

The Merger of eMarketing & CRM – A Meaningful Integration

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Often when firms embark on implementing a Client Relationship Management (CRM) system, the primary motivation is to have centralized contacts and lists so they can send clients and prospects newsletters, alerts, thought leadership pieces and/or event invitations. Significant effort and expense go into choosing and implementing the right CRM, but sometimes less consideration goes into the selection of the email delivery tool, known as an eMarketing or marketing automation system. In fact, because these systems are (or should be) so entwined, the consideration of one system typically should not be made without the other. When exploring the two systems, here are a few features and other things to consider.



Bi-directional Synchronization

Data in the eMarketing system should be shared with the CRM via a two-way synchronization process, meaning that updates flow seamlessly between the two. If your eMarketing system does not support bi-directional synchronization with your CRM, then you are left maintaining multiple ‘silos’ of data that have to be updated manually, which is inefficient and can create duplicative data.

Subscription Forms

One of the most important features of an eMarketing system is the ability to create forms that can be hosted on your website so that contacts can select topics of interest and receive related communications. In the past, organizations that had website subscription forms only received an email when someone subscribed, which then had to be manually entered into the CRM. An integrated CRM and eMarketing system allows contact details and list subscriptions to be automatically recorded and updated in the CRM.

Additionally, these types of forms can provide contacts with a method to opt out of communications they do not wish to receive. Having this information in the CRM also allows users identify individuals who have opted out of communications so that they don't inadvertently try to add them back to lists, which can lead to recipient frustration or even violations of privacy laws.

Tracking Consent

Subscription forms also allow you to capture and record electronic consent to process contact information, which is required by an increasing number of global privacy regulations including GDPR, CASL and CCPA. It's important to have integrated systems to properly collect, store and report on this information because the costs for non-compliance can be significant.

Analytics

More firms are finally starting to rely on metrics to help refine the content they send. The eMarketing system you select should have out-of-the-box reports for measuring the success of mailings and the quality of mailing lists, as well as identifying which individuals received, opened and clicked on an email. This information empowers system users to follow-up personally with those contacts, which enhances opportunities for business development – and drives CRM adoption as an added benefit.

Bouncebacks

After a campaign, being able to identify and report on contacts with bad email addresses from within CRM is vital to data quality. Additionally, since bounced emails most likely will get suppressed from future mailings by your eMarketing system, it's important to have 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

Some eMarketing systems have the ability to automatically send new related emails to a contact based on their reaction to previous emails they have been sent. But if you want to automatically send an email based on data in your CRM system, the eMarketing system must be able to access that data. Without a tight integration, your only option is to manually upload the data from CRM to eMarketing, which is time consuming and inefficient.

Event Management

The right eMarketing system, working in tandem with the CRM, can make event management easier and more effective. Once an invitation is created from a custom template, lists can be quickly and easily updated by professionals or assistants and then flow into the eMarketing system for distribution. The RSVPs then flow back to the CRM where they be recorded and reported on. The eMarketing system will also automatically create activities in CRM to provide an ongoing history of touches with key contacts that can be analyzed to identify business development opportunities.

A Final Success Note: Don't Do It Alone

Whether you're evaluating an eMarketing or CRM system for the first time or re-evaluating your existing systems, CLIENTSFirst can help you select and implement the right products to provide value and return on your technology investments. We can also help you come up with a CRM and eMarketing success strategy and define efficient processes to streamline your marketing technology tasks. **[Contact us today for a free CRM and eMarketing Success Discovery Session!](#)**

*For more than 15 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.*