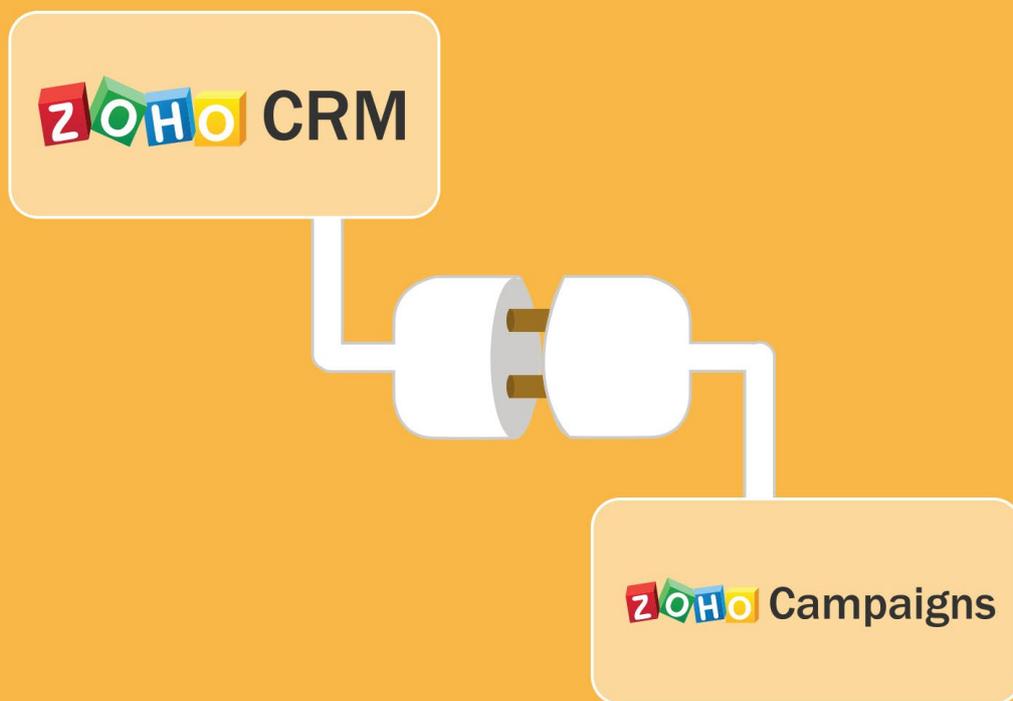


# INTEGRATING EMAIL MARKETING WITH CRM



# Integrating Email marketing with CRM

Sales teams depend on CRM (Customer Relationship Management) software to manage their company's interaction with leads, prospects, and potential customers. Sales teams often struggle to organize, maintain, and share data with marketing departments so that both groups can update their records simultaneously. On the other hand, a marketer may come across the following situations when they are clueless and have no idea on how to proceed:

- 1) Trouble syncing marketing data with the CRM system.
- 2) A poor flow of information between the sales and marketing departments.
- 3) Trouble maintaining two sets of data.

Difficulty identifying which prospects have been reached by email campaigns.

Most marketers have faced some of these problems. In such scenarios, it's time to look for a strategy to integrate your CRM software with your email marketing software. Zoho CRM users can easily integrate their data with Zoho Campaigns to foster collaboration across their organization and engage customers at every stage, from marketing to sales. By integrating with Zoho Campaigns, CRM users receive insights on marketing related statuses and are able to create more targeted automated email marketing campaigns.

*Let's take a detailed look at why marketers should integrate their Zoho CRM account with Zoho Campaigns.*

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## Sync contacts from Zoho CRM to Zoho Campaigns

By integrating Zoho CRM and Zoho Campaigns, sales teams don't have to wait for reports from marketing teams. This frees up time for sales teams to focus on bringing in more revenue. Syncing contacts between sales and marketing allows for:



*Sync contacts from Zoho CRM to Zoho Campaigns*

- 1) A single, efficient database free of duplicate data and other manually introduced entry errors.
- 2) Better visibility on marketing data for the sales people. Tracking how campaigns performed.

