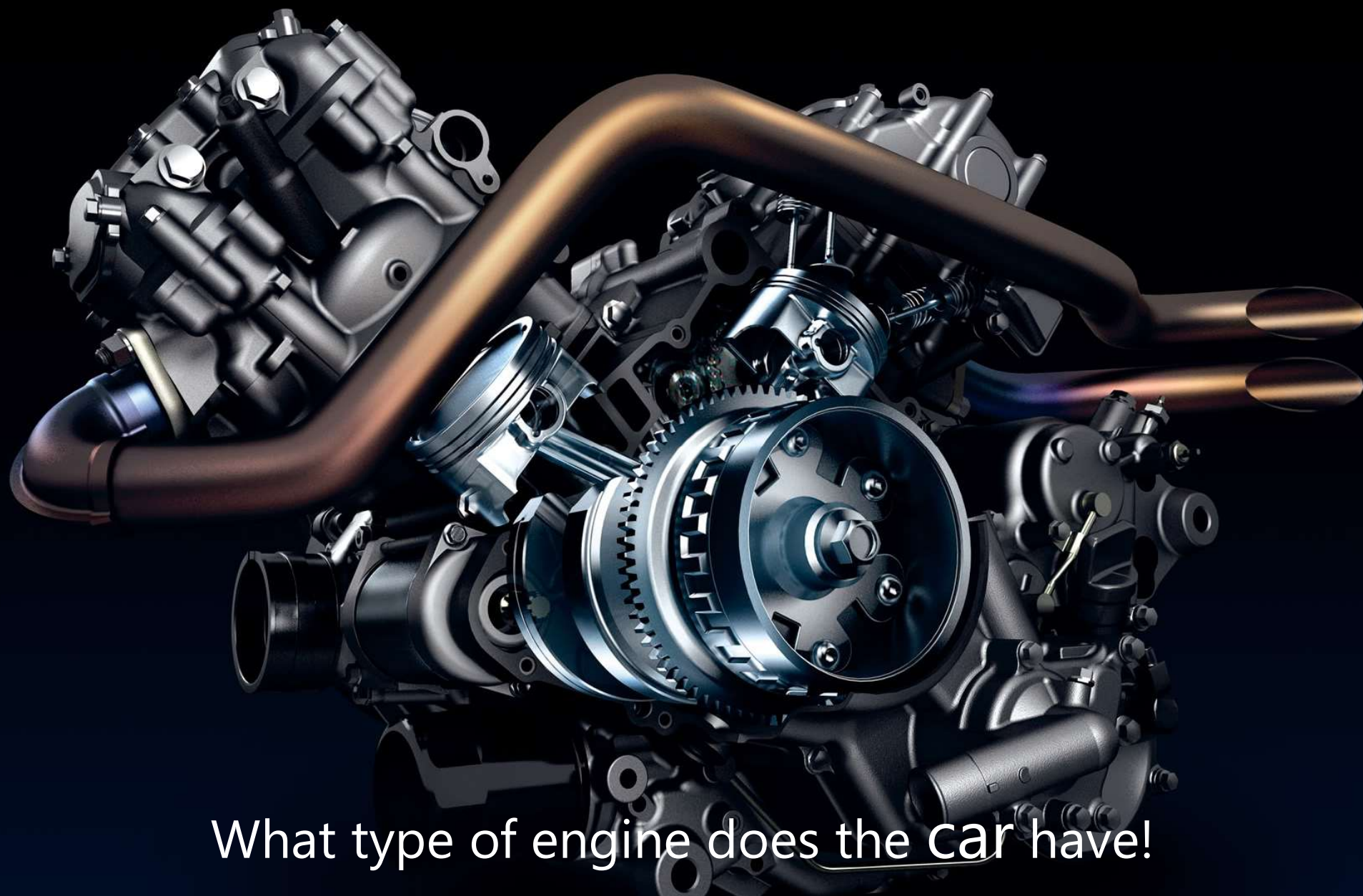Microsoft Dynamics CRM
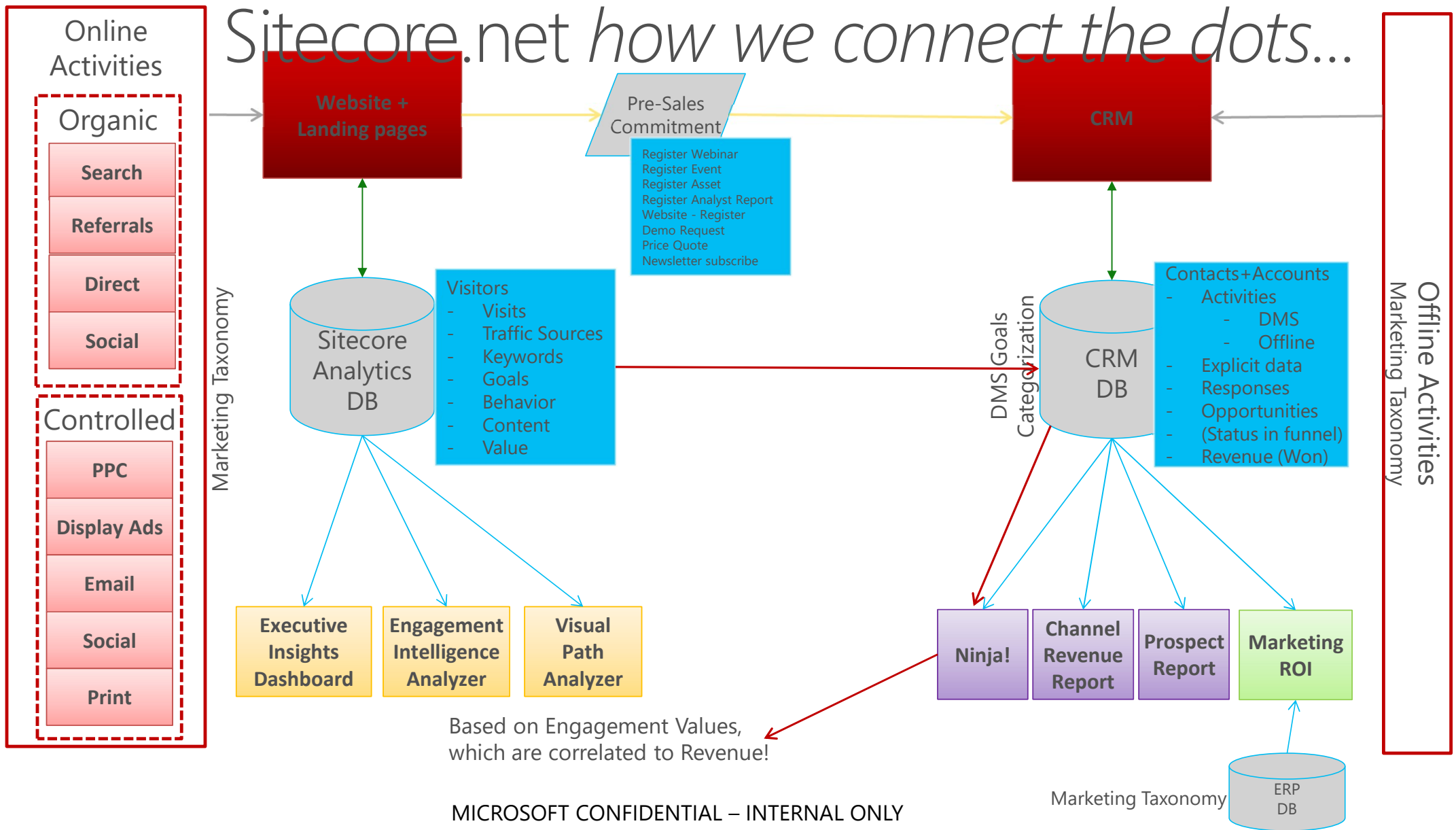
What is the first question you ask when looking at a muscle car?

