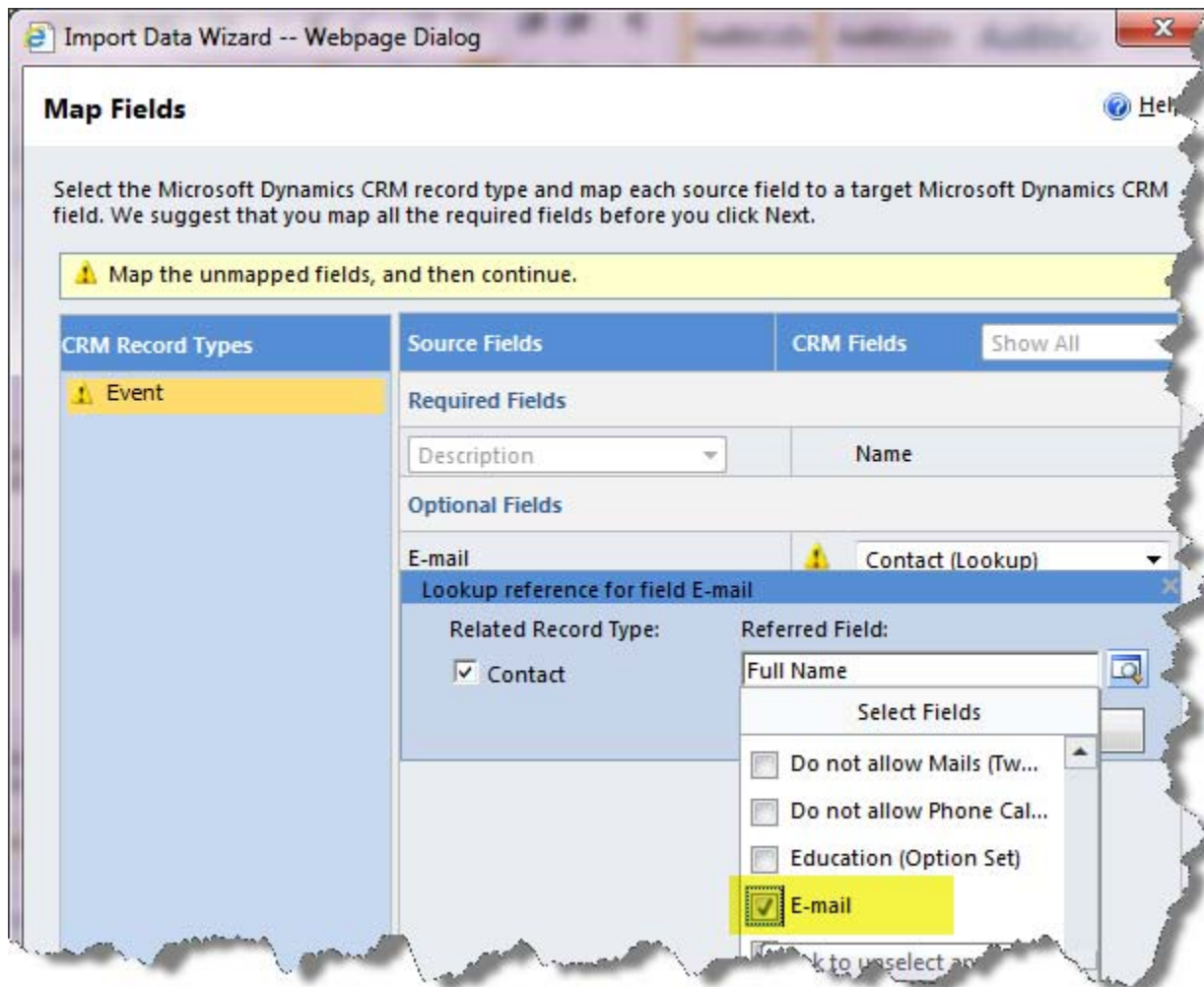
Now, let's do an import. Go to your events area in Microsoft CRM and click import. The wizard will prompt you to select a .csv file with your data in the three columns we mentioned earlier...



