# CRM & Marketing Automation Guide for Professional Services:

An Industry-Focused Primer for Technology Implementation & Optimization

# CRM for Professional Services

Sales and marketing efforts are a commitment for those in professional services. Businesses and independent providers must contend with long-winded customer journeys, evolving consumer demands and the highs and lows of lead generation and conversions. Not to mention, the professional services sector grew by nearly 6% in 2022 and is expected to continue growing throughout 2023—meaning even greater competition for businesses.

Already saturated markets have become more crowded, prompting business owners and their employees to prioritize the wants and needs of their customers. With 87% of consumers now beginning product searches online and 75% of consumers expecting a consistent experience across multiple channels like, social media and traditionally in-person experiences, many professional service businesses have accelerated their digital transformation plans. In doing so, many business leaders have realized and exploited the benefits of innovative digital tools, most notably, Customer Relationship Management (CRM) software and Marketing Automation (MA) tools.

While larger enterprises possess the resources to quickly adjust to these new technologies, many small- and medium-sized businesses (SMBs) have slowly transitioned to incorporating CRM and MA tools into their everyday operations. While some, unfortunately, continue to resist the new technology altogether.

However, SMBs that have embraced digital change are reaping the benefits. Our 2022 Act! Survey Report – The Role of CRM in Today's Small & Medium-Sized Businesses found SMBs that implemented CRM and MA saw improvements in:

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| Sales Productivity | Customer Service | Business Productivity | Marketing Outreach | Customer Satisfaction | Customer Retention |
| Customer Insights | Company Growth | Employee Efficiency | Information Accessibility | Business Insights | |

In short, CRM and MA solutions have proven their worth among professional service businesses of all sizes. Improvements across the board were attainable for companies with minimal experience and knowledge of the technology. That is why Act! set out to create an industry-focused guide to CRM and MA implementation and optimization.

Through industry findings and expert insights, Act!'s CRM & Marketing Automation Guide for Professional Services eBook will provide industry-specific best practices for CRM and MA implementation and optimization to help business professionals provide stellar customer experiences and outpace the competition.

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## Enhancing Client Service, Property Management and Prospect Reach

## The Real Estate Market Today

When selling or purchasing a home, having a professional by your side can pay dividends. Professionals know the ins, outs and intricacies that come with buying and selling homes, especially at a time where the market can change, seemingly at a moment's notice. That value is something that can't be overstated. In fact, on average, for sale by owner (FSBO) properties sell for 26% less than agented properties. That disparity shows exactly why a realtor or brokerage firm is leveraged in 86% of all real estate transactions.

Real estate professionals understand the importance of customer satisfaction in the real estate industry. A consumer who is dissatisfied with their service will tell nine to 15 people, on average, about their bad experience. The impact of negative word-of-mouth can be devastating to independent realtors or small- and medium-sized real estate agencies. And access to online review sites and social media has amplified the impact dissatisfied customers can have.

To mitigate poor customer support and enhance the customer experience, real estate professionals have turned to innovative tools—with CRM solutions being one of the top six technologies among real estate agents.

While innovative tech, like CRM solutions, has helped real estate industry professionals cater to customer demands, finding and implementing the right CRM solutions, the right way, can be the difference between good and great client service and operational efficiency.

**Over 72% of real estate agents and 96% of brokers leverage CRM software** to improve customer experiences and networking opportunities.

# Implementing the Right Real Estate CRM & Marketing Automation Software, the Right Way

Start your real estate CRM implementation with a full audit of your business. Doing this will help you identify how you are currently operating and how the organization is performing. You can use this information to decide which type of real estate CRM platform to use. Start by auditing your current practices, asking yourself the following questions:

> What business data do you currently collect?

> What percentage of this collection is manual?

> How much time does the team spend on this?

> Which of these workstreams can be automated?

After completing your audit, implement your business's most crucial CRM features to get it up and running with the technology needed to operate your solution at its best.

## CRM Expert Corner

**Debora Boyle**

*Act! Certified Consultant and Owner of Action Platinum Solutions*

**Tip:** A CRM solution capable of supporting residential or commercial real estate should be able to keep track of important details for people, match them to properties, and be flexible enough to handle the needs of a broker's given specialty.

# Optimizing Your CRM for Real Estate

Real estate CRM solutions are built to help agents improve support and outreach, track leads and automate their sales processes. For any real estate professional, that level of customizability and flexibility should be the top priority when rolling out a new CRM solution within their organization. No two businesses are the same, and that can also be said for those who deal in the sale or purchase of properties, no two homes or buyers are alike—a CRM solution custom-built just for you can unlock a whole world of potential.

Here are four ways to get you organized, optimized and ready to outpace real estate competition through excellent customer support and operational fluency:

## 1. Contact Tracking & Calendars

Real estate agents have deep contact lists. In today's fast-paced, digitally driven world, Rolodexes and spreadsheets simply aren't practical for an industry where seconds can be the difference between netting a new customer, retaining a partner or acquiring a property.

A CRM platform enables users to keep essential details on different buyers, sellers, owners, tenants, investors, brokers, partners, regulatory agencies and much more. With the simple click of a mouse, real estate professionals can have access to a sea of data including contact information, secondary contacts, contact notes, activities, contact and task calendars and contact history. Users can also generate unlimited contact groups to, for example, separate buyers from sellers, clients from leads or segregate contacts on a property-by-property basis.

