HOW CMOS CAN LEVERAGE SALESFORCE® TO GROW THE BUSINESS
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While working with companies to identify net new growth opportunities—whether it’s to launch a new product, enter new markets or find new distribution or direct-to-consumer channels, I have become a student of business relationships. For many years, Salesforce was a sales tool that we used to keep up with relationships, opportunities, leads, deals, pipeline, and related activities. Today, the company has a whole suite of scalable marketing tools, making it possible for marketers in any industry and of any size to not only be more impactful and effective in what they do, but to also drive enterprise growth. And as we continue to trudge through the longest recovery period in U.S. history, business leaders recognize the huge opportunity marketing has to impact sales, business development, and revenue generation. Salesforce deserves serious consideration as a tool that can help the CMO do that.
The following are a few of the more recent trends in the revenue engine of companies. These trends are global, impact the functional marketing role, and occur across a multitude of industries, geographies and sizes. If they are not on your radar, take the time to research them in your own respective company or industry.

**Digital Wallet**
Replacing Cash and Credit. In my own backyard of Atlanta, I can pay for products through Twitter if the company has deployed BitPay. Virgin Companies just introduced it into their portfolio, and Starbucks recently launched a campaign for customers to send friends electronic Starbucks gift cards through Twitter. A cup of coffee no longer needs to be paid for by cash or credit—you simply link PayPal to your checking account, and Twitter to your Starbucks account—and your mobile device does the rest. The digital wallet is replacing both cash and credit, and you need to understand how to leverage that reality in your own world.

**Big Data**
Big Data Is Creating Real Impact. Beyond the hype, big data is actually creating real impact. A dashboard report from six months ago isn’t nearly as impactful as what’s happening in realtime. Big data gives you the ability to understand who is on your website and what their online behaviors are today, so that you can better engage them. A good example is click-to-chat technology, which has become prevalent in the life of the consumer. They grow to expect that level of service, and as such, businesses are soon going to expect the same.

**Social Media for Grown Ups**
Now that we’ve gotten beyond the coolness of social media, everyone is looking at practical and pragmatic applications to measure social CRM, leverage social analytics, social collaboration, etc. At the NourGroup we use Hootsuite to manage our multiple social media channels. Sysomos is one of the best all around social media management product suites we know of. Start there and add to the list tools that fit your own social measurement needs.
Mobile Platform Viability

I sometimes lose track of what version device has been put out by what company. The proliferation of devices is amazing, as is the bandwidth. The content is getting better, stronger, and wider. Mobile is becoming more mature, evidenced by the fact that companies are launching websites that are responsive to all the different devices on the market. Applications are being developed for mobile first, from which they then can migrate to their websites.

Real-Time Media Buys Taking Shape

Companies are buying media time in realtime, because they understand in realtime how their target audience behaves. They know where they are, what will engage them, and are able to influence their thinking and call to action with the right media buy. It’s no longer a “Jetsons” idea. It’s here.

Organizations becoming more astute at identifying marketing pivot points

Long gone are the days of planning and rolling out massive six, nine or 12-month campaigns where at the end we scratch our heads and wonder if it worked. Companies with the right metrics in place in realtime can keep their finger on the pulse of what’s happening and respond proactively.

Smarter touchpoints, i.e. QR codes maturing

Some still don’t use QR codes, but that first-generation technology is only going to become easier. One terrific example is how a QR code is integrated into a brand’s logo, so that all someone has to do is photograph the logo to be sent immediately to the website. Consumers are already aware of QR coding, and many are practiced at using them on their mobile devices.

Sentiments and reputation capital becoming understood organizational assets

Soft assets of relationship currency, reputation capital, and professional net worth are not clever terms anymore. They are behaviors organizations develop in their high-potentials because they are leading indicators of what’s happening in a business.
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Greenwashing is subsiding
“Going green,” aka sustainability, was cool and trendy, but a lot of it was fluff—more sizzle than steak. Now, it’s reality. Companies are taking it seriously and integrating it into what they are doing, as they realize there is a stronger way to be and do good, and to also make it profitable. Outdoor clothing/gear manufacturer Patagonia has been a longtime leader in true green behavior. Latest example—not just developing, but encouraging its competitors to use, its new plant-based material to replace petroleum-based neoprene in wetsuits.