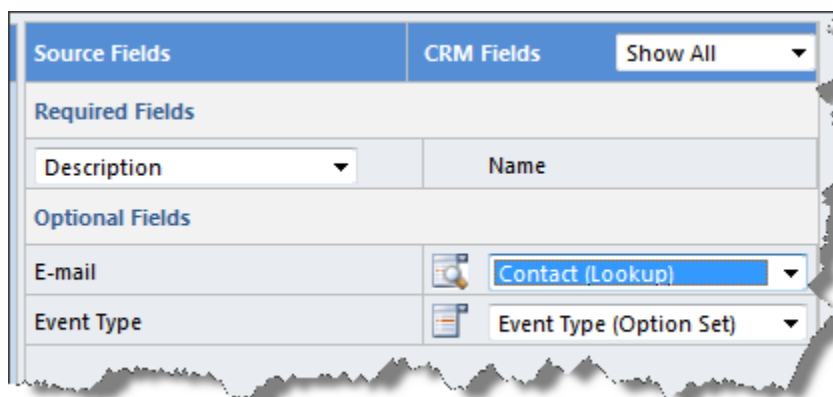
You will need to select your event entity type...



Then you will map the fields. For contact you will map it using the contact email address in your import sheet. CRM 2011 allows you to create a lookup reference so, if it finds the email address in your sheet on a contact record in your CRM, it will link that event record to the matching contact...



Your final mappings will look like this...



Then, before you submit the import be sure and save your mapping so that you will be able to skip that part on future imports.

Review Settings and Import Data [Help](#)

Review the default settings, make the necessary changes, and submit the data for import.

Information Duplicate detection is not enabled.

Select Owner for Imported Records

John Gravely

This user will own the imported records if the records do not contain owner information or if the records cannot be assigned to the specified owners.

Data Map Name (optional)

Event Import

Save this data map for future imports.

[Back](#) [Submit](#) [Cancel](#)

https://clickdimensions.crm.dynamics.com | Protected Mode: Off

With your import mapping saved getting event data into Microsoft CRM will be as easy as preparing your three column import sheet and clicking through the CRM import wizard. It is fairly simple and, best of all, it works. Now when you have that list of email addresses from a tradeshow you can import them into CRM and easily create these event records to track their participation in the event.

There are a number of improvements you could make to this simple customization but this works and is probably enough for most situations. Now you will be able to see in CRM in which events your contacts participated and it will be simple to import data from tradeshow, webinar participation reports and other sources.

Information

General

Details

Administration

Notes

Related

Common

Profile

More Addresses

Activities

Closed Activities

Sub-Contacts

Relationships

Connections

Audit History

Events

Contact

Meghan Burner

Events: Event Associated View

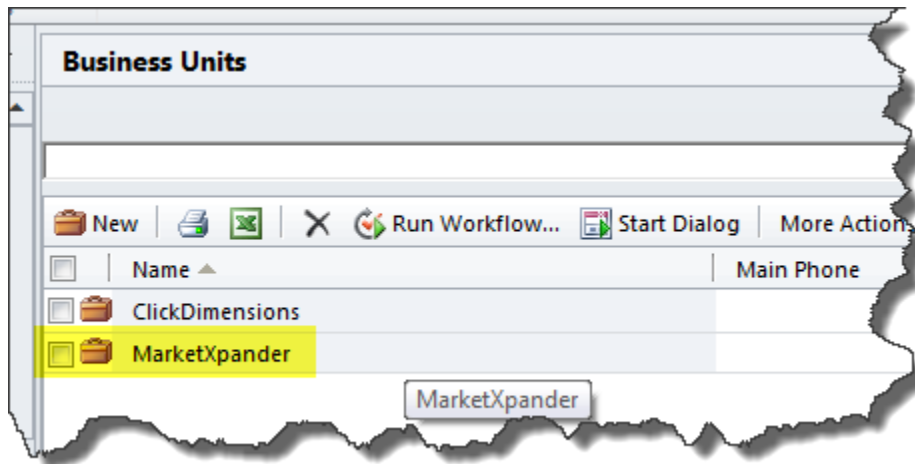
<input type="checkbox"/>	Name	Created On
<input type="checkbox"/>	Convergence 2011 - Visited Booth	1/15/2011
<input type="checkbox"/>	Weekly Webinar - Attended 5/1/2011	1/15/2011

