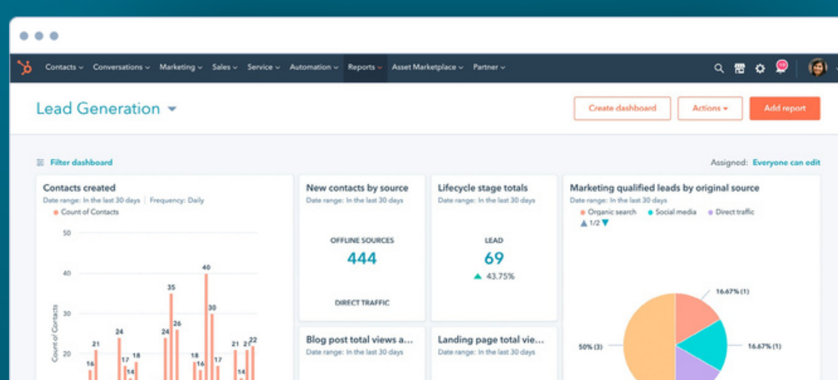
The Benefits of Using your CRM to Power your Marketing

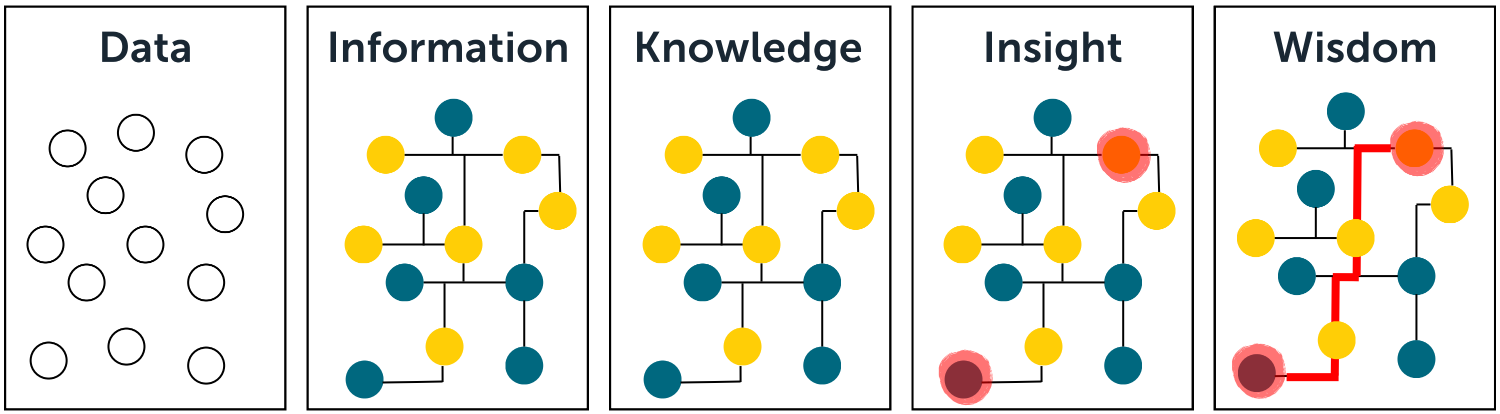
This guide explores and explains how to harness the power of your data and turn your CRM into a revenue-generating growth machine.



CRM is the cost of entry into a modern market: try running a business without one. But a CRM is more than just a digital filing cabinet. It's a way for you to access, understand and monetize a goldmine already at your fingertips: customer data.

The Data Gold Rush

Data on its own is useless. For data to be effective, it needs to be collected, stored and harnessed in such a way it becomes valuable with minimal maintenance.



For example, having all the names of anybody showing interest in your business over the last eighteen months can be helpful.

But how about knowing who was just browsing, who is ready to buy, or even who is ready to buy AND checked two or three other boxes critical for making a sale?

By better understanding your data and working smart, you can ensure the right messaging gets to the right people at the right time without labor-intensive or prospect-annoying processes. Targeting has also become more sophisticated, meaning that ads are now less interruptive and more informative.

