Microsoft Dynamics 365

Marketing Best Practices to Generate Pipeline
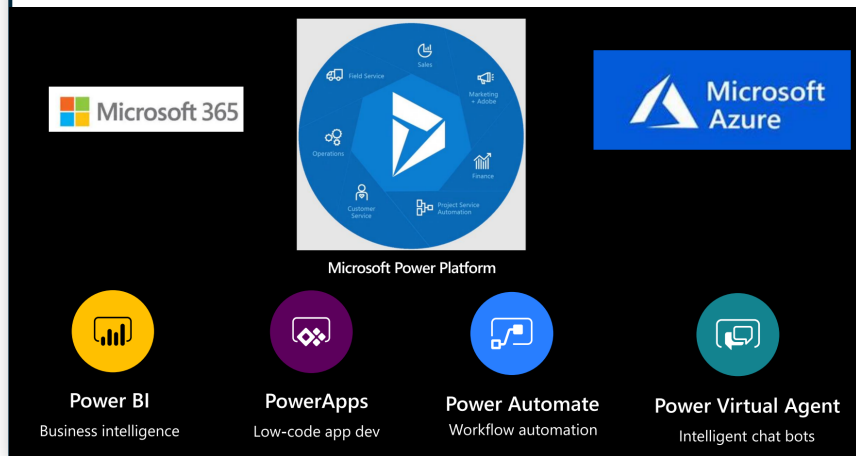
Angie Hirata

Agenda

1. State of Marketing Today

2. But First... Emotional Engagement

3. Generate Demand to Generate Pipeline

4. Nurture to Convert

5. BONUS: Gain More Insights & Productivity with *Tech*

15 Years of Working with Dynamics Partners

NEURAL IMPACT
The Neuroscience of Emotional Engagement

No onboarding. 99% of our Clients = Microsoft Partners

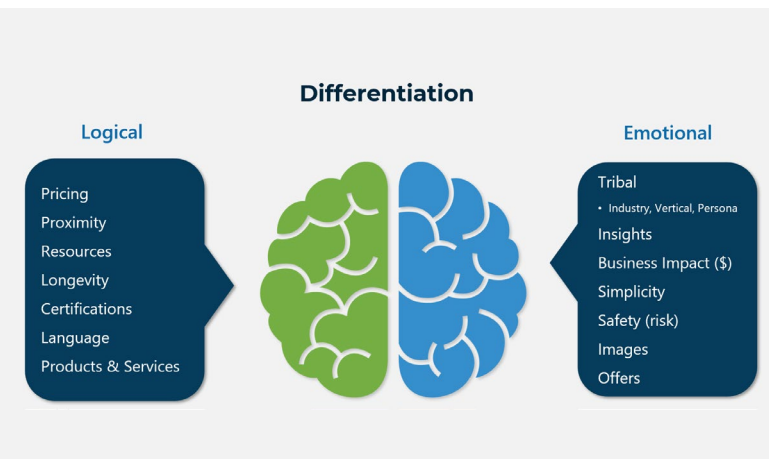Microsoft 365

Microsoft Azure

Microsoft Power Platform

Power BI
Business intelligence

PowerApps
Low-code app dev

Power Automate
Workflow automation

Power Virtual Agent
Intelligent chat bots

Experts in Neuroscience

Differentiation

Logical
- Pricing
- Proximity
- Resources
- Longevity
- Certifications
- Language
- Products & Services

Emotional
- Tribal
  - Industry, Vertical, Persona
- Insights
- Business Impact ($)
- Simplicity
- Safety (risk)
- Images
- Offers

Specialize in Customer Acquisition & SaaS Transformation Strategy Development

Modern Digital Marketing

Accelerated Remote Selling

Cloud/SaaS Transformation

State of Marketing & Challenges

Marketing Is the New Sales

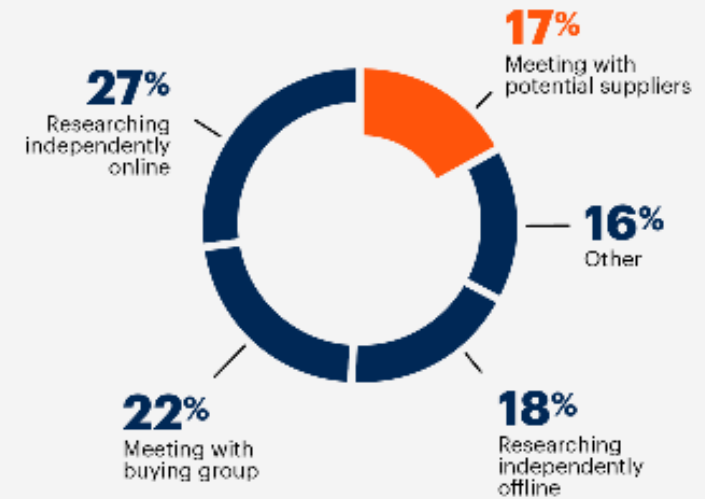"88% of business research is done online before purchasing offline."

