



Are You Ready to Use CRM & Marketing Automation Together?

October 2025

Microsoft
Partner











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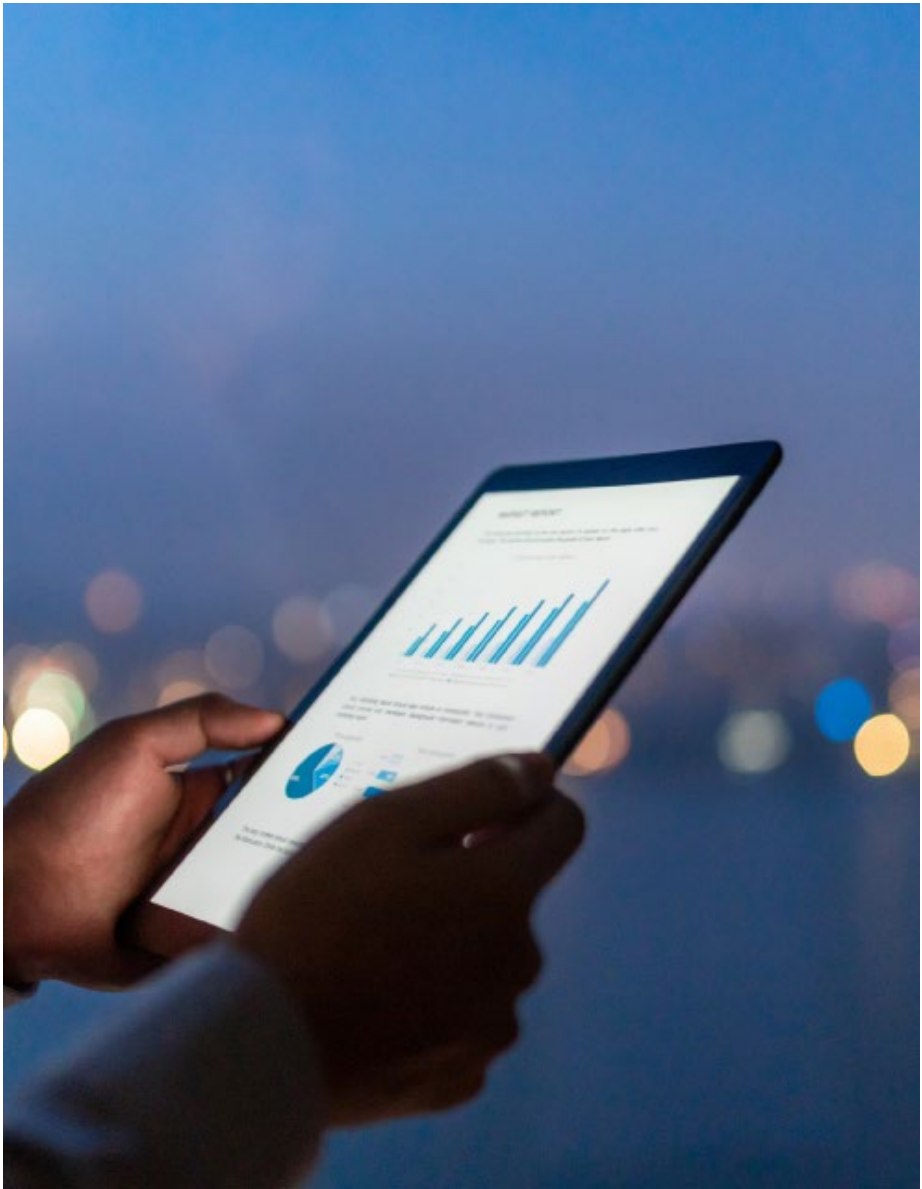
Business Technology Services

We solve for business challenges & support innovation through technology solutions.

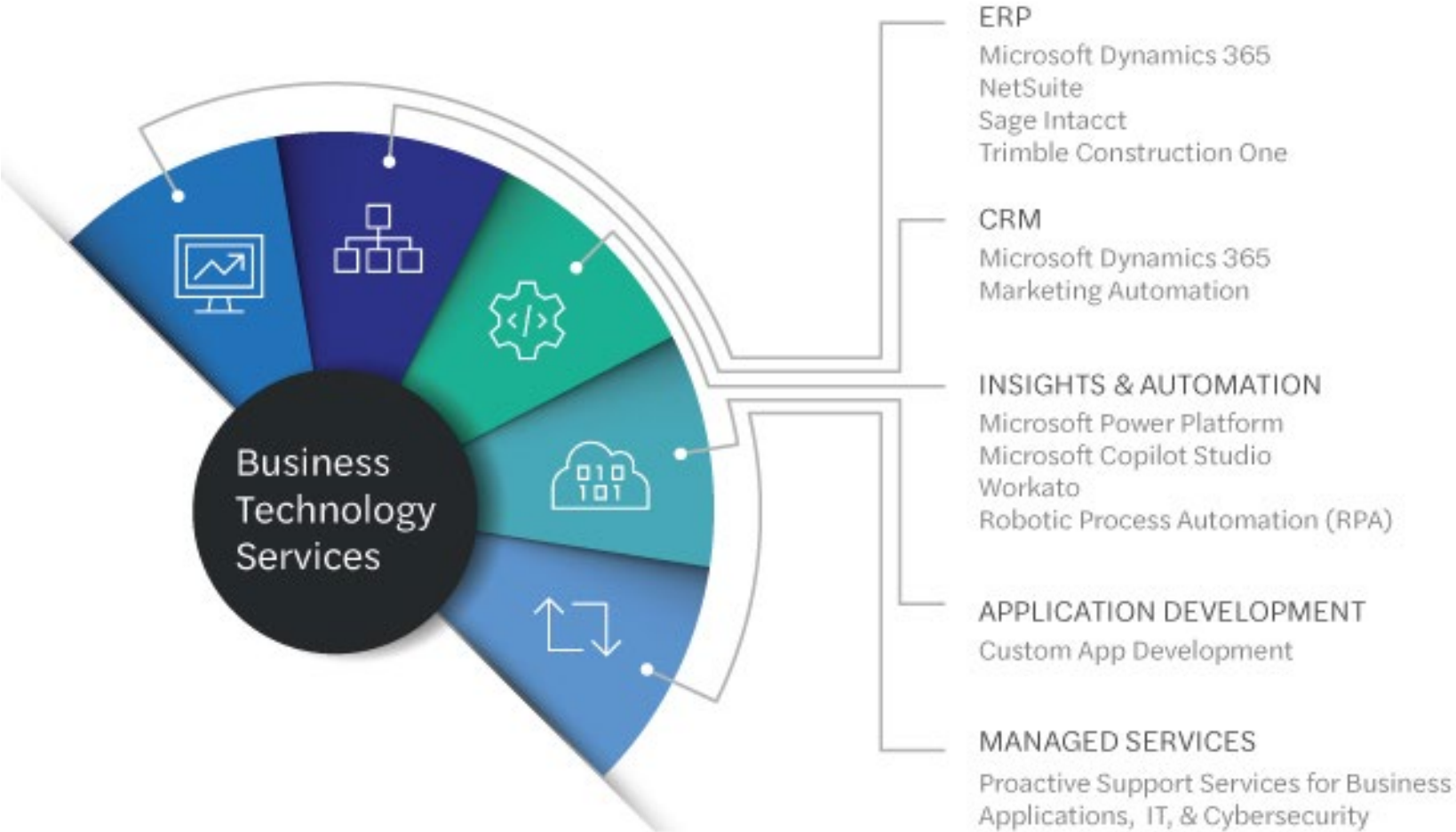
Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, & business intelligence (BI) tools.