What type of engine does the car have!

Sitecore.net *how we connect the dots...*

Online Activities

Organic
- Search
- Referrals
- Direct
- Social

Controlled
- PPC
- Display Ads
- Email
- Social
- Print

Marketing Taxonomy

Website + Landing pages

Pre-Sales Commitment

Register Webinar
Register Event
Register Asset
Register Analyst Report
Website - Register
Demo Request
Price Quote
Newsletter subscribe

CRM

Sitecore Analytics DB

Visitors
- Visits
- Traffic Sources
- Keywords
- Goals
- Behavior
- Content
- Value

DMS Goals Categorization

CRM DB

Contacts+Accounts
- Activities
  - DMS
  - Offline
- Explicit data
- Responses
- Opportunities
- (Status in funnel)
- Revenue (Won)

Offline Activities
Marketing Taxonomy

Executive Insights Dashboard

Engagement Intelligence Analyzer

Visual Path Analyzer

Ninja!

Channel Revenue Report

Prospect Report

Marketing ROI

Based on Engagement Values, which are correlated to Revenue!

Marketing Taxonomy

ERP DB

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CRM Integration – Every Car Has A Motor

Marketing	LQT	Sales

Sitecore Powers:
1.) Lead Generation
2.) Predictive Scoring
3.) Data for Nurting, Personalization, Sales
4.) Granular Analytics and KPIs

sitecore®

- Marketing Campaigns
- Sessions and Visit Analytics
- Traffic Types
- Engagement
- Conversions
- Value

Lead

Stage:
SQL

Opportunity

Campaigns Tied to Revenue

Sitecore
Campaign
Analytics

Microsoft Dynamics™

What is a Campaign Response

A Campaign Response is an activity type in Dynamics CRM that is related to a Campaign in CRM. When working with marketing in Dynamics CRM 2011, it is possible to create a Campaign and record a Campaign Response(response) to track outcomes from a particular Campaign.

