Best Practices for

INTEGRATING YOUR EMAIL MARKETING TOOLS AND SPIRO

SPIRO TECHNOLOGIES

At Spiro, many of our customers integrate our AI-Powered Sales CRM with their marketing initiatives.

We commonly integrate with MailChimp, Pardot, Constant Contact, InfusionSoft and many other marketing automation platforms to make sure that you leverage each platform to their fullest extent.

To help give you some ideas about the best ways to integrate Spiro and your marketing software, we put together this list of the 5 most common things our clients are doing:

1) Capturing Top of Funnel Inbound Leads

As you know, there are countless ways to generate leads for your company. In addition to making cold calls to prospects, and your sales reps proactively doing their own networking and outreach to referrals, your company is probably also working to generate inbound leads.

These inbound leads are when you put out information on your company and product to attract new prospects. Typically these are top of funnel, low-cost, high yield leads. The best way to capture these prospective clients is through forms on your website.

Have an email capture form that encourages people to subscribe to your company newsletter or blog. This can be a simple sign-up that only asks for their email address. You can also offer up a white paper on topics pertaining to your business and ask for an email address in exchange for that article. Once you capture your prospect's email address this information should be pushed into your marketing platform.

It's best practice to have your marketing database be a superset of your Spiro CRM. Don't pump all your contacts into Spiro as leads, as this will just muddy the waters and overwhelm your sales reps with unqualified prospects, who aren't ready to warrant a phone call.

Instead, once someone signs up for a white paper to receive your information, you can run targeted email campaigns with additional opt-ins and offers to learn more about your product. Make sure your marketing software can track what prospects are opening, reading, clicking through, and highly engaged with your content. If a prospect clicks on a link to schedule a demo or learn more, then you can have that trigger an Opportunity to be created in Spiro and assigned to a sales rep. Once that contact is in Spiro, our AI-Powered CRM will automatically enhance the social and demographic data pertaining to that contact and company, giving the sales rep a fuller picture of this lead.

REMEMBER

- Don't send every unqualified lead to your CRM
- Properly name and label forms for CRM data capture
- Hide content behind email sign up walls

2.) Capturing Pre-Qualified Demo Requests

Another way to get inbound leads is through an offer on your website for a demo request, or a call to action to speak with a product specialist. Once someone clicks on this button, you can set a more detailed form asking them questions that can help to pre-qualify them as a good lead. If you are only selling to Canada, then ask what country they are in. You can then filter out the bad leads, and only funnel through the good leads to Spiro.

We have worked with customers in the past to set up a trigger to have good leads that request demos automatically flow into Spiro - creating a contact, company, and opportunity. All of the information on where this lead came from, and all the questions they answered on the form will transfer into Spiro. Not only does this help give the sales team a complete picture of who they are pitching too, but it also helps Marketing track what pages, buttons, and campaigns are working to generate leads. You can have all of this data pulled into Spiro, and then run Marketing reports from within your CRM.

If you're in sales, you know how important it is to contact a new lead right away, so an automated alert can be set up to let the sales rep know when someone has requested more information or wants to schedule a call.

REMEMBER

- Pre-qualify your leads through intake from questioning
- Track where your leads are coming from and pass that information to Spiro
- Set up automated alerts to have your sales reps follow-up immediately

3.) Nurturing Old Prospects

Once marketing passes over a lead to sales,that person should then be taken out of any blanketed email marketing campaigns, since they are now assigned to a sales rep, and will receive one-on-one attention from sales. However, not all leads that marketing pushes through to sales are actually good prospects.

Sales can sometimes quickly look at a lead and deem them as not a real opportunity. However, you don't want them to just fall through the cracks and never hear from you again. These unqualified leads typically need more education around your product or service, so can subsequently be put into an email campaign that has messaging tailored around the benefits and differentiators your company has to offer.

It's best practice to have a sales stage in Spiro of "No Opportunity", and any prospect a rep thinks isn't ready for a sale yet, can be marked as such. Once this field is changed to "No Opportunity" you can set up a trigger that automatically adds this contact's email address to an email campaign in your marketing platform.

You may also have leads that were accepted by sales, but they perhaps missed their demo, or were qualified out at a later stage. These prospects can flow through a similar channel - having a trigger set that if their sales stage field in Spiro changes to "Qualified Out" they will be put into a targeted list in your email marketing platform. This campaign should work to keep them abreast of company news or encourage them to reschedule their demo to learn about new features your product may offer.

It's best practice to have these nurturing campaigns be a rep driven process, meaning that an action of the sales rep will be what determines if a lead is put back into the marketing department's hands. This allows the sales team to focus on only the good opportunities, and rest assured that all other prospects and leads are still being catered to and receiving pertinent information.

REMEMBER

- Remove active leads in your sales funnel from general marketing emails
- If a prospect is qualified out, be sure to add them back into a nurturing campaign
- Use your sales stage fields to have leads flow in and out of email campaigns

4.) Customer Communication

Marketing automation tools shouldn't be used just to bring people into the funnel and move them closer to becoming a prospects. That's not where it ends. You can also use your marketing platform to communicate with current customers. When a sales rep wins a deal, they will update a field in Spiro to mark this contact as a customer. You can then have this field automatically updated in your marketing database, and have it add them to a specific email campaign used to help educate your consumers.

The goal of a customer email campaign is two-fold: reducing churn and reducing staff administrative time. As we all know in sales, finding new customers is harder than keeping current ones. It should be a primary goal of your company to prevent churn.

One way to combat churn is to keep your customers close to you, and using your product or service to the best of their ability. You need to educate them on the benefits of your company, and always let them know about new features or services that could enhance the user-end experience.

Another reason why it's best practice to have a cadence of customer emails, is because it proactively reduces time your customer support staff will spend on answering customer inquiries. Include in your customer communications links to FAQs and other self-help portals.

If you use your marketing automation tools to keep in contact with your customers, then sales will have an easier job renewing their contracts. It's a win - win for sales and marketing.

REMEMBER

- Use your marketing automation platform to keep customers informed
- Emailing your customers can help reduce churn and administrative support time
- Help keep sales and your customers support team working together by integrating mrketing automation and your CRM

5.) Marketing Lead Source Analysis

When a lead comes in and an opportunity is created in Spiro, marketing will want to know what happened with that lead. Did the sales team close the deal? Was the lead any good?

A best practice is to pull into Spiro all of the information on where that lead came from. Was it from an organic google search, or through a link on your blog, or perhaps through paid advertising? You can have all of the lead source data automatically dropped into Spiro, and then set up Spiro reports to show what sources are producing the best leads.

With putting all of your marketing coding into Spiro, you can see if you are hitting benchmarks for marketing spend versus sales revenue. For instance, you are able to create a report in Spiro to see how much MRR a lead from Facebook generates versus a lead from LinkedIn.

Spiro and Marketing Working Together

Sales and Marketing need to work together seamlessly, not only as departments, but as tools to help your company run more efficiently. Our Spiro customers have successfully used our AI-Powered CRM with many different marketing platforms, such as Mailchimp, Pardot, Constant Contact and InfusionSoft, to name a few. And our CRM Adoption Guarantee includes an amazing customer service team to help get all of your marketing needs set up for you.