Our end-to-end & managed service solutions help clients achieve their digital transformation goals. Services include:

- | | | | |
|--|--------------------------------------|---|--|
|  | Solution Assessment & Selection |  | Implementation Project Rescues |
|  | System Implementation & Integration |  | Business Intelligence (BI) & Analytics |
|  | Process & Technology Design |  | Robotic Process Automation (RPA) |
|  | Upgrades, Enhancements, & Automation |  | Custom Application Development |
|  | Training, Monitoring, & Support |  | IT & Cybersecurity Managed Services |



Premier Technology Partnerships



Microsoft Partner



Today's Presenter



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Microsoft
Partner

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“ If you don’t have time to do it right,
when will you have time to do it over?”



John Wooden
UCLA Men’s Basketball
10 championships in 12 years

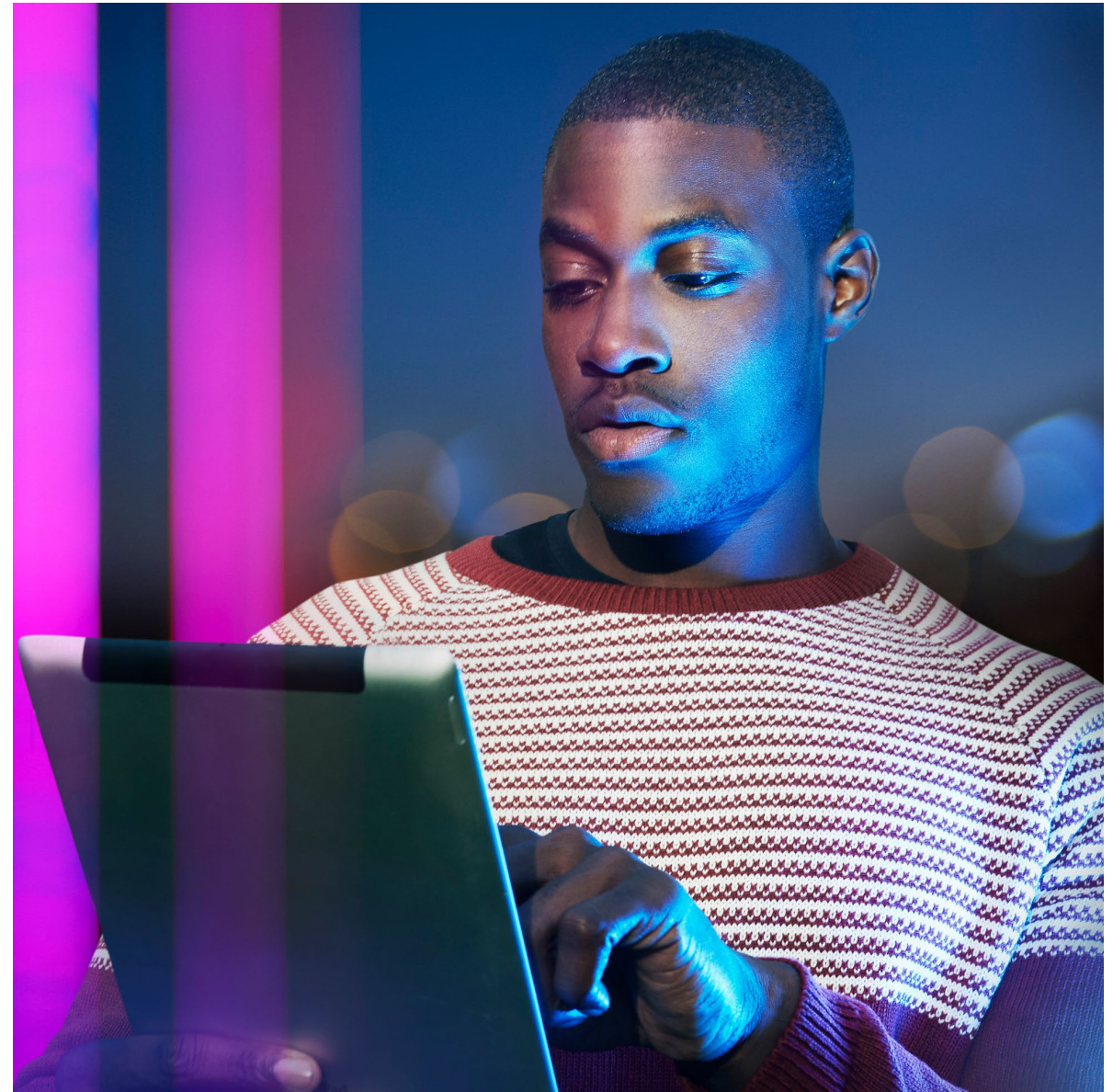
Objectives

1. Describe high-level features of marketing automation tools & how these differ from core CRM features
2. Define common data points used by automation tools & how to use each for improved lead segmentation & more
3. Discuss several marketing automation tools & their key differentiators



Agenda

- Marketing Automation vs. CRM
- Key Data Points
- Choosing a Marketing Tool
- Common Barriers to Success
- Q&A