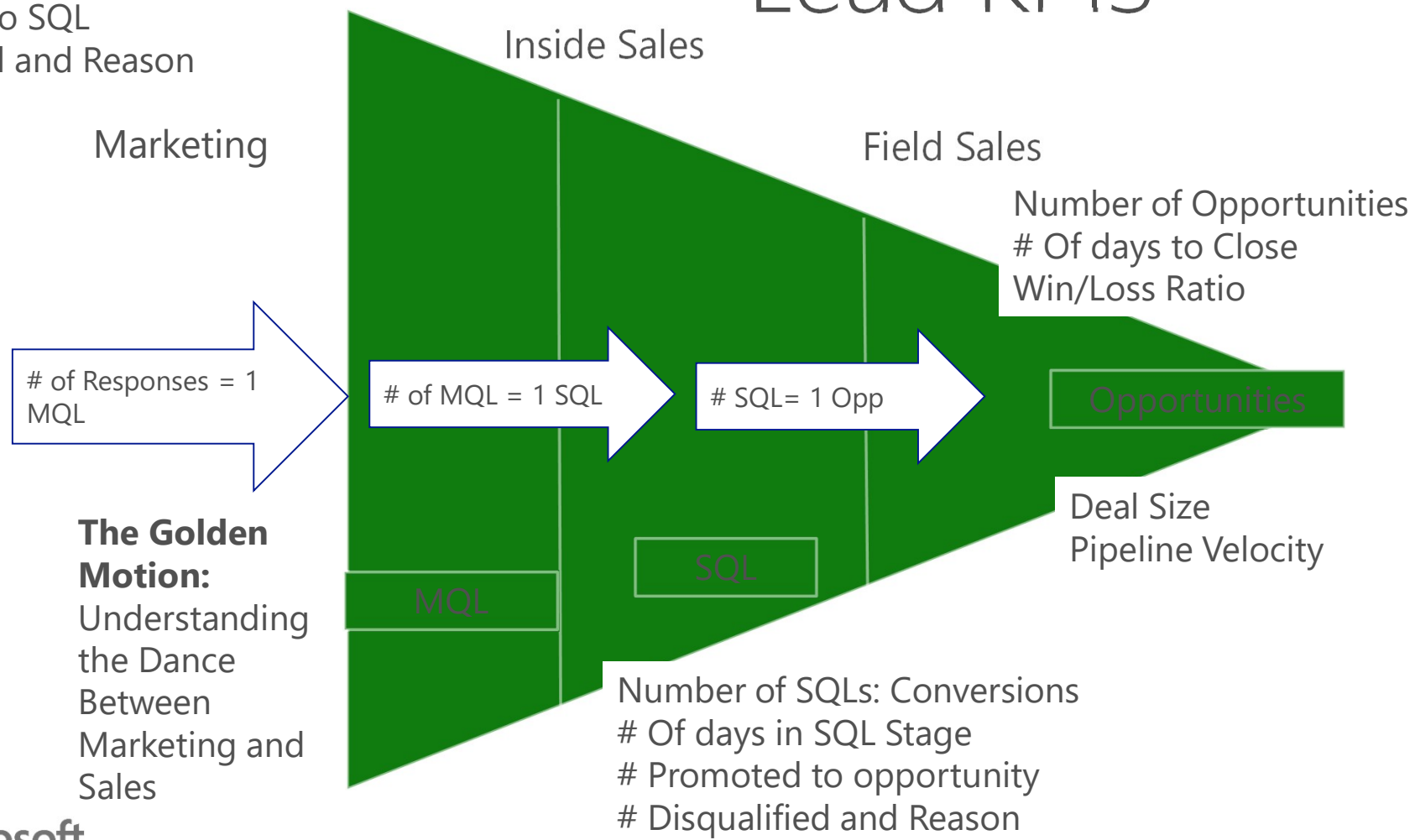A (Campaign)Response is a Receipt from a Marketing Outcome both Offline and Online

CRM Integration – Simple Data Flow

- Campaign Response is created either from Form Submit or impor
- Contains Campaign Data and Analytics
- Represents a "Receipt"- a single step in the customer journal

Contact: Originating Response

Stage: MQL

Stage: SQL

Sitecore Campaign Data (Online)

