

# GOT MICROSOFT DYNAMICS® CRM?



Make Your Customer Engagement  
Even More Intelligent with Act-On  
Marketing Automation, Too!



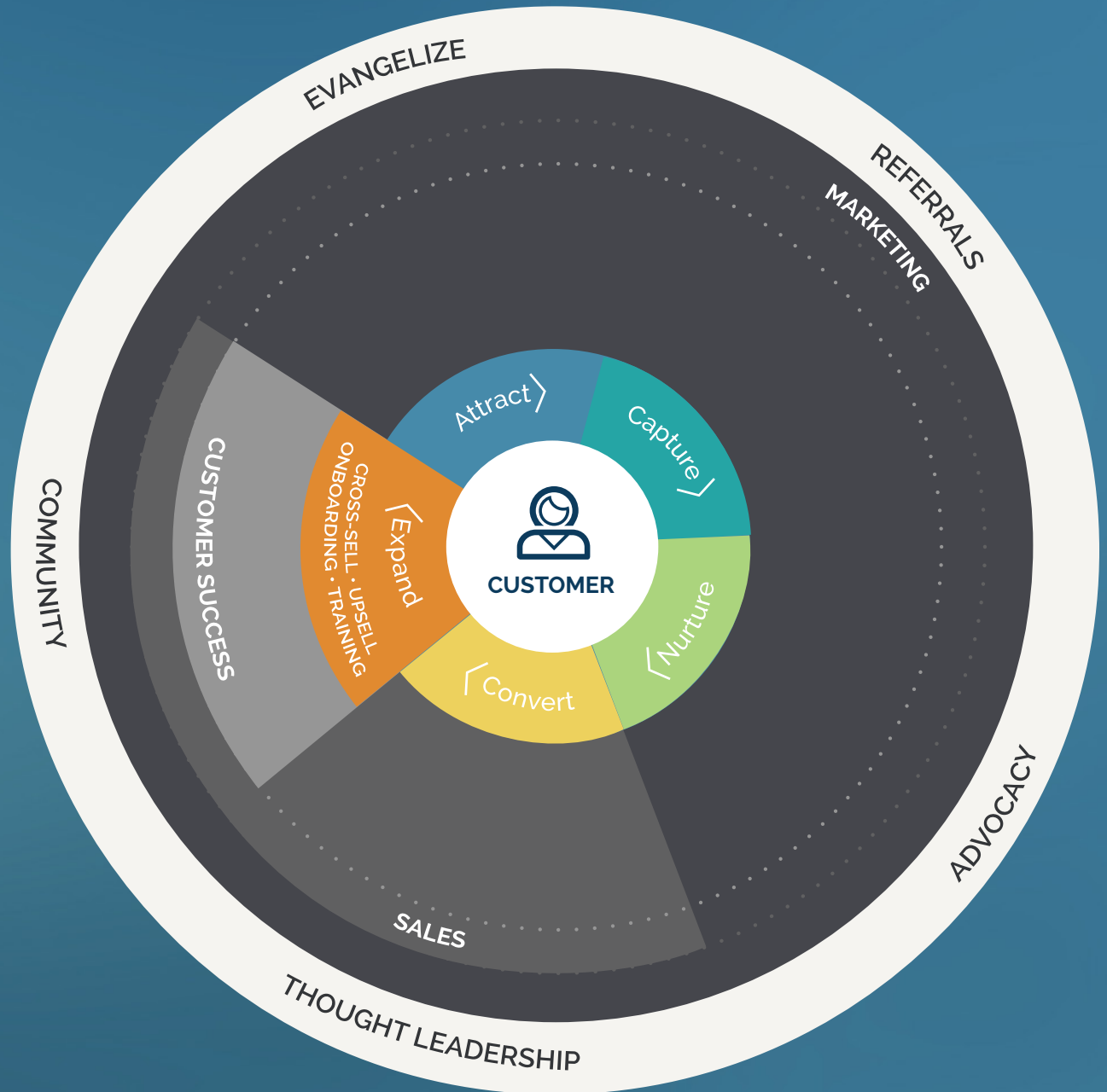
MICROSOFT DYNAMICS + ACT-ON =

# Better Together

From Lead to Revenue

From Attraction to Retention

From Anonymity to Advocacy



Act-On's list management function is fantastic! Its ability to automatically pull updated lists from Microsoft Dynamics in real time is huge.

Act-On lets me nurture leads until I'm ready to hand them over to sales, while also automatically notifying sales when they should follow up with hot prospects, such as those who complete key forms on our website. It makes sales more accountable and allows us all to work more efficiently.

The amount of time I save now that the two are connected is amazing.