01

Marketing Automation vs. CRM



Marketing Automation vs. CRM



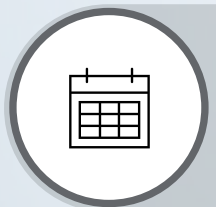
Mass Email Sending With Click-Tracking



Automated Email Sequences



Forms & Landing Pages



Activity Tracking/Engagement Timeline



Automated Lead Scoring



Integrations With Webinar/Event Platforms



Marketing Automation vs. CRM



Specialized Analytics/Reporting



Advanced List Building Tools



Consent Management/GDPR Features



Public File Hosting

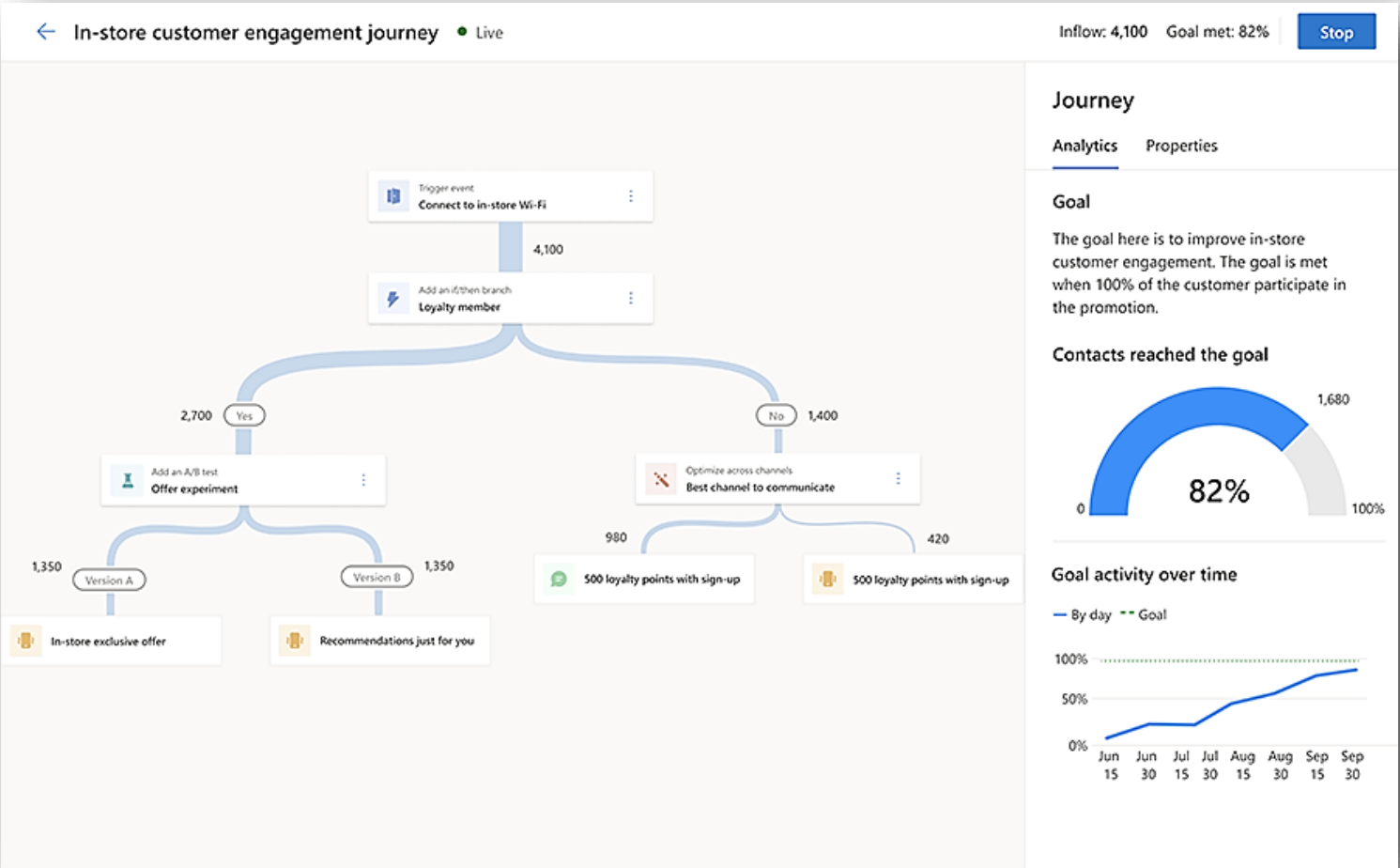


Custom Domains (www2.yourbrand.com)



Social Media Connectors

Automation Programs



Source: Microsoft Learn

Landing Pages & Forms

Lead Generation Form

Please provide your contact information
and a member of our sales team will be in touch.

What is your first name? *

Enter your first name

What is your last name? *

Enter your last name

What is your company name?

Enter your company name

What is your email? *

Enter your email address

What is your job title?

Enter your job title

We are committed to protecting and respecting your privacy. We will only use your personal information to administer your account and provide the services requested.

☐ Subscribe to our Newsletter

Submit

Automated Lead Scoring

Engagement Scoring

- How engaged are they?
- Based on activity

Event Participations	+75 Points
Form Submission	+50 Points
Email Clicks	+10 Points
Website Page Views	+3 Points

