Scenarios

Your Customer Lifecycle

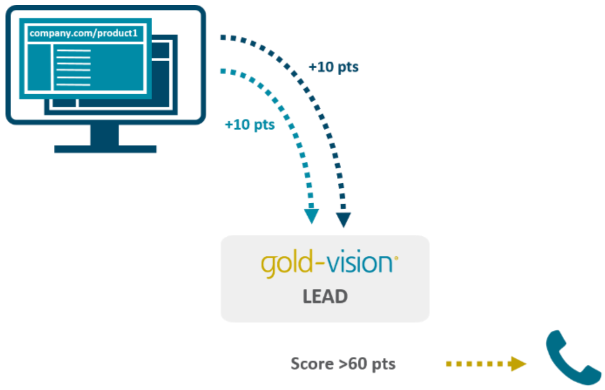
Marketing Automation can be applied to the entire customer lifecycle. Applying automation should free up time for your sales and marketing teams, allowing them to generate more Leads and produce more sales!

Gold-Vision's Marketing Automation module consists of two key concepts: automating Gold-Vision Campaigns and Touch Point alerting.

We've set up this example series to show how you can use Campaign automation and Touch Point alerting to improve your process from first identifying a Lead, right through to ongoing sales with existing customers.

There is a good mix of Campaign types below, so you should find something which is applicable to your business.

Lead Capture



Using web tracking Touch Points in Gold-Vision allows you to identify when a Lead visits an important page on your website. This may be a specific product page, your pricing page, or a set of pages that you've identified as key.

The best time to contact a Lead is when they have already decided to spend time looking at your company. Imagine if your team could call and qualify new website visitors that visited your pricing page, just after they visited? It's easy with Gold-Vision Touch Point alerting.

How to set up Lead Capture:

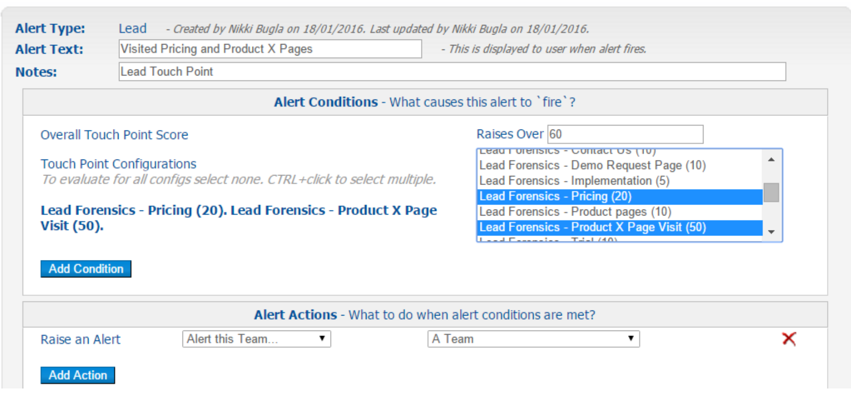
Requirements: Marketing Automation, Lead Management, Touch Points, Web Tracking, Alerting

Step 1

Set up your web tracking Touch Points in the administration console and choose one or more specific pages that are of interest. Don't forget to tick the box to create new Leads if they don't already exist.

Step 2

Set up a **new Lead Touch Point alert** in the administration console. Set your specific page(s) using the Touch Point Configurations options, and set the 'Raises Over' Touch Point score.
Next, add an action. We've chosen to **Raise an Alert** in Gold-Vision for Team A, although you could do this by email if you prefer. Team A could be your marketing team or whoever you assign the initial follow up to in your business.



What happens next?

When a Lead visits the selected pages on your website and reaches a score of 60, all Team A members will get a Gold-Vision alert, prompting them to follow-up / qualify the Lead.

Lead Nurture

What do you do with a Lead that is relevant to your business, but not ready to buy? Pop it into a Lead Nurture cycle of course! You want to ensure that your product/service stays top of mind, and you can pick up on their buying signals to contact them at the right time.