Intrapreneurship is gaining enterprise support.
This year alone the Nour Group has launched startups within three companies. As long as entrepreneurs within an enterprise are outside of the traditional anchors and can look, act and feel like a startup, they will bring fresh perspective. If a mature company or industry doesn’t give its intrapreneurial startup freedom from its stranglehold, it will choke the innovation and agility it could otherwise bring. Result: lost relevance, competitive differentiation and market gravity/pull.

Real-time metrics matter
Real-time metrics help you make course correction. Your organization needs to be agile and astute enough to understand what it’s measuring, but to also act on it. You have to move.

Context becomes the emperor.
Content used to be king. Now, context matters more than ever before. Content that a consumer can’t relate to is ignored. If people can’t see how they are better off because of your content they will unsubscribe or unfollow. It has to speak to them. I’m not a mom, so mommy bloggers don’t do anything for me. Conversely, my wife is a mom and she looks at a lot of them. You must intimately understand the behavioral details of your clients. It will make or break you in this next decade. Understand their likes, dislikes, their preferences—not what they tell you, but what they do. What they do speaks far greater volume than what they say they do.

As a CMO these global, overarching trends are probably already affecting you. What can you do to leverage the opportunities in them, or minimize the headwinds? Evolve your mindset, toolset, and roadmap.
THE EVOLVING CMO MINDSET, TOOLSET, ROADMAP

Without question, everybody realizes that the marketing function has evolved, and what effective marketing means today. It is a given that the mindset of the CMO must evolve. Where do you think you are going, and how do you plan to get there? The following are a few contrasting views that CMOs take of themselves:

**Are you a sophisticated strategist or an entrepreneurial trailblazer?** Some CMOs can strategize as well as anybody, but also know when to move. You have to be both, but most importantly, you’ve got to move when you are 60 or 80 percent ready. The last 20-40 percent you can build as you go, as you learn.

**Are you a business leader or a marketing guru?** Again, you will have to be both. Trust is credibility plus empathy. Credibility says you know more about the art and science of marketing more than anybody else; empathy says you can put yourself in the CEO, CFO or COO’s shoes, or the board’s for that matter. To be a trusted advisor at the C-suite level, your company need you to be a hybrid.

**Are you a sector specialist or a versatile partner?** Unequivocally, you need to understand a deep-dive of the industry, the competitive landscape, and what’s happening in the periphery, but also be a partner of the CEO. You need to sit next to that CEO who has to evolve the organization into something very different in 18 months.

**Are you an innovation champion or a shopper expert?** Shopper experts think price, promotion, product, placement—all the traditional P’s of marketing. Innovation champions find ways to give customers opportunities to try products before they make the big cap-ex spend. How else can we get our physical products into the consumer’s hands without the brick and mortar place? Where can they go to see, use, touch and apply it to their own challenges before they buy? How you answer these questions is there is a fundamental difference between a CMO who thinks differently versus better. Better is just incrementalism. Different is real innovation.

**Are you a digital expert or marketing traditionalist?** Marketing is still a discipline. Effectiveness doesn’t come from whiz-bang, here-today-gone-tomorrow digital campaigns. You have to understand the science of marketing but not bury your head in the sand, and recognize that newspaper and magazine ad buys are declining. Magazines used to be an inch thick, now they are an eighth of an inch because most of the ads are gone. Much of what remains is sponsored “advertorial” content. Personally, I despise ads disguised as articles, and rip them out. I buy publications for content I can trust. But, I also get my content a lot of digital channels. CMOs need to understand those behaviors and adopt an omni-channel, multi-modality approach to engage and influence the consumer’s thinking and call to action.