Profile Scoring

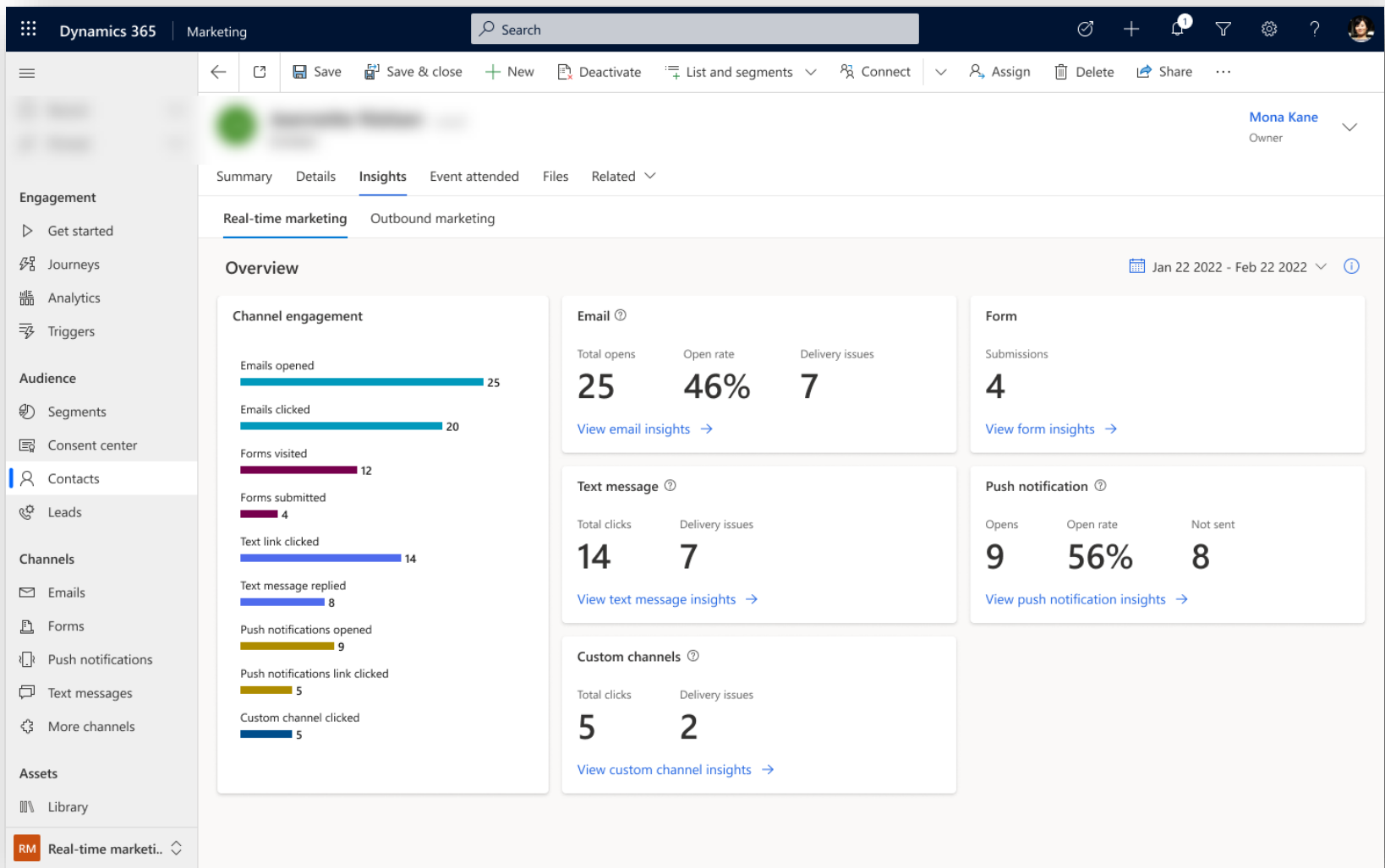
- Are they a target customer?
- Based on ideal customer profile

Company Size	+25 Points
Buying Influence	+25 Points
Job Level	+20 Points
Industry	+10 Points



Don't Work in a Vacuum

Activity Tracking



Reporting & Analytics

Positive customer engagement

25.19%

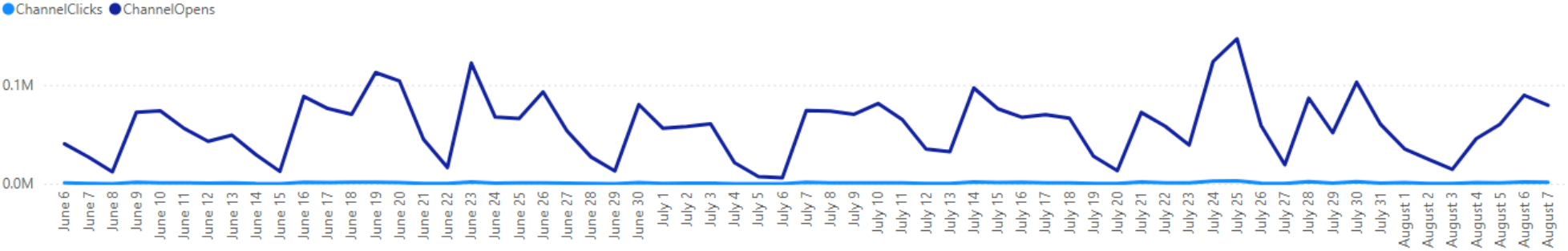
Open Rate

0.40%

Click-through Rate

1.60%

Click-to Open Rate



Link	UniqueClicks	ChannelClickThroughRatePerLink
https://assets-usa.mkt.dynamics.com/904864b2-6f5a-ef11-bfdf-6045bddbb039/digitalassets/standaloneforms/...	2762	0.10%
https://assets-usa.mkt.dynamics.com/904864b2-6f5a-ef11-bfdf-6045bddbb039/digitalassets/standaloneforms/...	2528	0.11%
...	1077	0.48%
...	734	0.05%
...	650	0.01%
https://assets-usa.mkt.dynamics.com/904864b2-6f5a-ef11-bfdf-6045bddbb039/digitalassets/standaloneforms/...	638	0.11%
https://assets-usa.mkt.dynamics.com/904864b2-6f5a-ef11-bfdf-6045bddbb039/digitalassets/standaloneforms/...	622	0.11%