This series sends an email every 10 days to all Leads with a Lead status of 'Keep Warm'. Whenever a Lead clicks on the link in the email, they receive a score of 10 Connect Touch Points. When a Lead reaches a high enough score, the Lead owner receives an alert. This is a prompt to see if the Lead is ready to buy!
If they are, the Lead owner will change the Lead status – which will automatically remove the Lead from the nurture cycle.
If they aren't ready to buy, they stay in the cycle. The Lead owner will get another alert at 80 points i.e. after even more email interaction.

How to set up Lead Nurture:

Requirements: Marketing Automation, Lead Management, Campaigns, Gold-Vision Connect, Touch Points, Alerting

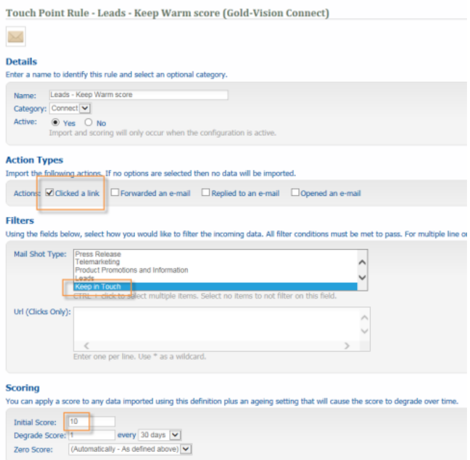
Step 1

Design your Automated Email Templates. You'll need to design an **automated email template** in Gold-Vision Connect for each Campaign Stage, with a link that leads to something useful. This could be a link to a blog, case study, whitepaper, ebook, testimonial, video, offer, etc. As soon as you **start** the automated email template in Connect, it is ready to send.

Step 2

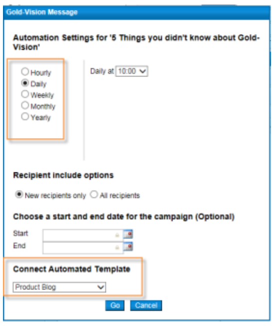
Set up your Connect Touch Points. In the administration console navigate to Data > Touch Points > Configure Touch Point Rules.
Add a **new Gold-Vision Connect Rule**, ticking 'clicked a link' and choose the **Mail Shot Type** you will use in your Campaign Stages. Set the score to 10. Simple!

If you'd like to be more specific, you can type the specific URL of each link into the URL box – meaning only this link will receive scores (as you may have other links in your emails that you don't want to score).

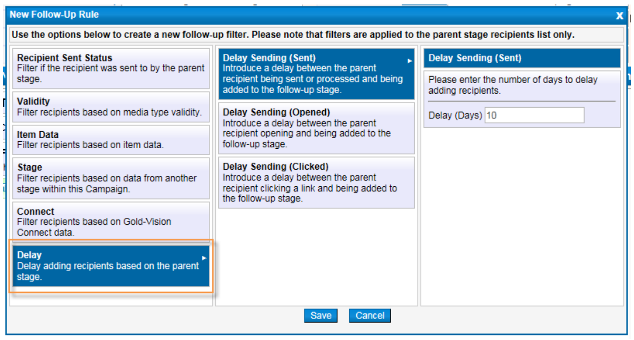


Step 3

Set up your Automated Campaign. In Lead Management, create your Campaign Source by filtering to Leads with a **Lead status** of **Keep Warm**, which are **not promoted or discarded**. Once set up, your sales team can set their Leads to 'Keep Warm' and they will automatically be added to the Source, and therefore the nurture cycle.
Create a new Campaign and add your first Stage. Choose Email - Connect as your media, and choose the same Type as you selected when setting up the Connect Touch Point Rule, then drag your Keep Warm Campaign Source into the included column.
Run the Stage '**Repeatedly or On A Schedule**'. Set up how regularly you would like your first Stage to run, ensure you've selected '**New Recipients Only**' (or you will repeatedly send the same email to your Leads!) and choose the Automated Template for your first nurture email.



