



Marketing Creatio overview

Presented by

collier pickard
the CRM experts



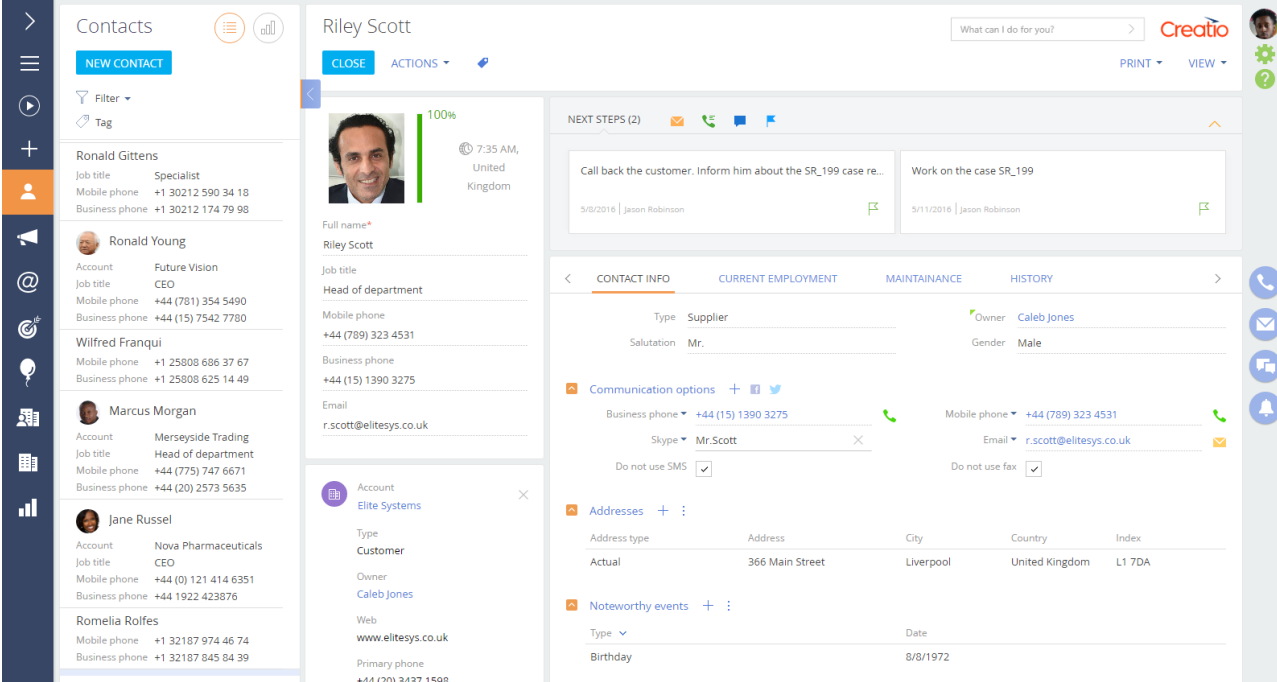
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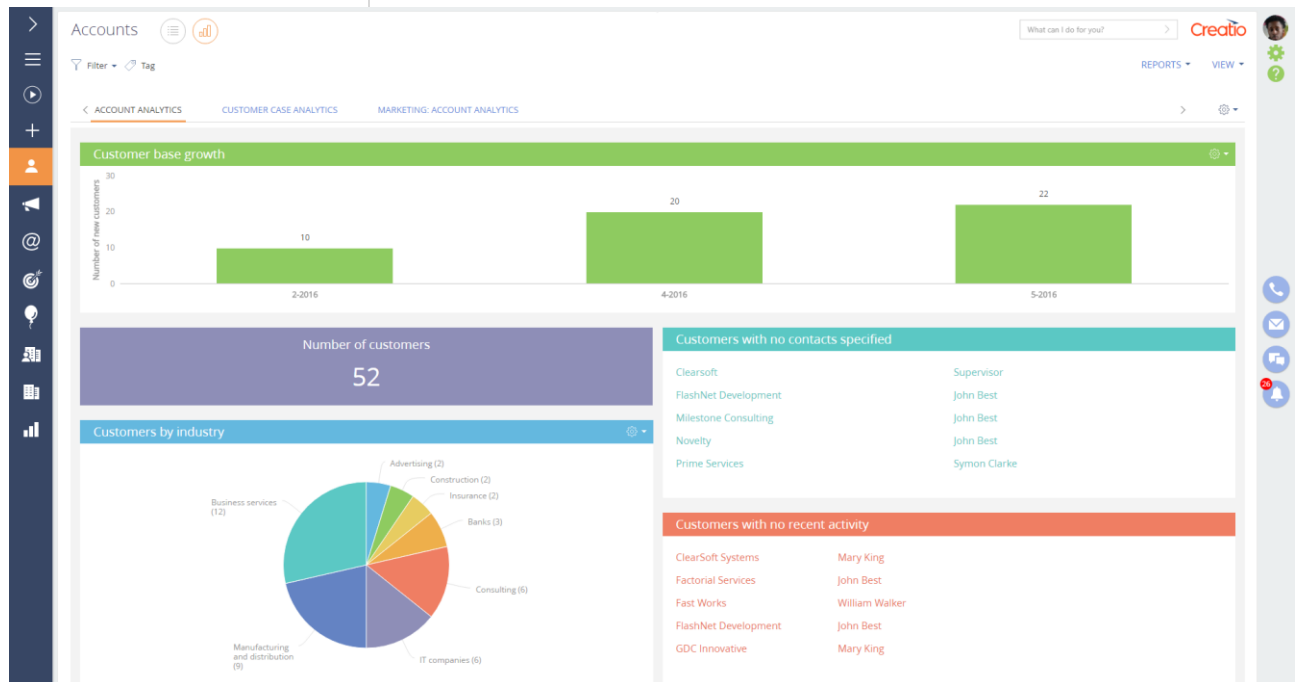