## 2. Property Tracking

Depending on the state of the market, properties can be snatched up as quickly as they appear. With the right CRM software, real estate agents can be confident that they are always up to date with vital property details, availability, contractual needs and other key aspects of the buying and selling process. Customized property tracking lets you categorize and organize everything from property profiles to requirements and status to property management companies and all related contacts. A powerful CRM solution will also generate property databases that let you search for available sales and leasing properties. With CRM solutions tailored to their specific market, real estate agents and brokers can maintain up-to-the-minute information, ensuring a smooth transition from prospecting to closing and every other stage in between. With all of these in place, you'll never be caught off guard or unprepared for an opportunity.

## 3. Sales Pipeline Tracking

By implementing real estate CRM solutions, real estate agents and brokers can get a handle on their entire sales pipeline, tracking the flow from beginning to end while focusing on the most relevant sales details. With efficient sales pipeline tracking, you can better monitor both property listings as well as purchase and leasing opportunities, quickly and efficiently. These solutions let you generate custom-made dashboards that provide detailed information on sales and provide insights that can help accelerate deal closings and ensure potential clients are guided effectively from start to finish.

## 4. Remote & Mobile Access

A real estate agent is only as good as their availability to their clients, prospects and partners. Being able to react and seize on an opportunity for you or your clients means being tied to your desk at the office is a non-starter. Remote work has dominated countless industries in recent years, and as digital continues to dominate everyday life, real estate agents and brokers need to be able to access their client and property information as quick as possible, no matter where they are. Integrated, cloud CRM tools enable real estate professionals to meet and connect with contacts anywhere and at any time with the power and knowledge of the CRM platform on their laptops or mobile devices.

**Cardinal Realty Group: Access to over 15,500 Contacts with the Click of a Mouse**

" When I've got a property or I'm looking for real estate, I always go straight to Groups to see who I know in a particular location that could help me. "

**Hal Hanstein,**
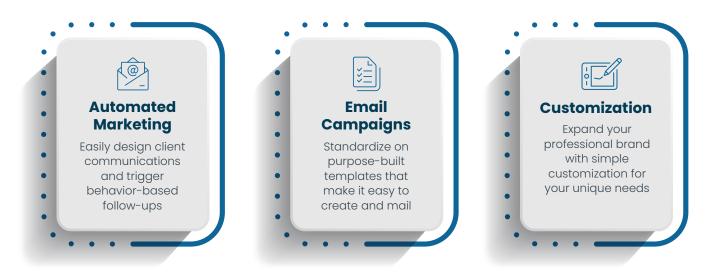CEO and President of Cardinal Realty Group

# Leveraging Marketing Automation for Real Estate

Adoption of marketing automation (MA) in the real estate industry has grown substantially, and with the global real estate MA software market size forecasted to surpass $9.5 billion by 2027, that growth is only going to accelerate. So, what makes MA so valuable to real estate agents and brokers? And how can you harness it to make an immediate impact on your business?

From email marketing to landing pages and automated reporting and testing, here are three ways to improve your marketing operations and increase conversion rates with MA:

## Email Marketing

In today's digital world, 89% of real estate professionals use email to communicate with clients and prospects. However, independent realtors and smaller real estate businesses don't always have the same resources or marketing teams to keep up with long-winded email marketing campaigns. That is where MA comes in handy. With MA, real estate agents have the tools and automated capabilities to create professional quality email marketing campaigns using:

**Automated Marketing**

Easily design client communications and trigger behavior-based follow-ups

**Email Campaigns**

Standardize on purpose-built templates that make it easy to create and mail

**Customization**

Expand your professional brand with simple customization for your unique needs

Email marketing powered by MA enables real estate professionals to send personalized content to clients and prospects—like new listings to potential buyers—consistently and in a fraction of the time of manual email marketing. This gives real estate agents and brokers the power to nurture relationships and build their brands without breaking the bank.

## Landing Pages

Consistency and brand recognition are what make independent and SMB real estate professionals stand out. While MA and email marketing help maintain consistent client and prospect nurturing, customized landing pages allow you to create brand-focused forms or surveys for your audiences and capture valuable lead contact information. With landing pages, you can bolster your marketing strategy, boost your SEO rankings, create custom lead capture pages and streamline the user experience. Whether in email, ads or landing pages, brand consistency establishes professionalism and recognition to get audiences remembering and talking about your brand.

MA tools that provide customizable landing page templates give novice designers the ability to create awe-inspiring digital pages that promote your company's brand, mission, vision and goals and boost conversion rates.

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### Plan B and C, inc.: The Power of a Whole Marketing Team in One

> Through its software innovation, Act!'s email marketing templates have evolved to be extremely user-friendly. Today, I feel like I could sit my 10-year-old son in front of the computer and ask him to design an email marketing campaign on Act! and he would be able to with ease.

**Matt Agnese,**
President, Plan B and C, inc.

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## Automated Reporting & Testing

The goal of any marketing campaign is to convert audiences into clients. With automated reports in MA, real estate professionals not only have the power of an entire marketing team at their fingertips, but they also can easily track and monitor the success of each marketing campaign. And, the right MA software comes with powerful testing tools, like A/B testing. This allows you to test various marketing designs and copy, fine-tune messaging and optimize your marketing campaign's productivity.