# Personalizing Campaigns using CRM Data

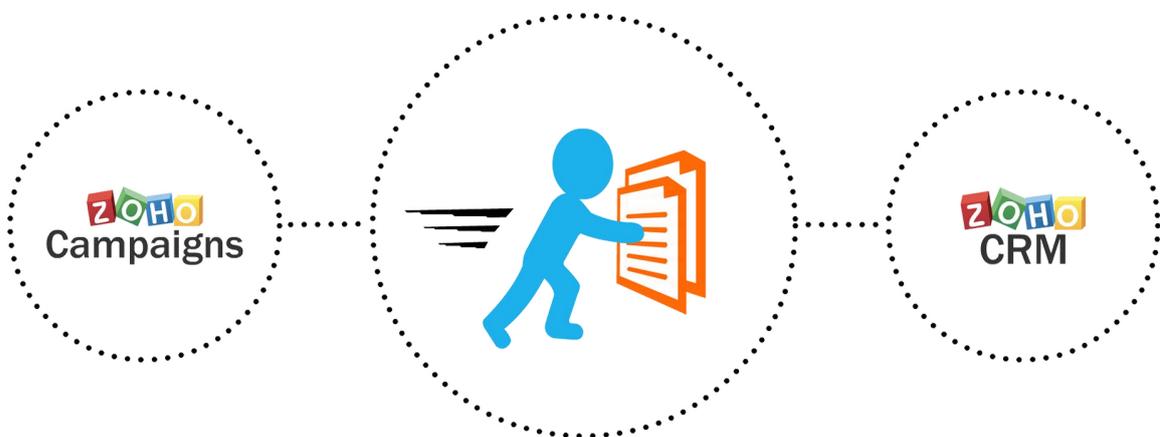
## Personalize Campaign Content using CRM Data

You can send an email campaign with a personalized sender name and email address of a Contact/Lead owner who is associated with that record in CRM.

## Personalize Sender Details using CRM Data

You can also use CRM based merge tags, which automatically pull information from your CRM account. All you need to do is add relevant merge tags in your campaign content. The merge tags pull specific data from CRM based on how the information is requested within the email contents.

# Push marketing campaign data to Zoho CRM



*Push marketing campaign data to Zoho CRM*

### Track Email Contacts Activity from CRM

Push information from Zoho Campaigns such as email openings, clicks, and bounce data to every record in your contacts or leads module in CRM. Later, you can create a view in your CRM account and filter your leads and contacts on the basis of your campaigns' status.

### View Campaign Reports from CRM

View detailed stats and real-time reports from the Campaigns module of your CRM account.

### View Email Content from CRM

Review your email campaigns from the Campaigns module of your CRM account.

## Align sales and marketing activities



*Align sales and marketing activities*

## Automatic Updates with Opt-in/Opt-out Preferences

Zoho Campaigns helps you with the information in your CRM like which leads converted, who opted out of emails (unsubscribes), and which contacts were deleted. Fine tune your email campaign to your target audience's preferences.

## Move contacts to CRM

If you create new contacts in Zoho Campaigns, you can move them to CRM either as leads or contacts. This capability ensures collaboration between sales and marketing teams, and maintains data coherence.

## Up-to-date Customer Information

This gives you the flexibility to create customized emails for various sets of contacts and maximizes the impact of your email campaigns across the board. contacts and maximizes the impact of your email campaigns across the board.

# A User Scenario

Tim runs a coffee bean distribution company. Recently, he attended a trade show where he noted down the contact details of people who expressed interest in his products. These people are restaurant or cafe owners. He submits all of these contacts into Zoho CRM as leads. Now Tim integrates his CRM account with Zoho Campaigns. He syncs all of his leads to his Zoho Campaigns account and starts sending email campaigns to these leads.

Using the Push Member Status, an automated function in Campaigns, these leads' activities, such as opens and clicks, are pushed to a text area field in CRM. Based on recipient (lead) activities, leads are converted into individual sets of accounts (e.g. Barnabo Beans Cafe), contacts (e.g. Jane Doe), and potentials (e.g. 50 x 1kg Bags Jamaican Coffee beans). At this stage, Tim focuses on the potential customer that is at the centre of his sales process.

Tim needs to baseline his activities/tasks/quotes etc. around this potential. While Tim does this, he also creates an autoresponder message in Zoho Campaigns and imports his potentials from CRM into a new mailing list. Once the autoresponder is activated, Tim's potentials will start getting a series of emails.

Now Tim can watch his potentials based on email campaign's status, such as open, click, subscribe and other related statuses from the Campaigns tab of his Zoho CRM accounts and find ways to close the deal based on the potential's behavior. Using the Push Member Status, an automated function in Campaigns, these leads' activities, such as opens and clicks, are pushed to a text area field in CRM.

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