Delivery successes

Delivery issues

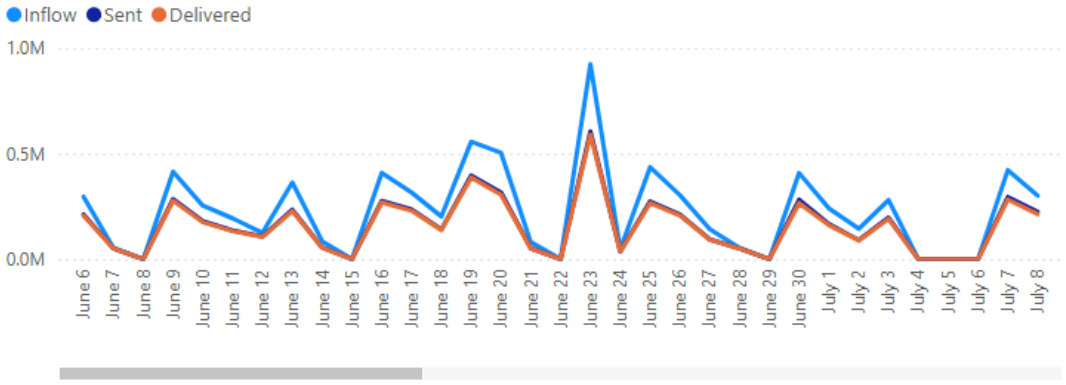
Reporting & Analytics

Delivery successes

20M
Inflow

70.71%
Send Rate

97.17%
Delivery Rate



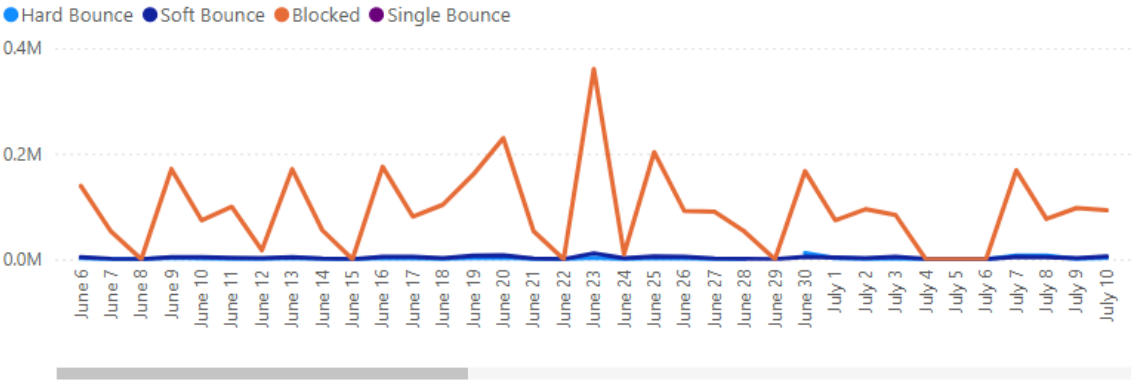
Delivery issues

40.13%
Blocked

1.82%
Soft Bounced Emails

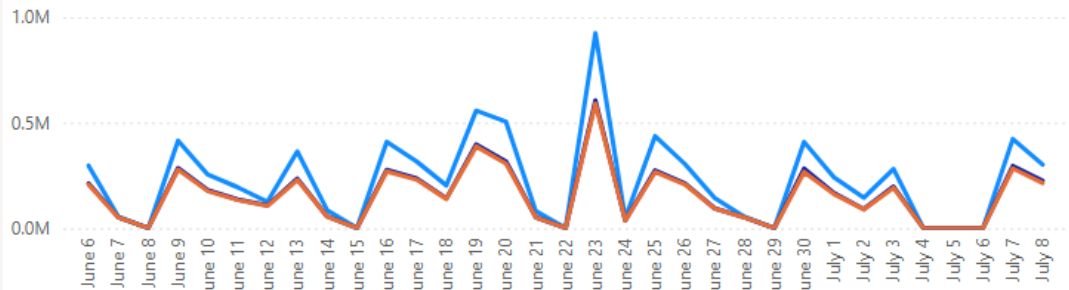
1.05%
Hard Bounced Emails

N/A
Single Bounced Text ...

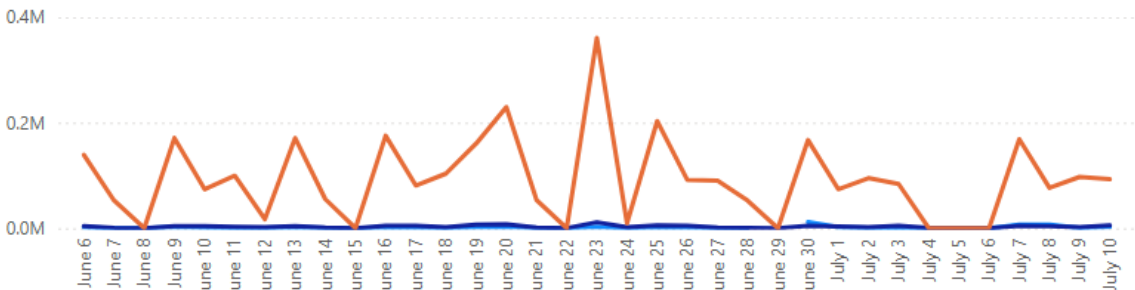


Reporting & Analytics

Inflow Sent Delivered



Hard Bounce Soft Bounce Blocked Single Bounce



Negative customer engagement

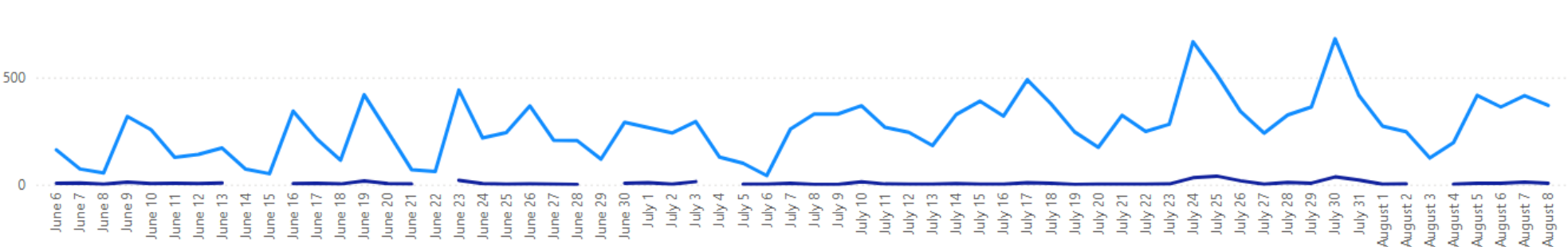
0.00%

Email Spam Rate

0.16%

Email Unsubscribe Rate

Unsubscribe Spam



What Not to Expect

- “One platform that does it all”
 - Direct management of digital advertising
 - Advanced social media posting features
 - Social “listening” or sentiment analysis
 - Built-in video hosting
 - Line-by-line order confirmations/abandoned cart emails
 - Event management
 - Built-in webinar hosting
- ***Customer Insights – Journeys** includes “personalization lists,” in-depth event management capabilities, and an integration with Microsoft Teams webinars.



02

Key Data Points



A blue-toned photograph of two men, one Asian and one Black, smiling and looking at a laptop screen in a dimly lit office. The man on the left wears glasses and a dark shirt, while the man on the right wears a light-colored shirt. A semi-transparent blue arrow graphic points from the left towards the text.

Adopt the Mindset, Not the Specifics

The Architect Mindset

- What does my team need to know to serve our customers quickly & efficiently?
- How would we engage differently based on this information (when we have it)?
- How do I want to report on this in the future?



