

COLUMBIASOFT INTEGRATES MARKETO & MICROSOFT DYNAMICS CRM FOR A SEAMLESS SOLUTION

ColumbiaSoft™

ColumbiaSoft was looking for a marketing solution that would enable them to better leverage their database to increase sales. They also needed a system that could integrate seamlessly with Microsoft Dynamics CRM. ColumbiaSoft chose Marketo to improve marketing productivity and drive new sales opportunities through a robust set of marketing automation capabilities.

ColumbiaSoft is a document management software company that helps businesses improve and automate document-centric business processes where regulations and quality are a concern. Businesses use their software, called Document Locator, to manage files in compliance with policies and standards for document control.

Procedures are automated using built-in workflow, and paper is converted to full-text searchable digital files using imaging technology. ColumbiaSoft's solutions are used for quality records, engineering drawings and specs, construction projects documents, manufacturing process records, accounting records and more.

The Challenge

ColumbiaSoft's previous marketing automation solution did not integrate well with their Microsoft Dynamics CRM. Only a limited amount of data was shared between the systems, and it wasn't updated in a timely manner, which made it difficult to segment leads properly. Because ColumbiaSoft's services benefit such a wide and diverse audience, the company needed a process to effectively reach several different markets and segments with targeted solutions. Service interruptions with their previous solution also raised concern that ColumbiaSoft might be missing leads coming through their website.

Solution

ColumbiaSoft needed a way to automate multi-step, targeted email campaigns to a wide variety of industries. In its search for a new solution, a key goal of ColumbiaSoft's was to maintain contact with and nurture their prospects through a long buying cycle. To do this, they needed a way to provide their sales team with intelligence they could use to more effectively prioritize their activity in order to close business faster. Things like sales alerts, lead scoring, and a prospect's complete activity history were considered to be very important. Finally, ColumbiaSoft wanted a rich set of features to drive the generation of new leads.

In seeking a marketing automation platform, ColumbiaSoft looked at a number of other solutions. "Several of the solutions we looked at seemed more difficult to use," said Jim Kemp, Marketing Communications Manager at ColumbiaSoft. "Marketo's interface is straightforward and easy to understand, and the native integration with Microsoft Dynamics CRM was critical to enabling us to gain full insight into our existing lead database."

Results

Once ColumbiaSoft decided Marketo was the right solution, implementation was a breeze. In fact, Kemp completed the implementation without assistance from either Marketo's implementation team or his own IT group by following Marketo's easy step-by-step guide. "I'm not especially tech-savvy, but I was able to set up the integration in about an hour," explained Kemp. "The directions were very straightforward and clear." After that, ColumbiaSoft began building out campaigns immediately.

The seamless integration between Marketo and Microsoft Dynamics CRM enables ColumbiaSoft to maximize the output of their sales and marketing initiatives.

- Maximize the existing lead database
- Simplified new lead generation with automation
- Saved time and improved Marketing productivity with automation
- Increased opportunities through nurturing
- Improved customer retention through increased engagement

Maximize the Existing Lead Database

Before Marketo, ColumbiaSoft didn't have the tools to fully leverage their existing database.

The company's typical sales cycle is several months long and prior to Marketo, there wasn't a simple, automated way to keep prospects engaged over the long buying cycle. Now, ColumbiaSoft can educate and inform prospects over the long-term. "We see the effects of Marketo in speeding up the sale every time a prospect clicks on an email or registers

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for an event and then restarts a conversation with us,” explained Kemp. With Marketo’s sales alerts, ColumbiaSoft’s sales team can engage prospects at exactly the right time. “Our sales group uses Marketo’s sales alerts extensively. They have become an incredibly powerful tool for improving productivity,” Kemp added.

Marketo also helps ColumbiaSoft ensure that leads don’t fall through the cracks. With lead recycling, those not ready to buy can be further nurtured until they are ready to return to sales. “Marketo has dramatically improved our ability to identify prospects re-warming after long periods of going dark, and help us bring these prospects back in the sales cycle. Marketo is helping us work smarter with the database we already had,” said Kemp.

Simplified New Lead Generation with Automation

Marketo also enables ColumbiaSoft to leverage automation to increase new lead generation. With Marketo, ColumbiaSoft can automatically qualify more prospects and quickly develop them into sales-ready leads. In addition, automated lead scoring helps the sales team prioritize follow-up activity based on multiple dimensions so they can pursue the most promising leads first.

With Marketo, ColumbiaSoft has been able to increase productivity and efficiency through automation, generate more opportunities through prospect nurturing, better engage existing customers, and quickly and easily identify new prospects.

Saved Time and Improved Marketing Productivity with Automation

Prior to Marketo, a simple one-off email campaign would take two people a full two days to prepare and launch. The old process was very manual, and required them to build an email list in the CRM, export data, cleanse the data, re-import data and more. With Marketo’s real-time synchronization to their Microsoft Dynamics CRM system, deeper automation capabilities and easy to use campaign templates, it now takes one person less than 2 hours to create such campaigns.

“The time savings from Marketo has been enormous. The analogy we use is that Marketo does the equivalent work of an employee,” said Kemp. “But I think even that falls a

little short because, truthfully, a single employee couldn’t accomplish all the work Marketo does!”

Marketo’s sophisticated lead segmentation has been an especially powerful tool for ColumbiaSoft. “In my experience with CRMs, data often gets hidden in different areas,” Kemp said. “Marketo increases the visibility by showing everything.” This segmentation allows ColumbiaSoft to quickly tailor their messages and offerings to each specific audience.

Increased Opportunities through Nurturing

The process of building relationships with qualified prospects, regardless of their timing to buy, is a critical part of the sales cycle in today’s climate. ColumbiaSoft uses Marketo to create multiple nurturing programs that are based on segmentation and engage different types of prospects in a unique and therefore highly-relevant manner – something that wasn’t possible with ColumbiaSoft’s previous marketing automation solution.

Improved Customer Retention through Increased Engagement

Although their initial focus was on prospects, after implementing Marketo, ColumbiaSoft saw tremendous opportunities to more deeply engage their existing customer base. Their ability to use Marketo’s automation capabilities to deepen their relationship with customers not only helps with retention, but also provides new upsell/cross-sell opportunities that fuel revenue growth.



Marketing Software. Easy, Powerful, Complete.

Marketo, (NASDAQ MKTO) uniquely provides an easy-to-use, powerful and complete marketing software platform that propels fast-growing small companies and global enterprises alike. Marketo® marketing automation and sales effectiveness software streamlines marketing processes, delivers more campaigns, generates more win-ready leads, and improves sales performance. With proven technology, comprehensive services and expert guidance, Marketo helps thousands of companies around the world turn marketing from a cost center into a revenue driver.

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