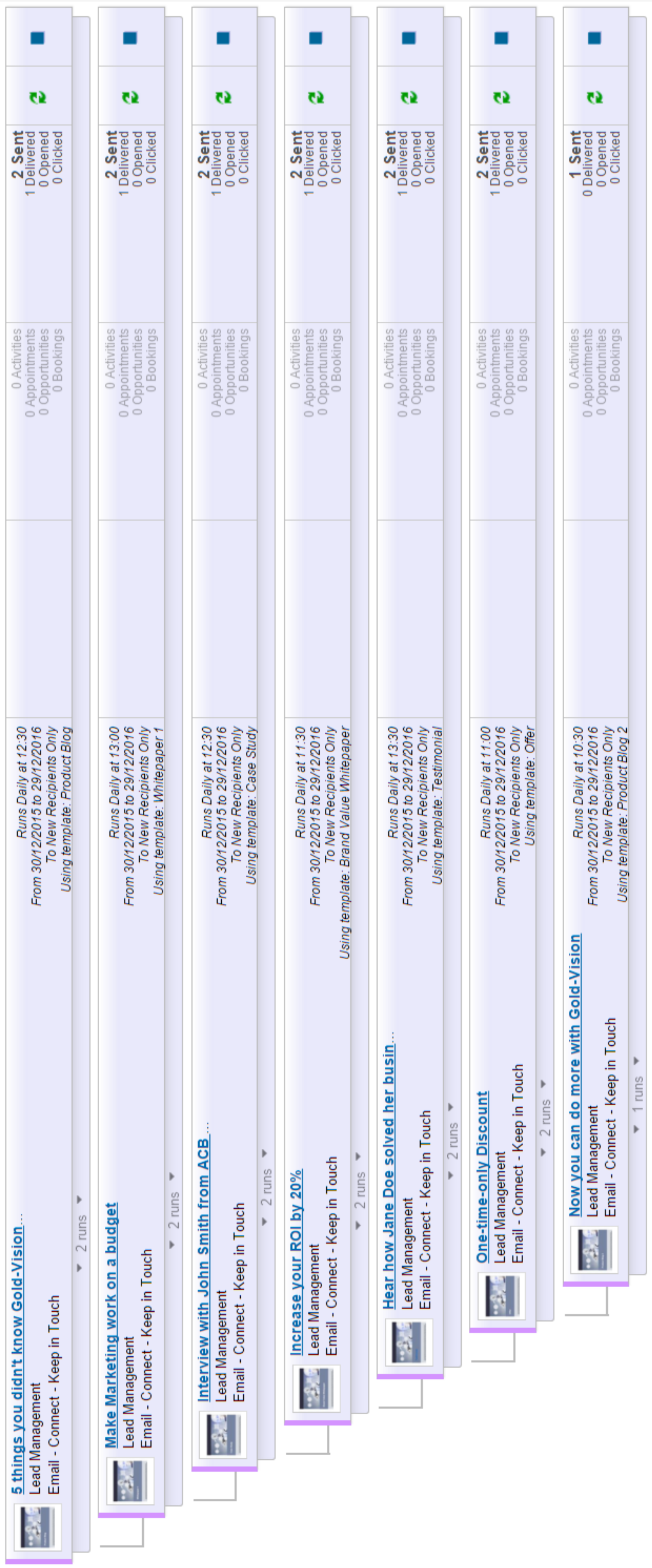
It's really easy to set up the rest of the Stages, and there can be as many as you like!
Create a Follow Up Stage, choosing Email - Connect as your media and setting the same Type as the previous Stage then **add a rule**. Set a **Delay**, we've chosen 10 days. This means that every Lead who has received email 1 of your nurture series, will receive email 2 ten days later. Run the Stage '**Repeatedly or On A Schedule**' and set this one **Daily** – so it can run as soon as the delay has finished. Repeat the above for as many Stages as you would like.



