



# Why CRM for Marketing and Advertising

A Guide to CRM Software for  
Digital Marketers

# Contents

3 In Marketing and Advertising—CRM is Key

4 CRM Basics

6 CRM for Marketing and Advertising

6 Tracking and Managing Leads and Clients Takes Reign

9 Organization Brings Collaboration and Creativity

10 Transparency Aids in Business Forecasting

11 All Features Circle Back to Adoption

# In Marketing and Advertising — CRM is Key

In the advertising and marketing sector, Customer Relationship Management (CRM) software is often overlooked. The culprit? Creatives aren't aware of the usage benefits a client management tool like a CRM can bring.

There's a strong misconception that CRM software primarily functions as a sales tool. But this simply isn't true.

A few years ago, Tech News World surveyed over 500 companies on the main benefits of a CRM. And while companies reported that their CRM helped increase sales by 54 percent, they provided that the software also had many other benefits.



So, what's the common theme here? Retaining customers is just as important as signing new business.

Luckily, in today's market, it's all about building and maintaining relationships. And CRM software does just that—manage customer relationships, in order to keep them satisfied, and grow business.

So, while core functions of the CRM revolve around selling and expansion, it's also used to manage and organize existing customer interactions, as well as plan and forecast for the future.

And this is just the tip of the iceberg. The list of CRM functionalities is endless. Not to mention, a CRM is completely customizable. Which means companies can tailor the product to their own needs.

We'll give you the rundown on how a CRM platform works, as well as how it can be tailored to different industries, i.e. marketing services and advertising.

# CRM Basics

Before we tackle the ways this industry utilizes customer relationship management, let's take a step back to ensure we're all on the same page in terms of how to get the most out of the platform.

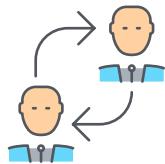
At its core, a CRM helps companies organize and analyze customer data, in order to foster existing relationships, and develop future business. The idea is that the software will help in making sales predictions, decisions, and grow relationships.

## 1. Sales Pipeline Management—



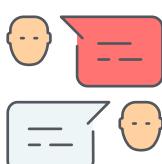
Helps track and manage each stage in the sales pipeline. Whether that be capturing prospect information at the top of the funnel, to tracking their progression through various deal stages as they turn from prospect, to lead, to sale. A CRM is a vehicle for visibility into the entire process.

## 2. Lead Management—



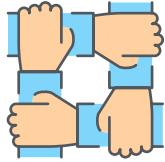
Similar to sales pipeline management, lead management does exactly what it sounds like—manage leads. It essentially tracks and manages them as they flow through the sales pipeline, from first capture, to the final sale. CRM platforms provide a place to capture and organize all contact with leads, so you're better equipped to nurture them into a sale.

## 3. Client Management—



A key component of a CRM is being able to cultivate relationships with your customers. And with a CRM platform, you'll be given a means to manage and foster relationships with existing clients. From a universal location to store their information, to insights into how they use your product, you'll begin to paint a clearer picture into how to better develop these relationships.

## CRM Basics (continued)



## 4. Team and Project Management—

CRM software works as more than just a channel for maintaining and growing relationships with customers. It also serves as a team management tool. From serving as a shared location for storing client information and projects, to helping bring visibility into team members' workloads—a CRM provides a vessel for collaboration and teamwork..



## 5. Reporting—

By far one of the most powerful components of a CRM is its reporting features. Managing sales and relationships is only part of the equation. The other half is being able to track deals stages to close, customer retention, and other statistics, in order to make predictions about the state of the company.

**Moral of the story: CRM software helps track and manage prospect, lead, and customer relationships. But not every company is going to get the same benefits out of the system. Let's discuss how the marketing and advertising industry utilizes customer relationship management.**

# CRM for Marketing and Advertising

Through the collection of market research, customer testimonials, and reviews, we were able to analyze data, in order to make inferences on which characteristics of a CRM the advertising and marketing industry finds most valuable. So, what were the findings?

## Tracking and Managing Leads and Clients Takes Reign.



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**CRM software gives you the ability to capture information on your advertising and marketing channels at a granular level. But it doesn't just do this by storing information in the system for you to analyze. It's much more complex.**  
.....

