

# IT Expert NetStandard uses Act-On and Microsoft Dynamics to Save Time and Empower Sales

For two decades, NetStandard has been managing IT for small and medium businesses, providing them with everything from managed technology to virtual servers to Microsoft Dynamics consulting. Like many companies, they struggled with nurturing leads effectively and efficiently. Building and maintaining lists, implementing campaigns, and coordinating efforts with sales consumed an inordinate amount of time. With the help of Act-On and its seamless integration with Microsoft Dynamics, they were able to automate sophisticated nurture programs and streamline the collaboration between marketing and sales – reducing frustration and saving hundreds of hours of work in the process.



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**NATALIE JACKSON**  
Marketing & PR Manager  
NetStandard

# Challenge

NetStandard markets their IT solutions to a range of industries, including healthcare, insurance, financial services, and government. Among their primary personas are CEOs and CFOs, many of whom could benefit from managed IT services, but don't really understand how. The company addressed this gap by planning a series of events to educate them, but before using Act-On and Microsoft Dynamics, nurturing and inviting prospects was time-consuming and complicated.

"The process was cumbersome and prone to error," said Natalie Jackson, NetStandard's marketing and public relations manager. "Sales would forward an email we created, or call prospects directly – actions which were difficult to track and inevitably resulted in uncertainty about exactly who was invited and planning to attend. Sometimes prospects would receive the same invitation twice – even after having registered."

Managing lists for these and other campaigns was also fraught with difficulty. Before NetStandard used Act-On and Microsoft Dynamics, Natalie would have to download a list and manually scrub it to ensure everyone on it wanted to receive the communications. The process took two hours, and she had to repeat it for each sales rep and account manager before compiling and uploading a master list.

And knowing who engaged with content was nearly impossible, requiring Natalie to manually tabulate for the sales team the prospects that took action with the marketing campaigns. "After I distributed a newsletter, I would spend three hours identifying who clicked on what links and which sales reps I should alert," Natalie said. "The process was not scalable."



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# Solution

Act-On's robust automation and seamless integration with Microsoft Dynamics changed everything.

With Act-On, Natalie was able to easily build a program to promote her executive marketing events. The process begins with a direct mail piece that drives recipients to an Act-On landing page where they can register for the event or sign up to receive further notifications. An automated drip campaign takes it from there, nurturing prospects who don't register immediately, and removing them once they sign up. Attendees of any event in the series are automatically entered into the nurture campaign for the remaining events, and sales can add prospects from within Microsoft Dynamics at any point.

"I don't have to worry about who said they're coming, or whether they get the right email or receive one when they shouldn't," said Natalie. "And I don't have to check with sales to see who they want added to the list. Act-On reduces confusion and eliminates the need to dedupe lists by automating the entire process."

Natalie also leveraged Act-On's power to deliver relevant, timely content. Instead of distributing one large newsletter on a broad range of topics, she created four smaller alternatives, each focused on a relevant theme, such as security and compliance issues and trending IT news. She sends new contacts an email inviting them to opt-in to one or more of the newsletters, and uses social media and web forms to encourage them to sign up later, if they don't make a selection right away.

"Act-On allows me to continuously engage prospects and customers with relevant content, and both the subscription and delivery process is entirely hands-off," Natalie said. "It makes it easy for me to keep NetStandard top of mind by reminding my entire audience of the value we provide."

Perhaps the most significant contribution Act-On has made to Natalie's work has been to streamline her collaboration with sales. Act-On's integration with Microsoft Dynamics gives sales direct access to the information they need through a tab in the CRM, while allowing Natalie to independently nurture her leads until they're ripe enough to be contacted. These strategic and operational gains were immense, and their value became even more apparent when she briefly replaced Act-On with ClickDimensions.

"I thought we should try ClickDimensions because we're an MS Dynamics provider and it's embedded in the software, but I was immediately sorry we did. Within three months I was back using Act-On," Natalie said. "The ClickDimensions dashboards were difficult to navigate, and it was nearly impossible to keep sales from calling everyone who entered the system. 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."

# Results

Natalie has been thrilled with the efficiencies Act-On has enabled. She estimates saving at least 20 hours each month, most of which she previously had to devote to managing lists. "Act-On's list management function is fantastic! Its ability to automatically pull updated lists from Microsoft Dynamics in real time is huge," she said. "Act-On was great before Microsoft Dynamics, but the amount of time I save now that the two are connected is amazing."

She's also been able to greatly reduce the time she spends assessing and following up on her email campaigns. "Newsletter engagement has increased, and I can easily review click-through and web activity to determine what action to take," she said. "Act-On's dashboards offer great insight, and provide immediate and valuable feedback to sales."

Finally, Act-On has made it easier for Natalie to present and defend her work to executives, and to increase the contribution she makes to NetStandard. "Act-On lets me focus on projects with greater value, like creating more lead nurture campaigns," she said. "It's simplified life for everyone, and allowed us all to be more strategic and effective for the company."



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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 IT resource.

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