Marketing Creatio features overview

360° customer view

<p>Socio-demographic data</p>	<p>Obtain a complete view of your customers. Store various information about your customer that include industry, company size, geography, noteworthy events, contacts' career history, and many more in Marketing Creatio. Get to know your customers better, understand their preferences and build efficient personalized communications.</p>
<p>History of customers' events</p>	<p>Use Marketing Creatio to track customers' preferences and their buying behavior: website browsing, history of quotes and orders, etc. Search and segment your database in any number of ways and increase chances of transforming prospects into customers by building personalized communication strategies.</p>
	
<p>Understanding customer needs and preferences</p>	<p>Keep track of the changing customer needs and match them with the appropriate product or service. Manage the evolution of your customers' preferences by offering them products and services that might interest them in the future. The system allows tracking changes in customer preferences, as well as creating new ones.</p>
<p>Intelligent data enrichment</p>	<p>Manage your CRM data faster and with minimal effort by leveraging automatic smart data enrichment. Creatio's CRM data scientist will swiftly identify email addresses, phone numbers, social media profiles and other valuable information about a company from open sources. With this intelligent tool, Creatio users get the most complete and up-to-date customer data with no additional effort.</p>

Profile completeness	Manage the information completeness about your customers and their needs. Creatio enables you to add weights to each parameter in a customer profile and conveniently visualize the data.
Data cleansing and merge duplicates	Keep your customer database up-to-date and accurate. Easily import lists of leads, contact data or any other information from Excel files with just a few clicks. The system provides all the necessary tools for data cleansing and duplicate merging.
Customer database analytics	Analyze the structure of your customer database adjusting and setting new and different parameters while consistently tracking all new leads. Using analytics tools, you can also evaluate the overall coverage of existing and potential customers within the database.



Segmentation

Segment builder

Segment your database and build data selections of any complexity. For a truly personalized approach, build custom target segments based on the data stored in the system, such as the history of orders and requests, responses, interests and needs. You can use filters to create dynamic groups of accounts and contacts or create static groups manually.

Work with targeted segments of the audience

Add target audiences to bulk emails or events with the click of a mouse. Use quick filters to divide the audience by interest, role or other criteria and create dynamic folders for audience segments. Alternatively, create static folders and fill them manually. Build personalized campaigns for each segment. Easily generate leads and hand off only warm prospects to sales.

