Creatio

Marketing Creatio overview

Presented by

collier pickard
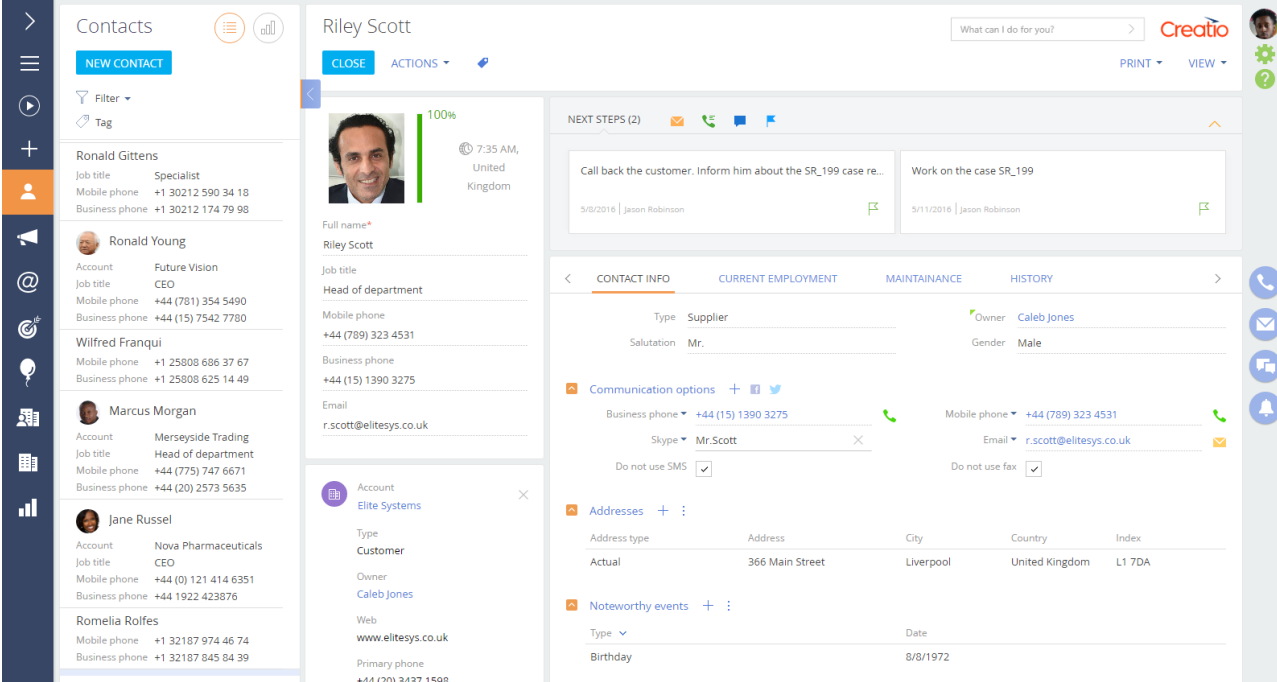### the CRM experts

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Marketing Creatio features overview

360° customer view

Socio-demographic data	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.
History of customers' events	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.

Understanding customer needs and preferences	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.
Intelligent data enrichment	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.

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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.

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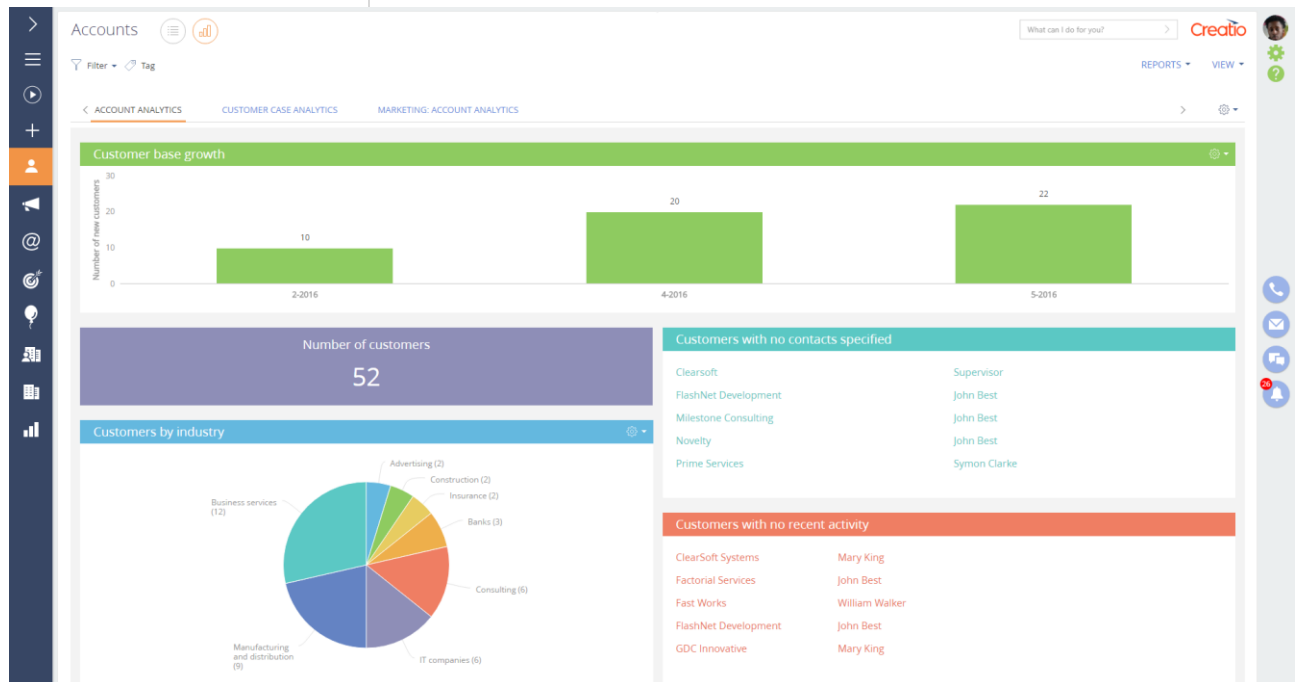
Segmentation