MA software can also be customized to track the stats that are most important to you in real time. So, not only can real estate professionals monitor the success of different marketing campaigns but also track the health of their sales pipeline and prospect win/loss analysis to pinpoint when and where adjustments are needed concisely.

### MA Expert Corner

**Kristin Gray**
*Act! Marketing Automation Expert*

**Tip:** Combining landing pages and robust list segmentation can save you time and effort. Create dynamic lists in your CRM database that segment things like area, zip code, budget or type of home. Then, as prospects or clients fill out landing pages that acquire this data, these entries are automatically placed in the correct segmentation lists based on their form answers.

## In Conclusion

For real estate professionals, reputation and customer experience mean everything. The right CRM platform will help you stay in the know on every property and sales opportunity, in turn helping your customers sell their homes for the best value or close on their perfect match. CRM software helps keep you at the top of your game and ensures you'll never miss an opportunity. When it's time to execute your marketing strategy, an all-in-one CRM and marketing automation tool can streamline implementation, making for smooth integration into other software within your tech stack.

# CRM & Marketing Automation for Financial Services:

## Providing a More Personalized Client Experience

## The Financial Market Today

Nowadays, consumers are turning to social media, of all places, to find, connect and learn from financial advisors. Countless financial advisors have been taking to popular platforms like TikTok and Instagram to build relationships and provide insights into finding financial freedoms through supplemental income streams. As that trend continues, the demand for financial advisory services continues to grow. A reality highlighted by a 2022 Allied Market Research study examining the year-over-year growth of the financial services market, predicting a compound annual growth rate of 5.8% from 2020 to 2030 ($79.4 billion to $135.6 billion).

The financial services industry is a people-driven sector, with advisors relying on healthy client relationships to fuel their bottom line. With the average financial advisor handling anywhere from 50 to over 200 clients, the deck is stacked against advisors looking to provide clients with a personalized experience. However, exceptional customer experiences are critical to a financial professional's, or business's, retention, with 77% of customers stating they are more willing to stay with a financial firm if they feel valued.

This is why CRM has quickly become the most valuable software among financial planners and advisory companies to help improve sales, efficiency and, of course, customer satisfaction. While independent advisors and financial institutions alike continue to scrape the surface of CRM technology, those who master the capabilities of their CRM software can set themselves apart from the crowd and develop customer experiences that leave them comfortably ahead of the curve.

**77% of customers say they are more willing to stay with a financial firm if they feel valued.**

# Implementing the Right Financial CRM & Marketing Automation Software, the Right Way

For financial advisors, implementing CRM platforms the right way must start with finding a solution that meets your exact needs. A CRM platform with integrated MA is a must, and an important place to begin. Client satisfaction begins with communication, and marketing automation (MA) enables finance professionals to communicate with an extensive client catalog efficiently and effectively.

A CRM platform allows advisors to connect all of their operations, bringing together otherwise disparate data and harnessing it to unlock critical insights into their customers. Whether independent or part of a sizeable financial team, advisors need a cohesive dashboard to access vital client, partner or investment information quickly and easily.

Once an advisor finds the right CRM solution, the best place to start the implementation process is with a business audit. Ask yourself:

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| Is all of your client information secured centrally? | Do you have a network of professional partners? | How do you prioritize sales-ready opportunities? | Can you access important opportunities and referrals? |

For financial advisors still using paper records, uploading and organizing this information into your CRM platform may take a bit longer, but the benefits are immediate. By segregating client information, investment opportunities and network partners on a flexible CRM platform, advisors can then create custom categories for each client to optimize organization and provide a superior customer experience.

## CRM Expert Corner

**Debora Boyle**
*Act! Certified Consultant and Owner of Action Platinum Solutions*

**Tip:** The right CRM solution for finance should be able to accommodate everything from an individual practice to an entire firm, bringing calendaring tools and relationship-building features that will help transform leads.

# Optimizing Your CRM for Financial Services

A CRM platform for financial services requires both flexibility and customization at its core. By leveraging a highly agile CRM platform, advisors can simplify the intricacies of managing a client's financial portfolio. Untangling those complexities within your client management means a major boost to work productivity—consequently helping improve customer relationships, sales pipelines, lead nurturing and client retention in the long run.

Let's look at how CRM helps financial advisors drill down into client information as well as streamline and improve business operations.

## Client Management

At its basic level, a CRM platform allows advisors to track and organize client information including notes, documents, upcoming activities, secondary contact information and relationship status just to name a few. But going a level deeper, CRM platforms can be customized to even include individual client accounts or assets under management (AUMS) pages. From here, you can track all of a client's current house accounts including 401k's, savings accounts, pensions, IRAs, business accounts and more. And advisors can track policy, investment, retirement and estate planning all from within a client's portfolio. This level of integration enables advisors to assess investment and planning performances effortlessly to quickly flag and communicate potential risks or profitable gains.

## Search Functionality

Financial advisors have vast amounts of client data and details that they need access to at any given time. A highly functional, customizable, internal search engine is pivotal for financial advisors juggling so much at once. When it comes to things like policy or estate plans, advisors may not always be dealing with the account owner, which only adds to the complication. When a spouse or relative on the plan calls with an inquiry, quickly searching their names in the CRM database and pulling relative information saves advisors' time and avoids creating a negative customer experience in the process.