The screenshot displays the 'Contacts' management interface in Creatio. On the left, a sidebar contains navigation icons and a list of folders/filters such as 'Favorites', 'Sample records', 'All', 'Cases history', 'Contact not connected to accounts', 'Contact Persons', 'Contacts by needs', 'Contacts not connected to active leads', 'Customers', 'Do not use email', 'Employees', 'Final Authority', 'Influencers', 'Invalid email', 'Orders history', 'Participation in bulk emails', 'Participation in campaigns', 'Participation in events', 'Sample records', 'Schedule a meeting', and 'Website visits'. The main area shows a table of contacts with columns for 'Contact name', 'Account', 'Job title', 'Business phone', 'Mobile phone', and 'Email'. The table lists various contacts including Alexander Wilson, Alice Phillips, Andrew Baker (sample), Andrew S. Barber, Bruce Clayton, Caleb Jones, ChatBot Operator, Christine Nelson, Christopher Brown, Email Supervisor, Grace Stewart, Henry Wayne, Hillam Jazlyn, and James Smith. The interface also includes a search bar at the top right, a 'What can I do for you?' prompt, and a 'VIEW' dropdown menu.

Contact name	Account	Job title	Business phone	Mobile phone	Email
Administrator	Our company				
Alexander Wilson	Alpha Business	CEO	+1 (212) 1542 4238	+1 (212) 854 7512	a.wilson@alphabusiness.com
Alice Phillips	Streamline Development	CEO	+44 (15) 1440 5222	+44 (782) 204 5477	alice.phillips@streamdev.co.uk
Andrew Baker (sample)	Accom (sample)	Specialist	+1 617 440 2031	+1 617 221 5187	a.baker@ac.com
Andrew S. Barber	Infocom	Specialist	+1 206 480 3801	+1 206 587 1036	a.barber@gros.com
Bruce Clayton	Axiom	Specialist	+1 404 532 3976	+1 404 389 0476	clayton@axiom-corp.com
Caleb Jones	Our company	CEO	3010	+44 782 223 4967	c.jones@yahoo.co.uk
ChatBot Operator					
Christine Nelson	Build Technologies	Specialist	+44 (20) 3488 6553	+44 (788) 247 1010	christine@novcorp.co.uk
Christopher Brown	Optimum Services	CEO	+44 (20) 4849 3465	+44 (752) 254 7058	c.brown@corporate.apex-co.uk
Email Supervisor					
Grace Stewart	Clearsoft	Specialist	+1 404 571 2302	+1 404 047 2547	grace.ste@aol.com
Henry Wayne	Apex Solutions	CEO	+1 206 429 1595	+1 359 258 9878	henry.wayne@apex.com
Hillam Jazlyn	Console Solutions	CEO	+1 216 874 56 59		VinceStrite@gmail.com
James Smith	Gateway	Sales manager	+44 (15) 1432 4926	+44 (787) 121 4006	smith@gateway-invest.co.uk

Website behavior tracking

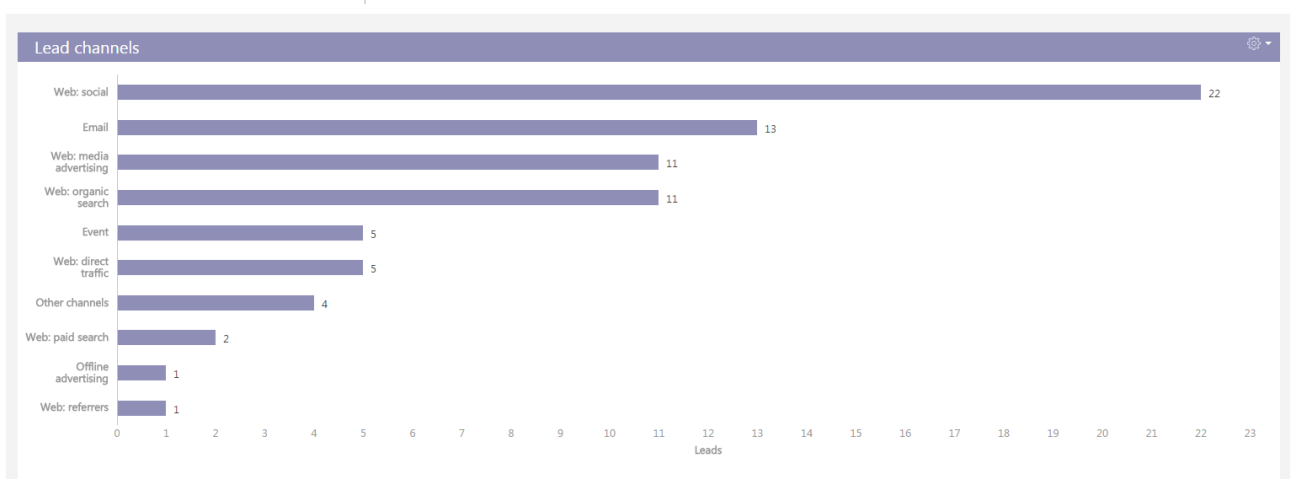
Website event tracking

From the first visit to a site, the visitor's web browser gathers information about pages visited, website paths and time spent on the site. When registering, all the information in the visitor's cookie files is sent to Marketing Creatio and added to a lead's profile.