— NATALIE JACKSON

Marketing & Public Relations Manager  
NetStandard

When we promote a webinar through Act-On, I select the marketing list I want to use, the messages and the frequency of those messages. I just schedule everything and I don't have to go back in there every day. And everything just goes into our Dynamics system flawlessly ...

The sales team can easily go into Dynamics and see what a prospect has been looking at, which Act-On emails they've opened, everything. That really helps them relate to prospects when they're on sales calls... We're building this automated pipeline that runs so seamlessly that it really frees up our time.

— JULIE WEIL

Marketing Director  
Templeton & Company

# Data Tells a Story

Use Data to  
Define and Identify  
Prospects

Develop  
Relationships

Deliver **Sales-Ready**  
Leads to Microsoft  
Dynamics CRM

Better Engage  
Customers  
From **Anonymity**  
to **Advocacy**

## **BUILD ENGAGEMENT, TRUST, ADVOCACY**

Adaptive customer engagement builds loyalty, trust, and advocacy. With Microsoft's Dynamics CRM, your sales, support and success teams can be as responsive and effective as possible in creating personalized customer experiences.

When you add Act-On's next-generation marketing automation platform to Dynamics, you get a window into the heart of the customer. Where they go, what they do, what they care about. Trade show interactions, content downloads, web page visits, email opens, online display and social advertising clicks (and much more), are all digital footprints that prospects and customers generate, signaling interest, intent and opportunities.

*From the moment the journey begins, **intelligent engagement progressively builds your understanding, so that sales and marketing can align around the customer experience.***

## **GATHER AND SHOW DATA IN ITS COMPLETE, USEFUL FORM**

Act-On has a seamless native integration with Microsoft Dynamics CRM. The bidirectional sync between the two means you have 360 degrees of current data at your fingertips. You can make more informed decisions about how to engage your customers and prospects, and how to shape the customer experience across the entire lifecycle.

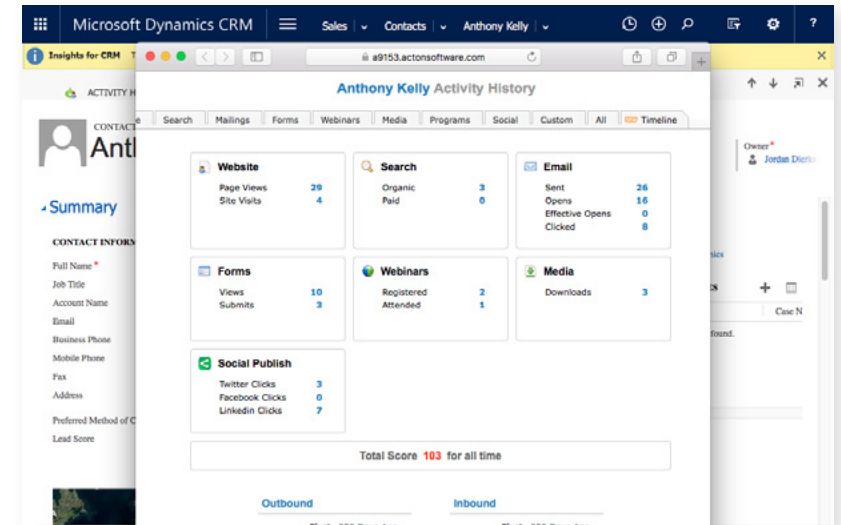
You can also attribute revenue to campaigns and channels (even social media) so you can measure your ROI more accurately.

Sales and marketing can better serve every prospect and customer when they share data.

# MICROSOFT DYNAMICS CRM + ACT-ON MARKETING AUTOMATION = Accelerating Leads, Engagement, & ROI

*Dynamics gives you data and organizes it. Act-On gives you the tools to make that data actionable – and the intelligence to make it personal.*

- **Craft trackable Act-On emails** for salespeople to send from Dynamics, Outlook, or Office 365.
- **Build creative elements**, landing pages, and automated programs that schedule and deliver the right content to the right person at the right time.
- **Build forms** that work with SharePoint and .Net sites, with ease.
- **Track and measure** all your campaigns across all the media and channels you use: email, ads, social, events, and more.
- **Leverage data from Dynamics:** Pull leads, campaigns, contacts, opportunities, accounts, groups, and owners for use in segments, scoring, and personalization.
- **Push data to Dynamics:** Send notes and create tasks from automated programs in Dynamics, and sync custom fields (such as Lead Score).
- **Give sales a window into marketing data.** From their Dynamics dashboard, sales can access Act-On lead scores, Hot Prospects, and activity histories, to see every email sent and opened, every page visit, every download, every form fill – every engagement – for informed, smarter conversations.