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### CRM Partner: Allied Financial Software

> "As consultants, an important part of our job is getting clients to understand that while their current processes may "work," they may not be serving their customers to the best of their ability, and CRM technology like Act! is designed to take their operations and customer service to the next level. "

**Scott Abboud,**
Allied Financial Software

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The financial industry is highly regulated. Advisors can be asked to provide relevant documents or information at any time. A robust CRM, with customizable search parameters, enables advisors to separate and categorize important information or documents and create search rules to simplify retrieval of such files—saving advisors hours not having to rummage through paperwork.

## Email Integration

Like a highly functional search engine, email integration for CRM platforms is essential from a compliance standpoint. By connecting your email to your CRM platform, you can capture interactions and histories automatically, eliminating vast amounts of tedious, previously manual, work. Even if emails are deleted or removed from your inbox, the histories are still stored within a contact's record, helping to avoid any human error or accidentally lost records. Aside from creating a paper trail, this saves advisors time. No longer are you forced to bcc yourself to record relevant email information into a contact's records, your CRM platform simply does that work for you.

# Leveraging Marketing Automation for Financial Services

Financial advisors are masters of their own trade. However, efficient and engaging marketing practices may not fall within their expertise. Fortunately, MA tools are here to help advisors bridge the marketing knowledge and experience gap without the need to be a marketing genius and giving them the tools and resources to generate professional content. Much like CRM software, marketing automation software adoption within the financial services industry has continued to grow, with the market expected to grow by over $2 billion by 2027.

With MA set to take off for financial advisors in the coming years, what can you do to make the most of the tools you've implemented? Here are two ways to optimize and get the most out of any MA implementation:

## Automated Campaigns

For financial advisors and their clients, fluid communication is essential. Any delays, complications or mishaps in communicating the status of a client's financial portfolio or account could leave them with a very negative experience, and you with one less customer. With MA tools, advisors can keep clients in the know faster and more efficiently. By creating automated recurring campaigns, advisors can build steady communication with monthly newsletters for clients that highlight market trends, new services, referral requests or any other business-related updates.

This technology can also be used for re-engaging leads that have gone dormant. MA platforms allow advisors to trigger weekly, monthly or quarterly emails for leads that have shown interest at one point but have since gone silent.

## MA Expert Corner

**Kristin Gray**
*Act! Marketing Automation Expert*

**Tip:** By taking advantage of highly accurate lists in Act!, you can use MA to deliver email campaigns that are tailored to the needs of your segmented lists of customers.

**Tip:** MA can take advantage of campaign activity, like specific email link clicks to trigger your predefined actions, like creating a to-do task.

## Email Analytics and A/B Testing

Not every email marketing campaign will be perfect on the first go around, and not every client will engage with the content you put out. But that doesn't have to be the end of it. With MA in place, you can use these instances to learn and hone your messaging. With the analytics inside your MA platform, you can see how different campaigns are performing in real-time and how audiences interact with each email. A/B testing enables you to create multiple email designs and copy for each campaign and gauge the performance of each among audiences. With both email analytics and A/B testing, advisors can get much more granular about the market data and business updates clients are most interested in and how to best present that information in an engaging and compelling way.

# In Conclusion

Success in the financial services industry depends on strong, long-lasting client relationships. At a time when customers want to forge a more personal connection with their financial advisors, CRM solutions provide a powerful tool to engage with and strengthen any client roster. When it's time to implement your marketing strategy, an all-in-one CRM and marketing automation tool can streamline implementation, making for smooth integration into other software within your tech stack.

# CRM & Marketing Automation for Independent Insurance Agents:

**Enhanced Organization & Automation to Improve the Customer Experience**

## The Insurance Market Today

Societal and economic uncertainties have continued to drive up demand in the insurance industry. Events like the COVID-19 pandemic highlighted just how important insurance can be during times of unpredictability and crisis. Now, a looming economic downturn, coupled with an increase in extreme weather trends have continued to push protection plans to the front of consumers' minds. With businesses and individuals of all backgrounds taking an economic hit over the last few years and looking to mitigate future losses, the insurance market is poised to continue growing.

While one may assume there are plenty of fish in the sea for independent insurers, the market is becoming more and more saturated. Standing out to potential leads and retaining current clients will ultimately be what drives long term success for insurance agents. Fueling that success is superior customer support, which is why 85% of North American independent insurers have a strategic initiative to improve their customer experience.

The adoption of CRM solutions will play a massive role in helping independent agents improve customer experience, with the CRM market set to grow from $63.9 billion in 2022 to $145.7 billion by 2029. While many agents have already begun implementing CRM solutions, those who can optimize the technology to eliminate time-consuming manual tasks and recycle those hours into their clients will see greater success.

**85% of North American independent insurers have a strategic initiative to improve the customer experience.**

# Implementing the Right Insurance CRM & Marketing Automation Software, the Right Way

Independent insurance agents are wearers of many hats. Outside of sales, manual administrative and operational work, from handling policyholders' paperwork to managing agency bookkeeping, takes up a sizable amount of an agent's day. These tasks bring down productivity and drain an agent's energy. With independent insurance agents handling hundreds or even thousands of policies at any given time, fatigue and disorganization can make effective customer support nearly impossible.