A Note About Field Types

- **Option Sets/Picklists** are preferred
- **Multi-Selects & N:N/Related Objects** are hard to update in bulk or with form submissions
- **Text** fields are a last resort for most segmentation fields, but can be useful as “detail” fields



Key Standard Data Points

Tables



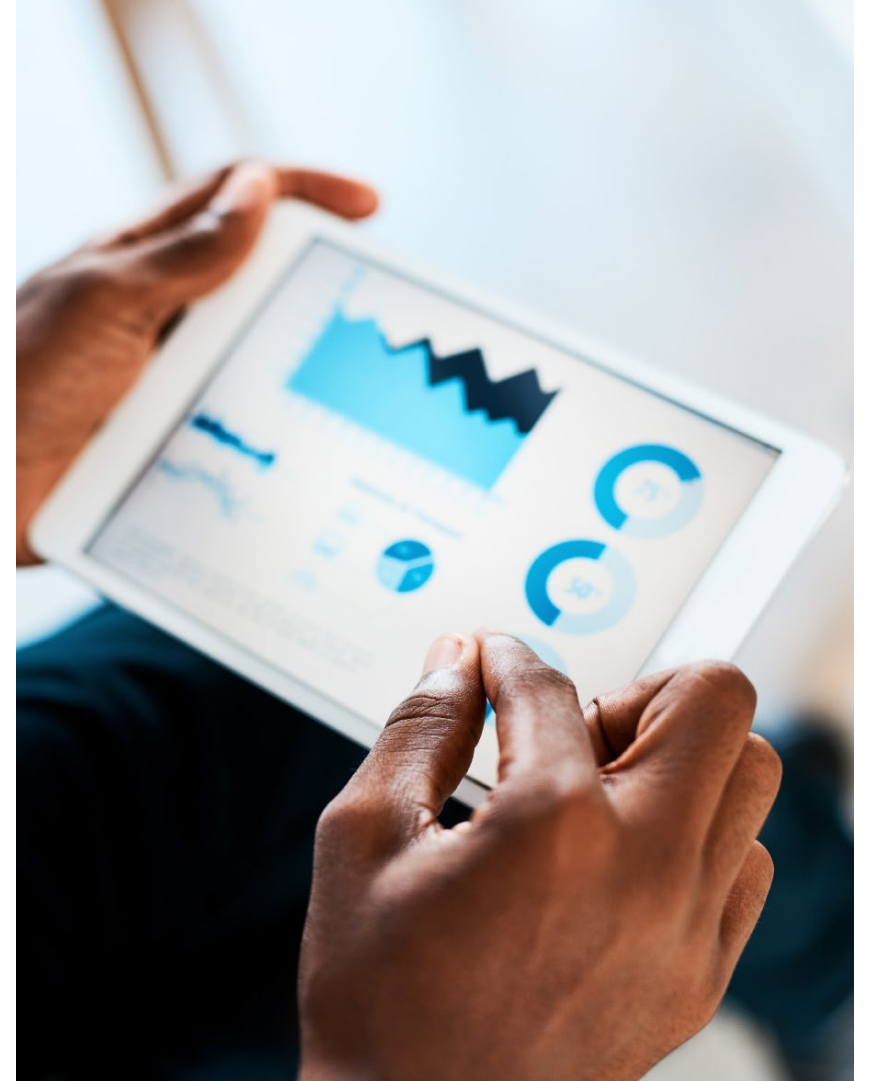
- Lead
- Contact
- Account
- Opportunity
- Segment
- Marketing List
- Campaign

Columns



- Lead Source
- Consent
- Email
- Parent Contact
- Parent Account
- Traffic Source (Custom)
- Source Campaign (Legacy)

Customer Insights – Journeys is not reliant on Marketing Lists & Campaigns as other platforms. Also, its consent model is much more advanced than simple Allow/Do Not Allow fields.



Key Standard Data Points

Parent Contact | Parent Account

Qualify (15 Mo)

Active for 15 months

Existing Contact?

✓

Kevin Beale

×

Existing Account?

✓

Forvis Ma...

×

Purchase Timeframe

✓

This Quarter

▼

Estimated Budget

✓

\$25,000.00

Purchase Process

✓

Committee

▼

Identify Decision Maker

mark complete

▼

Capture Summary

✓

Download - eBook

Next Stage

Consent

Contact method

Preferred

Any

▼

Email

Allow

▼

Bulk email

Allow

▼

Phone

Allow

▼

Mail

Allow

▼

Key Standard Data Points

Consent

Contact point

@gmail.com

Compliance profile

(default)

Communication status

Partial communication

Some emails to @gmail.com with (default) compliance profile may not be sent.

Tracking status

Will be tracked

@gmail.com contact point's interactions will be tracked.

Edit

Communication consent records

Purpose	Contactability	Consent
<div>> Content Marketing</div> <div>Non-restrictive enforcement model</div>	<div>Will not send</div> <div>Reason: Opted out</div>	Opted out (Edit)
<div>> Distributor Member Updates & Education</div> <div>Non-restrictive enforcement model</div>	<div>Will send</div> <div>Reason: Opted in</div>	Opted in (Edit)
<div>> Event Communication</div> <div>Non-restrictive enforcement model</div>	<div>Will send</div> <div>Reason: Opted in</div>	Opted in (Edit)
<div>> Supplier Member Updates & Education</div> <div>Non-restrictive enforcement model</div>	<div>Will not send</div> <div>Reason: Opted out</div>	Opted out (Edit)
<div>> Transactional</div> <div>Disabled</div>	<div>Will send</div> <div>Reason: Consent not needed</div>	Not set (Edit)

“Allow” vs. “Opt-In”

- Consider your default values
- “Allow” doesn’t necessarily mean “opt-in”
- Opt-Out = false doesn’t necessarily mean “opt-in”
- Capture clear consent for subscribers
- Consider dedicated “Opt-In Source” fields to capture where the consent was expressed
- Capture specific topic-based preferences if possible



03

Key Segmentation Data Points



Position or Role

Department

- Executive Team
- Information Technology
- Procurement
- Operations
- Quality/Engineering
- Sales & Marketing
- Human Resources

Job Role/Function

- Branch Sales Manager
- Design Engineer
- Hygiene Specialist
- Procurement
- Consultant
- Board Member



Job Level or Influence

Job Level

- C-Suite
- Senior VP/Director
- VP/Director
- Senior Manager
- Manager
- Team Member

Buyer Role

- Decision Maker
- End-User
- Champion
- Stakeholder
- Influencer
- Economic/Technical Buyer



Size

Employee Range

- Less than 50
- 50–99
- 100–249
- 250–999
- 1,000–2,500
- 2500+

Company Size

- Number of Locations
- Number of Branches
- Number of Technicians
- Number of Members
- Assets Under Management



Interest/Customer Goal

Product Interest

- Auto Loan – New Car
- Auto Loan – Used Car
- Home Mortgage
- Small Business Loan
- Small Business Credit Card
- ...

Inquiry Type

- Quote Request
- New Project Request
- Technical Support
- Career/HR
- Sponsorship
- ...