Step 4

Set up your Touch Point Alert:
In the administration console navigate to Alerting > Configure Alerting.
Set the score to **Raise Over 39**, and select the **Connect Touch Point** you created earlier. Add the action: **Alert Object (Lead) Owner**. Save your alert and press the **Activate** button.
Set up another alert, this time for a score of over 79. If need be, you can keep adding alerts for higher scores.

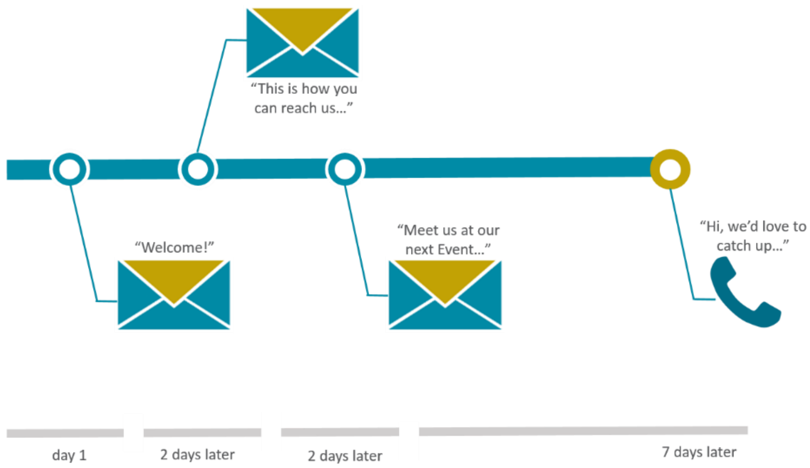
Now you can leave your nurture series alone, knowing your sales team can place Leads into them, and then draw them out when they are ready to buy. If the Lead is promoted or discarded it will be removed from the Campaign Source and therefore will no longer receive any more emails in this Lead Nurture series.
If the Lead is not promoted, it will stay in the Campaign and if further interest is shown and the Touch Point score reaches 80, the next alert will fire, prompting the Lead owner to call and follow up again.


5 things you didn't know Gold-Vision...
Lead Management
Email - Connect - Keep in Touch
Runs Daily at 12:30
From 30/12/2015 to 29/12/2016
To New Recipients Only
Using template: Product Blog
0 Activities
0 Appointments
0 Opportunities
0 Bookings
2 Sent
1 Delivered
0 Opened
0 Clicked
2 runs
Make Marketing work on a budget
Lead Management
Email - Connect - Keep in Touch
Runs Daily at 13:00
From 30/12/2015 to 29/12/2016
To New Recipients Only
Using template: Whitepaper 1
0 Activities
0 Appointments
0 Opportunities
0 Bookings
2 Sent
1 Delivered
0 Opened
0 Clicked
2 runs
Interview with John Smith from ACB ...
Lead Management
Email - Connect - Keep in Touch
Runs Daily at 12:30
From 30/12/2015 to 29/12/2016
To New Recipients Only
Using template: Case Study
0 Activities
0 Appointments
0 Opportunities
0 Bookings
2 Sent
1 Delivered
0 Opened
0 Clicked
2 runs
Increase your ROI by 20%
Lead Management
Email - Connect - Keep in Touch
Runs Daily at 11:30
From 30/12/2015 to 29/12/2016
To New Recipients Only
Using template: Brand Value Whitepaper
0 Activities
0 Appointments
0 Opportunities
0 Bookings
2 Sent
1 Delivered
0 Opened
0 Clicked
2 runs
Hear how Jane Doe solved her busin...
Lead Management
Email - Connect - Keep in Touch
Runs Daily at 13:30
From 30/12/2015 to 29/12/2016
To New Recipients Only
Using template: Testimonial
0 Activities
0 Appointments
0 Opportunities
0 Bookings
2 Sent
1 Delivered
0 Opened
0 Clicked
2 runs
One-time-only Discount
Lead Management
Email - Connect - Keep in Touch
Runs Daily at 11:00
From 30/12/2015 to 29/12/2016
To New Recipients Only
Using template: Offer
0 Activities
0 Appointments
0 Opportunities
0 Bookings
2 Sent
1 Delivered
0 Opened
0 Clicked
2 runs
Now you can do more with Gold-Vision
Lead Management
Email - Connect - Keep in Touch
Runs Daily at 10:30
From 30/12/2015 to 29/12/2016
To New Recipients Only
Using template: Product Blog 2
0 Activities
0 Appointments
0 Opportunities
0 Bookings
1 Sent
0 Delivered
0 Opened
0 Clicked
1 runs

