



Marketing & Sales – Integrate for the Ultimate ROI

How CRM & Marketing Automation are the tools to help

Winning and keeping customers requires modern data tactics. Marketing must deliver value with every interaction to begin meaningful dialogues that result in sales. Today's sales teams must be able to share unique expertise – beyond what competitors are offering. To do so, both organizations need access to the same high-quality data and the latest tools.



Meet the New B2B Buyer

The B2B sales and marketing landscape has changed tremendously. Marketers no longer gather copious amounts of leads and hand them off to sales without as much as a backward glance. Not only do today's sales and marketing pros have to navigate an increasingly competitive marketplace, but they also have to figure out how to reel in and satisfy smarter, savvier, and more empowered prospects.

With the latest **Customer Relationship Management (CRM)** applications **and advances in marketing automation**, companies can equip their teams with insight-embedded workflows that drive efficiencies, enable organizations to capture high-quality leads, find untapped business opportunities, and gain market share.

The number of companies using marketing automation will increase by 50% by 2015, according to research from Sirius Decisions' consolidated report on the MAP market.

What's more, a recently published Gartner report, titled "Gartner Forecast: Enterprise Software Markets, Worldwide, 2012-2017, 2Q13 Update," shows CRM increasing to a \$36.5 billion worldwide market by 2017. These estimates illustrate how quickly behavioral and predictive analytics are transforming the market.

But is that enough to tackle today's complex B2B sales and marketing landscape?

The purchasing process used to go something like this:

a buyer would identify the need for a new product or service, compile a list of vendors, collect what little collateral was available, contact a short list of vendors, conduct a trial period, select a vendor, negotiate price... A slow and arduous process went on and on.

Fast forward to today, and the B2B purchasing cycle has turned on its head — largely because of the Internet.

Your prospects are proactively scouring the Web— turning to companies' websites, social channels, and third-party industry

analysts reports— to learn about a company and see how it stacks up to its competitors.

However, just because buyers have access to a wealth of information doesn't mean decision-making is any easier. The sheer amount of data now available makes it challenging for buyers to filter through to determine what's credible and useful. In addition, budgetary constraints require buyers to make a strong business case to get money to proceed.

So what does this mean for sales and marketing professionals?

Today's buyer holds all the cards. They no longer reach out to representatives for information, but rather educate themselves and take control of the sales cycle.

In fact, 41% of buyers said they waited longer to initiate contact with B2B vendors than they did a year ago, according to Demand Gen Report's 2014 B2B Buyer Behavior Survey.

Because salespeople aren't entering the cycle until after buyers have formulated much, if not all, of their opinions on a product or service, marketing now owns a much larger piece of the lead-to-revenue cycle. As a result, marketers need to attract and keep the attention of influencers by providing content that motivates. They also must work more closely with sales to meet expectations and drive meaningful, measurable results. However, the strategic readjustments necessitated by these changes present a slew of difficult challenges.

In the following pages, we'll explore how the integration of CRM and marketing automation can enable organizations to capture high-quality leads, find untapped business opportunities, and gain market share.

Marketing Automation and CRM: Better Together

CRM and marketing automation are not bitter rivals. Rather they're complementary tools that work better together. Combining their power can help solve the biggest challenges facing companies, including poor lead quality and a lack of sales/marketing alignment. How? The D&B DUNS number (or any unique identifier), for instance, provides the connective tissue between systems — high-quality data helps to tag all contacts/leads are tagged with a single, unique ID, so when they move over to your CRM, there is no risk of creating duplicates or assigning to the wrong rep. It can help unlock potential at every customer touch point, and the synergies only begin there.

The Power of Integration: Benefits for Sales and Marketing

MARKETING:

Prospects access content from a variety of channels. With marketing automation and CRM integration, marketers are able to capture buyer behavior, turn it into actionable intelligence, and put it to work. Reps get access to critical insight that enables them to get in the door quickly – and prepare once they are inside. The chief advantages integration offers include:

Better Targeting:



As buyers demand a more personalized experience, “Drip” email campaigns can be personalized to buyers’ preferences and stages in the purchasing cycle. Highly targeted campaigns boost engagement levels and increase conversion rates.