With that in mind, implementing an insurance CRM solution should first focus on segmentation and automation. The more organized you are and the smoother your processes are, the more care you can give your clients and prospects. Prioritize finding a CRM solution with customizable segmentation categories that allow you to drill down and separate clients from leads, and customer and lead bases from one another (e.g., personal lines, commercial lines, construction).

A CRM platform with underline marketing automation (MA) enables agents to relieve many of the manual burdens that hinder their productivity. By finding a CRM and MA tool that integrates with your email inbox, agents can automatically create histories of interactions with clients on their client contacts and can generate automated email responses and recurring drip campaigns to continuously engage with clients and prospects.

## CRM Expert Corner

**Debora Boyle**
*Act! Certified Consultant and Owner of Action Platinum Solutions*

**Tip:** Choose a CRM platform with strong relationship-building features and robust pipeline management to turn leads into clients and better track the sales process every step of the way.

# Optimize Your CRM for Insurance

The insurance industry is yet another highly regulated market, leaving independent agents with little room for error, and with a vast amount of information to manage at any given time. With hundreds of clients and policies, independent agents need a CRM platform that simplifies their lives, organizing client and prospect information and providing them with the resources they need to stay ready to respond to customer needs as quickly as possible. The ability to streamline data creation, storage and retrieval is pivotal for agents to not only deliver an exceptional level of customer support, but also ensure they are remaining compliant with the evolving landscape of compliance and regulatory guidelines.

With that in mind, let's examine how independent agents can optimize their insurance business with a CRM solution:

## Client & Policy Segmentation

For independent insurers offering various insurance types and packages, nearly eight out of every 10 consumers bundle their insurance packages. For example, a customer can purchase a home, auto and life insurance policy from the same insurer. That's great for agents, right? Well, it is with a tool that can help you stay organized.

Customizable CRM platforms let you segment clients and their dependents, and then create policy pages for each separate type of coverage that the client owns. By separating different policy types, like property and personal insurance, an agent can create a more granular and organized inventory of each client's policies. Then, through search, an agent can retrieve information quickly to answer client questions or adhere to auditing requirements.

### CRM Customer: MAP Insurance

Secure centralized client data means approaching renewals or upcoming terms are at the fingertips of the MAP Insurance team. Act! simplifies monitoring these events, providing reps with ample time to prepare the best policy options. Act!'s Task List tool ensures that the team never misses an outreach opportunity, key date, anniversary or policy renewal.

## Policy Renewal & Expiration Notifications

Nothing can be more frustrating for a client than finding out a policy is set to expire in a month, and they have to decide whether to renew or search for alternative policy options in a short amount of time. A CRM platform can be customized to provide a dashboard full of all your client's upcoming renewals and expirations, so you can instantly determine client prioritization. Agents can also create notifications for upcoming client policy renewals or expiration dates. Rather than waiting until a month out—which is standard insurance agency policy—agents can set notifications to remind clients six months, a year or any amount of time in advance.

# Leveraging Marketing Automation for Insurance

A KPMG study found that automation can reduce repetitive agent work by more than 80%. With insurers focusing on improving their customer experience, eliminating repetition is a must for every agent. On top of that, 80% of insurance shoppers say they want personalized offers. Both figures demonstrate the necessity of MA in an independent insurer's toolkit.

Let's look at a few ways MA can optimize your insurance operations:

## Automated Lead Capturing

Insurance agents are often swamped with requests for quotes and pricing. An insurance CRM solution can help automate capturing lead information directly on your website. From there, you can design automated parameters to prioritize the most qualified leads for immediate follow-up. This allows you to automatically score and focus on the most promising leads to accelerate lead nurturing and the entire sales pipeline process. Putting a closer eye to your most promising lead means you'll be ready to step in at the perfect moment to convert them into a client. Couple that with other MA tools, and your name may very well already be the first that comes to mind for those prospects to begin with.

## MA Expert Corner

**Kristin Gray**
*Act! Marketing
Automation Expert*

**Tip:** With marketing automation, you can score your leads based on activity, saving time by automatically separating the most active leads from your least active. This level of insight makes it easier to understand where an agent should be spending the bulk of their time.

## Automated, Personalized Email Marketing Campaigns

It's no surprise in our digital world that over 91% of all internet users in the United States use email. Email has proven itself to be the one digital channel that transcends different consumer demographics' preferences. Consumers want to communicate via email, but not at the expense of having a personalized experience with those they interact with. Email marketing automation allows agents to create large-scale, brand-facing email campaigns to their intended audience, meeting them on the desired channel, without losing that personal touch.

Agents can also take advantage of pre-populated, customizable email templates—even the most novice designer can make awe-inspiring email designs that promote brand awareness and engage customers. These tools also allow agents to build drip campaigns for both clients and prospects, with customized triggers that automatically send follow-up emails to respondents based on how they interact with the email.

This customization enables agents to stay connected and provide constant communication with clients and prospects, from initial engagement to retention cycles. Leveraging MA makes it possible for an agent to get proactive with their policy renewals and develop automated email notifications for clients 30, 90, 180 or 360 days out so they're ready to reach out at just the right time.