One Integrated Pipeline: Marketing Campaigns Tied to Revenue

Triggering Response

CRM Parent Campaign (Offline)
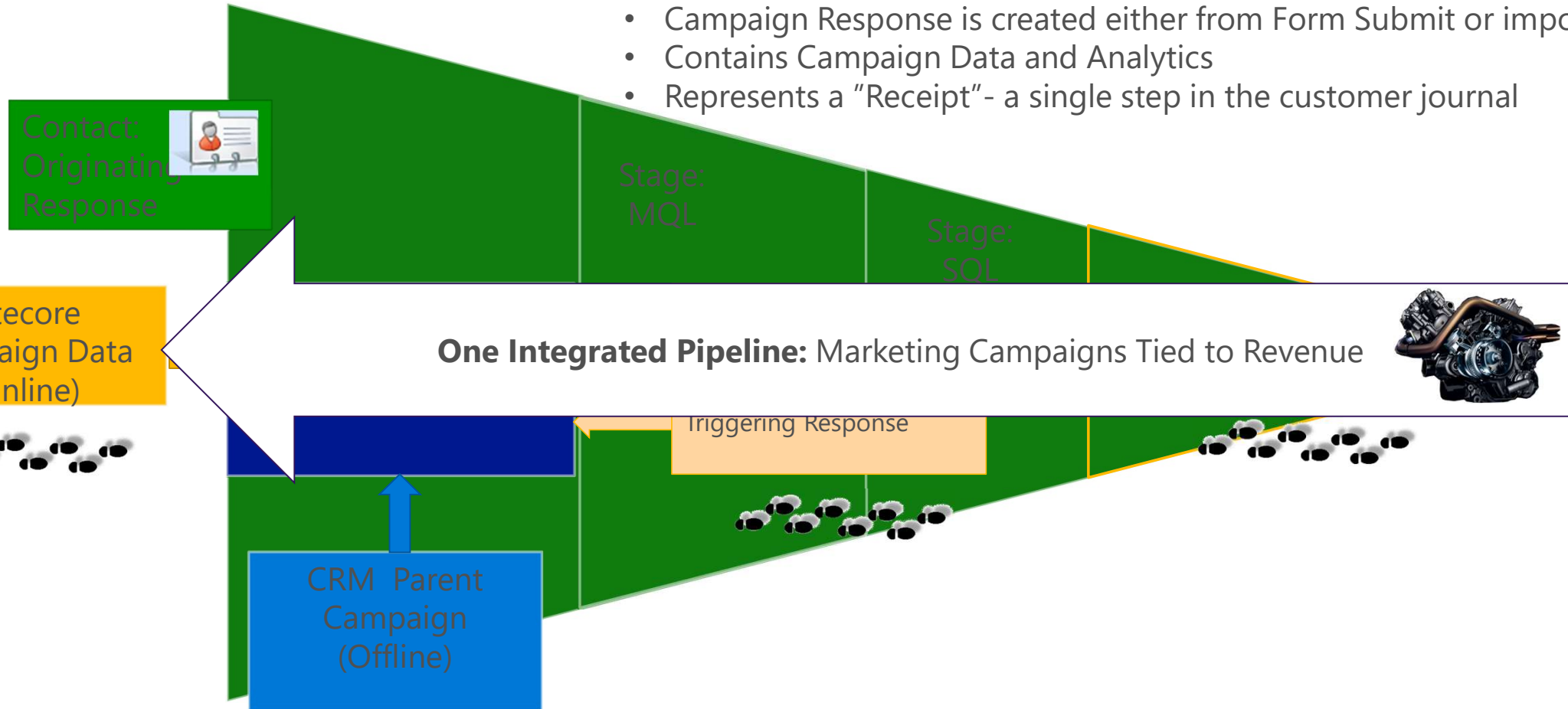
Lead KPIS

Number of MQLs: Conversions
\# Of days in MQL Stage
\# Promoted to SQL
\# Disqualified and Reason

Inside Sales

Marketing

Field Sales

Number of Opportunities
\# Of days to Close
Win/Loss Ratio

# of Responses = 1 MQL

# of MQL = 1 SQL

SQL= 1 Opp

Opportunities

The Golden Motion: Understanding the Dance Between Marketing and Sales

MQL

SQL

Deal Size
Pipeline Velocity

Number of SQLs: Conversions
\# Of days in SQL Stage
\# Promoted to opportunity
\# Disqualified and Reason

Microsoft

How Does Sitecore Support the Data Map?

1. Marketing Taxonomy
2. Goals has Web Activities and System Aggregation
3. Goals as Predictive Scoring
4. Data Views in CRM

The Marketing Taxonomy: Data Quality Lifter for Marketing Campaigns

Online Marketing

41-00-00	Reserved	Reserved	Reserved
PPC Advertising			
41-10-01	Online	PPC Advertising	Bing search
41-10-02	Online	PPC Advertising	Google search
41-10-03			
41-10-04			
41-10-99			
Display Advertising			
41-11-01	Online	Display Advertising	LinkedIn
41-11-02	Online	Display Advertising	Facebook
41-11-03	Online	Display Advertising	Google Display Network
41-11-99	Online	Display Advertising	Other Display
Direct			
41-20-01	Online	Direct	Company Website
41-20-02	Online	Direct	Direct Input of URL
41-20-03	Online	Direct	Referrals Misc.
41-20-04	Online	Direct	RSS
41-20-05	Online	Direct	Search Engine Branded

Offline Marketing

42-00-00	Reserved	Reserved	Reserved
Sales Activities			
42-10-01	Offline	Sales	In bound phone call
42-10-02	Offline	Sales	Customer meeting
42-10-03	Offline	Sales	Cold Calling
42-11-01	Offline	Telemarketing	Tele Marketing
42-11-99	Offline	Telemarketing	Other
Events			
42-20-01	Offline	Event/Trade Show	Sitecore Symposium
42-20-02	Offline	Event/Trade Show	Sitecore Trendspot
42-20-03	Offline	Event/Trade Show	Trade shows
42-20-04	Offline	Event/Trade Show	Customer events / hospitality
42-20-05	Offline	Event/Trade Show	Industry event sponsorship
42-20-99	Offline	Event/Trade Show	Other
Direct Marketing			
42-30-01	Offline	Direct Marketing	Direct mail - Print, Collateral
42-30-99	Offline	Direct Marketing	Direct Marketing Other