77% of people want different, targeted content at each stage of their research, according to Pardot’s “2013 State of Demand Generation” study. Marketing automation technology tracks and collects behavioral data — such as website visits, whitepaper downloads, and webinar participation — allowing marketers to better target content and offers.*

Clean, up-to-date data:



When Marketers can rely on accurate and current data to develop campaigns and automation is integrated with CRM, contact record information is synched across both platforms, eliminating duplicate or incomplete entries. With more complete business records, marketers have greater options for segmentation.

Having good foundational demographic and firmographic information for a contact allows for vertical-specific messaging for outbound marketing.

Improved lead nurturing:



When dealing with long sales cycles, it’s easy for leads to fall through the cracks. Salespeople can’t adequately follow up with each and every prospect.

Automated lead nurturing takes the onus off sales by addressing the needs of prospects not yet ready to talk to a salesperson. Besides staying in front of non-sales-ready leads, automated nurturing can be used to mitigate churn rates and find hidden opportunities.

Automated lead scoring:



Poor lead quality is a common sales and marketing problem. Many leads that are funneled directly to sales are not qualified — and do not convert.

Using behavioral data collected from a marketing automation system, marketers can more accurately score and grade leads, passing only the most qualified ones to sales and nurturing those that aren’t sales-ready.

With marketing automation and CRM Integration, marketers are able to capture buyer behavior, turn it into actionable intelligence and put it work.

*<http://www.pardot.com/whitepapers/state-demand-generation-2013>

Top Challenges Facing Marketing and Sales Teams

LEAD SCORING:

It's no longer acceptable for marketers to generate leads, hand them off to sales, and call it a day.

Today, lead quality is all about finding the right buyers efficiently. Yet the majority of B2B purchases involve multiple decision-makers, it has become increasingly difficult to attract and convert the right buyers. As a result, marketing often feeds sales poor-quality prospects that aren't in a position to make important purchasing decisions or, worse, are not a fit for the product or service being sold.

73% of all B2B leads are not sales-ready, according to Marketing Sherpa's "B2B Marketing Benchmark Report."

A LACK OF SALES/MARKETING ALIGNMENT:

It's not uncommon for sales and marketing departments to have complex, contentious relationships. While both sides must work together to meet respective goals, the teams often operate in silos. However, as marketing focuses more on delivering targeted messages and sales becomes centered on personalized attention, the need for these two to work together increases.

Companies that have alignment are **67%** better at closing deals and generate **209%** more revenue from marketing, according to Marketo's "2013 Sales and Marketing Alignment Study."

DIRTY DATA:

More organizations are turning to data-driven marketing to reach today's buyers. However, most marketers forget that quality data is the foundation for success. Without complete and accurate business records, effort and dollars are wasted. Despite this, the level of inaccurate data floating around is high.

According to industry experts, an overwhelming number of marketers don't perform data quality control on a weekly or monthly basis, while many can't even recall the last time they cleaned their data.

*Companies that have alignment are **67%** better at closing deals and generate **209%** more revenue from marketing.*

The Power of Integration: Benefits for Sales and Marketing

SALES:

Salespeople no longer carry all the burden for making sales. When automation is coupled with CRM technology, reps get access to critical insight they need to prepare and get a foot in the door quickly. They have access to advanced analytics to help improve visibility and forecast more accurately. The benefits of integration for sales are:

Improved preparation:



The more a sales rep knows about a potential buyer the better.

Not all lead intelligence resides in a CRM system. The information is often housed within marketing software. When sales uses an integrated platform, the department is able to access all contact information in a single place and act quickly and accurately. Access to detailed information reduces research time, shortens the sales cycle, and enables sales to engage in more meaningful conversations.

Revenue generation in partnership with marketing:



The more a sales organization is aligned with its partners in marketing, the greater ability the two departments have to creatively spearhead significant revenue growth.

When both teams operate using an integrated system, they work with the same set of data. Sharing lead information in real time ensures that both sales and marketing are presenting the best messages to the right prospects at the right time.

Greater visibility into the sales pipeline:



When dealing with long sales cycles, it's easy for leads to fall through the cracks. Salespeople can't adequately follow up with each and every prospect.

Today, with advances in CRM and marketing automation integration, salespeople have access to advanced analytics to help improve visibility and forecast more accurately. More importantly, better visibility enables sales to identify demand and pinpoint other revenue-generating opportunities as well as spot potential bottlenecks before they cause problems.

