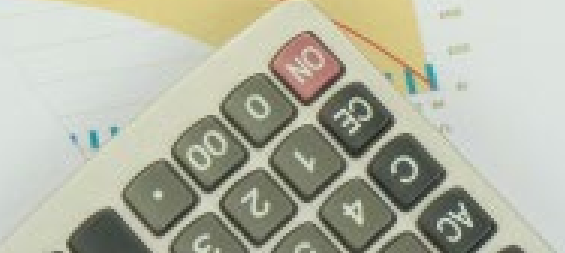


AUTOMATION AT WORK: REDUCE ADMIN AND IMPROVE LEAD GENERATION AND CUSTOMER SERVICE

JOSELA RENARDSON



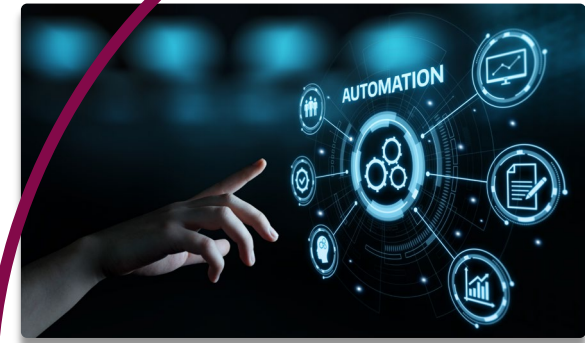
Barriers to success



Lack of understanding of marketing function



Sales follow-up process was not robust



No investment in marketing systems

Benefits of good administration

Accurate records of communication

Not over-contacting

Compliant data handling

Minimise errors in data set

Web leads

Efficient delivery of content

CRM Integration

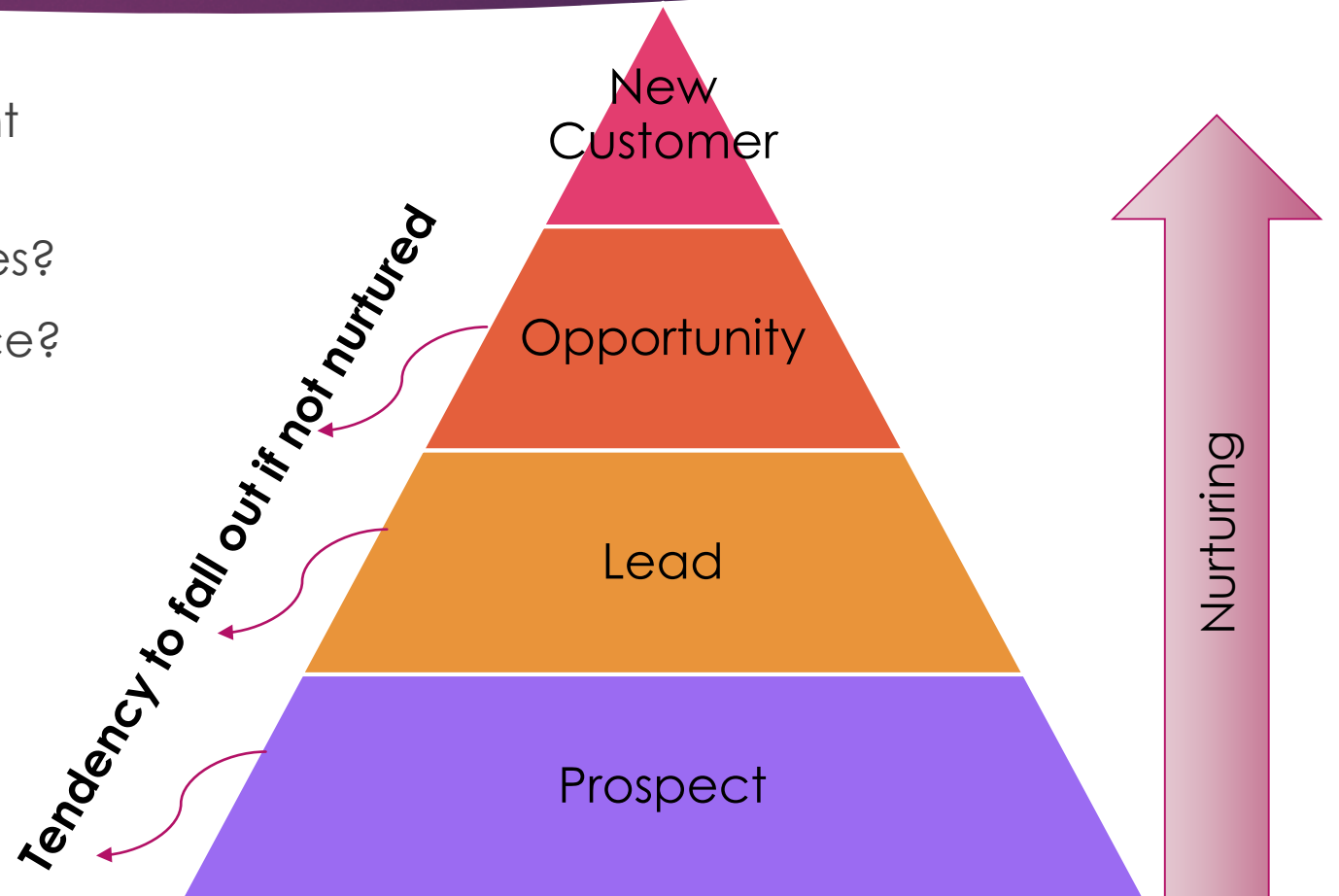
- ▶ No more manual data handling
- ▶ Clear audit trail
- ▶ Visibility for the rest of the business
- ▶ Preferences recorded
- ▶ Aids decision making on who should be included in campaigns
- ▶ Auto sending of campaigns based on changes (refreshing lists)
- ▶ Analysis of source campaigns

Web Captures and Gated Forms

- ▶ Leads generated
- ▶ People received content in real time
- ▶ No internal admin
- ▶ Clear audit trail of data source

Sales Process - Workflows

- ▶ How are we managing our current leads and opportunities?
- ▶ Do we immediately answer queries?
- ▶ Do we have enough sales resource?
- ▶ What is our nurturing process?



Document and Image Manager

- ▶ One storage system for document and images
- ▶ No more broken links
- ▶ Enables teams to follow through a process independently

WHAT'S NEXT?

Workflows

Popups

Surveys

Social

Top tips

- ▶ Do it for the customer
- ▶ Reduce manual data handling
- ▶ Be critical of your processes





Don't do it
alone!