Use Microsoft CRM with an outsourced telemarketing firm

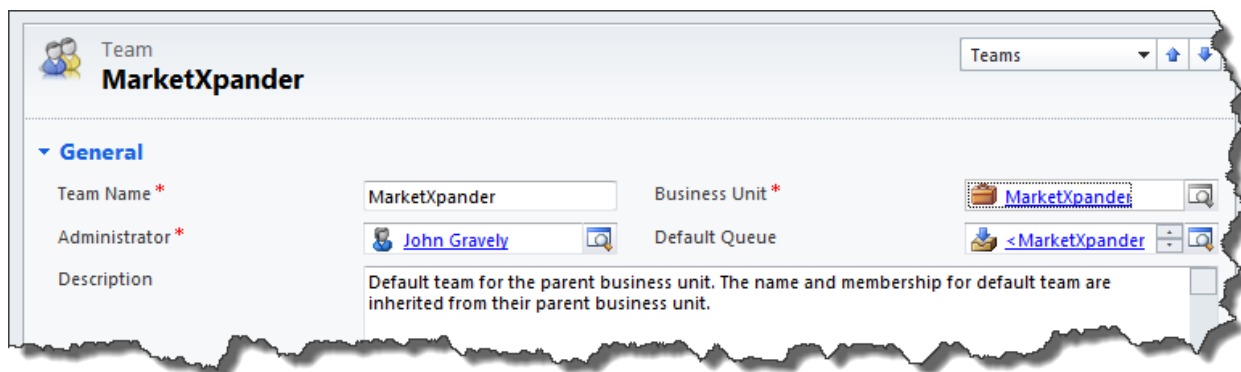
If you've ever thought of using an outside telemarketing firm to do some prospect calling for you Microsoft CRM makes this very easy and measurable. The Microsoft CRM security and customization model allow you to give your outside workers access to only the data you want them to see. Further, the ability to have different CRM forms for different security roles make it easy to give outside workers a streamlined user experience.

We're currently working with an outside firm so I thought I'd share how we've set things up.

First, we created a new CRM business unit so we can assign certain account records to that business unit and then place the outside workers in that business unit. We named the business unit after the firm we are working with...



When we created the business unit Microsoft CRM automatically creates a default team for it. We used this to assign accounts over to the outside firm for research and calling...



And then we added the outside workers to this business unit...

User
Jay Singh

⚠ The information provided in this form is viewable by the entire organization.

▼ **General**

Account Information

Windows Live ID Invitation Status *

User Information

First Name * Main Phone

Last Name * Other Phone

Organization Information

Manager Business Unit * **MarketXpander**

Territory Site

Status

And gave the outside workers a security role that provides access only to entities in this business unit...

Security Role: MarketXpander

Details	Core Records	Marketing	Sales	Service	Business Management	Service Manag
Entity	Create	Read	Write	Delete	Append	
Account						
Activity						
App						
ent						

Now, when we assign account records to the CRM team created by this business unit the outside workers can access only those account records

Assign Account

You have selected 1 Account. To whom would you like to assign it?

☐ **Assign to me**

Assign the selected Account to yourself.

☒ **Assign to another user or team**

 **MarketXpander**

Help

OK

Cancel

Now that we have isolated a set of account records for our outside workers to research and call we want to make their user experience simple. So, we create a special account form just for them...

View: All Forms

New ▾

×

Assign Security Roles

Form Order ▾

More Actions ▾

	Name	Form Type ▲	State	Customize
<div><div></div><div></div></div>	Information	Main	Managed	True
<div><div></div><div></div></div>	MarketXpander	Main	Unmanaged	True
<div><div></div><div></div></div>	Information	Mobile	Managed	True

This form has fewer fields than the standard account form so the outside workers see only what they need to see when researching and calling accounts. In addition, we created several custom fields so the researchers can document the status of the account, where the information came from, etc...

The screenshot shows the 'Account' form in ClickDimensions. The left sidebar has a 'MarketXpander' dropdown menu with a green checkmark. The main form area is titled 'Account ClickDimensions'. It contains several fields: 'Account Name' (ClickDimensions), 'Parent Account' (empty), 'Relationship Type' (dropdown), 'Web Site' (http://www.clickdimensions.com), 'Primary Contact' (empty), 'Main Phone' (empty), 'CRM System' (empty), 'Email Solution' (empty), 'Marketing Automation Solution' (empty), 'MarketXpander Status' (Passed to Sales), 'MarketXpander Status Reason' (empty), 'Exists' (radio buttons for No and Yes, with Yes selected), 'Research Data Source' (LinkedIn, BroadLook), and 'MarketXpander Notes' (Hot prospect!). There are also green checkmarks over the 'MarketXpander' dropdown and the 'Web Site' field.