McKinsey & Company

Sellers have little opportunity to influence customer decisions

The ready availability of quality information through digital channels has made it far easier for buyers to gather information independently, meaning sellers have less access and fewer opportunities to influence customer decisions.

In fact, Gartner research finds that when B2B buyers are considering a purchase, they spend only 17% of that time meeting with potential suppliers. When buyers are comparing multiple suppliers, the amount of time spent with anyone sales rep may be only 5% or 6%.

Distribution of buying groups' time by key buying activities

- 17% Meeting with potential suppliers
- 16% Other
- 18% Researching independently offline
- 22% Meeting with buying group
- 27% Researching independently online

n = 750 B2B buyers
Source: Gartner

Gartner.

Source: Gartner "5 Ways the Future of B2B Buying Will Rewrite the Rules of Effective Selling", 2020.

Changing Buyer = Change Your Marketing & Sales

Marketing

Sales

Customer Success

Business Problem

Buyer 2.0

Decision

out of CONTROL
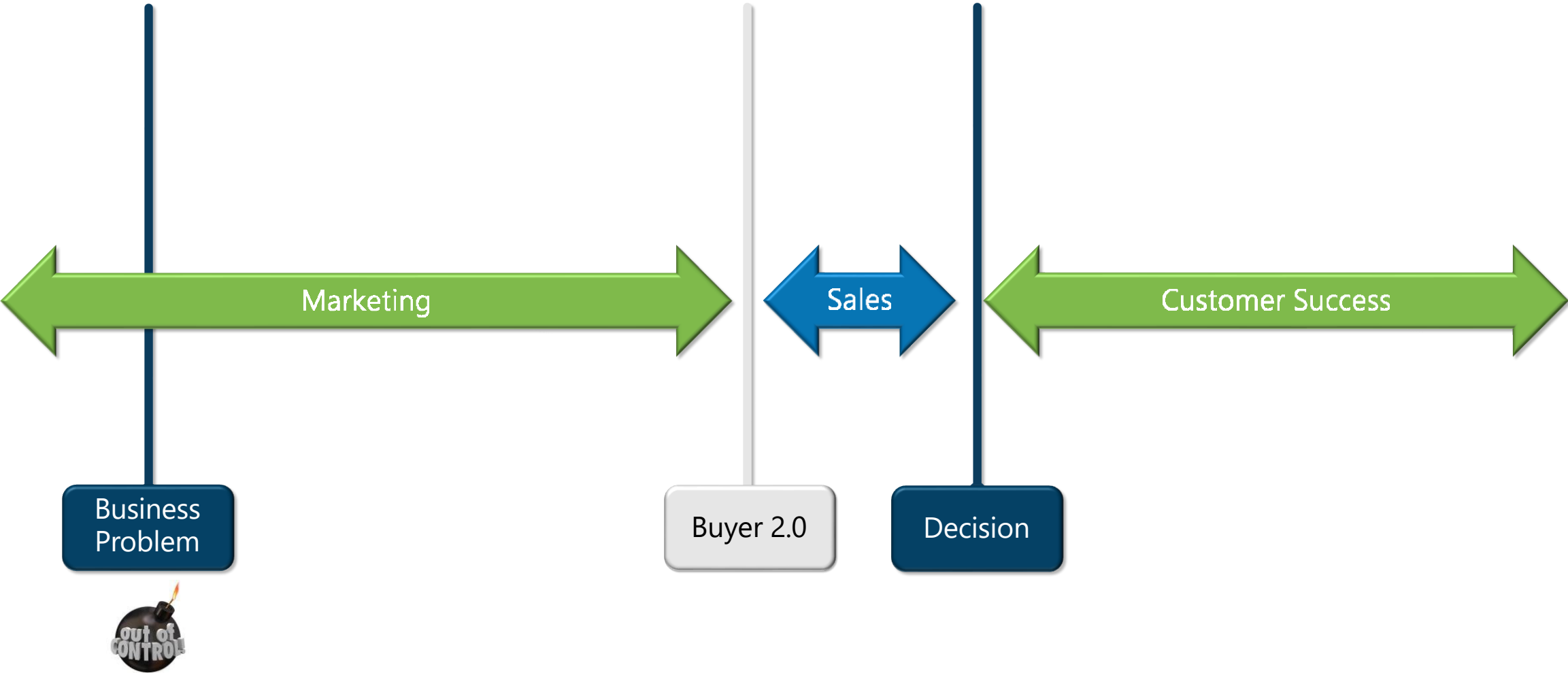
Big Responsibility = Tough Job

Emotional Engagement

Capture with Primal. THEN Convince with Rational.