The old ways don't work anymore

Contemporary digital marketing has changed from its first inception 20 years ago. GDPR, privacy, savvy prospects, and even huge corporations like Apple redefining data mining have all had a profound impact.

Sound familiar?

- Buying data lists
- Mass email sends with misspelt names
- Cold calls without consent
- Spam SMS messages from random numbers

You probably even still see some of them. And we're not talking about the occasional 'Hi {first name}' greeting mistake every marketer dreads sending. We're talking about the data-scraping, privacy-invading, industry-shaming practices that gave us all a bad name.

Any company relying on these practices today would seem ancient by comparison. But the uncomfortable truth is many businesses STILL market like this. We bet you've even had one this week.

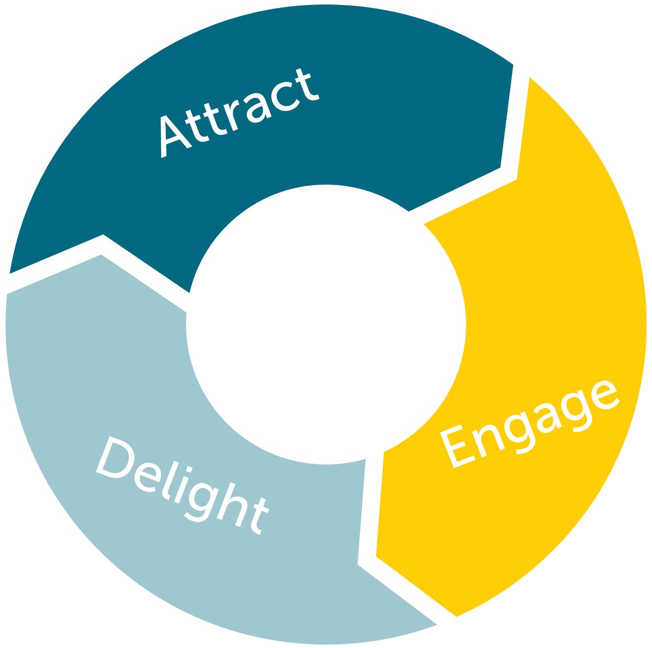
But why? Malicious intent? Avarice? Lack of caring?

In most cases, it's none of the above. It's the opposite. Many companies are so excited to get their message out there, they forget **the blend of science and craft that comes together to create great marketing**. They forget they sit on a goldmine of prospect data offering powerful insights into behavior, predilections and desire.

Why You Need to Leverage Your CRM for Experience-Driven Marketing

The marketers who get ahead today are hyper-focused on the customer experience. Experience-driven marketing puts your customers at the center of everything you do as a marketer.

When focused on the customer experience, marketing attracts and feeds into sales. Sales engages and feeds into service. Service delights and feeds back into marketing. And all of this is only possible when the customer is at the center, managed by a CRM.



Leveraging your CRM is the secret to experience-driven marketing.

Experience-driven marketing isn't just a buzzword -- it's your secret to growth. Forrester research found that companies who said they were focused on experience grew 40% faster and increased customer lifetime value by more than 60% versus those who weren't.

Very few marketers have all of their tools and tactics tightly integrated into a CRM -- which often leads to disjointed customer experiences, siloed data, and an inability to know what's working.

A CRM Helps You Personalize Your Marketing Offers

Rooting your marketing in a CRM also lets you create personalized experiences across every channel. Personalization continues to be the holy grail for delivering a great experience. In this hyper-competitive environment, it's harder than ever to win attention -- and we all know that the more you personalize, the greater your chances are of being noticed.

What does real personalization look like?

Real personalization is when the content on your site changes, recommending content that your visitor hasn't read yet. Or when that visitor has shown interest in one topic, so you show them an offer that's related. Or when you have CTAs for customers and different ones for prospects. Or when the chat bot on your site remembers not only their name, but who their sales rep is. All of this is possible through CRM-driven marketing.