We also added custom fields and a custom form to the contact entity so that our outside researchers can add contacts for each account and then call those contacts...

The screenshot shows the 'Contact' form in ClickDimensions. The left sidebar has a 'MarketXpander' dropdown menu with a green checkmark. The main form area is titled 'Contact John Gravely'. It contains several fields: 'Salutation' (empty), 'First Name' (John), 'Middle Name' (empty), 'Last Name' (Gravely), 'Job Title' (CEO), 'E-mail' (john.gravely@clickdimensions.com), 'Business Phone' (empty), 'Other Phone' (empty), 'Mobile Phone' (empty), 'Parent Customer' (ClickDimensions), 'Auto Email' (MarketXpander (pre-call email)), 'E-mail Address 2' (empty), 'MarketXpander Status' (Passed to Sales), 'Newsletter' (radio buttons for No and Yes, with No selected), and 'Research Data Source' (LinkedIn, BroadLook). There are also green checkmarks over the 'MarketXpander' dropdown and the 'E-mail' field.

When each call is complete the outside caller can quickly and easily send a ClickDimensions email using a simple customization that takes advantage of our [ability to send trackable and personal emails using CRM workflow...](#)

Auto Email	MarketXpander (interaction held)
E-mail Address 2	Airmail Check-In Dynamic Content
Newsletter	MarketXpander (interaction held) MarketXpander (meeting request) MarketXpander (pre-call email)

With each call the outside worker will create an activity record to show the outcome of the call. We use a series of statuses so we can pull all the activities into a list and monitor how the calls are going...

Activities: **MarketXpander Phone Calls** Search for records

Due: All

	Subject	Regarding	Phone Number	Call Response	Activity Status	Owner	Description
<input type="checkbox"/>	United States Cavan Real Estate Investments...			Voicemail	Completed	Jay Singh	
<input type="checkbox"/>	United States Ceridian Corporation Brian ...			GateKeeper	Completed	Jay Singh	Gk said there
<input type="checkbox"/>	United States Bid4Spots Dave - Chief Exec...			Interaction Held	Completed	Jay Singh	Dave asked to
<input type="checkbox"/>	United States CambridgeSoft Corporation ...	John Hienada	1 800 315-7300	Voicemail	Completed	Jay Singh	

With CRM's advanced find and filter tools it is now easy to see how many contacts have been added, how many accounts have been contacted, how many calls have resulted in interactions and how many leads have been passed to the sales team. By having the outside firm working directly inside our CRM we know that we are capturing all the information directly without complex import/export processes. Nothing is lost and we can easily measure how effective the initiative is for us. Happy marketing!

Make fields searchable in Microsoft CRM and find data more easily

Because we know marketers are very dependent on CRM data here's a tip on how to make sure you can find the data you're looking for in CRM. Have you ever tried to search on a field in CRM only to find no records? But, at the same time, you know what you are searching for exists? The reason you can't find what you are looking for is that not all fields in CRM are searchable by default. To make a field searchable you need to add it as a 'find column' to the entity's Quick Find View.

Here's a great example. In a trial version of Microsoft CRM online where no customization has occurred I can see that the Lead pictured below has the email address someone1@example.com

Lead
Yvonne McKay (sample)

Lead Source: Advertisement Rating: Warm

▼ **General**

Topic *	New store opened this year - follow up (sample)
Salutation	
First Name +	Yvonne
Last Name *	McKay (sample)
Job Title	Purchasing Manager
Company Name *	Practical Supply Company
Web Site	
E-mail	someone1@example.com

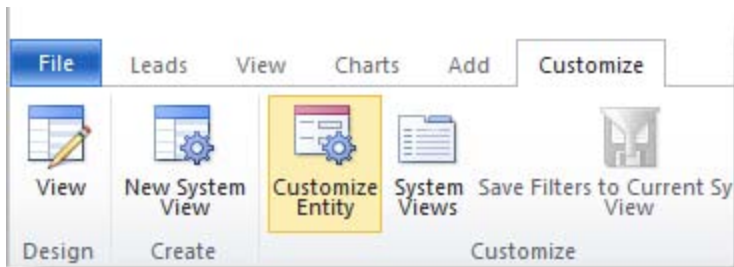
However, when I enter that value into the Lead search box and press enter I get the message that nothing is found. Why?