Engaging with leads and clients is the backbone of any advertising or marketing agency. It keeps the engine going. How can you run a successful business without building and maintaining customer relationships?

But keeping track of a large client base is hard work. And based on our research, a huge concern for companies in marketing services is ensuring their clients and prospects don't fall through the cracks.

A CRM seeks to curb this matter in a few different ways.

### Lead Capture

Acquiring leads is important. But in the marketing services industry, it's important to first understand where those leads are coming from, in order to make better business decisions. Are certain advertising or marketing channels performing better than others?

"How is my email marketing doing compared to my pay per click (PPC) campaign?" A CRM can capture and record where your leads are flowing in from, to gain a broader perspective on which channels are outperforming others.

This will allow you to make adjustments to the underperforming campaigns, and signal that it's time to pull your money out of one campaign, in order to strengthen the other.

## CRM for Marketing and Advertising (continued)



### Reporting

How can you make predictions on advertising trends, without a clear visual of how your distribution channels are performing? Luckily, many of the CRM platforms come with in-app reporting features that allow you to analyze data and trends over time.

Through the use of graphics and metrics, you'll be able to gain a more robust view into your marketing strategy, and what you've accomplished historically. This way, you'll be able to better forecast for the future.

Which deals are closing and why? What is the typical time frame to close deals for big vs. small companies? Which industries maintain contracts the longest? These are questions you should be asking yourself, that reporting features will help you answer.



### Client Management

Once you're able to capture leads and turn them into customers, it's all about maintaining relationships with those customers. Winning deals is one half of the equation. The other half is keeping them happy.

In a Rockefeller Corporation study, it was found that, "82% of customers will leave because they think you do not care about them."

That's a huge margin. So, how can you reduce their churn and keep them satisfied?

Well, in marketing services, the first step is delivering on the customer's expectations. Whether that be performing on projects on time and on budget, or just collaborating efficiently to get the job done, you'll want to build good standing with the customer.

And luckily, there are features of a CRM that can help.

## CRM for Marketing and Advertising (continued)

### Centralized Database



CRM platforms provide a central place to store your customers, your relationships, and your interactions with them. Import their contact information, record all customer interactions, projects you're working on, documents, and any other pertinent information. CRM functions like a warehouse of sorts. It serves as a reservoir for client information that's accessible to the entire team.

**When PipelineDeals user, Lucy M. of Vistar Media looked for a CRM, she looked for one that was, “Easy to navigate and understand where a deal is in the sales process. [One that] helps with centralizing, forecasting, [and] attribution rates of meetings to closed deals.”**

**She says, “By having an organized and highly functioning CRM, it provides transparency to the sales process and makes people accountable.”**

### Visibility

With a central location for customer information, it's much easier to gain full visibility into what's going on in your pipeline. Are you working with a customer on a project, but they haven't touched it in a while?

Or, maybe you've used the CRM to notify another department that you need assistance on a task. The transparency of the CRM will help with customer, and cross-team communication.

Visibility is key in holding your team responsible, in order to maintain steady customer relationships.

### Automations

Turn visibility into action by automating key parts of your workflow and follow up. Doing so makes it easier to stay on top of client needs, so you don't have to focus all your attention in one area.

Maybe you haven't heard from a customer in a few weeks? Go ahead and have your CRM set monthly or quarterly check ins, notifying you if a customer hasn't been in contact with you in a while.

It's important to maintain relationships with customers, and CRM automations provide that extra push, to make sure that happens.



# Organization Brings Collaboration and Creativity

Once you have an organizational structure in place to store and nurture leads and contacts, the next big task is developing a database for the entire company to access.

In the creative world, departments are constantly working on multiple projects, and have various roles and workflows. It can get complicated without a centralized location for data. But a CRM serves as an all-encompassing archive for the whole company to utilize.

A CRM will help provide your team with a sound organizational structure. And structure leads to visibility and collaboration, which frees teams to be creative.