The three paths to CRM success:

Segment - ensure prospects hear a message suited to their needs

Contextualize - explain in clear terms why it's useful

Personalize - make them feel valued and loved

Segment

The average consumer is bombarded by promotional messaging and sees anywhere between 5000-1000 advertisements per day.

Think about the last time you were relaxing and browsing on your phone, maybe doing a bit of online shopping, checking in on social media, reading the news. How many irrelevant ads did you see?

“Today only - 50% of all organic aloe vera & chilli peanut butter cups!”
“Door, doors, doors! Get your doors from Acme doors!! Big doors, small prices!”
“Crypto, something or other.”

We bet this week alone you’ve closed down at least one web page because the advertising ruined the online experience for you. But there’s a bigger danger for marketers lurking in the internet shadows than angry prospects. Something much scarier… Apathy!

When your consumer doesn’t feel like your messaging has direct relevance to their life at that moment, they’ll tune out. This is why a CRM is vital to modern marketing. **If you don’t understand your customer, you can’t give them the content they need when they need it in a way that works for them.**

But the good news is you already have the answer to the problem in your marketing arsenal - the data in your CRM. From that data, you can isolate specific groups of customers by wants, needs, and readiness to buy.

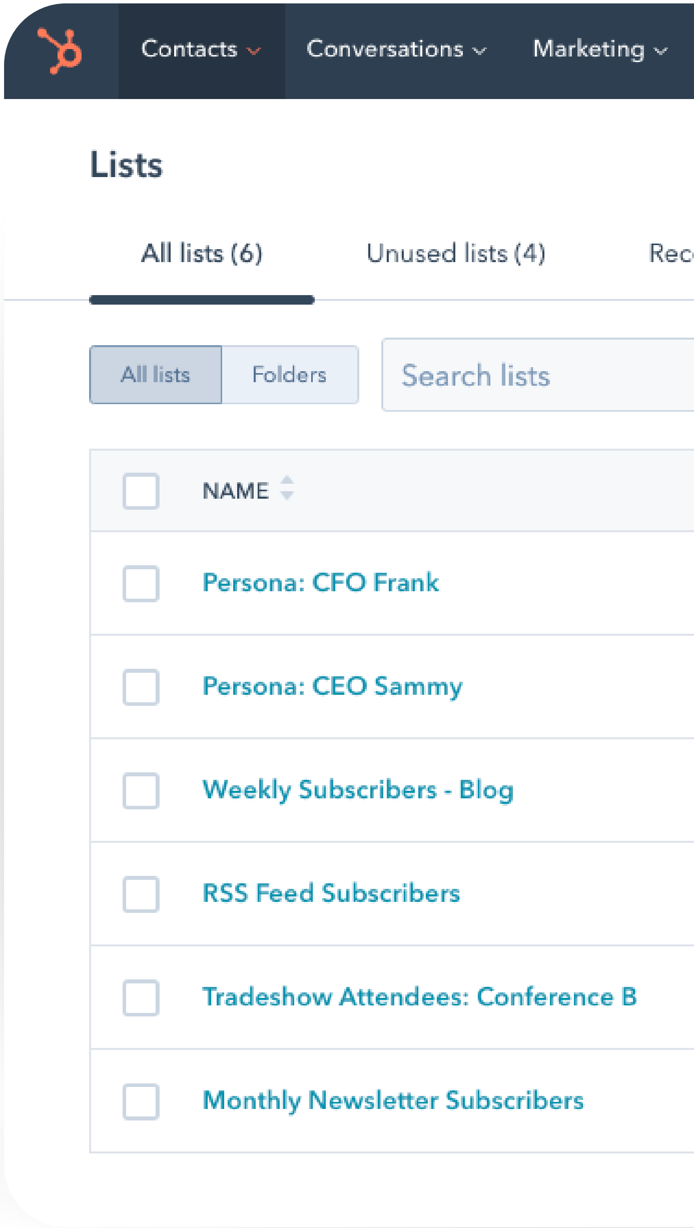
Use HubSpot lists to segment your database

Lists are a great way to isolate segments of your database by any data point you hold. It can be contacted by (who they are) company (where they work) or activity (what they're doing) focussed and they can even constantly update to suit changing data fields in real-time.