Welcome New Customers

Hurrah! After capturing a Lead and nurturing it up to the crucial purchase decision, you've won a new customer! Great news! So, that's that for marketing automation, right?
Wrong! Many Marketing Automation solutions position themselves as a 'Lead only' tool. The main reason for this is they run inside their own product database, separate to CRM. Once a Lead has become a customer, typically it would move out of the Marketing Automation solution and into CRM. But Gold-Vision is a truly integrated solution, and once your Lead has converted into a customer you can still use automation!

One common requirement is a welcome series to onboard new customers, such as the example below:



The series includes a welcome email, an introduction to help and support contact details, an event calendar and finally a follow up call from their Account Manager. Ensure you have set up and started your automated email templates in Gold-Vision Connect, and then it takes minutes to set up the Campaign.

How to set up the Welcome Series:

Requirements: Marketing Automation, Campaigns, Gold-Vision Connect

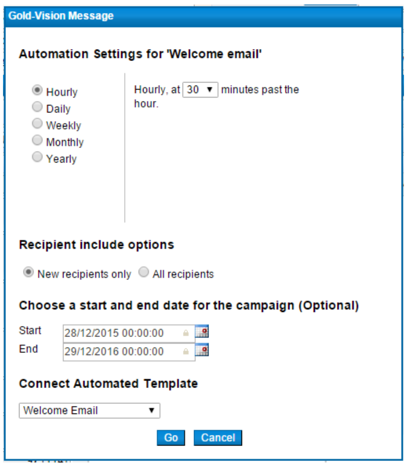
Step 1

Create and **start** your automated email templates for the welcome email, contact details and event calendar in Connect.

Step 2

Set up your automated Campaign. Create a **Campaign Source** of your customers by filtering a list in Gold-Vision. Be conscious to create a Source that will only include customers from the date you would like your Campaign to start on, to avoid sending all of your existing customers the welcome series when you turn it on!

Create a new Campaign, add your first Connect Campaign Stage 'Welcome Email' and include the 'Customers' Source.
Run your Stage '**Repeatedly or On a Schedule**', choose your automated template from the drop down options, and set a start and end date. This Campaign Stage only runs to **New Recipients**, every hour at 30 minutes past. This means that any new customer will automatically be added to this Campaign Stage, and sent a Welcome Email within an hour of becoming a new customer in Gold-Vision.

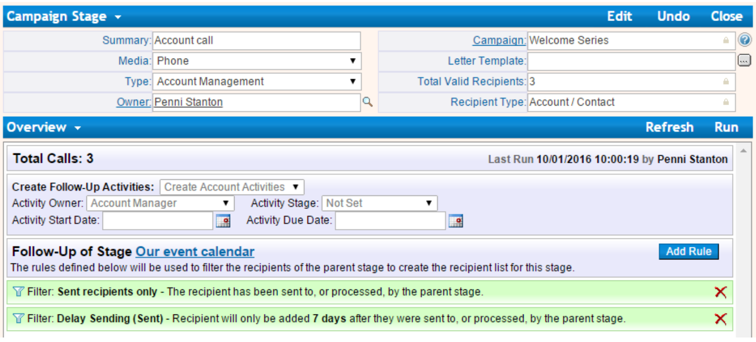


Add in 2 more Connect **Follow Up Stages** for the contact details and event calendar, and make sure to involve these 2 rules:
1) Send to **Sent Recipients only** (will set automatically as default)
2) **Delay Sending** by 2 days.