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.

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![Creatio logo](formerly bpm'online)

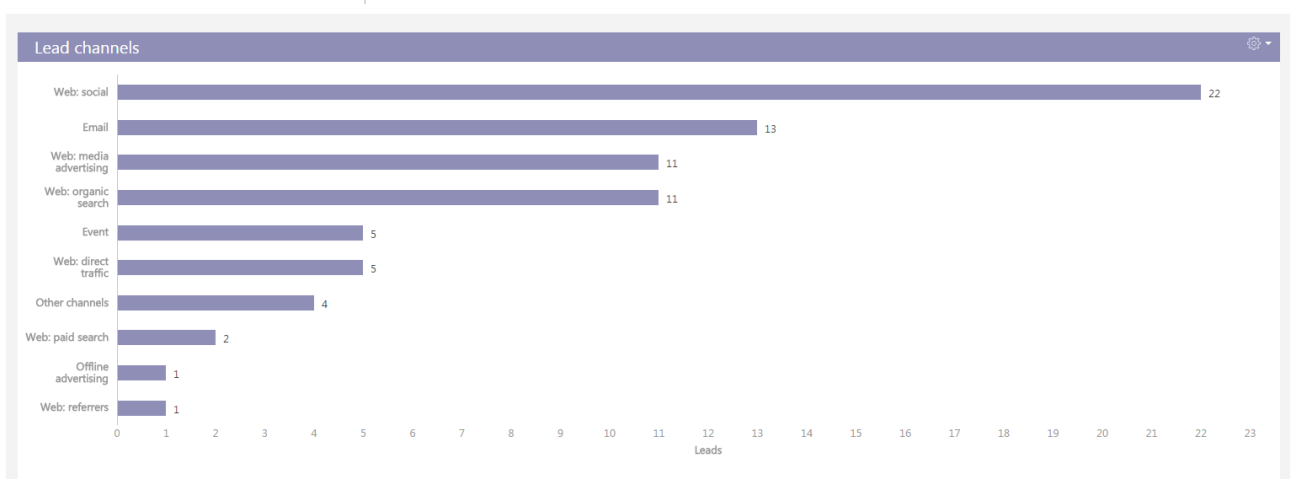## Website behavior tracking

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 channels

Channel	Leads
Web: social	22
Email	13
Web: media advertising	11
Web: organic search	11
Event	5
Web: direct traffic	5
Other channels	4
Web: paid search	2
Offline advertising	1
Web: referrers	1

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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.

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!