In minutes, you can build a list of all contacts in the third month of their current contract - would they benefit from a useful upsell to complement their existing package?

How about targeting every prospect that's visited your pricing web page more than once in the last 30 days by sending them a discount code?

Obviously, the same messaging isn't going to work on both of those two groups. But with a small amount of thought, each will get messaging they're likely to welcome because it solves a specific problem they have.

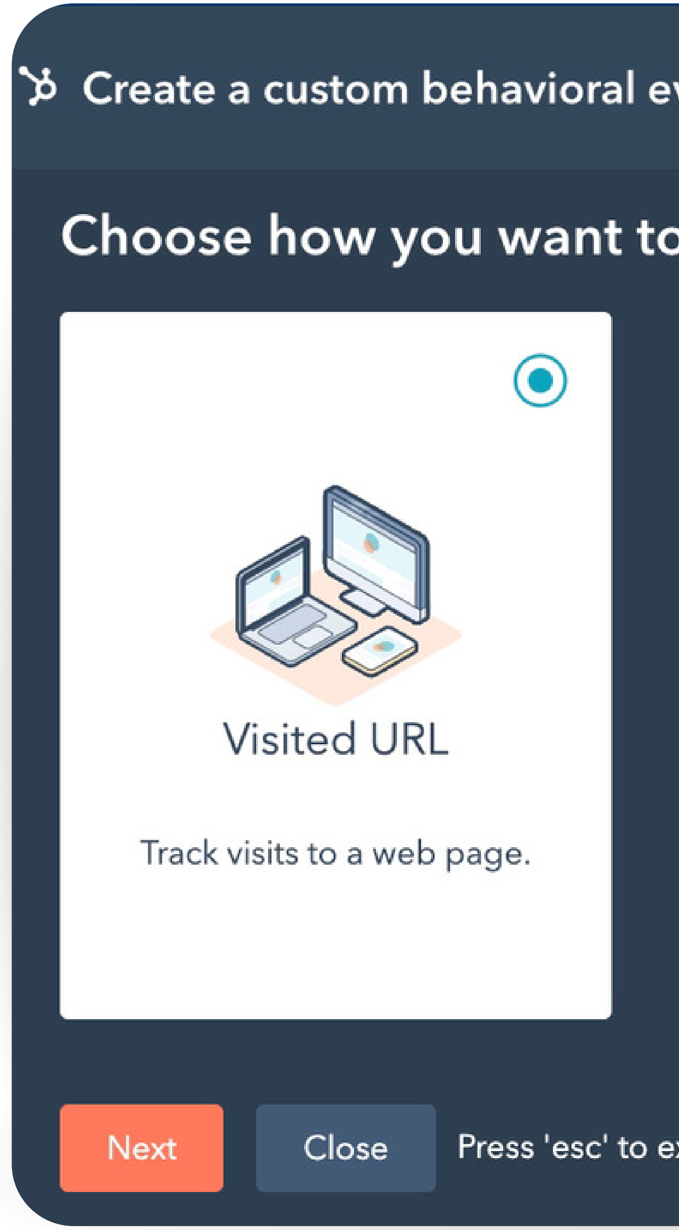


Create manually tracked custom behavioral events

Manually tracked custom behavioral events enable you to define and track events that are unique to your business. Custom behavioral events can be tied to contact properties, which you can then use across HubSpot's tools. Manually tracked events use the analytics API, and require a developer to set up.

This is a tool available in HubSpot Marketing Hub Enterprise that allows you to track more advanced analytics on your website or from external third-party apps to gain richer context about the full customer journey.

Learn how this tool works in this article>>



Contextualize

Every buyer for every product must pass through the three key buying stages of Awareness, Consideration and Decision.

But depending on your product or service, those stages often vary. A thirsty person on a hot day will travel from Awareness to Decision about buying a cold drink faster than a Project Manager looking at new forecasting software for a global SaaS business. One is made in minutes, the other could be months.