This will ensure that your new customers will receive each Follow Up Stagetwo days after the previous email. Set up the automation by running your Stages '**Repeatedly or On a Schedule**' and choose your time of day to send, when to start and end the Campaign, and select your automated email template from the drop down list.

Step 3

Finally, add in your **final Follow Up Stage**. This time select **Phone** as your media type, add your rules (this time we **delay** the final Stage by 7 days) then set up the kind of activity you would like. We've set the Stage to '**Create Account Activities**' for the Account Manager, meaning your new customer's Account Manager will receive an Account Activity to call their customer 7 days after they receive the event calendar email.

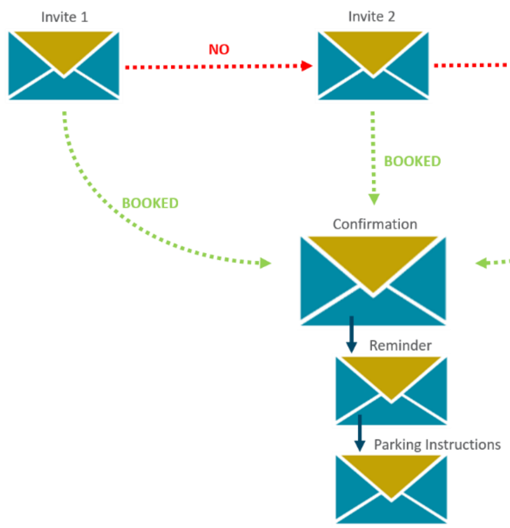


Run your Phone Stage '**Repeatedly or On a Schedule**' to set up the automation, we've set ours to run **Daily** at 10am.

Event Invitation

Manually sending event invitations, confirmations and instructions at the optimum moment can be a real time sink for your team. This automated email series will sell the maximum number of tickets whilst providing fast confirmation emails, and on-time event instructions. Set it up on day one, and then sit back and leave Marketing Automation to do the work!

This series includes three invitation emails, to ensure maximum bookings. At the same time, following every booking your attendee will automatically receive an email confirmation and event instructions closer to the event date.



How to set up the Event Invitation Campaign:

Requirements: Marketing Automation, Campaigns, Gold-Vision Connect

Step 1

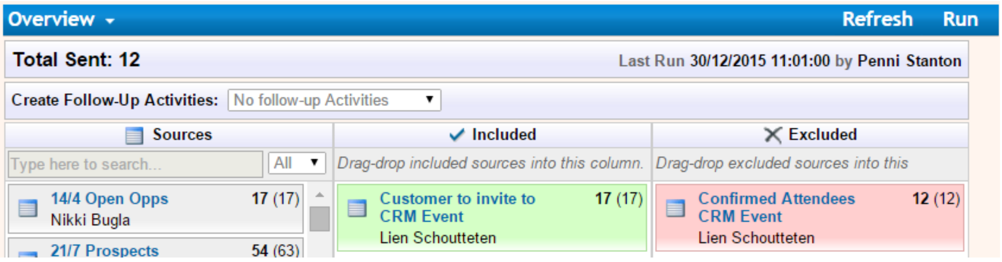
Create and **start** your automated email templates for the invitation emails, the confirmation and further instructions in Connect.