Lead Source

Lead Sources

- Event – Tradeshow
- Event – Public Workshop
- Event – VIP
- Event – Webinar
- Lead Form – Website
- Download – eBook
- Lead Form

Traffic Sources

- Paid Search
- Paid Social
- Organic Search
- Organic Social
- Direct
- Referral
- Offline Sources



Turning Your Option Sets

Too specific

can be cumbersome for users

“XL Series Model Page”

Ambiguous

can lead to misinterpreted data

“Existing Customer”

Too broad

can limit reporting/segmentation

“Web”

Time-based

creates impractically long lists

“TradeExpo 2007”



How Many Are Too Many?

A blue-tinted photograph of a crowd of people, likely at a conference or event, with many hands raised in the air. The image has a soft, out-of-focus quality. A semi-transparent blue circle and a white jagged-edged shape are overlaid on the image, serving as a background for the title text.

Cultivate Confidence for Your Users

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04

Choosing a Marketing Tool

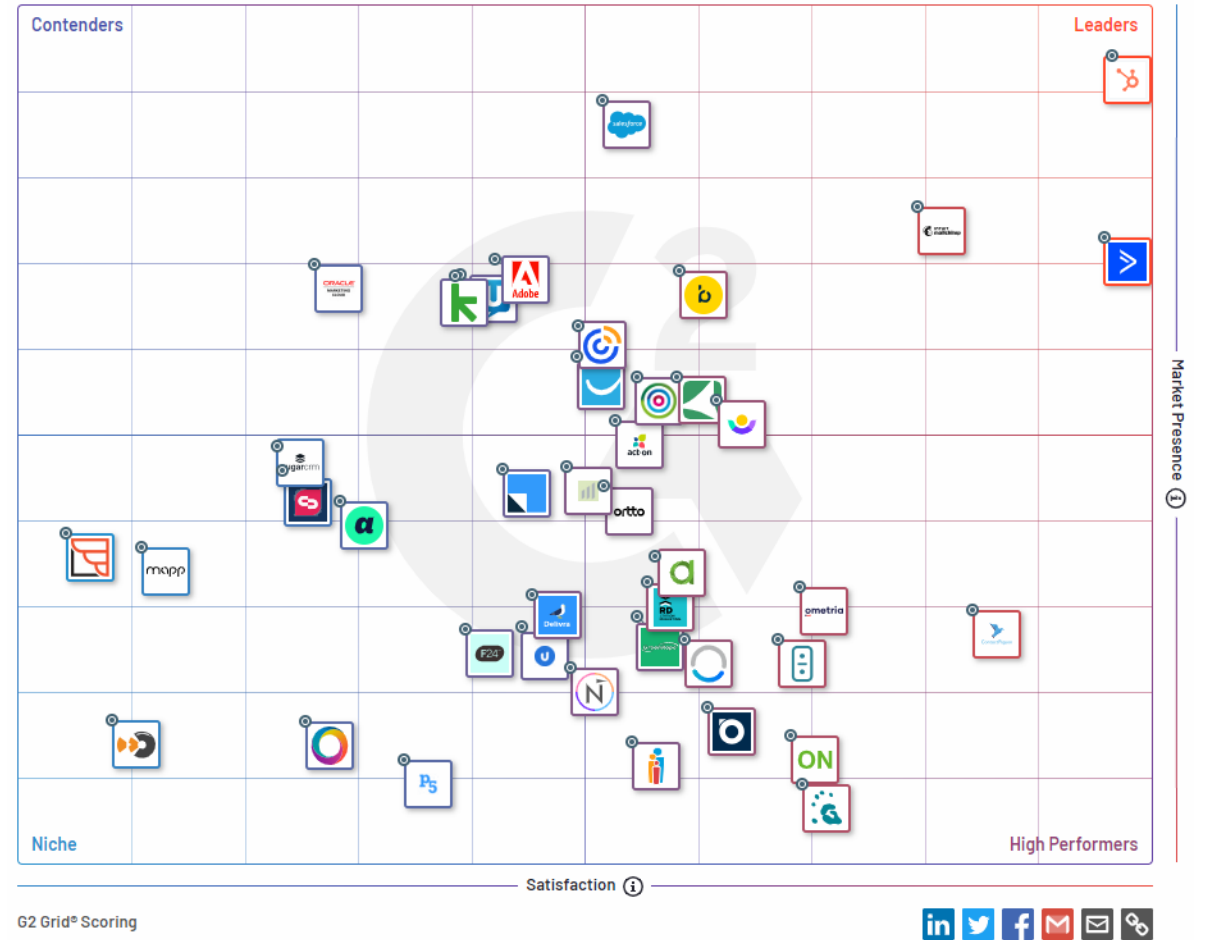


No System or Platform Is Perfect



So Many Options ...

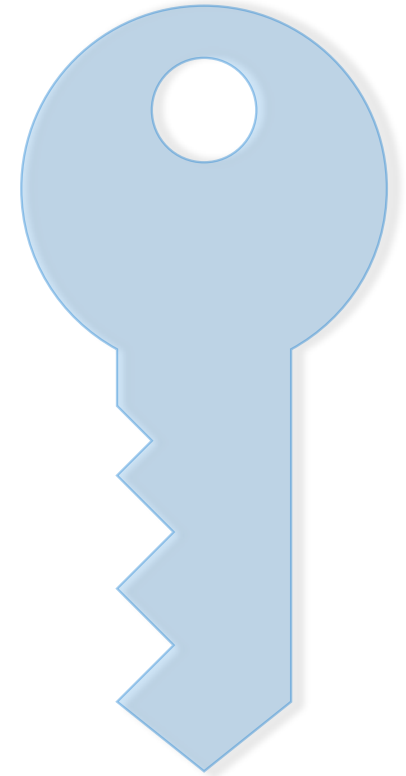
- Dynamics 365 Customer Insights – Journeys
- Click (ClickDimensions)
- HubSpot
- Klaviyo
- emfluence
- Act-On
- Marketo
- Eloqua



Source: g2.com

Key Technical Differentiators

- Create a lead for each form submission (with custom options)
- Keep prospects in a separate database
- GDPR & consent management features
- Segmentation options that use related tables (parent account, opportunity)
- Automation program flow control (entry/exit)
- Analytics like UTM/URL parameters
- Third-party integrations
- Landing page/form editors



Items to Consider

Low

SMS & Mobile

Social Media

Surveys

Content Hosting

Admin & Security

Account-Based Marketing

Offline Marketing

Medium

Website Tracking

Campaign Management

Events & Webinars

Audience Building

High

Email Marketing

Lead Scoring

Third-Party Integrations

Critical

Landing Pages & Forms

Automation Programs

CRM Integration

Segmentation

GDPR

Reporting



Start With “Simple & Reliable”