Rational
Brain:
Cognitive, Thinking

Primal Brain:
Emotional, Instinctive

Appeal to the Emotions. Back it up with Logical Information.

Primacy & Recency Effect

Primacy → Anchoring → Premature Cognitive Commitment → Confirmation Bias → Consistency Principle → Recency

Shortcut 4: WIIFM
"What's In It For Me?"

1. Emotions (Negative, Positive)

2. Industry ➔ Micro Vertical

3. Persona

4. Imagery (still & video)

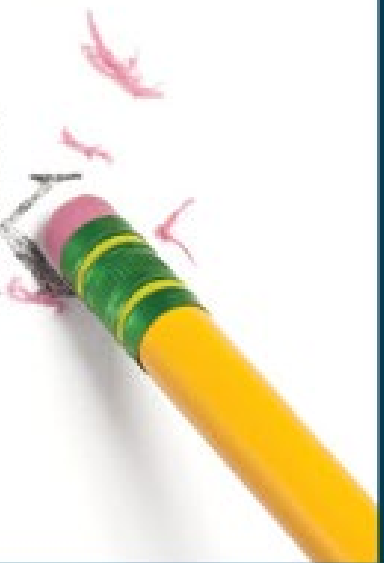# Fear, Risk

5x Impact on Behavior

Than Positive Emotions

MONEY, RISK & CONTROL

Emotions before Features (Why before What)

Why: Fears or Desires

- Parts price fluctuations
- Wasting money/inventory
- Changing building codes
- Strict safety regulations
- Differing payroll laws by country
- Employee churn
- Increased online competition
- Tech savvy customers' expectations

How: Solution Resolves or Achieves

- Benefit A
- Benefit B
- Benefit C
- Benefit D
- Benefit E

What: Feature Enables

- Feature A
- Feature B
- Feature C
- Feature D
- Feature E

For Each Industry,
For Each Persona

Microsoft Dynamics built for Construction

Whether you're a Contractor or Product Supplier

[Microsoft Dynamics for Construction - m-hance](#)

Fellowmind

When rapid fluctuations become commonplace

The fact that the pr[...]
that transaction vol[...]
often small, is comr[...]
food & beverage inc[...]

But we see that infla[...]
disruptions in supp[...]
sustainability regula[...]
on operations. Man[...]
the lack of traceabil[...]
to handle without tł[...]

Food & Beverage | Fellowmind (fellowmindcompany.com)

Fellowmind

← Industries

Best ahead in the food & beverage industry

Is your business keeping up? When the market swings daily, you need to be both fast and flexible to be the best before the next turnaround. We live in your industry and understand the support your business needs.

→ Aptean - Business Central

→ Bison ERP

How Curo365 Helps Within A Law Firm

Managing Partner

Partner

Lawyer

Business Operations

The average attorney is expected to promptly complete all of the work that is piled on their desk, anticipate all of the work that might pile up, and make sure that the work is generating revenue for the law firm.

With all of that to think about, most lawyers are hesitant to introduce more complexity into their lives Curo365 and Microsoft can make the practice of law more bearable through the use of technology that most lawyers are already using. Lawyers at law firms that utilize Curo365 can use Outlook and/or Teams to run their entire practices.

Said differently, a lawyer would never need to leave Teams and Outlook to run the cases, communicate with the team or the client, enter billings, review AR, or otherwise engage in their practice. Microsoft's productivity applications that most lawyers already utilize in their daily routines are now powerful and simple solutions that allow attorneys to focus more time and energy on their cases and the law firm's clients.