Step 2

Set up your automated Campaign. Create a Campaign Source, which should be a list in Gold-Vision of all the contacts you would like to invite to your event.
Create a new Campaign, add the first Email - Connect Stage ‘Event Invitation’ and drag your Campaign Source into the included list. **Run** your Stage ‘**Repeatedly or On a Schedule**’ to access Marketing Automation.
Choose your Automated Email Template from the drop down options, and set a start and end date for your Stage. This Campaign Stage will run **Once** to **All Recipients**, on a Thursday at 10am, so your selected start and end dates should only include one Thursday, otherwise your invite will be sent more than once.

Step 3

Create another Campaign Source of all confirmed bookings for your event, we’ve named ours ‘Confirmed Attendees CRM Event’. Then create a **second Campaign Stage** to send out your second invite. Again, this should be using Connect as the media type. Drag your invitation Campaign Source into the included box, and then drag your confirmed booking Campaign Source to the excluded box, as shown below. This second Stage is now set up to send to all of your chosen contacts to invite, minus those who have already booked.



Run the Stage, selecting '**Repeatedly or On a Schedule**' and set it up just as the previous Stage but at a later date.

Repeat Step 3 once more to set up your 'Last Minute Tickets' email, to send a week or two before your event. You now have a fail-safe invitation system, with three emails ensuring you receive maximum bookings without annoying those who have already booked!

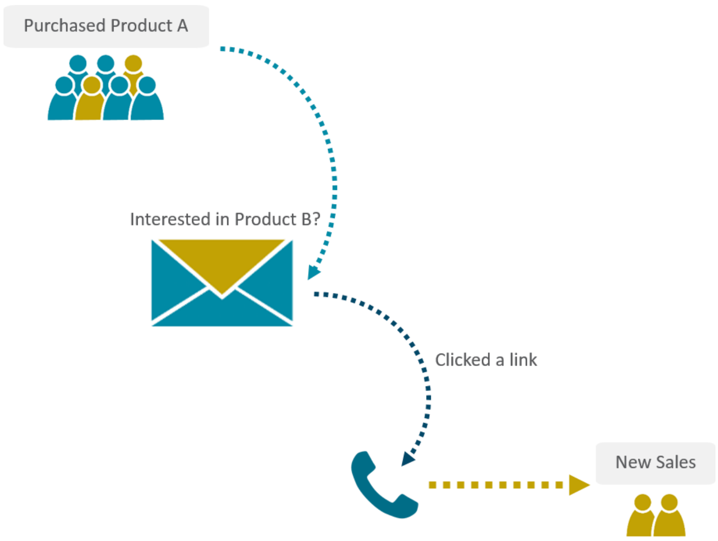
Step 4

To set up automatic confirmation emails to those who book onto your event, set up a new Email – Connect Stage and drag your Campaign Source 'Confirmed Attendees' into the included box. Run '**Repeatedly or On a Schedule**' and set up your automation to send **Hourly** to **New Recipients**, setting the end date on the last day you will accept new bookings for your event.

You may want to send reminders, agendas, location information and other such necessities to your attendees near to an event. This is easy to do with Marketing Automation.
Create a Follow Up Stage to your confirmation email, with Email – Connect as the media type, and add the default rule of '**Sent recipients only**'. This means your Stage will be sent to anybody who has received the Confirmation email. Automate sending, to run **Once** to **All Recipients** at a date close to your event.

We've added a second follow up Stage to send on the day before the event with parking instructions to make our attendees lives easy. Just automate it to send once for the day before the event. Easy!

Up-sell Campaign



Marketing Automation is a great tool for additional sales! If you sell a range of products, you could send automated emails to customers suggesting additional complimentary products they may want to buy. Bought a dining room table? Maybe you'd like some chairs with that! Bought a printer? Maybe you need some ink? Purchased tickets to an event, maybe you'd also be interested in this other event? For this example, we're simply calling them Product A and Product B.

This series sends an automated email promoting Product B whenever a customer purchases Product A. If a customer clicks on the email link to learn more about Product B, the series automatically creates a follow up phone call for the customer's account manager, to get on the phone and sell Product B! The series can also work in the opposite direction: if a customer purchases Product B, they'll receive the email about Product A, and the telephone call if they click on the link.