<	CONTACT INFO	CURRENT EMPLOYMENT	MAINTAINANCE	HISTORY	COMMUNICATION CHANNELS	>
Website events						
Date/time	Event type	Need type	Source	Tag		
6/17/2016 11:36 AM	View product demo		Newsletter "Webinar "Integration with social networks"	347		
6/17/2016 11:30 AM	View product documentation	Marketing management system	Trigger email "Demo Registration bpm'online marketing"	346		
6/21/2016 3:36 PM	View video tutorial about the product		Bulk email "Aligning Marketing, Sales and Service"	344		
6/17/2016 11:24 AM	View video tutorial about the product		Remarketing Banner in Google	345		
6/21/2016 3:26 PM	Add discussion in Community		Social media: Facebook promoted post	342		
6/21/2016 3:31 PM	Successful authorization		Bulk email "Key sales metrics and stats"	343		

Tracking lead sources

The system not only helps to track visitor behavior on your website, but also enables you to identify lead generation channels and sources. All information is collected in the lead profiles and is also displayed in dashboard analytics. Track lead sources to evaluate the effectiveness of lead generation channels used in your marketing campaigns and focus your efforts on the best performing channels.



Lead management

A unified interface for lead management

The system not only helps to track visitor behavior on your website, but also enables you to identify lead generation channels and sources. All information is collected in the lead profiles and is also displayed in dashboard analytics. Track lead sources to evaluate the effectiveness of lead generation channels used in your marketing campaigns and focus your efforts on the best performing channels.

Leads					
Need for our services	Distribution	Discovered	Robyn Weatherwax		1/3/2016 5:05 PM
Workflow automation system	Distribution	Sales-ready	Winter Hodge		12/22/2015 3:46 PM
Bulk email management system	Qualification	Suspected	Rosa Sklar		1/19/2016 5:04 PM
Need for our products	Distribution	Discovered	Alexander Wilson	Alpha Business	1/11/2016 11:37 AM
Marketing management system	Qualification	Suspected		Elite Systems	1/13/2016 10:15 AM
Need for our products	Qualification	Suspected	Ralph Watson	Creative Solutions	1/7/2016 3:49 PM
Need for our products	Qualification	Suspected	Ralph Pulido		1/7/2016 5:14 PM
Software	Qualification	Discovered	Alice Phillips	Streamline Development	9/3/2011 10:28 AM
Bulk email management system	Qualification	Suspected	Ronald Gittens		1/20/2016 1:08 PM
Opportunity management system	Qualification	Discovered	Grace Stewart	Clearsoft	12/30/2015 2:40 PM
Need for our products	Handoff to sales	Discovered	Christine Nelson	Novelty	1/9/2016 4:46 PM
Need for our services	Qualification	Discovered	Alexander Wilson	Alpha Business	1/5/2016 3:19 PM
Bulk email management system	Qualification	Suspected	Rosio Geronimo		1/18/2016 4:30 PM
Workflow automation system	Distribution	Sales-ready	Scottie Elizalde		12/23/2015 5:40 PM

Lead qualification

Leverage Marketing Creatio to better qualify leads. Check lead profile accuracy and search for duplicate leads. Connect leads to relevant accounts and enrich lead data with insightful intelligence that can be leveraged during sales follow up. Search for similar leads in the system to identify a prospect's needs and make decisions when qualifying a lead.

Hand-off to sales

Make sure you know all the detail before transferring the lead into an opportunity or an order. Record the history of communications in accordance with the sales process. If the customer is ready to make an order, initiate the appropriate business process in one click. Use the action dashboard to focus only on key lead indicators.