Although while the journey may change, one fundamental remains consistent throughout: **consumers need specific buying stage-specific content before they can make a decision.**

Think about it - before a Project Manager becomes aware your forecasting software even exists, they first need to either experience or recognize they have a problem: the pain caused by poor planning tools.

Then, with a problem to solve, they will look for a solution - which could be a number of options ranging from integrating a new tool right through outsourcing the entire problem.

Build Campaign triggers that are linked to the Buyer's Journey using HubSpot

Consider the below content that was created for buyers at each stage of the journey, triggering emails and messages for the prospect that are linked to where they find themselves in the buyer's journey will ensure that content is relevant to their needs. Put yourself in the buyer's shoes and ask yourself what they need at each stage of their journey to purchase.

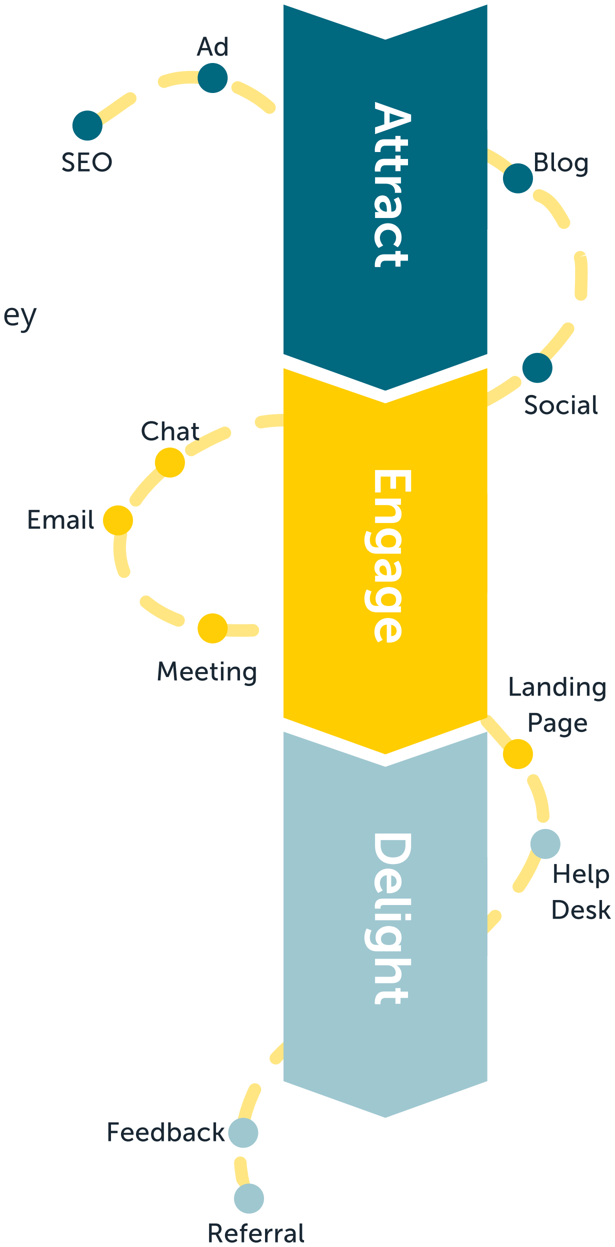
Awareness:
Blog: Why Project Managers never have enough hours in the day

Consideration:
Guide: 10 ways to become a more effective Project Manager.

Decision:
Case Study: Why company X chose our technology to solve their forecasting problem

By labelling prospects in your CRM depending on their customer journey, you can ensure they see suitable messaging for their journey. Like you're probably unlikely to propose marriage on a first date, you also don't want to bombard a prospect with technical data when they've only just discovered they have a problem. Keep sending well timed, useful pieces of information like a small trail of breadcrumbs that draw the buyer in rather than forcing your product on them too soon.

By segmenting your audience, you can ensure they receive relevant, contextually relevant sales messaging to nurture prospects and improve convention rates.