As these contrasting views should make clear, the mindset, toolset and roadmap of the evolving CMO now requires a sophisticated balancing act. The demands of strategy and entrepreneurial courage, deep sector knowledge and cross-industry acumen, and ability to effectively deploy an omni-channel, multi-modal approach must be met. CMOs must lead based on rigorously understood customer behavior (a moving target), not tradition (a rear view mirror).
Where does Salesforce come in? Salesforce has heavily invested in creating B2B marketing features and functionality. They tout the fact that they want you to be more efficient, effective and measurable in your methodology, and have focused on campaign management, lead management, demographic scoring, workflows, triggers, approvals, analytics, reporting and dashboards to drive their marketing platform.

Remember the days when we would install a software suite from a CD or download? Today, we simply use software in the cloud. Salesforce has created its own cloud of marketing technologies, and they call it Salesforce 1 ExactTarget Marketing Cloud. My only criticism of the company is that, according to their own copy, their overarching goal is to create “richer” relationship with customers. “Richer means different things to different people. It sounds vague to me, and I’m allergic to vagueness. In fact, the more I read their marketing material, the more I scratch my head. Maybe it’s a fresh MBA or English major writing clever copy, but I just don’t get that part of their messaging.

The reason I’m in business is to build relationship scorecards, the relationship value pyramid, and to do strategic relationship planning. It concerns me that someone would read Salesforce’s clever marketing copy and get lost in the hype. Please, do challenge what you read on their website or hear from a Salesforce sales rep or business consultant. Personally, I’d like to see more depth.

That said, Salesforce’s ExactTarget marketing cloud offers many compelling functions for strategic relationship development. The areas that will help you the most in your role as CMO are email campaigns, social marketing, web, mobile campaigns, data and analytics, and marketing automation tasks. What follows is a breakdown of each area and how you can leverage it to grow your business.
EMAIL CAMPAIGNS

• **Create compelling content.** Email continues to be by far the preferred channel by which we engage, interact, and share, but we truly do need less email and more conversation. I get 200-300 emails a day, and recognize the need in my own practice for more face meetings. There is an enormous amount of potential in Salesforce to develop a more sophisticated approach—to send customers messages that are relevant to their current stage in buying from you. If you subscribe to the customer life cycle, automated email campaigns make it so much easier for reference, look to what Nordstrom Company has done this area. Salesforce’s drag-and-drop content tools make it very easy to create templates. A step-by-step playbook of business rules walks you through creating compelling content for email campaigns.

• **Target your audiences.** Relevant messages are good, but they aren’t enough. You have to target your audiences, and focus your content to them. Salesforce allows you to filter your subscriber base according to individual behavior or attributes with its Audience Builder functionality, which helps marketers target content to the right audience.

• **Streamline and send emails.** Customers interact with you and your brand with email (in many instances, 24/7/365), and expect realtime communication back from you. A marketing platform that arms you with that speed and agility is critical. In a lot of cases companies don’t actually have someone at a desk replying; rather, they’ve created a business rule to respond back regardless of when the email is sent.

• **Track and optimize email campaigns.** Salesforce offers a huge opportunity to track and optimize email campaigns. You can keep tabs on every transaction in realtime through a graphical interface, and see emails sent, opened, clicked on and forwarded. That kind of detail allows you to continually optimize campaigns.

• **Scale capabilities.** Scalability is a huge asset of the platform, because no one individual or marketing department is scalable by themselves. You need the opportunity to automate, whether you are looking at a standard email automated feature or more sophisticated cross-channel campaigns. You don’t want to outgrow your capabilities. A lot of email engines are limited in how much they can handle, so deliverability drops immensely after a certain number. Salesforce is one of the bigger players in the space, and as such, gives you that ability to scale.

• **Optimize your content.** If you do all of these things well, it’s a great opportunity to focus on optimizing your content. Salesforce says they have a 60 percent open rate on their email campaigns because they are targeted, contain compelling content, are delivered in realtime, and create conversation. We use Salesforce for our CRM, and the more I learn, the more I want to know.
SOCIAL MARKETING

• **Listen** with Radian6. It’s okay to promote on social, but when you start selling on social it completely turns people off. Salesforce understands that, and so their platform is a lot about listening. They wisely bought Radian6, a Canadian company that came out of the gate early on and that Dell used in their digital operations center to track brand mentions and measure sentiment. Radian6 was incredibly powerful and insightful for seeing realtime conversation about Dell products, competitors, brands and industry trends. In many ways, social is about listening, and Radian6 technology allows you to do that.