Leads: **Search Results** ▼

someone1@example.com

	Topic ▲	Company Name	Status Reason	Business
No Lead records are available in this view.				

The reason that nothing is found is that the E-mail field is not searchable. To make it searchable go to the Customize Entity option on the navigation ribbon



This will launch the customization screen where you can then choose the 'Views' option under the Lead entity

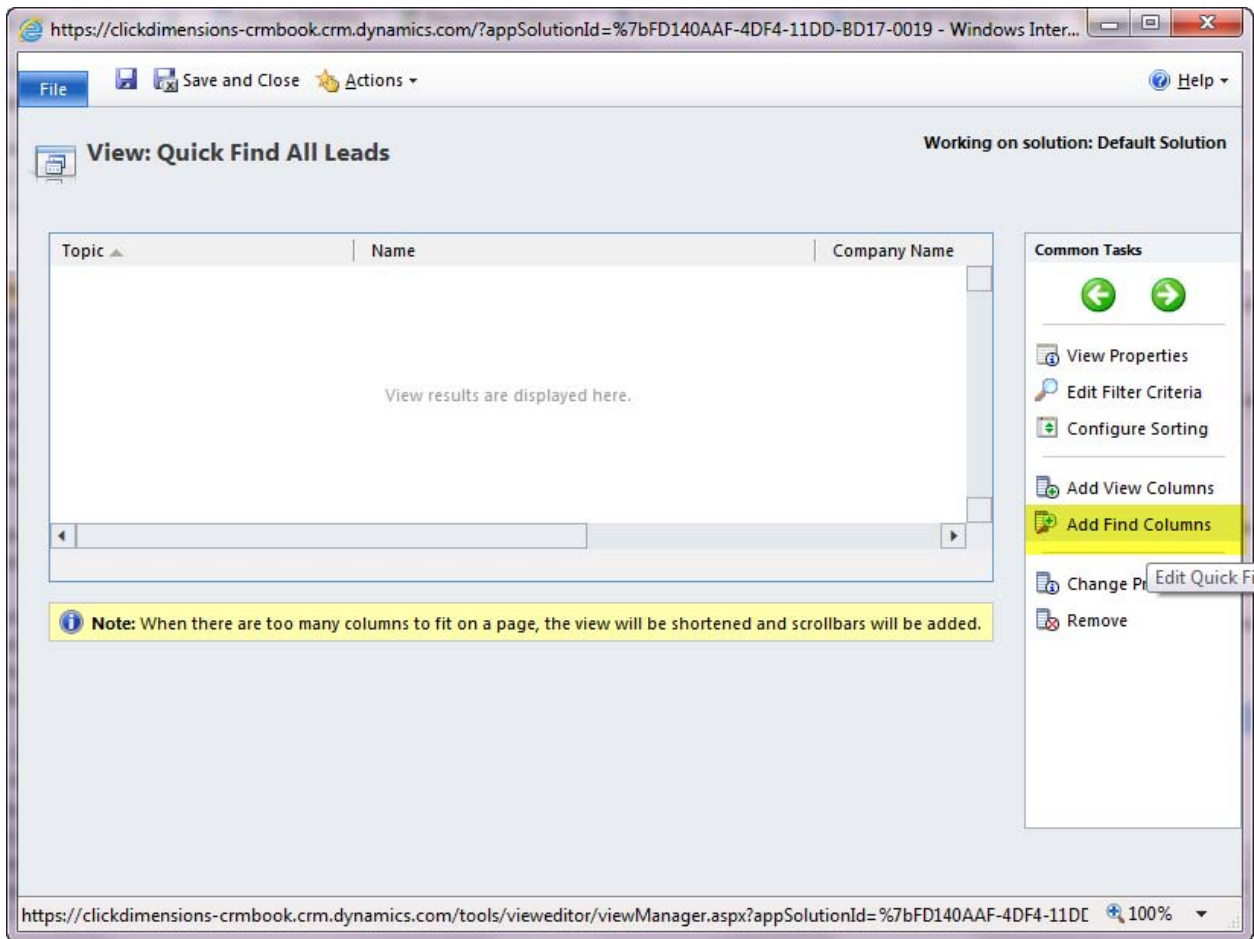
View: All Active Views

Name	Type	State	Customizable	Description
All Leads	Public View	Managed	True	Shows all leads.
All leads in current fiscal year	Public View	Managed	True	Display all the leads created in the cu
Closed Leads	Public View	Managed	True	
Lead Advanced Find View	Advanced Find View	Managed	True	