# In Conclusion

There's no shortage of choices when it comes to picking an insurance agent. And as consumers seek out a superior customer experience, meeting those preferences will be the difference between success and failure. Implementing the right CRM platform makes it easier for agents to both retain clients and capture new leads. When it's time to incorporate your marketing strategy, an all-in-one CRM and marketing automation tool can streamline implementation, making for smooth integration into other software within your tech stack.

# CRM & Marketing Automation for Nonprofits:

## Optimized Donor Management to Build Strong Relationships

## The Nonprofit Market Today

Nonprofit organizations, big and small, face all sorts of challenges from shrinking budgets to increasingly hesitant donors. And with an economic recession on the horizon and rising inflation, the donors that nonprofits depend upon are becoming more cautious over who, and what, they are giving to. Research found that 63% of donors reported being more cautious with their giving. This trend is something that existed even before the COVID-19 pandemic. Additional research from 2019 found that only 19% of those surveyed said they highly trusted charities. But even with growing scrutiny, 98% of donors do still intend to give, even if only 21% of those planned to give more than the year prior. In this industry, there can be no nonprofit without donors.

Fundraising is the lifeblood of these organizations, requiring monumental efforts to help drive a lasting impact in their respective fields. For every 1,000 fundraising messages sent, nonprofits raised $90. With that in mind, it's clear just how important building strong relationships with donors can be.

The number of contacts and donors needed to drive a nonprofit's operations means email lists and marketing efforts are only going to grow over the coming years. And as it does, CRM platforms will be essential to make the most of opportunities and build strong relationships that are capable of withstanding greater scrutiny, while reducing costs and staying within a tightening budget.

**63% of donors have become more cautious with giving due to economic uncertainty.**

# Implementing the Right Nonprofit CRM & Marketing Automation Software, the Right Way

It all comes down to relationships—capturing interest from donors means building a strong foundation of trust to keep them coming back. In an environment where giving is becoming more selective, these organizations need to be able to reach out to as many targets as possible, while still building strong, personalized connections.

So, nonprofits need to reach donors, but contacting people too frequently runs the risk of causing donor fatigue—a reality that ranks among the top concerns for many charitable organizations. With a CRM solution, you can customize messages to donors and ensure that the information you're sending resonates with the people reading them.

Finding the right CRM solution for nonprofits starts with tailoring the tools to meet the unique needs of your organization. Start by getting a closer look at your day-to-day activities and operations. Nonprofits have a lot going on at any given time, with activities including volunteer management, outreach, event management, fundraising campaigns, online donations and social media management. Effective implementation requires you to look at each of those activities that apply to you, and pair it up with the right CRM solution.

For nonprofits especially, a CRM solution needs to be budget-friendly while still providing the ability to help them cultivate and strengthen donor relationships. From there, look for a CRM solution that enables your organization to manage both online and offline donations, track event attendance, phone conversations and every interaction in between.

# Optimize Your Nonprofit CRM

Out of necessity, nonprofits have deep contact lists of donors, volunteers, stakeholders and others to keep track of, build relationships with and train. If nonprofits want to achieve their full potential, all of that data needs to be integrated. But if you're managing donors in one spreadsheet, volunteers in another, you're not only creating unnecessary labor, but also leaving opportunities for revenue growth untapped.

A CRM solution can save time, improve relationships and make operations much more manageable. Here are just a few ways that nonprofits can optimize their CRM:

## Centralized data management

With a revolving door of volunteers and a constantly expanding list of regular, and potential, donors, being disorganized can prove fatal to nonprofits. Getting a handle on, and centralizing, all of a nonprofit's data makes it easier to track donor relations and past interactions, helping to forge stronger connections. A CRM platform can optimize your data management, capturing details from donors, volunteers, sponsors and grants, among others all in one organized, easily searchable location.

For an industry that hinges on its relationships, this feature is critical. With all of that data centralized, you can simply pull up a given contact's details and view every donation they've made or event they've attend. Or in the case of volunteers, you can track who is responsible for what tasks, and how to best allocate resources. In all, no matter what the intent, centralizing internal data unlocks a plethora of opportunities, all in just a few clicks—no more hunting down spreadsheets and databases.

## User-friendly CRM interface

A CRM built for nonprofits is only useful if the people who rely on it understand how to use it. These organizations are a mix of professionals, part-timers and volunteers, often with a high rate of turnover. All of that means there's a steady stream of new faces coming in that require training on internal tools. You could have the best CRM software on hand, but if the user interface is complex or convoluted, training people to use it can be an exercise in futility and a big waste of time.

Optimizing your CRM platform with an easy-to-use interface makes getting critical donor information into the system easier, and enables employees and volunteers to navigate the CRM platform whether they've been with the nonprofit for five years, or five days.

# Leveraging Marketing Automation for Nonprofits

Marketing automation (MA) has the potential to transform nonprofit communications and fundraising practices. But research has shown adoption hasn't followed as quickly as other industries, with only 34% of respondents stating they leverage email automation. Failing to incorporate MA features into your nonprofit operations will only hamper your ability to follow up with donors, volunteers and other audiences.

While it may not seem essential on its face, MA is about much more than just sending automated responses on email and social media. The right solutions make it possible to automate key marketing workflows and stay engaged with key stakeholders.

**Allegiant Giving: Growing a Database of over 4,300 Prospects, Partners, Donors and Participants in Act!**

> We are constantly reaching out to people who don't know who we are. That means communicating with them in a way that shows we know what we are doing. We have to tell our story well and present it professionally right from the start.