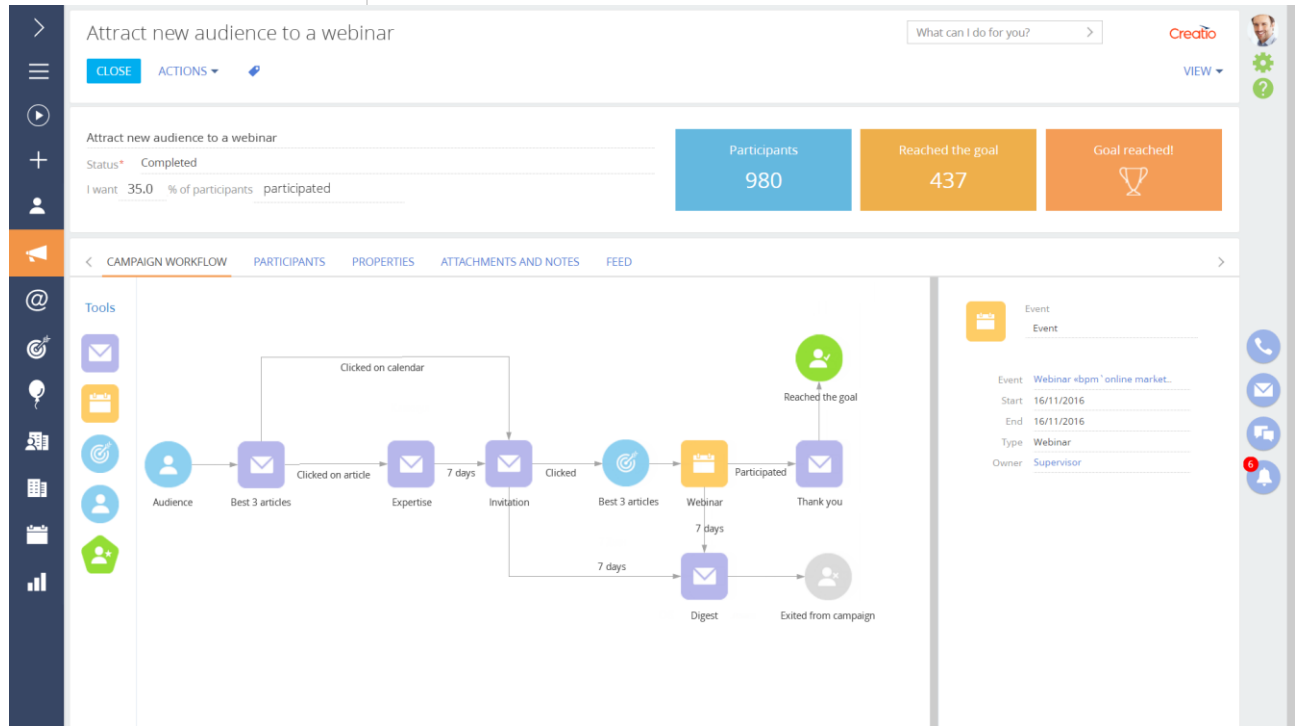
Analytics on leads

Approach prospects more intelligently with in-depth analysis of your leads. The end-to-end lead pipeline will help you assess conversion throughout the entire lead management process, from lead generation to hand-off to sales. Use the dashboards to analyze leads in different dimensions, such as the number and quality of new leads, conversion rates, most efficient lead generation channels, etc. All this helps to increase the conversion of prospects into opportunities and deals won!

Trigger campaigns

Intuitive campaign designer

Create efficient multichannel campaigns with Marketing Creatio. Plan campaigns using the simple visual campaign designer and define conditions for transitioning between campaign stages. The system allows for the setting up of criteria for target conversion rates and campaign completion. It also offers tools to monitor campaign progress in real-time.



Lead nurturing campaigns

Stimulate your prospects' interest in your products or services through automated lead nurturing campaigns. Build multichannel campaigns of various complexity, considering prospects' responses at each stage. Intelligently nurture your leads until they become sales-ready and convert into new opportunities for your business.

Trigger emails

Maintain a constant dialogue with your prospects and gradually nurture them. Set up trigger emails based on lead behavior on a website or other events, for example, a birthday, registration on a website, product comparison, abandoned shopping carts. Segment audiences by various criteria using smart filtering capabilities in Marketing Creatio and build up your communications with prospects that haven't made any purchases for a while.

Analytics

Evaluate your marketing efficiency and optimize marketing campaigns using Creatio's marketing analytical tools. Analyze campaigns by the number of generated leads and their conversions rates and obtain a 360-degree campaign view to identify bottlenecks. Target your efforts towards the most relevant audiences, channels and approaches.