• **Engage** and publish with Salesforce’s Buddy Media. Beyond listening, social media can quickly become a chaotic world of juggling multiple accounts, teams, content and tools. Buddy Media allows you to create and publish content to all your social networks from within your Buddy Media Social Studio, and to socially engage. You can also schedule and send tasks to team members. Essentially, your social strategy can be implemented in one centralized hub.

• **Create** with SocialPages. They’ve also made Facebook Page management possible with an app called SocialPages. It allows you to dive deeper into who those Facebook fans are, and to create specific branded experiences for them.

• **Drive** social ad results. One of the challenges of social advertising is spending money on Google AdWords, or not having any idea where Yahoo is going. Part of the Salesforce offering is Social.com, which helps you create highly effective social ad campaigns that drive very specific outcomes, and to track results for that ad spend.

• **Deliver** scale. Again, scalability is possible with Salesforce. You can scale your social marketing across multiple accounts, channels, and in different geographies.

• **Optimize** your content. Salesforce wants their marketing cloud to become your one-stop center for social interactions, and boasts a 94 percent in-brand recognition and call to action from within social ad campaigns produced on their platform. You may want to read their case study on Citrix for their understanding of how the content (also called community) manager impacts their business, pull realtime information on clicks, signups and conversations, and discover which posts are most impactful.
WEB

The first place anyone goes for company information is to that company’s website. As the web has evolved, the notion of the website as an electronic brochure has for the most part dissipated. Your website needs to be a conversation.

Think of the most popular website in the world, Google. It presents nothing more than a white page with a logo that mirrors the seasons or current events, and a box. In that box we tell Google who we are (DNS server/location/cookies/apps loaded in a user’s browser), what we are looking for (natural language search), and how they can help (relevancy, algorithms, SEO). Contrast that to your own website. Honestly, does your audience really need to know everything you know? No. They need to know how they are better off because of you. If you can get to the same place Google is, where you can find the same answers about your audience from your website, it will go a long way in helping you grow your enterprise.

Who are your site visitors? What are they looking for? How can you help? A website can be used to leverage information from a visitor’s interaction and personalize cross-channel communication with them accordingly. Some of the ways to do that:

• **Predict relevant content.**
  Use customer data from your website to predict the right message, the right channel, the right timing—to create great experiences for them. Can you deduce their stage in the buying cycle, in order to keep them engaged, build trust, and create deeper relationships? You may have noticed the rise in use of images and infographics. Can you make your relevant content more visual?

• **Collect behavioral insights.** As a marketer, if I can gather realtime data around customer preferences, lifestyles, purchase habits and interaction preferences, it helps me act on that data to increase conversion while building customer loyalty. For example, Delta knows I live in Atlanta, am a Diamond Medallion, where I’ve travelled, my travel preferences, etc. When I visit their website and they recommend certain flights, routes, or planes, it shows some intelligent use of behavioral insights.

• **Deliver personalized experiences.** Years ago I worked for a spinoff of Peppers & Rogers Group, the company founded by Don Peppers and Martha Rogers. They really were the parents of one-to-one marketing, which is what Salesforce is trying to do with the marketing cloud. One-to-one is pretty expensive, whereas one-to-many is cheaper, a practical example being when you and I buy from the local, big-box, DIY warehouse. Each of us does things differently, but they market to us in the exact same way. Why? Because one-to-many is cheaper. When you are able to gather that data, and know that creating a personal, online experience drives bottom line benefits, of course, you will want to do it. Product recommendations tailored to each customer is the holy grail of one-to-one marketing. Amazon does this particularly well: “Customers who bought this (whatever product you are viewing) also bought ….” Without those tailored recommendations, the upsell and cross sell wouldn’t happen.