Lead Associated View	Associated View	Managed	True	Displays information about related le
Lead Lookup View	Lookup View	Managed	True	
Leads Opened Last Week	Public View	Managed	True	
Leads Opened This Week	Public View	Managed	True	
Leads: Influenced Deals That We W...	Public View	Managed	True	Key leads who influenced deals that
Leads: No campaign Activities Sent	Public View	Managed	True	
Leads: Older Than 6 Months	Public View	Managed	True	
My Connections	Public View	Managed	True	Shows all active instances of the lead
My Open Leads	Default Public View	Managed	True	
Open Leads	Public View	Managed	True	
Quick Find All Leads	Quick Find View	Managed	True	

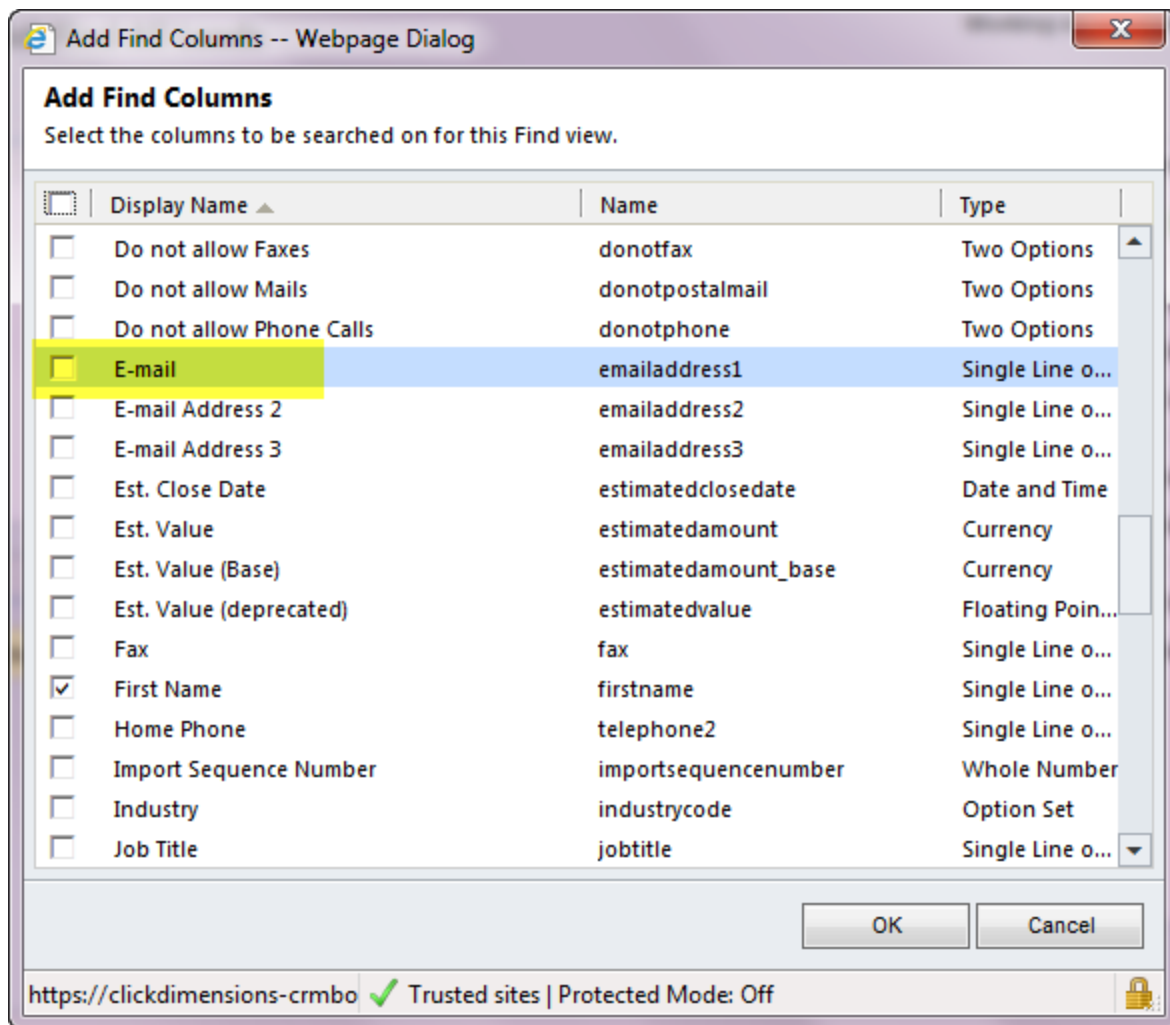
1 - 15 of 15 (1 selected)