**Michael Matthews,**
Co-Founder, Allegiant Giving

Here are a couple of different ways MA can empower nonprofits to engage donors and strengthen relationships more effectively.

## Email Marketing Campaigns

How many of us can think of a time where we've received an email from a nonprofit or charitable organization? Probably most, if not all, of us have at some point. Email campaigns are unquestionably some of the most important tools in a nonprofit's arsenal. Whether it's notifying volunteers about trainings or ensuring you invite every major donor to the next big event, the right CRM and MA solutions make it easier than ever to hit the right contacts, all with just a few clicks.

Utilizing email MA, nonprofits can map out email flows that will automatically follow up with donors anytime a contribution is made or when someone reaches out to inquire about the organization. It also presents an opportunity to reach interested individuals, identifying opportunities to educate relevant donors through newsletters that highlight all the work the nonprofit is doing, sharing the most informative and relevant updates.

With features offering greater personalization and customizability, nonprofits can always send the right message to the right audience, at the right time, leveraging MA to differentiate the organization with personalized campaigns and landing pages with professional, turnkey templates.

## Landing Pages

Success hinges on how well you're able to reach and attract donors, prospects and other stakeholders. Landing pages are a great way to build a pipeline of prospective donors, while also gauging what matters to your target audiences with forms and surveys. With landing pages, nonprofits can create workflows that ensure the latest information is always captured. Leveraging these features, nonprofits can create landing pages that incorporate donation forms that flow directly into their CRM, updating contact information, donation values and other pertinent details.

Once a donation happens on one of those landing pages, that data can then be fed through the CRM platform and used to trigger processes that send out a thank you email via MA campaigns. Small touches like this can have a major impact, ensuring the personal element is never lost, no matter how big the list of donors and prospects becomes.

### MA Expert Corner

**Kristin Gray**
*Act! Marketing Automation Expert*

**Tip:** Use marketing campaigns to send accurate donation tiers and requests to your database. With a CRM platform, store data, like donation tiers, that each donor fits into. Then use list segmentation in your CRM to keep these tiers and donors organized in your database.

## In Conclusion

As donors place more scrutiny on who, and what, they give their money to, it's becoming more important for nonprofits to create and sustain strong relationships with those people. With the right CRM solution and MA platform, nonprofits can reach target donors and manage their most critical relationships in a more impactful way. When it's time to incorporate your marketing strategy, an all-in-one CRM and marketing automation tool can streamline implementation, making for smooth integration into other software within your tech stack.

# CRM & Marketing Automation for Startups & Entrepreneurs:
## Improving the Customer Journey

## The Startup and Entrepreneurial Market Today

In the U.S. alone there are over 70,000 startups, all vying for a piece of the pie. In such a saturated marketplace, the stakes for these businesses are incredibly high. By all accounts, many of those startups will ultimately struggle and, more often than not, experience failure within the first five years, as they struggle to capture a consistent customer base and generate the revenue needed to survive.  No matter where a startup finds themselves, providing a consistent, memorable experience for customers has been one of the most important factors in generating long-term success. And research has shown that 73% of customers say their experiences had a direct influence on the purchasing decisions they make.

As these businesses look to draw in customers, it's important for them to gain a deep understanding of what their needs are—asking questions like, what are the areas prospects and customers are most interested in? And, how do those customers like to be contacted and communicated with? Answering these questions makes achieving that level of customer experience possible.

> **Customer experience influences 73% of purchasing decisions**

When it comes to creating those experiences, CRM solutions are uniquely suited to help startups manage everything from sales pipelines to forecasting revenue and engaging customers. Competition among startups isn't going to lighten up anytime soon. Incorporating the right CRM solution can help these businesses ensure they are meeting the needs of their customers and forging strong relationships.

# Implementing the Right Startup and Entrepreneurial CRM & Marketing Automation Software, the Right Way

Funding and profitability are incredibly important for burgeoning startups. In fact, 38% of startups end up running out of capital or investors at some point. So, for these organizations there just aren't always the resources to invest in flashy software or to build out robust marketing departments full of professionals. So, when choosing a CRM solution for your startup, affordability should be a major focus. Look for solutions that are a match for your needs, but also won't drag along a catalog of features that are irrelevant to your business.

The most impactful CRM solutions for startups are custom built to save time, boost productivity and reduce costs, all providing much needed relief to the businesses bottom line. These functions are particularly essential for startups as they get first set out because many don't have a significant sales or customer service offering, leaving it up to founders to take on the extra responsibility.

## CRM Expert Corner

### Debora Boyle
*Act! Certified Consultant and Owner of Action Platinum Solutions*

**Tip:** The right CRM solution will evolve and scale with a startup business, keep crucial client details, offer solid relationship-building features to transform leads into clients and segment contacts into groups so you're always reaching out with the right message.

When adopting a CRM platform for your startup, look for a platform that can grow with your business and help you meet the unique needs of your target customers. The right solution offers affordability, scalability, flexibility and customizability that make it possible to master customer relationships and reach new audiences.

# Optimize Your Startup and Entrepreneurial CRM

For a CRM platform to be effective within a startup, it needs to deliver both flexibility and scalability capable of matching the unpredictable and rapidly changing nature of those businesses. Some startups may accelerate their growth much more rapidly than planned, and others may go through varying periods of growth and stagnation. Regardless, an optimized CRM platform is one that meets the needs of startups no matter the situation.