**When referring to the PipelineDeals' CRM, Mike Enders, CEO of MGECOM says, "It's the same tool for anyone who logs in from anywhere ... Nobody has to be tied to a database, and all of our documentation is readily accessible to everyone who needs it."**

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## Allocation of Workloads

Through the organizational structure and visibility a CRM creates, it becomes much easier to allocate workloads across the company.

If you're a copywriter but need information on user trends from the market research team, log into your CRM to see their activity. Tag them on the task you're working on, and ask for their assistance.

CRM allows you to gain insights into what other teams are working on, in order to fuel cross company collaboration. With the whole team on board and utilizing the CRM, it makes communication much more streamlined.

## Transparency

A CRM creates a window into what each team is working on. As a centralized location to house information, it creates a sense of transparency into the tasks of each department.

For example, say someone on the market research team is working on a project, and needs to look at past statistics on advertising campaign performance. Through the document storage feature of the CRM, they'll be able to go into the database and view the statistics from old email campaign reports that have been filed.

It's that simple. No need to bother other departments, and sift through sheets of documents and reports. It's all front and center on your screen, ready for your use. CRM opens up a window into your entire company.

# Transparency Aids in Business Forecasting

CRM software helps provide data, and data is what drives sales.



According to a Capterra survey, 74 percent of polled respondents said their CRM software allowed them to have greater access to customer data.

Insights into your company's performance helps with business forecasting. Data and statistics is what drives a company forward. You need metrics on the stability of a company, in order to make decisions and plan for the future.

## Tracking New Business

A CRM allows for better sales forecasting, by tracking leads from first touch to close. By following deals in each stage of the sales process, you'll be able to paint a better picture of where you stand, as well as how long it takes for a deal to move from each stage to close.

Visibility into your company's pipeline also gives perspective on its financial health. Being able to take a look at your pipeline and see how many leads have been generated, how many are actively in conversation, and how close they are to signing is valuable. It gives your team perspective on how to plan for the future.

Getting a sense of how quickly new business is coming on board is vital to making decisions about how to invest in the business and what strategies to pursue.

## Team Management

Getting a strategic look into the sales pipeline can also help assist with the internal management of your team.

Agencies operate best when they have visibility into what business is coming on board and what projects will need to be delivered. Understanding what's working and where additional resources are needed is essential to delivering outstanding work.

Gaining a sense of perspective on work being done, being allocated, and how employees are performing on it will give you an understanding of how the business is achieving its goals. From there, the company can make adjustments as they see fit.

At MGECOM, Enders said they found productivity and growth when improving transparency. He says, "Our greatest challenge is the same as it's always been: getting someone to put their signature on the dotted line ... PipelineDeals helps us maximize each opportunity. Our business development team keeps it open in a window whenever they're working. We use it to track each piece of information with every prospect."

Full visibility across teams helps Enders keep an account of all business processes, helping them stay on track for the future.

# All Features Circle Back to Adoption

While the features of a CRM lend themselves to better sales practices, client management, forecasting, and ROI, it's important to take a step back and remember that you need the whole team on board to reach ultimate efficiency.

**You'll want to ensure your team is able to adopt the CRM and truly understand how to use it, as well as customize it to their needs.**

**So, whether you're coming from another CRM, or you're looking for your first, there's a series of questions you should be asking yourself:**

- » How easy will it be to make the switch and transfer data from my existing CRM and/or spreadsheets?
- » How easy will it be for my team to make the switch from their enterprise CRM to one built for a SMB? Or vice versa?
- » What will be the level of effort to implement the setup? Will I have to involve my tech team?
- » What does the onboarding process with employees look like? How quickly can they learn the system?

More importantly, make sure you understand how easily the system can be adopted. Pick a CRM that's tailored to your company's needs.

When referring to PipelineDeals, Joe Colombo, President of 360 PSG, says, "It's got all the bells and whistles you need ... while not overwhelming you (as the sales manager/owner) or your reps with tons of required extras that clutter their ability to move fast and keep selling."

So, when searching for a CRM, make sure your criteria reflect the needs of your whole team.

For an unbiased account on the best software for your company, check out [G2 Crowd's guidebook on CRM implementation](#). Happy shopping!



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