Access to detail information reduces research time, shortens the sales cycle, and enables sales to engage in more meaningful conversations.

Case Study: Marketing Automation



Partnering with Dun & Bradstreet helped Adaptive Insights grow 220% over two years.

Adaptive Insights is a technology company that offers cloud-based planning, analytics, and reporting applications to help finance professionals automate their Financial Planning & Analysis (FP&A) processes. Understanding the value of information and insight, the Silicon Valley start-up's approach is to automate time-consuming manual processes in the cloud, allowing users to spend more time understanding their information than collecting and managing it.

Adaptive Insights allows its clients to quickly get to the stories their data has to tell, also giving them more time to focus on finding new opportunities and growth.

D&B Helps Adaptive Insights Work Smarter

A winning solution and fast-paced culture allowed Adaptive Insights to quickly double their business in 2012 and grow 60% in 2013. To help fuel the pace of growth, the team at Adaptive Insights, understanding the value of automation, turned to D&B for relevant and up-to-date customer data for their own Eloqua marketing automation system.

How It Works

D&B supplies critical customer data that Adaptive Insights uses to identify new companies within their target markets. With this insight, D&B has enabled Adaptive Insights to automate a "new name" upload process. With D&B's help,

Adaptive Insights is rapidly growing their database while also gaining efficiencies in:

- Targeting and identifying new companies within their target markets
- Connecting with the right contacts and understanding which companies to avoid
- Closing enough leads to grow the company by 220% in two years

Intuitively understanding the value of working smarter with information and automation, they were able to save time and achieve greater efficiencies using D&B information. "Now, we can quickly identify target companies and pinpoint who we should be talking to and almost more importantly, who we should not be talking to," said George Coughlin, Marketing Director at Adaptive Insights.

Results & ROI

Now, just like the value proposition they offer their own clients, with insights from D&B, Adaptive Insights can deliver more value to their end-user clients. Their use of D&B data contributed to their ability to double their business by automating their own processes where they could. This allowed them to achieve a 220% growth rate over just two years.



Sales & Marketing: The Ultimate Revenue Team

While the Internet has transformed the traditional B2B consumer into a more powerful and knowledgeable buyer, it has also made the purchasing cycle more transparent. Organizations can now track every online interaction and gather a wealth of critical data that can be used to improve sales and marketing processes. However, this information is wasted if it's not shared across both departments.

Marketing automation and CRM integration houses data in one centralized location, helping to decrease inefficiencies and boost revenue. Through automation, marketing departments can create more targeted campaigns that yield only quality leads to help sales improve close rates and deliver more predictable revenue.

The DUNS number gives you a way to link the data in both systems. For example, let's say marketing gets a new lead through the company website. They can automatically match this lead to a DUNS business identity and pull in detailed company attributes to begin nurturing this lead, or they can pass on to sales if the prospect has indicated that they want to be contacted immediately. When the

handoff to CRM occurs, the systems can automatically check to see if that DUNS already exists and what rep it is assigned to. This alleviates the pains of the handoff and gives reps confidence in the leads they are receiving.

Meanwhile, you have all the company attributes, so the rep can continue the conversation you've been having through nurture. For example, you may have been sending them content specific to the large insurance company vertical. When the rep gets the lead, they can immediately see the industry and size and refer to their vertical sales playbook on how to approach them.

D&B360™, D&B's CRM integration tool, takes integration to the next level turning data inside CRM systems into valuable insight that helps teams discover new opportunities and create more meaningful conversations. The solution combines trusted company and contact insight from Dun & Bradstreet, together with sales tools in an easy-to-use interface. With integration and D&B360, sales and marketing have everything they need to become the ultimate revenue team.



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About Dun & Bradstreet® (D&B)

The Dun & Bradstreet Corporation is the world's leading source of commercial data, analytics and insight on businesses, or "content." Our global commercial database contains more than 235 million business records. We transform commercial data into valuable insight which is the foundation of our global solutions that customers rely on to make critical business decisions.

D&B provides solution sets that meet a diverse set of customer needs globally. Customers use D&B Risk Management Solutions™ to mitigate credit and supplier risk, increase cash flow and drive increased profitability, and D&B Sales & Marketing Solutions™ to provide data management capabilities that provide effective and cost efficient marketing solutions to increase revenue from new and existing customers.

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