• **Build micro sites and landing pages.** Data from ComScore, the Nielsen of the web, reveals that if someone comes to your website and can’t find what they are looking for in three to five clicks or seven to ten seconds, they move on. We recommend building micro sites, for example a landing page about a specific solution, and promote that URL to quickly get prospects to relevant content. Salesforce allows you to do that within the marketing cloud.
It’s not any surprise that mobile is taking off in a big way. Think about the banking products you use, or look at 1st Midwest Bank’s mobile banking platform and app to see how they engage customers. Mobile not only creates awareness, but is relevant to you and can be used immediately. It’s been a while since I have physically walked into a bank. Companies realize that customers are no longer tethered to their desktops, so smartphones and tablets are often more prudent banking platforms than desktops or laptops. Salesforce supports mobile social marketing in several ways:

**Engage with mobile messages**

Just the form factor alone makes mobile messaging the right choice. The bizarre truth is that 95 percent of emails are seldom opened when received, but 95 percent of text messages are opened. A great example of real-time alerts is the parking app I use when in Manhattan. As I’m driving down Broadway, the app pops up on my phone and says, “Turn right in a quarter mile for a parking space for $20.” In Manhattan, that’s a good deal. It directs me right to the spot, I pay for it and am done. It’s relevant to me and I act on it in real time. That parking company and its backend technology just generated revenue that they wouldn’t have captured without engaging me in that mobile campaign. Another type of mobile messaging is the transaction notification sent to confirm a purchase. There are opportunities for your organization to learn from that engagement and leverage that behavioral information. Did the recipient click on it? Forward to anyone? How could you leverage that behavior to create a deeper bond?

**Drive mobile app engagement**

Apps take up digital real estate on a smartphone or tablet, so each needs to engage customers so they receive value from it and keep it installed. Salesforce’s marketing cloud helps you create app engagement through targeted mobile app alerts, which drives mobile commerce. The real growth opportunity is a mobile app strategy that intends to create awareness but also engagement.

**Use geolocation targeting**

Targeting by location may sound like Big Brother, but if you know the right time and place to interact with your customer, not only do you customize their personal mobile journey; you also create opportunities to engage in commerce. For example, I don’t want to see an ad for a vacation spot or restaurant in Ohio when I’m in Manhattan. If your customer has their geolocation mechanism turned on, you should be able to target them with a very relevant, timely message.

**Connect devices**

Customers want to connect their physical and digital worlds, and the functionality of the marketing cloud allows you to give that access to connected solutions. Marketers can manage the omni channel to connect with customers more than ever before. Consumers want access to a brand online and offline, and both have to be in line with each other.

**Manage the mobile lifecycle**

You can manage and enhance the functionality of your app by tracking when it was downloaded, how often it’s used, and what they do with the app.

**Build on strong APIs**

All kinds of analytics are possible with mobile campaigns.

**24/7 customer support**

If someone sends you a message at 3:00 a.m., you have a way to respond to them.
Since mobile devices present such a dynamic growth area for marketing, mobile strategy deserves a deeper into how CMOs can leverage it for business growth, before we move to the next area in which Salesforce’s ExactTarget marketing cloud can assist you.

State of Mobile Behavior:
When Salesforce bought ExactTarget, a marketing automation technology in the cloud, it allowed them to do some insightful work on the state of mobile behavior. Mobile is positioned to produce results for brands in a big way, in both B2B and B2C. Everyone realizes that digital mobility and connectivity have become very important to all of us, every day. Salesforce studied about 500 consumers for one month, tracking smartphone and tablet behaviors, which is an example of how tracking those patterns with users’ own insights can help a brand to shape mobile experiences.

The Age of Mobile Adoption: Like the societal and individual effects of electricity and the Model T, the smartphone continues to revolutionize daily activities and how people perform them. Consider these findings from that Salesforce study:

- **85%** said mobile devices are a central part of everyday life.
- **89%** say that mobile devices allow them to stay up-to-date with loved ones and social events.
- **83%** of consumers say a seamless experience across all devices is somewhat or very important.
- **91%** or more than nine out of ten consumers say access to content however they want it is somewhat or very important.