It's no secret that the key to success for startups comes down to how well they can identify and draw in customers. Leveraging a CRM platform empowers startups to optimize their workflows and take advantage of previously unrealized insights into customer desires and behaviors, unlocking opportunities to attract prospects and capture their target audience's attention.

There are several ways that startups can get the most out of their CRM platform. Here we'll look at a few of those methods startups can use with CRM platforms to get a handle on target audiences, effectively build relationships and improve experiences:

## Lead Generation

For startup founders already wearing multiple hats, gathering and tracking potential customers is a monumental ask. A CRM platform brings invaluable tools that offer resources like landing pages, email MA and workflows, enabling you to approach and follow up with prospects.

It also allows you to segment leads based on location, which products they're interested in and a host of other key demographic traits that may make them more likely to engage with your startup.

Segmenting these leads adds context to your targeting, ensuring you send out only relevant information to prospects. By segmenting customers into a variety of demographic groups you can then send highly personalized email campaigns through a CRM platform, boosting customer experiences by making them feel like you know what they want, thereby improving confidence.

## Application Integrations

In a budding startup, data doesn't always have one definitive home; some things are scattered across spreadsheets and other documents and file types, while others may live on something as low-tech as a post-it note. A CRM solution can gather all your customer data, track interactions and provide highly accurate, real-time reporting, saving you and your team valuable time instead of searching high and low for the right information.

Getting that data fully integrated into your CRM platform brings the added benefit of integrating with apps you're already using like QuickBooks or DocuSign, ensuring information flows effectively, saving time in the process.

> ### Salon Real Thibault: Developing a More Personalized Approach to Improve Service
>
> " For years, I recorded these details by hand, either on paper or in books, until I decided to computerize my business. "
>
> **Real Thibault,**
> Hairdresser and Stylist

## Streamlined Customer Journey

Providing an impactful customer experience is critical for startups looking to separate from the pack. And a key part of making that happen comes with ironing out the entire customer journey that a business is offering prospects. The right CRM platform makes it much easier for users to track that entire journey from the first time a prospect is contacted to the point they become repeat customers. Within a CRM platform for startups, users are also able to monitor and follow every one of those engagements across every channel including web pages and other content, as well as every human interaction that takes place, giving the business a complete picture of where every customer, and potential prospect, stands in their journey from start to finish.

# Leveraging Marketing Automation for Startups and Entrepreneurs

Startups are inherently fast paced, and often only have a small number of staff on board at any given time. With those constraints, it's important that everyone be maximizing the time they spend in ways that benefit the business. And the staff that are there often aren't equipped with a significant expertise or background in marketing. With limited staff availability and resources, marketing automation (MA) helps take away some of the more time-consuming tasks and simplifies processes so you don't have to be a professional to build an effective campaign.

With that in mind, let's explore a few ways that MA can help startups build strong connections and grow their customer base:

## Automated Email Marketing

Any effective marketing campaign needs to be tailored to the right audience. With highly segmented contact information in their CRM platform, startups can then take that data and create highly targeted and personalized email campaigns sending out updates and product information to those who are most likely to be interested. From there, startups can crack the code of where their customer's interests lie by sending email campaigns that request feedback on what they like and what can be improved.

Through these MA tools, startups can create response-driven nurture campaigns to gently guide prospects down a customized path. MA features like automated email marketing lets businesses set up automatically triggered emails to contact prospects when they reach a certain number of engagements, reducing the likelihood of connecting with them at inconvenient times.

## Landing Pages & Forms

Landing pages and web forms are a must for any MA toolkit. Incorporating these features into a startups marketing efforts and operations can help generate a deeper level of direct feedback from customers that help tailor their message, build stronger relationships and attract repeat clients. By folding in survey forms on those landing pages and web pages, startups can nail down what a customer is most interested in and feed that information directly into the CRM platform. And with MA, you can track when your forms are being submitted in real time with automated email alerts. Getting this instant feedback can help you take action faster and resolve any issues before customers are left with a negative impression of your customer service capabilities.

Broadly, forms present a major opportunity to improve customer experience. Creating pages and forms that survey customers and present them with a way to share feedback helps optimize experiences in an impactful way.

## MA Expert Corner

**Kristin Gray**
*Act! Marketing Automation Expert*

**Tip:** Having web forms and surveys on your site to ask customers about interests and experiences can help your business gain a better understanding of desires and opportunities for growth.

**Tip:** Creating forms for support questions makes it easier to respond to customers quickly, address their concerns and rapidly improve experiences.

## In Conclusion

For startups attempting to break through and establish themselves, differentiating from the rest of the crowd means delivering a top-flight customer experience. A customizable CRM solution, along with MA tools, can help startups get a handle on their intended customers, expand reach and create higher-quality engagements. When it's time to incorporate your marketing strategy, an underline all-in-one CRM and marketing automation tool can streamline implementation, making for smooth integration into other software within your tech stack.

# Why Act!?

Act! is the leading provider of all-in-one CRM and Marketing Automation solutions that empower small and midsize businesses to market better, sell more, and create customers for life.

CRM and Marketing Automation built for small and midsized business success.

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