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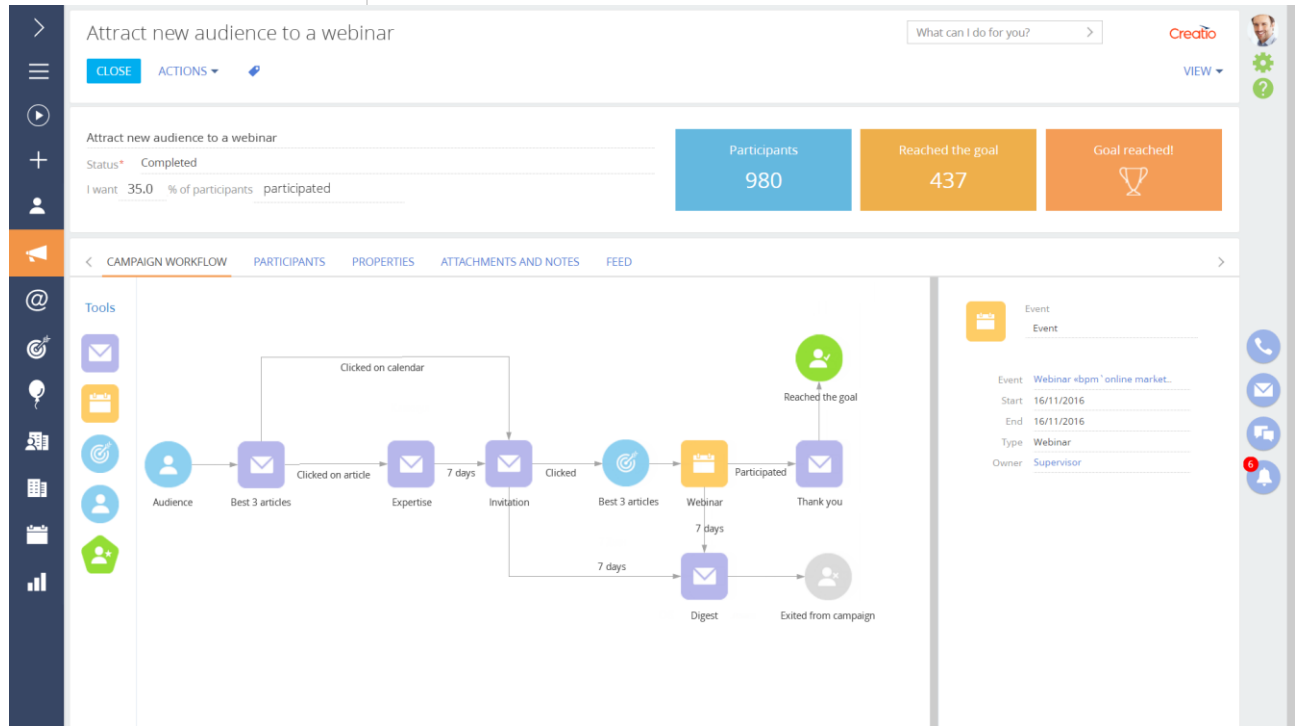
Lead nurturing campaigns	Stimulate your prospects' interest in your products or services through automated lead nurturing campaigns. Build multichannel campaigns of various complexity, considering prospects' responses at each stage. Intelligently nurture your leads until they become sales-ready and convert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

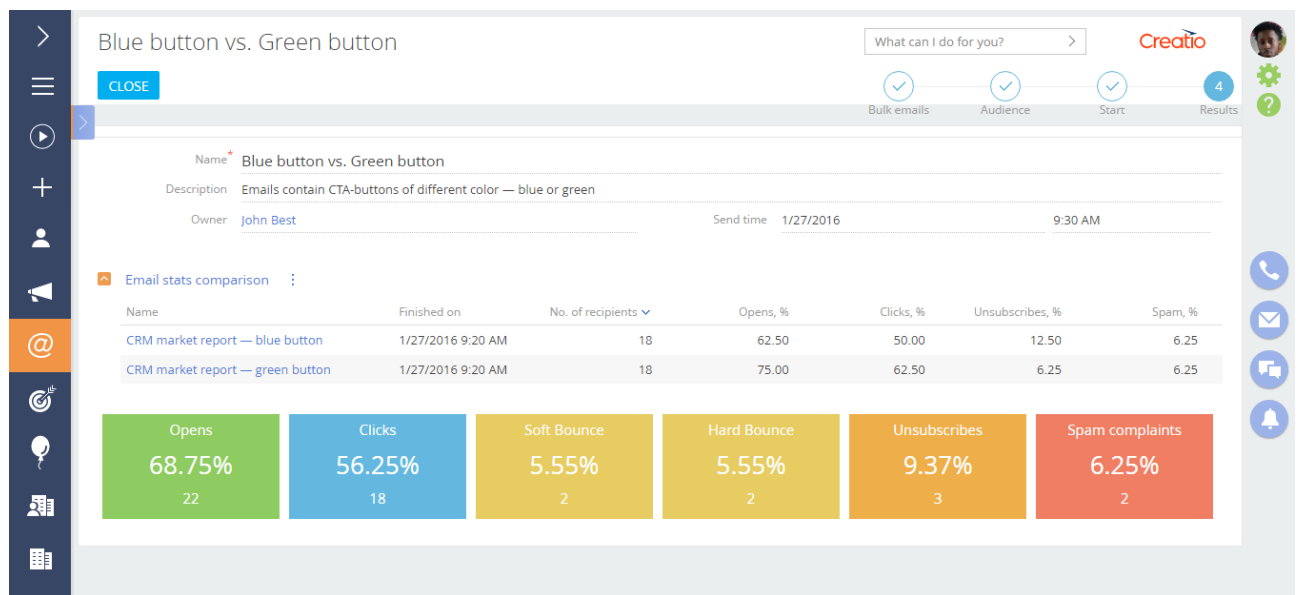|	
Bulk emails in just a few clicks	Get literally endless communication opportunities with Marketing Creatio. Built-in integration with professional email service providers - Elastic and UniOne - allow for the sending emails to millions of recipients instantly. Extend the providers list with cloud email 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.