How to set up the Up-sell Campaign:

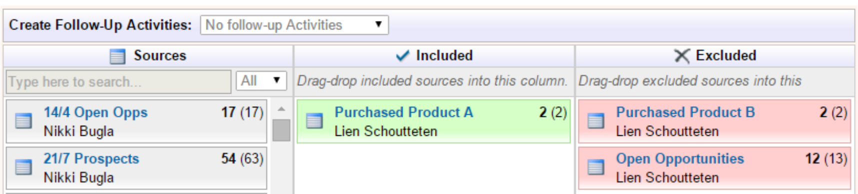
Requirements: Marketing Automation, Campaigns, Gold-Vision Connect

Step 1

Create and **start** your automated email template in Connect.

Step 2

Create two Campaign Sources in Product Sales. The first should be a filtered list of all customers who purchased Product A, the second would be a list of all customers who purchased Product B.
Create a new Campaign and add a new Email – Connect Stage. Drag your Campaign Source of Product A sales into the included column. To avoid upselling Product B to customers who have already purchased it, drag your Product B Campaign Source into the excluded column. We've also excluded any customers with open opportunities, which may or may not be applicable depending on your business processes.

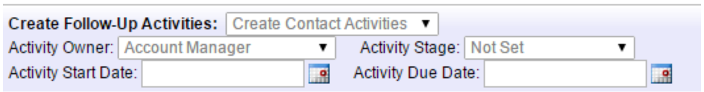


Now **run** the Stage ‘**Repeatedly or On a Schedule**’, choosing your automated template and setting it to run **Weekly** to **new recipients only**. Now, every time somebody purchases Product A, they will automatically receive an email promoting Product B, unless they have already purchased Product B or have an open opportunity.

You may sell the type of product where this is sufficient. A customer can click on the link to Product B and purchase. Job done. However, if you sell something with a longer sales cycle – this click may only be the first step to purchasing. You may want to nurture this action, and get your sales team involved.

Step 3

Set up a **Follow Up Phone Stage**. This Campaign Stage will create a phone follow up activity for the Account Manager of any customer who clicks on the link to learn more about Product B. Add a **rule; Connect – Clicked Any Link**. If you prefer to be more specific, you can choose ‘Clicked a Specific Link’ and the url of the link that directs your customer to Product B. Set the follow up activity settings:



Run your Phone Stage ‘**Repeatedly or On a Schedule**’, setting it to run **Daily**. Now your Account Manager will automatically receive a Follow Up Activity every time one of their customers clicks on the link to learn more about Product B.

You can set up this process as many time as you like. We’ve set it up twice – once promoting Product B to customers who purchased Product A, and vice versa.

Annual Renewal

Remembering annual reminders for different customers can be a chore, especially when they all happen on different dates. Whether you need to remind someone of an annual check-up, service, payment or appointment, it's all possible with Marketing Automation.

How to set up the Annual Renewal Campaign:

Requirements: Marketing Automation, Campaigns, Gold-Vision Connect

This one is a one-Stage Email – Connect Campaign that can run indefinitely.

Step 1

Create and **start** your automated email template in Connect.

Step 2

Create your Campaign Source. Filter your list, which could be activities, opportunities, profiles, or anything with a due date, to 'next month'. This should produce a list of all of your customers who are due to renew something next month.

Set up a new Campaign, and create a Stage. The media type should be Email – Connect, and drag your 'renewal date' Campaign Source to the included column. Save and run '**Repeatedly or On a Schedule**' to access Marketing Automation.
Choose your Automated Template, a start date and set it to run **Monthly** to **New Recipients only** on the 1st day of each month. If you don't set an end date, your Campaign Stage will run indefinitely.

That's it! On the first day of every month your Campaign will send an email to all customers whose renewal is the following month.