*Sales can drill down to see precisely which web page, which email etc. – where and how your prospect is interacting with you before they call.*

# When Dynamics + Act-On Connect, Marketing Can Scale

**It's the age of the customer.** Marketing automation makes it easy for you to pay personalized attention to segmented leads and established customers, building closer relationships at every stage without straining resources. Automated programs make it possible to replicate your successful campaigns and run them at scale, with less effort – and more precision.

## POWER MARKETING

Create, automate, and measure marketing, nurturing, upsell, and retention campaigns, leading to action and advocacy through timing and relevance. Right person, right message, right time.

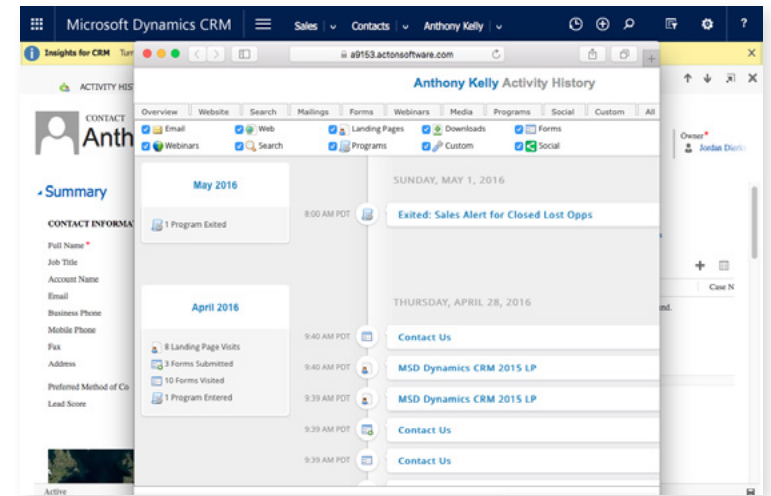
Plus:

- Track prospect behaviors and digital footprints, share the data with sales.
- Correlate behaviors from multiple people at the same company, use account-based marketing tactics to coordinate personalized nurturing.
- Score accounts and leads on specific behaviors, profiles, and attributes.
- Qualify leads, send to sales automatically when leads cross a set threshold.
- Automatically manage, assign, and recycle leads based on specific behaviors.

## POWER SALES

Give a window into Act-On right inside their Dynamics dashboard, so they can:

- Send marketing-created, personalized, trackable emails and messages.
- Get qualified, prioritized Hot Prospects delivered daily.
- Learn exactly why a lead has been qualified and assigned to them.
- See a prospect's interests and activities, understand what they want and need, know where to begin the conversation.



*Sales can see a Timeline view of a prospect's activity history and drill down into any category – email, web, downloads, etc.*

# Pick the Right Marketing Automation Platform from the Beginning

*Picking the right platform is much more than filling out a checklist of functionalities.*

Your own business processes, resources, goals, and budget should inform your selection of a marketing automation system that integrates with, and complements, your use of Microsoft Dynamics CRM while meeting the needs of your business.

## KEY CONSIDERATIONS

- **Your goals.** Can the platform help you get from A to B? And then to C?
- **Speed.** How quickly can you get from start to value?
- **Ease of use.** Is the platform intuitive and easy to use?
- **Hidden costs.** What will it cost for strategic planning and implementation?
- **How difficult will integration be?** Is it native or an API? Will it take more than one day? One week?
- **Does the data sync** automatically between the two systems, or must you do it manually?
- **Does the vendor's onboarding** program look sufficient? Is there a dedicated team to help you?
- **How much support** is included, and for how long? What happens when it ends?
- **Does the platform have** a native integration with Microsoft Power BI?
- **Does the platform support** account-based marketing tactics such as account scoring?
- **Does the solution support** account profiles that roll up all contact-level engagement data?
- **Your resources.** Some platforms require a full-time dedicated resource to keep the gears turning.
- **Your access to IT.** Some platforms require ongoing attention from your IT department.

Act-On is known for being easy to implement, easy to use, and cost-effective – and for world-class support. We'd love to show you what you can expect with Act-On. [Contact us](#) for a demo, or call 877-530-1555.



# Acclaim for Act-On

**Deloitte.**  
Technology Fast500  
2013, 2014, 2015

**Inc.** 2013, 2014, & 2015  
**500** FASTEST  
GROWING  
COMPANIES

**LEADER** in Forrester Research, Inc. report, The  
**FORRESTER WAVE**  
Lead-To-Revenue Management Platform Vendors, Q1 2014

**Forbes 2013**  
AMERICA'S MOST  
PROMISING COMPANIES

FROST & SULLIVAN  
**2014** BEST PRACTICES AWARD

See all of Act-On's  
awards & accolades...



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## About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated resource.

Connect with us to learn more

www.act-on.com | @ActOnSoftware | #ActOnSW