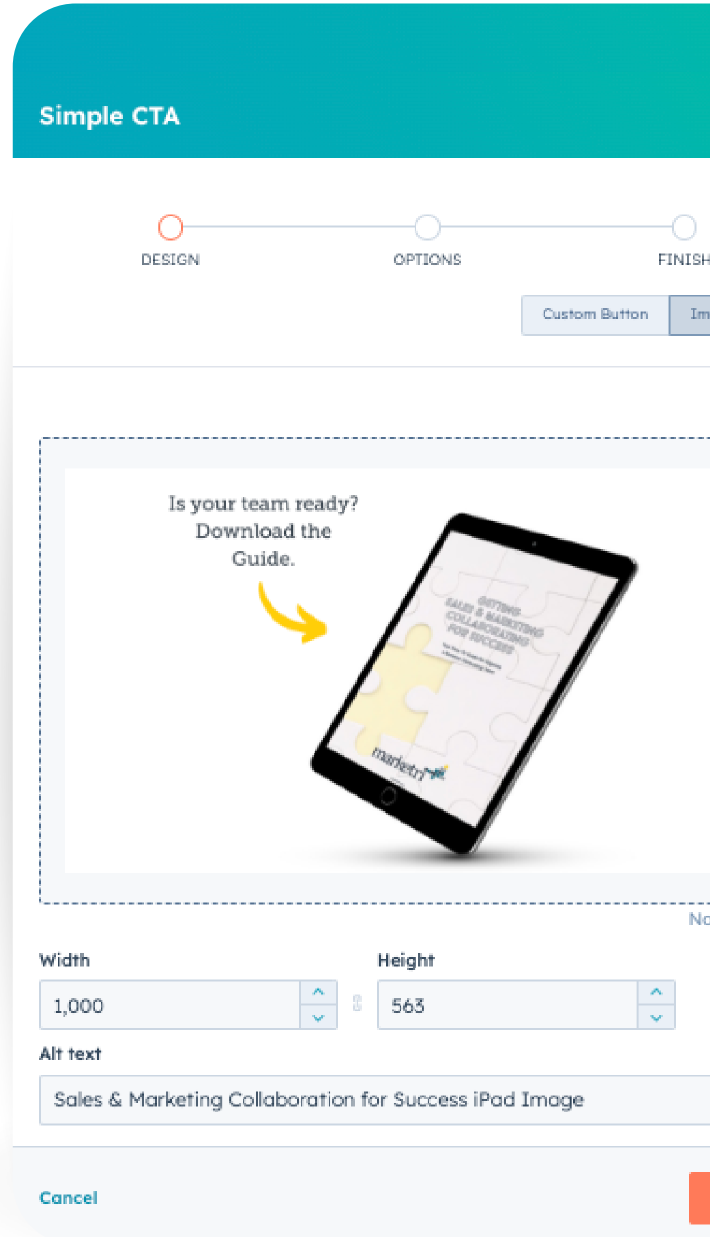
Use HubSpot Smart Content to Contextualize your messaging at scale

HubSpot Smart content allows you to create different content based on a set of rules. Your emails, landing pages and CTAs can display differently depending on what is known about a prospect or contact.

For example, rather than taking time to manually send context-specific content to prospects, you can adapt your HubSpot pages to react to their needs instead.

You can use the data in your CRM to show Awareness, Consideration or Decision-related content depending on their needs, allowing you to tailor content to the stage of the buyers' journey.

By understanding which prospects need to see your messaging, you reduce admin, boost conversion rates and drive more revenue with less effort.



Personalize

Yes, you can use HubSpot to personalize sales messaging on any standard or custom properties (the various data points you collect on contacts).

But effective personalization doesn't just mean greeting somebody through email by name. It may have been disruptive fifteen years ago, but the modern consumer is both tech and data-savvy.

Modern personalization means sending relevant messaging in a timely fashion using the right language, tone and subject matter.

Imagine this: receiving an email greeting you by name. Nice, but you've already had four others doing the same that morning alone. You can spot an automated email by now.

But what about four weeks before the renewal for your company-wide HR software is up for review, you receive a timely message specific to your HR management problem?