In summary, consumers have devices that they use consistently, they want a seamless experience, and they want relevant content at the right time of their choosing on the device of their choice. Salesforce’s backend platform can help deliver that.

*Salesforce Marketing Cloud, Mobile Behavior Report, 2014.*
Consumers are opting in for the win, as expressed in their hesitancy to opt into too many messages from brands on their mobile devices, citing privacy and disruption concerns. And honestly, who wants to constantly be receiving or sending messages about a particular brand? But they also acknowledge the value and usefulness of several types of communication from brands, as long as they can choose to opt in. Take a look at how consumers perceive branded messages on mobile devices, in terms of gender:

**MOBILE CAMPAIGNS**

**Opting in for the Win:**

- **76 percent** of users agree that location sharing provides more meaningful content.

- **91 percent** of push messages engage consumers immediately. For example, since I’ve opted in for a parking app’s messages when I’m in Manhattan, it pushes deals on parking through to me, and enables me to not only find available parking realtime in one of the most difficult cities in the world, but also the best deals on parking spaces. 92 percent can’t wait or ignore the notification before checking push messages.

- **91 percent** of text messaging is rated as somewhat or very useful by 91 percent of users who actually subscribe to a brand’s texts. For example, I get my cell phone bill by text and can press 1 to have it automatically deducted from my account, 2 to pay a different amount, etc. I find it very useful to be able to immediately act on it and move forward.

*Salesforce Marketing Cloud, Mobile Behavior Report, 2014.*

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56 percent of males are significantly more likely than females to scan a coupon or QR code to get quick access to information.

71 percent of females are significantly more likely to like or follow a brand on social media to receive coupons or deals.
People access mobile apps and the mobile web differently (i.e., an internet browser on a smartphone or Safari on iOS). The following list shows the percentage of tracked visits that occurred in the app instead of on the mobile website, demonstrating how much more popular apps are for some of these properties:

- 98% Weather
- 97% Instagram
- 95% Pinterest
- 88% Facebook
- 60% YouTube
- 55% CNN
- 26% Twitter


What’s useful is that Salesforce can track this behavior; again, if you know your customers’ IDs or handles, you can search using very specific key words and feed that into Salesforce Trends to identify and understand what they find of value. Hopefully, your brand is leveraging some of those sites to create awareness and drive traffic.

What’s Next in Mobile? Opportunities in simultaneous cross-device usage, an easier conversion path from mobile device to purchase, and better optimization of mobile websites and experiences are driving the future of mobile. Marketers need to engage across multiple platforms.

The same study found that 65 percent of tablet owners report using their tablet at the same time as watching TV at least once a day; 41 percent of tablet owners say they use their smartphone and tablet simultaneously at least once a day; 46 percent of consumers who signed up for emails from a brand made a purchase through a mobile device. There is a high tendency to be both passive and active at the same time. We buy things as we get prompted to do so, which is particularly useful for your mobile sales office because it allows you to directly connect with customers who are engaged on those devices and are willing and able to buy.

To summarize: A strategic view of mobile devices must be adopted company-wide. Mobile is not merely a new channel for marketing campaigns or a customer touchpoint. It is part of your customers’ world, 24/7/365, and as such, a platform absolutely fundamental to business growth. It may require CMOs’ efforts to evangelize this concept beyond sales, marketing, and technology silos. If convincing others is difficult, then make your case with data. Salesforce provides excellent tools in that area.
The challenge for most marketing executives is not merely data analytics, but capturing the right data and also analyzing it effectively.

**Audience Builder**

An application on the ExactTarget Interactive Marketing Hub, Audience Builder provides an intuitive interface that allows marketers to consolidate and segment data from any source to create targeted audiences. OneAmerica provides a great example of using Audience Builder. Using Salesforce data and analytics, they optimized onboarding efficiency, and got new employees trained and productive.

**Optimize your content**

The more data you look at and the more impactful the interactions, the more optimized and relevant your content can become.