Ledgernum/ISORegioncode/CampaignCode/Assettype/Messagecode/AdTitle
041.10.20/US/NNN/WP/NNNNN/Business Dot Com DOT NET Instant Demo Ad

The Marketing Taxonomy: Data Quality Lifter for Marketing Campaigns

Contact
Patrick Kitchell

E-mail
patrick@kitchell.dk

Parent Account
📁 service account

▾ General

Salutation   mr

First Name +   Patrick

Internal Information

Owner *   🟢 Jesper Lykkega

Originating Response 📅 MCEV DK Dig

Last Date Included in
Campaign

Registration Source   Personal Portal

Sitecore

Qualification Record
QR: 2013-Apr-16 Online 41 Auto Create

State   Disqualified   Status   Error - Internal Accide

Team   👥 NL Sales   User

Topic

Contact *   🟠 Patrick Kitchell 🔍   Type

Parent Account   📁 service account   Escalation

Total Number of QRs   5   Last Activity On
Related to the
Account

Time from Last   358d 20:14   Contact Score
activity

Response trigger   📅 MCOT XI Best CMS FR 🔍   Account Score

Opportunity   🔍   Date of Last Res

Referring Partner   🔍   Number of Oper
                                                 Opportunities

Description +

Contact
Patrick Kitchell

E-mail
patrick@kitchell.dk

Parent Account
📁 service account

Filter on: All

☐	Date Created	Actual End ▼	Subject
☐ 🏴	22-10-2013 15:44	22-10-2013...	website visited
☐ 🏴	17-10-2013 18:48	17-10-2013...	website visited
☐ 🏴	08-10-2013 08:21	08-10-2013...	website visited
☐ 🏴	01-10-2013 13:27	01-10-2013...	website visited
☐ 🏴	30-09-2013 15:38	30-09-2013...	website visited
☐ 🏴	30-09-2013 15:38	30-09-2013...	website visited
☐ 🏴	27-09-2013 21:26	27-09-2013...	website visited
☐ 🏴	26-09-2013 15:16	26-09-2013...	website visited
☐ 🏴	25-09-2013 15:57	25-09-2013...	NNNN XC Click Er
☐ 🏴	25-09-2013 15:43	25-09-2013...	NNNN XC Click Er
☐ 🏴	24-09-2013 10:39	24-09-2013...	website visited
☐ 🏴	10-09-2013 16:20	10-09-2013...	SIOP XC Hero Rev
☐ 🐾	10-09-2013 10:53	10-09-2013...	MCWB NO Live W
☐ ✉	10-09-2013 10:53	10-09-2013...	MCWB NO Live W
☐ ✉	10-09-2013 10:53	10-09-2013...	MCWB NO Live W
☐ ✉	10-09-2013 10:53	10-09-2013...	MCWB NO Live W
☐ 🏴	10-09-2013 10:53	10-09-2013...	MCWB NO Live W
☐ 🏴	10-09-2013 10:51	10-09-2013...	MCWB NO Live W
☐ 🏴	10-09-2013 10:49	10-09-2013...	MCWB NO Live W
☐ 🏴	10-09-2013 10:46	10-09-2013...	MCWB NO Live Webinar 11 September Form Completed	Websit
☐ 🏴	10-09-2013 10:46	10-09-2013...	website visited	Websit
☐ 🏴	05-09-2013 21:38	05-09-2013...	website visited	Websit
☐ 🏴	05-09-2013 10:45	05-09-2013...	website visited	Websit

1 - 250 of 573 (0 selected)   ◄ ◄ Page 1 ►

All   #   A   B   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T   U   V   W   X   Y   Z

AL ONLY

Website Activity
🏁 **NNNN XC Click Email Link**

▼ **General**

Activity Type +   🔧 NNNN XC Click Email Link

DMS Campaign   🔧 042.20.05/XI/XI13MSEPS/PE/NNNNN/INT Post EPS event inv 1

Date Created   25-09-2013   ▦ ▼   15:43   ▼

Actual End   25-09-2013   ▦ ▼   15:43   ▼

Regarding   🟠 Patrick Kitchell

URL or Description /site

Subject *   NNN

Parent Visit   🏴

Traffic Type   Dire

Website Activity Campaigns
⚙ **042.20.05/XI/XI13MSEPS/PE/NNNNN/INT Post EPS event inv 1**