Learn More

- G2.com is a great place to research
- Talk to fellow marketing professionals with experience in multiple platforms
- Talk with your professional network
- Review companies' user forums to see how active each community is
- Get a trial account

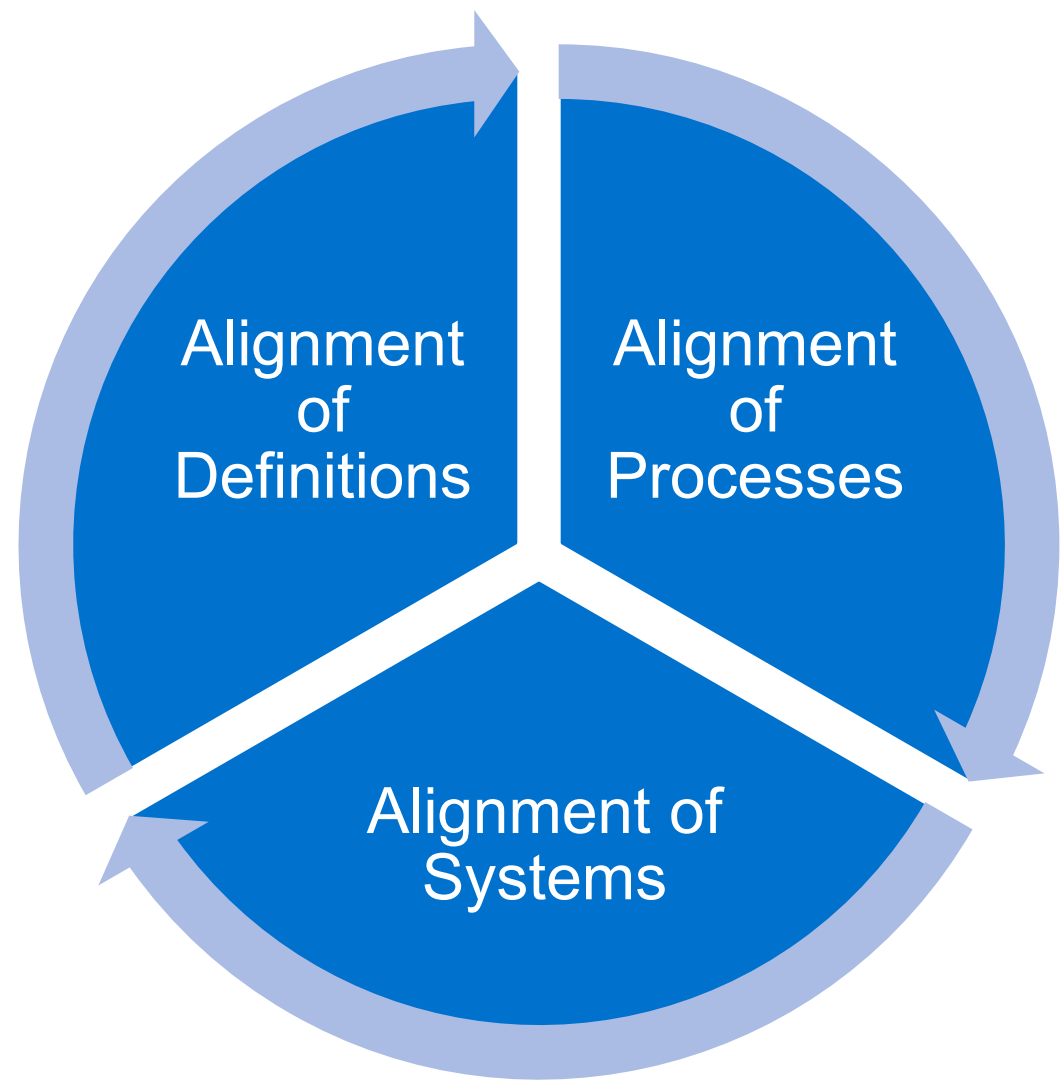


05

Common Barriers to Success



Common Barriers to Success



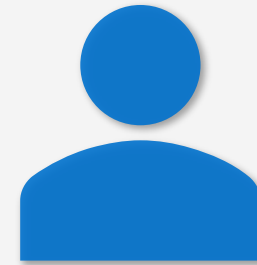


Align Before You Launch

Alignment of Definitions

What is a lead?

- Existing customer visits your booth to discuss a new project
- New prospect attends one of your webinars
- Existing customer sends in a quote request
- Existing customer adds a product to their cart
- Salesperson learns about a new employee at an existing client
- Marketing identifies prospects at a company sales has pursued in the past
- Certain contacts meet Marketing's target criteria in a ZoomInfo audience



Alignment of Definitions

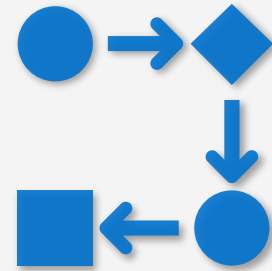
What is a qualified lead?

- Lead Score > x
- Meets 2+ BANT (Budget, Authority, Need, Timeline)
- “Requested Sales Follow-Up”
- Submitted Quote Request or Lead Form
- Submitted > x Forms
- Job Level > x
- Company Size > x



Alignment of Processes Qualifying Leads

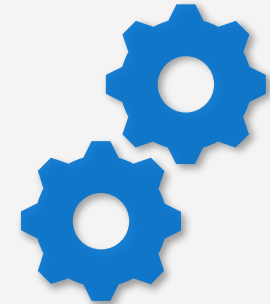
- Qualifying leads
- Who's responsible for qualifying leads?
- Who's responsible for assigning leads to sales?
- Should marketing be talking when sales is engaged in 1:1?
- What communication should never be sent to customers?
- How should we communicate to customers vs. prospects?



Alignment of Systems

Common Issues

- General Data Management
 - Ex., Lead Source – first-time update only!
 - Ex., Do Not Allow Bulk Emails – educate users or prevent access
 - What's the “source of truth” for subscriptions & consent to email?
- Lead to Opportunity Qualification
- Non-Standard Entities (lead, contact, account, opportunity)
- Non-Standard Fields (donotbulkemail)
- Subscription Management/Topics



06

Key Takeaways



Key Takeaways

01

Don't Work in a Vacuum

02

Cultivate Confidence for Your Users

03

Adopt the Mindset, Not the Specifics

04

No System or Platform Is Perfect

05

Start With “Simple & Reliable”

06

Align Before You Launch

Q&A



Business
Technology
Services

Questions?

Contact Thank you

Forvis Mazars



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Lead Consultant

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