**Contact Builder**

Contact Builder simplifies data management and allows you to build a 360 view of that customer. It’s practical in that it turns a lot of data into a conversation: “I noticed you did (such and such). Here’s our recommendation and response to it.”

**Tracking and reporting**

Salesforce gives you all kinds of insights. It is amazing how far we’ve come since the days of metadata and cross-reference data. Today data is realtime, customizable, color-coded, and so much more. Realtime insights are perhaps the most powerful attribute of Salesforce’s data functionality—enabling you to create meaningful conversations both inside the organization and in each stage of that customer life cycle.
MARKETING AUTOMATION

Most CMOs have integrated some kind of marketing automation, simply because the technology provides the ability to create business rules and if-then scenarios. Salesforce’s ExactTarget marketing cloud delivers two functions that help you achieve marketing automation.

**Journey Builder** allows you to develop and build one-to-one relationships, and to build the customer experience. One feature, Journey Maps, is particularly useful, offering a visualization of a customer’s journey that makes it easy to map their exact path across lifecycle stages and channels.

**Pardot-b2b automation** is another of Salesforce’s technology acquisitions. It focuses on lead scoring and nurturing, and ROI and analytics. CMOs focusing on B2B sales will find a useful adjunct to Journey Builder's marketing automation here.

This concludes our tour of the Salesforce’s areas that will help you most in your role as CMO. Allow me to offer a few best practices to conclude this discussion of leveraging Salesforce to grow your business.
Companies struggle with lead generation. I grew up in an era of call sheets and making 700 calls a day. We didn’t have email, and our cell phones were attached to our cars. Lead generation has come a long way, and customers are more sophisticated. The following are recommendations for how to maximize Salesforce for lead generation in today’s market:

1. **Simplify lead capture with Lasso2Go.** Turn on the Lasso2Go functionality within your sales environment, allowing sales personnel to simply photograph business cards of contacts (from trade shows, conferences or events). That photo populates the Salesforce leads file.

2. **Use web-to-lead functionality.** People look at your website for a reason; perhaps to download a form, or request information. Tie your website to Salesforce so that leads can be followed up with.

3. **Market where your prospects are searching.** A search engine is the first place people go to find information. There are plenty of tools available to ensure people find your website. If you capture prospects who use Google to search for your key words, you can generate leads automatically, and segment those leads to your reps to follow up quickly on.

4. **Leverage the AppExchange.** This is Salesforce’s library of third-company applications that you simply turn on. Some are free, some require a fee. One example is connecting the data through Google Analytics so you can understand the lead origin, report by search engine, search type, and key words campaign through your entire sales cycle.

5. **Use the Social Cloud.** Toucan CRM is a lead-capture application within AppExchange that promotes your products through Twitter campaigns and automatically captures those leads.
6. **Evaluate and invest in your most relevant lead sources.** Look through your opportunity management dashboard to see your lead sources, not just the initial touch but where they came from, and how fast they were able to go through the sales process. In many ways it’s part of the lead scoring, as it highlights your most impactful lead sources.

7. **Create a clear handoff between marketing and sales with assignment rules.** Many leads fall into the cracks between marketing and sales, unfortunately. Salesforce’s Simon Rules allow you to create stages. Let’s say you have a cycle of ten stages. Marketing brings a lead in and nurtures it in stages one through three. They pass it on to inside sales to manage from stage four to seven. If it’s still qualified then the lead is passed on to outside sales, and they take stages eight to ten.

8. **Clean your leads regularly.** AppExchange has all kinds of data cleansing tools, which give you the ability to clean your data on a regular basis (with validation and verification steps during merges).

9. **Prioritize leads with lead scoring.** There are apps to help you identify leads that are genuinely interested in you. For example, if someone downloads a white paper, attended a webinar and has been to one of our tradeshows, they are not doing it because they are bored. They are satisfying a buying process. Lead scoring makes sure those leads bubble up to the top.