[Next Generation of Law Practice Management Software - Curo365](#)
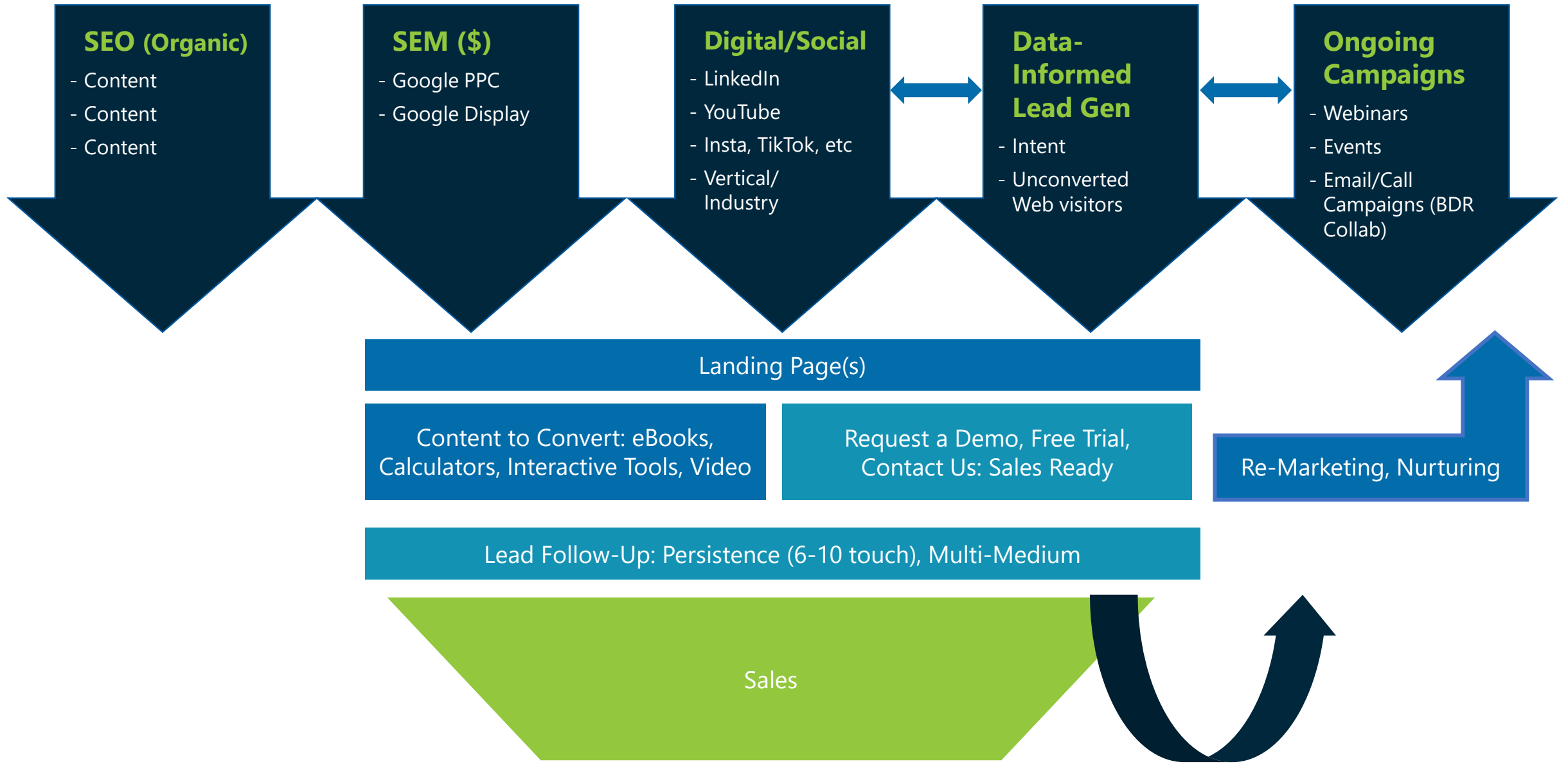
Generate Demand to Generate Pipeline

Inbound vs. Outbound Marketing

Lead Generation Machine

SEO (Organic)
- Content
- Content
- Content

SEM ($)
- Google PPC
- Google Display

Digital/Social
- LinkedIn
- YouTube
- Insta, TikTok, etc
- Vertical/ Industry

Data-Informed Lead Gen
- Intent
- Unconverted Web visitors

Ongoing Campaigns
- Webinars
- Events
- Email/Call Campaigns (BDR Collab)

Landing Page(s)