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	Blue button vs. Green button						
Name *	Blue button vs. Green button						
Description	Emails contain CTA-buttons of different color — blue or green						
Owner	John Best			Send time	1/27/2016		9:30 AM

Email stats comparison

Name	Finished on	No. of recipients	Opens, %	Clicks, %	Unsubscribes, %	Spam, %
CRM market report — blue button	1/27/2016 9:20 AM	18	62.50	50.00	12.50	6.25
CRM market report — green button	1/27/2016 9:20 AM	18	75.00	62.50	6.25	6.25

Opens	Clicks	Soft Bounce	Hard Bounce	Unsubscribes	Spam complaints
68.75%	56.25%	5.55%	5.55%	9.37%	6.25%
22	18	2	2	3	2

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.

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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.

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.

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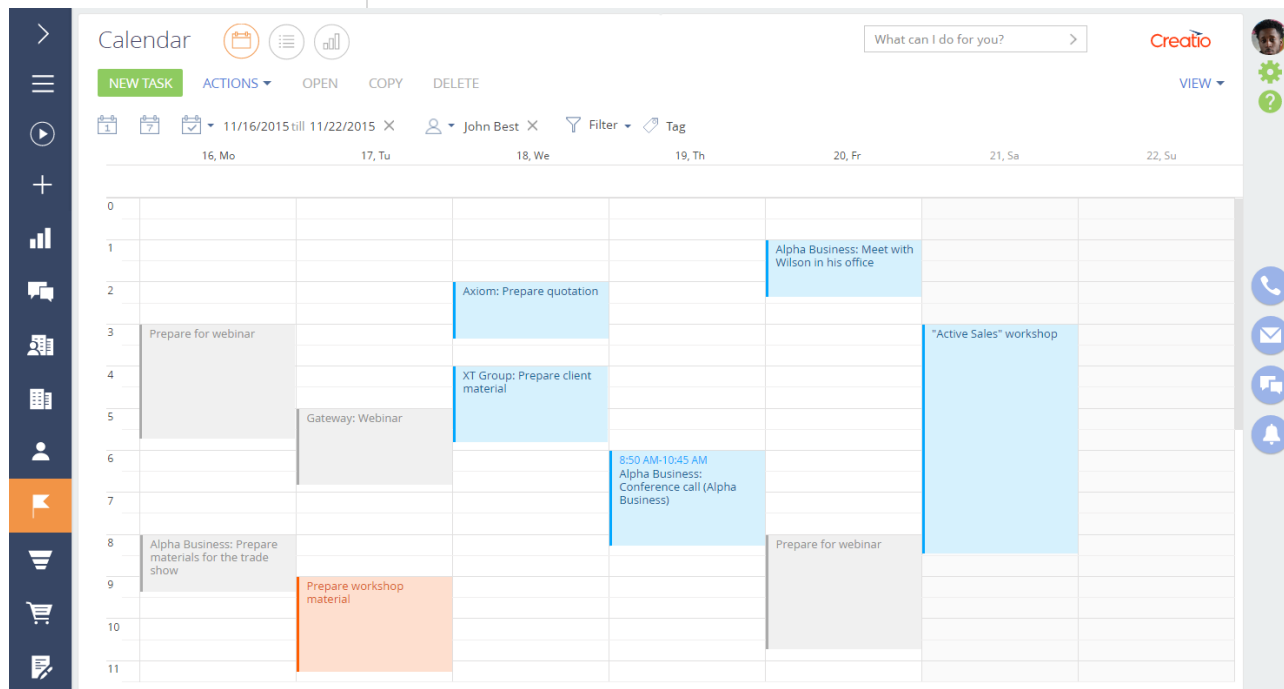
Email	Manage email from all your email boxes in a single unified environment – Marketing Creatio. Each email can be linked to the relevant account, opportunity, order or other object. Integration with MS Exchange and Google lets you merge all your email boxes and keep track of the correspondence in Marketing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

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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.

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