10. **Be disciplined:** plan, create, execute, track, measure campaigns and learn from them.
MEASURING MARKETING ROI

You want to be able to measure marketing ROI. Salesforce tracks the following:

- Increased response rates per campaign type. What worked?
- Increased cost per qualified lead and per opportunity.
- Increased sales productivity (e.g., speed at which deals are closed, values of these deals, etc.). How fast are you closing deals, and what is their value?
- Increased conversion rates from each stage of a revenue cycle to the next stage (inquiry to lead; lead to qualified lead; qualified lead to opportunity; and so on). How are you doing in each stage?
- Increased qualified leads, opportunities and revenue per campaign type. Which opportunities are bringing the most qualified leads?
ADVANCED TECHNIQUES FOR SALESFORCE MARKETING

If you are an executive with more advanced experience, the following are techniques you might find helpful, and that we coach our own clients to do.

1. Assign lead scores according to implicit data such as online behaviors of both anonymous and known visitors.

2. Create parent-child campaigns to provide greater insight into the marketing ROI of both large-scale initiatives and the specific marketing programs that comprise them.

3. Give greater detail to your campaign response types (e.g., for a webinar, measure responses for “registered,” “attended,” “did not attend,” “left early”) and use this information to enable more targeted, follow-up marketing.

4. Don’t just look at campaign results by individual campaign. Instead, use campaign influence reports to understand the key marketing activities needed to develop a lead, and the impact of your campaigns on the pipeline.

5. Upon importing members into a campaign, create an automatic workflow trigger to be sent out to every campaign member, such as using a standard email template.

6. Provide even greater levels of detail in your dashboards by combining two different chart types into a single chart layout, or by preventing small amounts of data from being classified as “Other” in your visual representation.

7. Use Salesforce.com for Twitter to bring greater insight into your lead nurturing and sales conversations by attaching relevant tweets to lead records.
CONCLUSIONS

In all the learning and excitement of engaging your audience using new tools and technology, don’t lose sight of the art and science of marketing. The marketing cloud can help you maintain that balance. Conversations are more important than ever, but they have to be contextually relevant or your customers will disengage. If you really want results from your marketing, you have to combine creative thinking, analytical rigor consistent campaign execution.
ABOUT US

About The Nour Group, Inc.

The Nour Group, Inc., advises global leaders and boards of corporations, associations, and academic forums on disruptive innovations to fuel their growth. Founded in 2002 by global business advisor, international speaker and best-selling author of Relationship Economics, David Nour, the Nour Group has attracted clients including KPMG, Siemens, Disney, IBM, Gen Re, Amerinet and over a hundred other marquee organizations in the evolution of their business models. The firm’s services range from strategic advisory, keynote speaking and facilitation of executive discussions, to training and development, coaching and mentoring, all aimed at fueling personal, team-based and organization-wide growth through the art and science of business relationships.

David Nour – CEO, The Nour Group

Senior Management Advisor | International Speaker | Best Selling Author

David Nour has been a recognized strategist and thought leader on the topic of business relationships for more than 25 years. He delivers over fifty keynotes annually at leading industry associations, universities and Fortune 500 companies, has several top selling books and pioneered the phenomenon that relationships are the greatest off-balance sheet asset any organization possesses. His unique perspective and independent insight has been featured in prominent media and blogs including The Wall Street Journal, New York Times, Fast Company, Mashable, The Huffington Post, Entrepreneur, Success and many others. He is also the author of several books including the best selling Relationship Economics (Wiley), ConnectAbility (McGraw-Hill), The Entrepreneur’s Guide to Raising Capital (Praeger) and Return on Impact - Leadership Strategies for the Age of Connected Relationships (ASAE). In addition he shares strategies and insight on The Nour Group’s blog, e-mail newsletters and social media assets reaching hundreds of thousands of executives and entrepreneurs across a broad base of industries and geographic markets.

An Eagle Scout, David is passionate about youth and supports multiple youth organizations as well as plays an active part in the Atlanta business community. David came to the United States from Iran with nothing more than a suitcase, limited family ties and $100. He holds an MBA from the Goizueta Business School at Emory University and a BA degree in Management from Georgia State University.