The power of personalization can be shown by the following example: You've started a small business in the last 6 months and you receive a persuasive message from an invoice management software vendor on the perils of not completing your tax returns in time?

You want your prospects to feel a sense of serendipity. Ultimately we know it was effective CRM management because you created a HubSpot workflow to message either HR managers one month before their next renewal date or small business owners who've set up shop in the last year. But prospects will feel a connection with your brand because the message is aimed at their needs at the right time.

Where contextualizing ends and personalization starts can be a grey area, so it's probably easier to think of it like this:

Segmentation - to whom do we want to speak?

Contextualization - what are we going to say?

Personalization - how are we going to say it?

Contextualization ensures you don't torpedo a conversion by going too hard too soon, but personalization ensures the prospect feels you're speaking directly to them at the time they're most likely to want to hear your message.

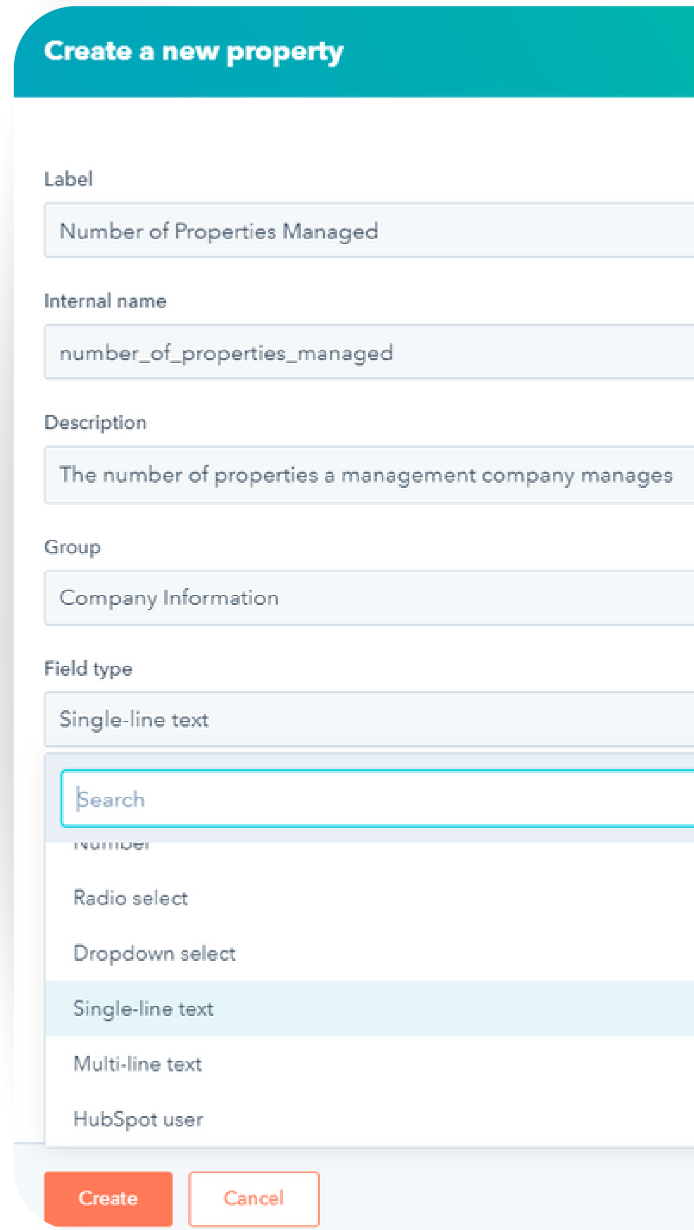
Contextual communications should be personal without being too intensely personal that it comes across as overbearing. Clients want personalized information that feels helpful and offers value when they need it.

Use custom properties to gather company-specific information on your leads

HubSpot comes ready-packed with a host of data points you can collect on each prospect. Ranging from name and address right through to how many emails they've opened, HubSpot can help you build a better understanding of both groups and individuals.