Page 1

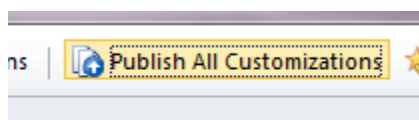
Open the view whose type is 'Quick Find View' and select the 'Add Find Columns' option



Then simply put a check mark next to the E-mail field so you can now search on it.



And you will need to publish your customization for it to take effect. Happy searching!

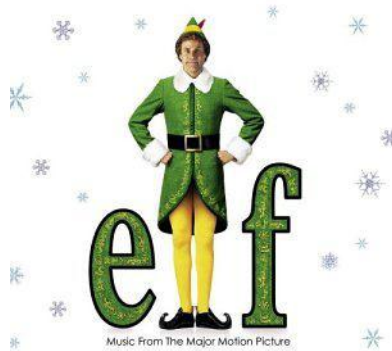


Brand Thoughts

For good measure we've included a couple articles related to branding and how to make sure you're positioning the right message in the marketplace. As digital marketers we are well aware of the ridiculous amount of shenanigans that take place. Our position is to take the high road on such topics. Let's see what you think.

Be honest! Your customers are not as naïve as elves

I recently was reading a press release from a private company that claimed to be the #1 vendor in their category. It reminded me of the movie Elf when Will Farrell rushed into a New York City coffee shop and congratulated the owner on having the 'world's best cup of coffee.' Unfortunately, what the self-purported '#1' vendor doesn't realize is that we're not all quite as naïve as a guy that's lived his entire life in the North Pole.



You see, it is beyond bold for a company operating amongst other private companies to claim to be #1; it is just plain stupid. After all, to really claim yourself #1 wouldn't you need to have audited metrics for all your competitors and outline what makes you #1? Are you #1 in

revenue, profitability, number of customers, what exactly does #1 mean?

Well, it means the company saying they are #1 is desperate and inexperienced. No respectable public relations firm would advise any private company operating in a market of private companies to claim to be generically #1. People are not stupid and we don't like being treated as if we are.

At ClickDimensions we refer to our company as the **top rated marketing solution on Microsoft's Dynamics marketplace**. Why? Because you can [verify it for yourself here](#). We have more reviews than any other solution and a 5-star rating on the Microsoft's Dynamics marketplace. It is a very specific and quantifiable claim.

Good marketing means honest marketing. If you are good you won't have to lie.

Don't risk your brand by tricking your customers and prospects with deceptive web tracking techniques

We know first-hand that it is very helpful that marketing automation solutions can give companies insight into their customers' and prospects' interactions with your emails and web sites. But when do you cross the line between gaining sales advantage and invading individuals' right to privacy? This post will tell you about how some sites may be tracking you even if you have taken the steps necessary to avoid tracking. It will also help you answer the question as to what you consider to be right and wrong when it comes to web tracking.



Transparency and Disclosure

We think it all comes down to transparency and disclosure. In other words, whatever you decide to do in terms of tracking, be clear about it so those who it makes uncomfortable can decide whether to visit your site and those who visit your site will understand how they are being tracked and what will happen to any data they provide. Your privacy policy should disclose the tracking techniques you use, how to avoid being tracked and what you will do with the data you collect. In building trust with prospects and customers there should be no deception or surprises.

If you read the ClickDimensions [privacy policy](#) you will see that we very clearly state how our web tracking works. We also educate visitors on how to avoid our web tracking as well as how we use the information we gather. Further, our privacy policy also includes a helpful [white paper we have created to inform consumers about the various ways web tracking can be done](#). When you read our privacy policy and white paper you will see that the tracking techniques used by the ClickDimensions solution employ only browser tracking techniques that many web browser users are aware of and that can be managed directly within the web browser.

