

# MARKETING AUTOMATION FOR MICROSOFT DYNAMICS CRM



The single most important criteria for sales and marketing success is the alignment of the two teams. To facilitate the alignment, it is essential to integrate marketing automation with Microsoft Dynamics CRM. Without this integration, too much time and too many resources will be drained and leads will leak out of the funnel. At the same time, you need to make sure it is a solution that has all the functionality that a modern marketer needs and allows them to work the way they want.

Salesfusion is a marketing automation platform that has a two-way integration with Dynamics CRM and is installed out-of-the-box with no middleware. The integration is unique in the industry in that it provides a native integration in both on-premise and hosted environments.

## Integrated Solution

- Create a two-way sync with Salesfusion and Dynamics CRM, ensuring that the data your sales and marketing teams are working with is always correct
- Provide sales with visibility to marketing activities and templates to send trackable emails to leads and contacts
- Send automated alerts and create tasks in Dynamics so sales can follow up based on a contact's activity
- Blend marketing and sales actions with intelligent and automated nurtures to decrease funnel leakage
- Prioritize and manage follow up with lead scoring and management
- Track a lead through the complete sales cycle from creation to close with reporting and dashboards

## Salesfusion together with Microsoft Dynamics CRM

- Integration with Dynamics CRM since 2009
- Integrates with all current supported versions of Dynamics CRM
- No middleware required. Fully supported out-of-the-box integrations are native
- Customize your view to only see the data that is most important to your organization
- See Salesfusion entities in the Dynamics CRM main navigation page

Salesfusion brings critical marketing data inside Microsoft Dynamics CRM with an out-of-the-box, native, fully-supported integration that is up and running in under an hour.

5 suggestions for creating sales and marketing alignment in your organization.

- 1 Leadership and Communication:** Articulate a vision and strategy to support efforts and improve communication.
- 2 Resources:** Invest in a marketing automation platform that natively integrates with Dynamics CRM and facilitates alignment.
- 3 Discipline:** Have the discipline to fully implement marketing automation so it has the opportunity to deliver the promised benefits.
- 4 Processes:** Use your marketing automation platform and Dynamics CRM to support and track key processes that support alignment and create a closed-loop experience, such as opportunity identification, lead scoring and lead nurturing.
- 5 Organization:** Put an organizational structure in place that provides the sales and marketing teams with the greatest opportunity to succeed. Consider outside support to de-risk the project.

Salesfusion makes enterprise-grade marketing automation accessible to everyone with a no-fail approach. Recognizing that marketing success depends not just on technology but also on expertise, processes and people, we provide a team of marketing experts in addition to our complete and easy-to-use marketing automation platform. Our solution includes all the features marketers need to create, manage and analyze marketing tactics and campaigns— including email & nurture marketing, lead scoring & management, website tracking & analytics, landing pages & forms, social media management, CRM integration and marketing dashboards.