

eMarketing and CRM Systems: Can We Talk?

- Rachel Fields, CRM & Client Success Consultant

More often than not, when firms first embark on implementing CRM, their primary motivation is to be able to have centralized mailing lists so they can send their clients and prospects newsletters, other thought leadership pieces and/or event invitations. Significant effort and expense goes into [choosing and implementing the right CRM system](#), but meanwhile the delivery system – [the eMarketing system](#) – frequently gets the short end of the resource stick.



Firms often skimp on eMarketing to make up for the cost of CRM and choose less expensive options that will not integrate with their CRM system. Unfortunately, this decision often ends up being penny wise but pound foolish. So, if you're not a marketing technology professional, or if you are and you need to make the business case to those holding the purse strings, here's a short list of items to keep in mind when selecting an eMarketing companion for your CRM system:

Tracking Consent

As firms continue to struggle with implementing processes to ensure compliance with the European Union's [General Data Protection Regulation \(GDPR\)](#), it is now clear that many firms are woefully unprepared due to the technology they currently have in place, and [data privacy and anti-spam regulations](#) are only going to get stricter. Without the proper technology configuration to collect, store and act on the information required for compliance, you're just not in compliance. It's as simple as that. And the costs for non-compliance can be significant!

Preference Forms

These days, just about every eMarketing system has the ability to create and host preference forms where the contacts can go and select the topics about which they are interested in receiving information. However, if that contact-generated data cannot be automatically resolved with the mailing lists in your CRM system, how can you be sure you're respecting the clients wishes and only sending them the information they actually want? Not connecting your preference form directly with mailing lists in CRM is at best a data headache, but at worst could potentially open your firm up to sanctions stemming from failure to comply with anti-spam and data privacy regulations.

Bi-directional Synchronization

Proper preference forms also give contacts the ability to update other data you hold on them such as their name, company, title, physical address and/or email address. This updated data must be shared with your CRM system via a two-way synchronization process, meaning that updates flow seamlessly to your CRM system from your eMarketing system and vice versa. If your eMarketing system does not support bi-directional synchronization with your CRM, then your data is out-of-sync, which can have a variety of consequences ranging from mere embarrassment to loss of business.

Metrics

More and more firms are finally starting to rely on metrics to help refine the content they send to their

contacts. While eMarketing systems often have out-of-the-box reports for measuring the overall success of mailings and quality of mailing lists, being able to see which individuals received, opened and clicked on an email from within the CRM system is essential. Professionals will be interested in knowing who at a particular company received and opened a specific mailing, and having the ability to generate a report that shows which of their own contacts clicked on an email empowers them to follow up personally with those contacts – and drives CRM adoption as an added benefit.

Bouncebacks

The topic of how to handle bounced emails could probably be an article on its own, but for now, relative to integrating eMarketing and CRM systems, you at least want to have the ability to see which contacts in your CRM have incorrect email addresses. If your email provider cannot send that data to your CRM system in a useable fashion, then your mailing lists are likely to be in much worse shape than you think. Being able to identify and report on contacts with bad email addresses from within CRM is vital to both [data quality](#) and user adoption of the CRM system. Furthermore, since bounced emails most likely will get suppressed from future mailings by your eMarketing system, you need a way to automatically remove those contacts from the suppression list when their email address is updated. Without a good integration between the two systems, this is impossible.

Automation

Again, most eMarketing systems have the ability to automatically send a particular email to a particular contact based on previous emails they have been sent and their reaction to those emails. But what about when you want to automatically send an email based on data in your CRM system? That data must be able to be read by the eMarketing system and without a tight integration, your only option is to manually upload the data from CRM to eMarketing, which means this is no longer an automatic process. Letting the technology take over and perform tasks that previously required a human to do requires that all involved systems have to work cooperatively with each other, and that requires a solid integration.

Event Management

Even if your firm doesn't host events, chances are good that at some point you're going to be faced with a scenario that, technologically, requires the same features of efficient event management such as creating a mailing list on the fly or recording information collected from contacts on an ad hoc form. Without a good integration between your eMarketing and CRM systems, you will be faced with hours of creating workarounds to make a simple task possible.

Don't Do It Alone

Whether you're implementing an eMarketing system for the first time or re-evaluating your existing system, CLIENTSFirst can help you select and implement the right product that will integrate with your existing (or planned) CRM system. We can also help you come up with a CRM and eMarketing success strategy and define efficient processes to streamline your daily marketing technology tasks. **Give us a call today for a free CRM Success Discovery Session!**

*For more than 10 years, the team at [CLIENTSFirst Consulting](#) has been helping professional services firms and other organizations successfully select and implement [CRM](#) and [eMarketing](#) systems to maximize value, adoption and return on investment. If you need help with CRM Success, please **contact us at 404-249-9914** or Info@ClientsFirstConsulting.com.*