Personalized email marketing

Bulk emails in just a few clicks

Get literally endless communication opportunities with Marketing Creatio. Built-in integration with professional email service providers - Elastic and UniOne - allow for the sending emails to millions of recipients instantly. Extend the providers list with cloud email service connector. The system will also help set up the exact sending time and easily track response and engagement rates.

Visual content designer

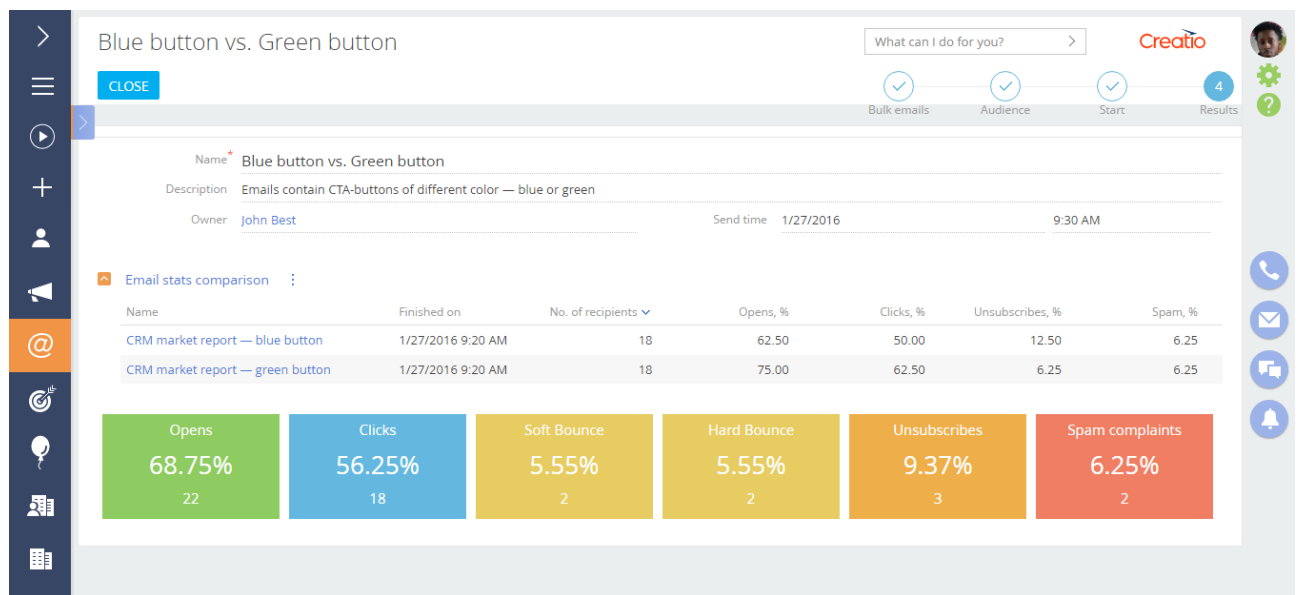
Create eye-catching email templates for your bulk email campaigns in just a few minutes. Use the built-in WYSIWYG designer with a set of ready-to-use content blocks for emails. Just add your company logo and insert content and the template is ready to be sent. In addition, the system offers a library of ready-to-use templates and optimizes the way emails are displayed on different devices and through various email clients.

Personalization

Personalize your communications with customers to increase sales. Start emails with a personal greeting and personalize email content using macros in Marketing Creatio.

Email split testing

Get the maximum response from your mass mail campaigns. Test several versions of emails with your target audience to determine which of them brings you more conversions. Marketing Creatio provides all the required stats to compare the results of the test so you can easily decide which template is more efficient.



Click stats

Identify customer interests by analyzing bulk email clicks. Leverage the click diagram in Marketing Creatio to identify the best time for communications with your audience. Use the click heat map to identify the most popular links in bulk emails and better understand your audience's interests and needs.

UTM codes tracking

Get detailed analysis of customer activities on your website. Use UTM codes to analyze conversions and track the entire journey of those customers who come on your website from bulk emails.

Communication management

Increase the level of customer loyalty with help of built-in mechanisms to intelligently manage communications with customers. You can set limitations on the number of messages per day, week or month, and give customers the opportunity to manage their subscriptions – a set of topics they are interested in.