Flash Tracking

In our [privacy white paper](#) we discuss how it is possible to hide tracking information about a web visitor in their computer's Adobe Flash player. The concept is simple; most computers have the Flash player installed, the Flash player has a storage area (called Local Shared Objects - meant for things like volume preferences) and most people are not aware that data can be stored there. This means that sites can hide data about you in the Flash player and you most likely will not know it is there or how to remove it. Sites sometimes do this so that they can rebuild your browser cookies when you decide to delete them to avoid tracking. The technique is called 're-spawning' and, unless it is done with explicit consent, is a gross invasion of your right to privacy.

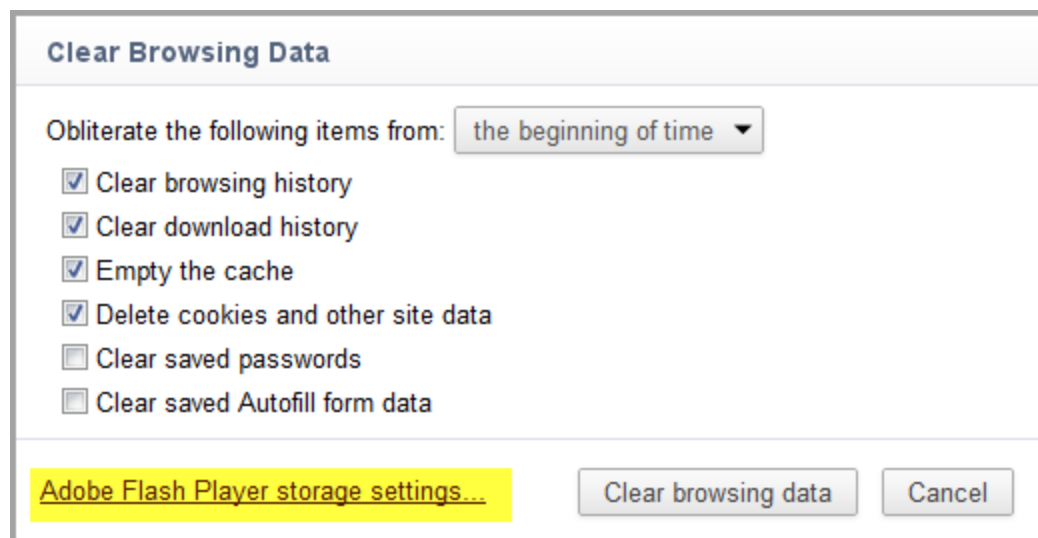
ClickDimensions and the mega vendors in the marketing automation space (Eloqua, Marketo, Pardot, etc.) do not hide tracking data about you in your Flash player. The brands we serve more often than not disclose their tracking techniques in their privacy policies and would not want to write a privacy policy that admits to this type of tracking. Further, the Adobe terms of service explicitly prohibit the use of the flash player for web tracking in this manner.

Flash tracking is sometimes used by login sites that contain a clear 'remember me' link and disclose the use of Flash tracking in their privacy policy. A site using Flash tracking in this way can make the argument that they have gained your explicit consent to remember you by asking you to click the 'remember me' link which ideally

would be near a link to their privacy policy. However, for a non-login site to store tracking information about you outside the browser and not disclose it creates a brand/perception risk that is not acceptable.

If you are curious about which sites/vendors are storing data about you in your Flash player you can access your Flash player storage area by visiting this URL

http://www.macromedia.com/support/documentation/en/flashplayer/help/settings_manager07.html. Keep in mind that some of the names you see have disclosed their user of Flash tracking, others are simply using it for its intended purpose (i.e. volume and other preferences) and still others are just using it to trick you. If you use the Google Chrome browser you may have even noticed that they include a link to the Flash player storage area on their browsing data screen. Google recognized that the Flash storage is being used for tracking and is making its users aware of this.



Conclusions

Ask yourself a few questions. Would your web site visitors expect you to hide data about them outside the browser when they visit your site? Would you feel comfortable disclosing the use of Flash tracking in your web site privacy policy? How do you think your visitors would feel if they read this post and then realized that your site has been tracking them in ways they were not aware were possible?

Organizations that care about the perception of their brand in the market will disclose everything they are doing with customer and prospect data and will not engage in techniques that could be seen as deceptive.

Organizations that actively seek to trick their visitors, or do so by not educating themselves on the technologies employed by their vendors, are at risk of losing the trust of their customers and prospects.

Want more inspiration?

Subscribe to the ClickDimensions 'Marketing with Microsoft CRM' newsletter by going to <http://www.clickdimensions.com/newsletter/> and we'll keep you up to date with fresh ideas!