But because HubSpot has to cater for everything from SaaS consultancies to animal feed suppliers, we're limited in the universal properties we build. Not every customer is going to need the average weight of a Nebraskan dairy herd, right?

But with custom properties, you can build bespoke data points specific to your needs.



Your CRM is your Growth Engine

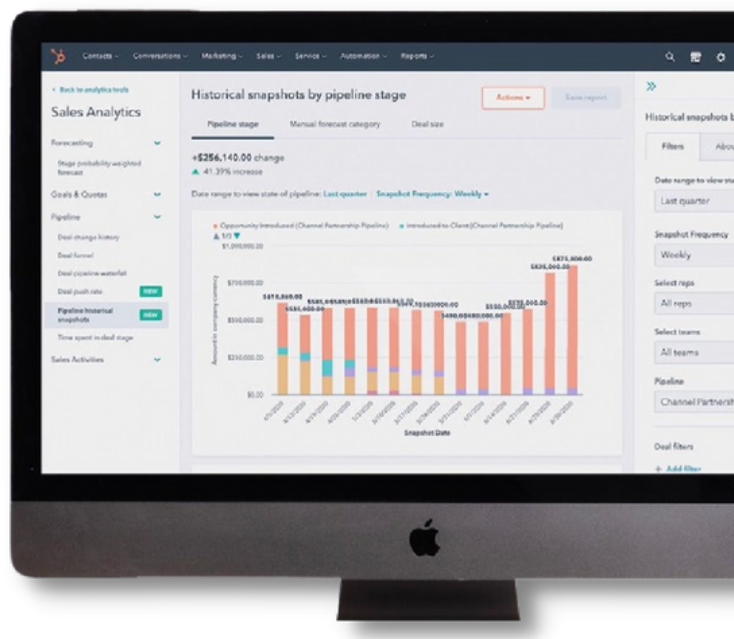
As long as you keep your CRM data clean and easy to access, you'll be able to drive more sales and delight more customers.

Segmenting your audience means you can narrow down exactly which groups of prospects you want to target to ensure you get the right message.

Contextualizing your messaging by matching it to a specific point in your prospect's journey allows you to boost funnel conversions at every stage.

Personalizing your messaging means treating your prospects as real people so they trust and respect your brand.

So **show your prospects that they matter by understanding their pain points and providing helpful information and solutions** to their problems when they need it.



The CRM triggers that can power hyper-personalized communications

Your CRM is packed with useful demographic data that you can use to personalize your communications but using activity and engagement data to send out timely messaging could be the difference between a personal email and hyper-personalized messaging.

Triggers for timely communication

- **Use page tracking to provide individual recommendations**
  - By knowing which pages a contact has visited you will be able to offer specific recommendations to contacts that are tailored to their needs. Think of this like re-marketing for emails.
- **Use deal stages to trigger customized bots on pages to help drive sales**
  - Use deal stages to trigger a bot to appear to prospects who are in a specific deal stage. Having a bot that is tailored to the stages of the buyer's journey you can answer questions that buyers need at the right time.
- **Use known dates to trigger personal messaging**
  - Send out a birthday email, anniversary mail or even a mail about a customers renewal date. These timely messages will help you engage with prospects and customers using the information you have gathered.
- **Use workflows to delay actions until a contact responds/performs an action**
  - In workflows you can delay actions until a contact has completed an action, like visiting a web page or completing a form. The advantage of this is that you can wait till a buyer is engaged with you before you send them an email. This will allow you to align with buyers in real time.

Transform Your CRM into a Revenue-Generating Machine with Targeted, Personalized Marketing Campaigns

Elevate your marketing efforts by utilizing your CRM to send personalized messages to the right audience, at the perfect time.

Applying any or all of these ideas will undoubtedly drive more revenue through your business in a sustainable, cost-effective way. By using the simple but powerful and effective toolset from HubSpot you can build deeply personal and contextual campaigns at scale.

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Elevate your brand & reach your revenue goals.

Marketri's profit-center approach to marketing accelerates growth for middle-market B2B businesses. We combine strategy, execution, and analytics for a full-service outsourced marketing solution.

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