Bulk email analytics

Manage the efficiency of your email campaigns with the help of marketing's pre-configured dashboards and reports. Open rates will help you understand which topics are most interesting to different segments of subscribers. You can also enhance your emails through analyzing such indicators, as: deliveries, open rate, hard and soft bounces, spam, unsubscribes, etc.

Event management

Events

Use Marketing Creatio to plan and manage all events: promotions, advertising campaigns, conferences, webinars and other off- and on-line activities. The system allows to track dates and locations, segment target audience based on required criteria, plan budget and assign team, as well as track responses connected to event.

CRM Day, New York

What can I do for you?

SAVE CANCEL ACTIONS

VIEW

Name CRM Day, New York

Type Seminar

Status Completed

Owner John Best

GENERAL INFORMATION AUDIENCE HISTORY ATTACHMENTS AND NOTES FEED

Start 1/23/2016 End 1/24/2016

Goal Partner-driven strategy Territory New York City

Industry IT companies Actual response 120

Financial indicators

Expected budget, base currency	15,000.00	Expected revenue, base currency	75,000.00
Actual cost, base currency	16,200.00	Actual revenue, base currency	62,000.00

Team

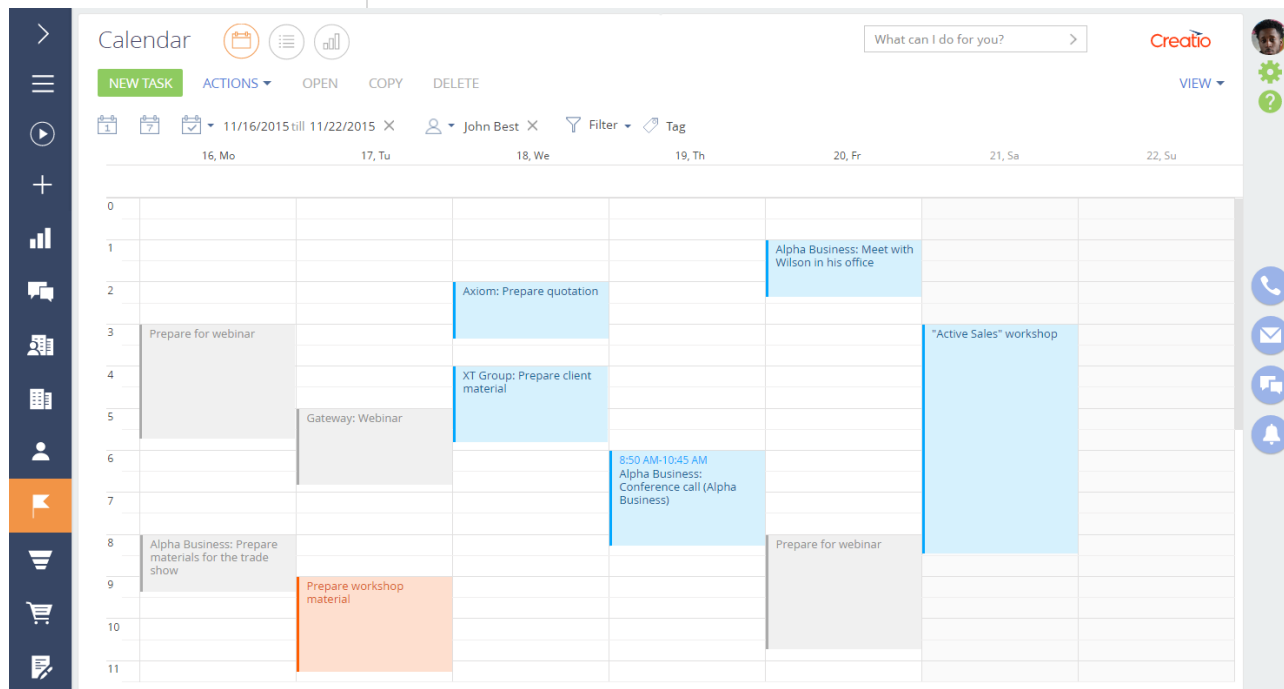
Contact	Account	Role
Mary King	Our company	Executive
Valerie E. Murphy	Our company	Consultant
Alice Phillips	Streamline Development	Partner
Caleb Jones	Our company	Executive
Megan Lewis	Our company	Executive

Analytics on events

Analyze your event-related activities with the help of easy-to-use pre-configured dashboards. Monitor campaign efficiencies and get a bigger picture through segmenting the audience by response.