▼ **General**

Campaign Name *   042.20.05/XI/XI13MSEPS/PE/NNNNN/INT Post EPS event inv 1
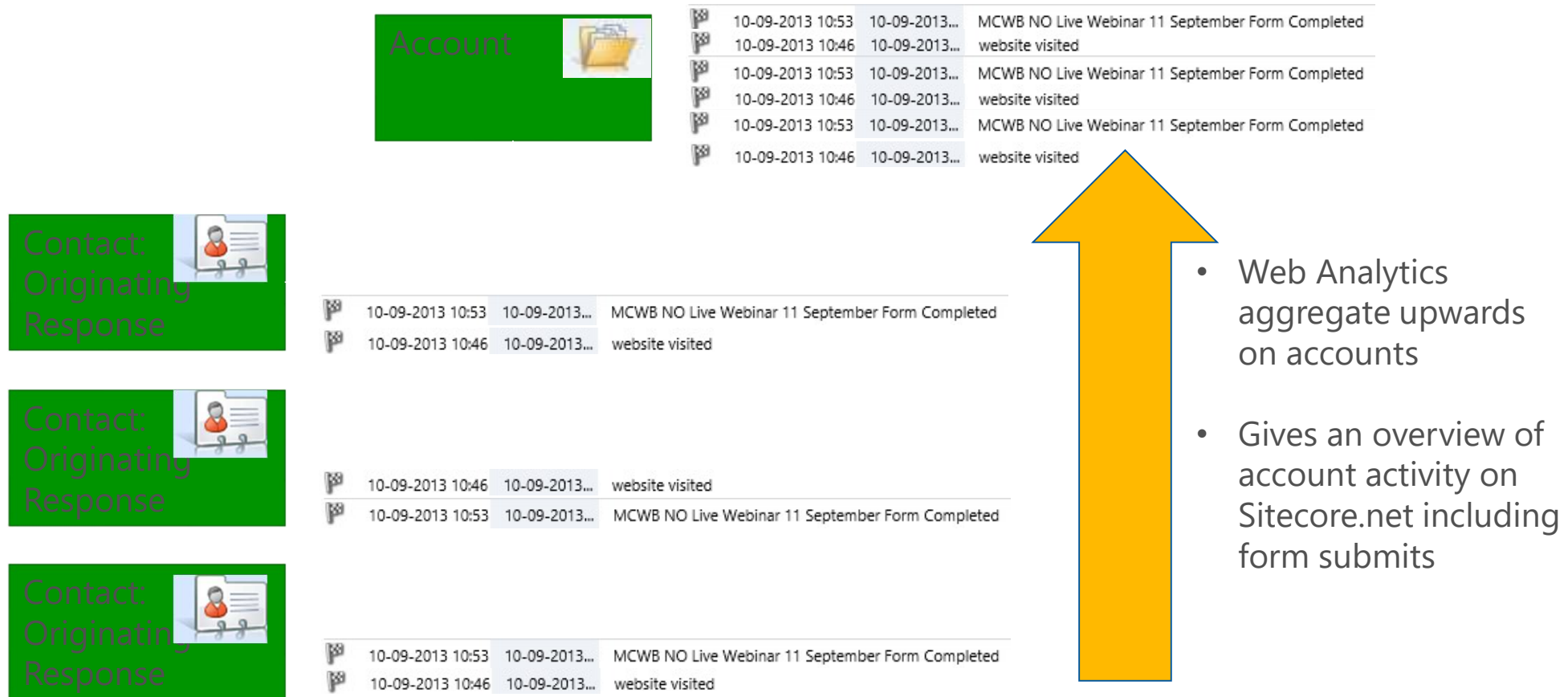
Region   XI

Channel   042 20 Event Trade Show

Sub channel   042 20 05 Industry Event Sponsorship

Goals has Web Activities and System Data Aggregation

- Web Analytics aggregate upwards on accounts

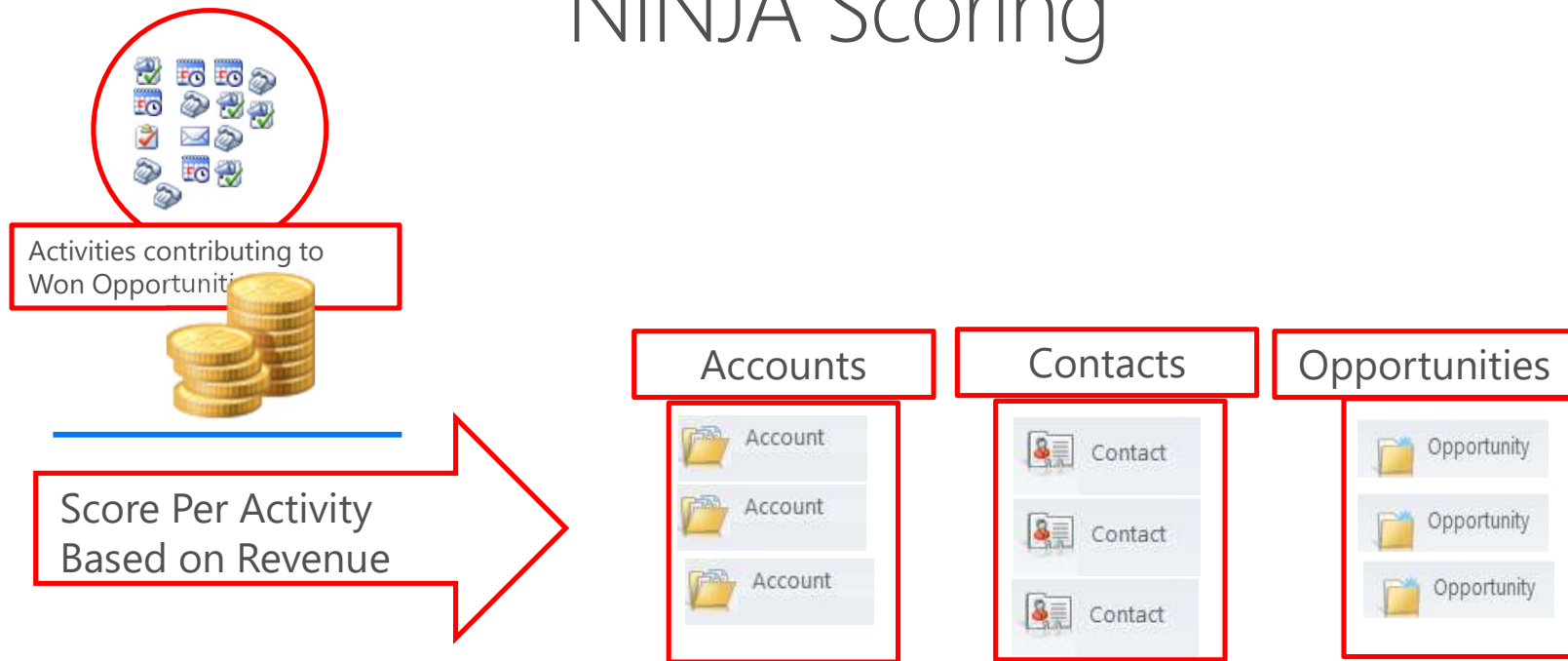- Gives an overview of account activity on Sitecore.net including form submits

What is Predictive(Ninja) Scoring?

Predictive scoring is a method in which tries to draw an understanding between the behavior that has led something to occur and probabilty that it will occur again.

Ninja Scoring is a predictive scoring system because it tries to measure the web behavior on a website from various channels and the relationship this behavior has in driving revenue in a company.

NINJA Scoring

Activities contributing to Won Opportunities

Score Per Activity Based on Revenue

Accounts
- Account
- Account
- Account

Contacts
- Contact
- Contact
- Contact

Opportunities
- Opportunity
- Opportunity
- Opportunity

CRM and Predictive(Ninja) Scoring

- Gives Indication of Interest
- Helps sales rank contacts, accounts

- Helps sales to know which opportunities could land first.
- Shows which marketing campaigns produce the most value.

Contact
Patrick Kitchell

E-mail
patrick@kitchell.dk

Parent Account
📁 Service Account

Score
38,33

▼ General

Salutation	mr	E-mail +
First Name +	Patrick	Email Validation
Middle Name		Bounce Count
Last Name *	Kitchell	Business Phone +
Parent Account	📁 Service Account	Mobile Phone +
Tentative Account Name	None	Skype

Address

Street 1 +		State/Province
Street 2 +		ZIP/Postal Code +
Street 3		Country
City +		Phone

▼ Details

Professional Information

Department		Contact Type
Role		Job Title
Personas	Jerry	

Start Date 6/4/2013   End Date 6/18/2013

Score Score 1

1 of 1   100%   Find | Next

Account: **Service Account**   Currrent Type: **Score 1** from 2013-06-04 to 2013-06-04