Tasks and calendar

Plan your work, tasks and meetings in your calendar within Marketing Creatio. Create personal or group tasks linked to contacts, opportunities or documents. Synchronize your tasks and calendar with Google Calendar and Microsoft Exchange. Get notifications and reminders in a notification panel.



Email

Manage email from all your email boxes in a single unified environment – Marketing Creatio. Each email can be linked to the relevant account, opportunity, order or other object. Integration with MS Exchange and Google lets you merge all your email boxes and keep track of the correspondence in Marketing Creatio.

Calls

Make and receive calls directly in the system thanks to integration with a PBX system and a unique solution designed to effortlessly connect to any cloud VoIP service. Access a complete call history via the communication panel to swiftly find the recently contacted customers. Leverage the call recording capabilities to control the sales reps' performance and video-calls to boost the collaboration between team members. In addition, Creatio users can communicate with each other (including video calls) via IP-telephony completely free of charge!

Enterprise Social Network

Use Enterprise Social Network (ESN) to keep your finger on the pulse of your business. You can get updates and notifications on the latest deals, projects or even contacts from various channels with an ability to comment and "like" different posts in the newsfeed. You can use the ESN in the Creatio mobile app as well.

Data enrichment through social media

Find customers on Facebook or Twitter and enrich their profiles using the pre-built social media integration features. Get various information on contacts and companies from social networks with the click of a mouse.

Dashboards

Use Marketing Creatio to get a 360-degree view of the efficiency of your marketing activities. Obtain relevant statistics and indicators displayed as graphical charts, which can be easily configured according to your needs. Create lists of the most important information and track your results. You can analyze how many bulk emails have been sent throughout the week or compare the efficiency of different sales managers.

Knowledge base

Knowledge base is an online library that stores articles, scripts, guidelines for new employees, document templates, presentations, answers to frequently asked questions, and any other useful materials. The knowledge base takes on features of social networks — users can 'like' posts and share ideas and comments. This helps other users to quickly and easily find the most popular presentation or the most useful answer.

The screenshot displays the Creatio Knowledge Base interface. On the left, a sidebar lists various articles with their codes, types, and authors. The main area on the right shows the detailed view of the article 'Conducting Online Presentation'.

Knowledge Base Articles List:

Article Name	Code	Type	Author
What to do when your laptop's touch...	11	FAQ	Supervisor
Field sales presentation	197-54	Rules and regulations	John Best
Integration with Email Providers	10	FAQ	John Best
New Presentation Style	198-02	Advertising materials	John Best
Magazine advertising	167-03	Advertising materials	John Best
Conducting Online Presentation	375-02	Rules and regulations	John Best
Headset or Microphone Doesn't Work	13	FAQ	Supervisor
Customer Satisfaction Survey	296-10	FAQ	John Best

Conducting Online Presentation Article Details:

- Name:** Conducting Online Presentation
- Type:** Rules and regulations
- Modified by:** Supervisor
- Modified on:** 5/12/2016 10:17 AM

Article Content:

1. Have a very clear introduction, to motivate what you do and to present the problem you want to solve. The introduction is not technical in nature, but strategic (i.e. why this problem, big idea).
2. If you have a companion paper, mention it during the talk and recommend it for more details. Don't put all the details in the talk. Present only the important ones.
3. Use only one idea per slide.
4. Have a good conclusions slide: put there the main ideas, the ones you really want people to remember. Use only one "conclusions" slide.
5. The conclusion slide should be the last one. Do not put other slides after conclusions, as this will weaken their impact.
6. Having periodic "talk outline" slides (to show where you are in the talk) helps, especially for longer talks. At least one "talk outline" slide is very useful, usually after the introduction.
7. Don't count on the audience to remember any detail from one slide to another (like color-coding, applications you measure, etc.). If you need it remembered, re-state the information a second time.
8. Especially if you have to present many different things, try to build a unifying thread. The talk should be sequential in nature (i.e. no big conceptual leaps from one slide to the next).
9. Try to cut out as much as possible; less is better.
10. Help the audience understand where you are going. Often it's best to give them a high-level overview first, and then plunge into the details; then, while listening to the details they can relate to the high-level picture and understand where you are. This also helps them save important brain power for later parts of the talk which may be more important.

User Activity:

John Best posted in knowledge base article Conducting Online Presentation

Please take into account #11

Today at 2:05 PM | Comments | 1 Like | Unlike