Score 1   Related Contacts Quantity

Relationship Type Change History

not specified

6/18/2013 11:39:54 PM   Page 1 of 1

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Opportunties By Score
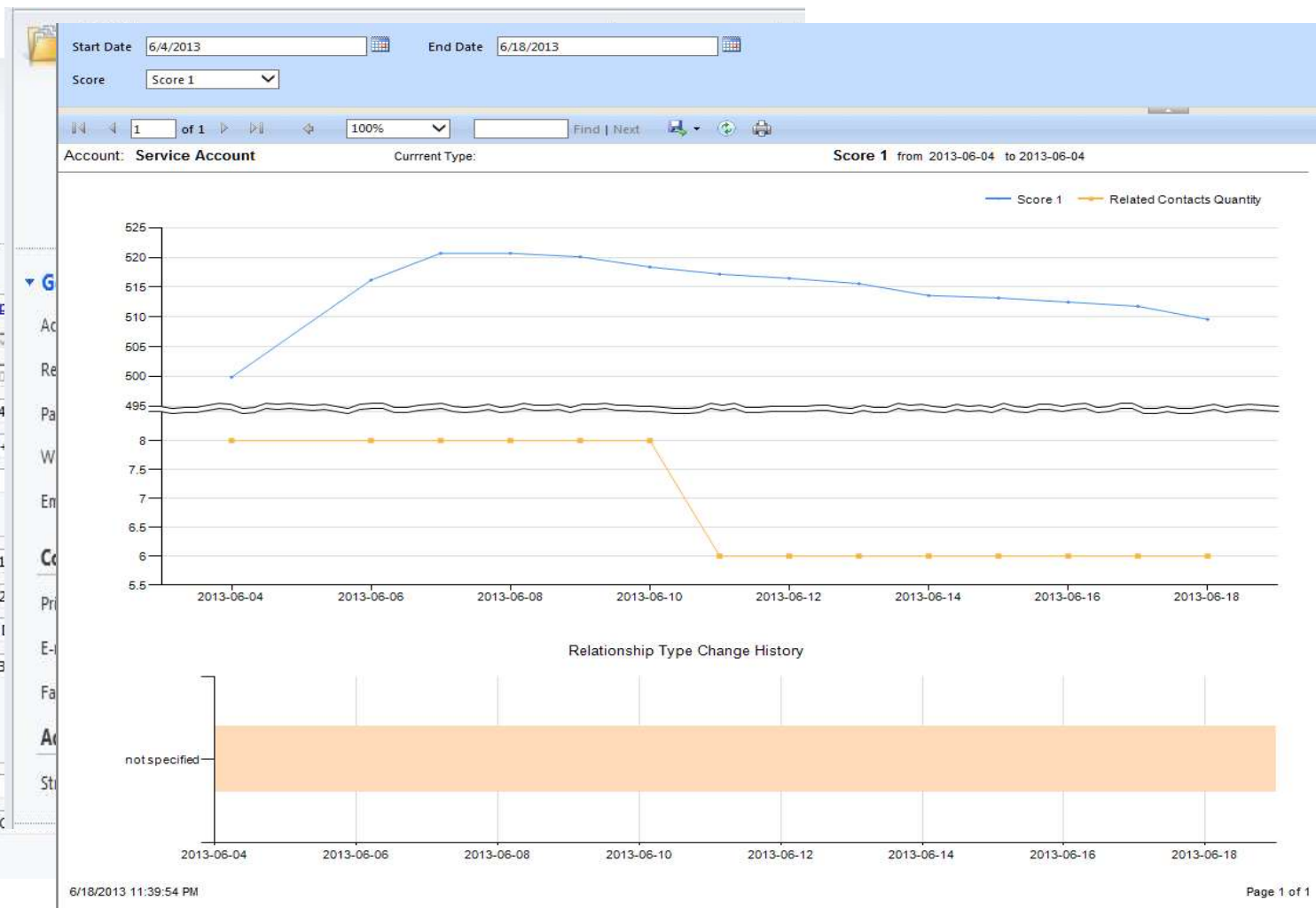
Country
Denmark
United States
Australia
Sweden
United States
New Zealand
New Zealand
United States
Australia
United States
United States
Australia
Belgium
Canada
Spain
United States
Denmark
United States
United States
Sweden
Netherlands
Netherlands
Australia
Denmark
Denmark
Norway
United States

Stage	Response trigger
SQL	Site
SQL	Site
SQL	Site
SQL	Site
SQL	Site
SQL	Site
MQL	Site
SQL	DE
SQL	Site
SQL	Site
SQL	Site
MQL	Site
SQL	Site
SQL	Site
SQL	Site
SQL	Site
SQL	Site
SQL	Site
MQL	Site
MQL	Site
MQL	Site
SQL	Site

Sales Territory | Account Score 1 | Contact Score 1

Score5 — 132,58

Account Score	Est. Close Date	Est. Revenue	. Proba...	Business Unit (Owning User)
231,24	30-12-2013	E 50.000,00	50	Sitecore AU
148,44	30-03-2015	kr 100.000,00	20	Sitecore USA Inc.
108,89	31-03-2015	kr 146.775,00	45	Sitecore Canada
107,74	25-02-2015	kr 669.600,00	20	Sitecore NL
107,74	29-01-2015	$ 80.000,00	20	Sitecore Norway
107,74	30-11-2014	$ 157.000,00	30	Sitecore Danmark A/S
107,74				Danmark A/S
107,74				USA Inc.
95,64	31-10-2014	kr 146.775,00	45	Sitecore Canada
83,50	30-09-2014	kr 669.600,00	60	Sitecore NL
77,95	26-09-2014	$ 80.000,00	50	Sitecore Norway
75,72	19-12-2014	E 50.000,00	30	Sitecore USA Inc.
75,60	31-10-2014	kr 100.000,00	50	Sitecore Canada
74,20	21-08-2014	kr 146.775,00	50	Sitecore NL
73,67	31-10-2014	kr 669.600,00	70	Sitecore Norway
73,67	30-06-2015	$ 80.000,00	50	Sitecore Danmark A/S
73,07	30-09-2014	$ 157.000,00	50	Sitecore USA Inc.
72,14	01-01-2015	E 50.000,00	90	Sitecore Canada
71,79	30-09-2014	kr 100.000,00	90	Sitecore NL
59,98	26-09-2014	E 50.000,00	30	Sitecore Norway
59,88	05-09-2014	kr 100.000,00	70	Sitecore Danmark A/S
59,82	30-09-2014	kr 146.775,00	61	Sitecore Danmark A/S
59,82	30-06-2015	kr 669.600,00	30	Sitecore Danmark A/S
58,31	30-09-2014	$ 80.000,00	30	Sitecore USA Inc.
58,31	30-09-2014	$ 157.000,00	45	Sitecore USA Inc.
54,60	30-08-2014	kr 187.000,00	65	Sitecore Danmark A/S
51,44	25-10-2014	E 50.000,00	30	Sitecore NL

Conclusion: Our Points of Learnings

- Develop a Long Term Data Stratgy and Vision Remember Good Things Take Time

- A Global Inititive Focus on Data Integrity

- A Combined Integrated Pipeline with Mandatory Pressure Points For Global KPIs

- Leverage the DMS Analytics both in Sitecore and in CRM

- Make Data Visible and User Friendly