Content to Convert: eBooks, Calculators, Interactive Tools, Video

Request a Demo, Free Trial, Contact Us: Sales Ready

Re-Marketing, Nurturing

Lead Follow-Up: Persistence (6-10 touch), Multi-Medium

Sales

The Power of Content Marketing for Inbound
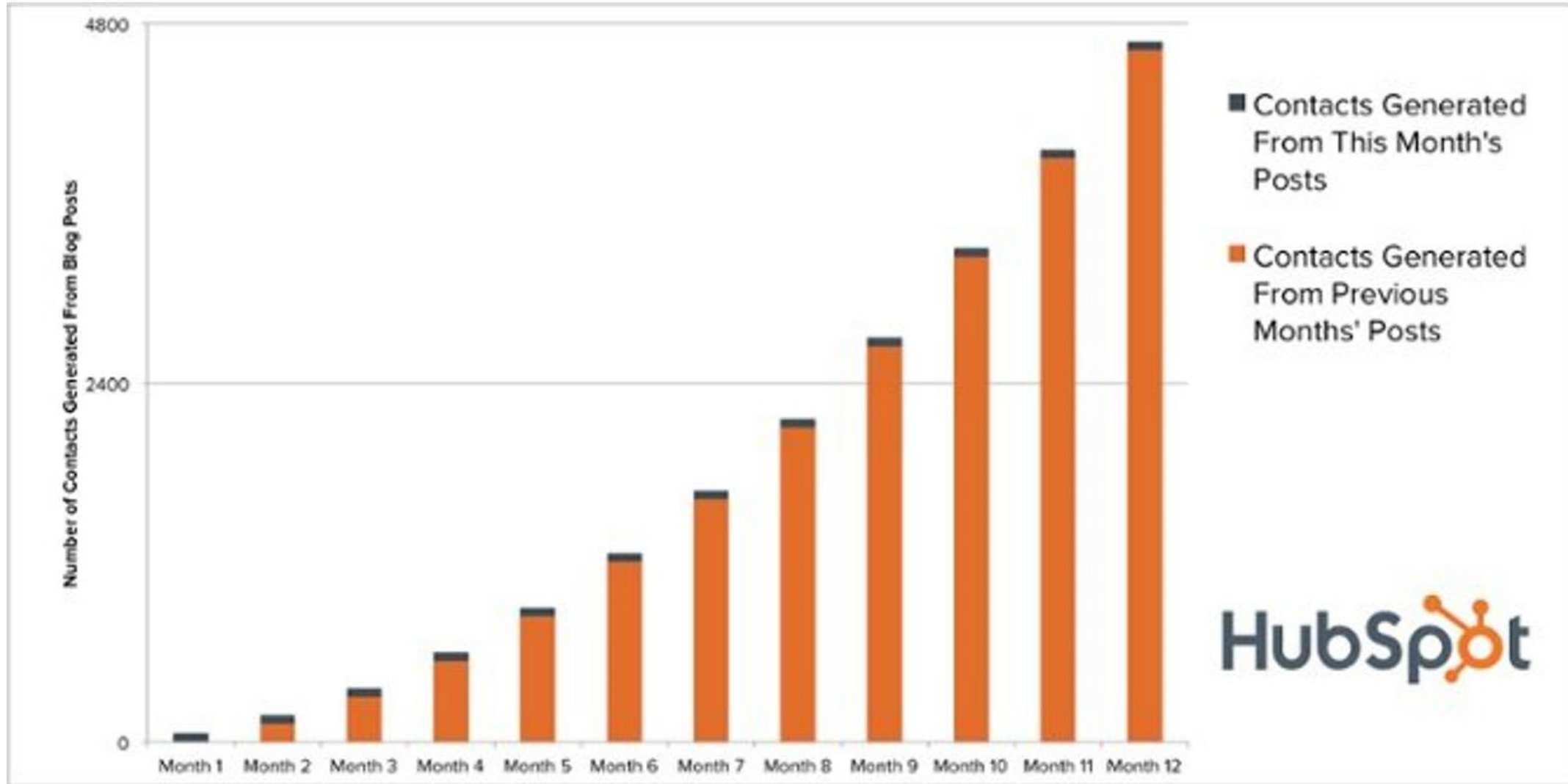
In Which Stage of the Buyer's Journey Is Each Content Type Most Effective* When Used for Demand Generation Purposes?

	Early Stage (Awareness/Interest)	Middle Stage (Consideration/Intent)	Late Stage (Evaluation/Purchase)
Blog posts/articles	73%	21%	6%
Case studies	18%	42%	40%
Ebooks	56%	39%	6%
In-person events	35%	33%	32%
Interactive content	46%	46%	8%
Podcasts	57%	35%	7%
Videos	54%	40%	6%
Webinars	36%	47%	17%
White papers	34%	53%	14%
Other types of content	36%	37%	27%

Source: Content Marketing Institute. Using Content Marketing to Generate Demand, Create New Audiences, 2018.

Base: All for-profit respondents whose organizations use content marketing to generate demand from buyers; aided list.

*Effective was defined as succeeding at moving leads/potential customers to the next stage (e.g., generating an initial inquiry, nurturing a lead through the buying process, or convincing/persuading someone to make a purchase) based on your organization's specific objectives.

Top 5 Information Sources Used by B2B Tech Buyers
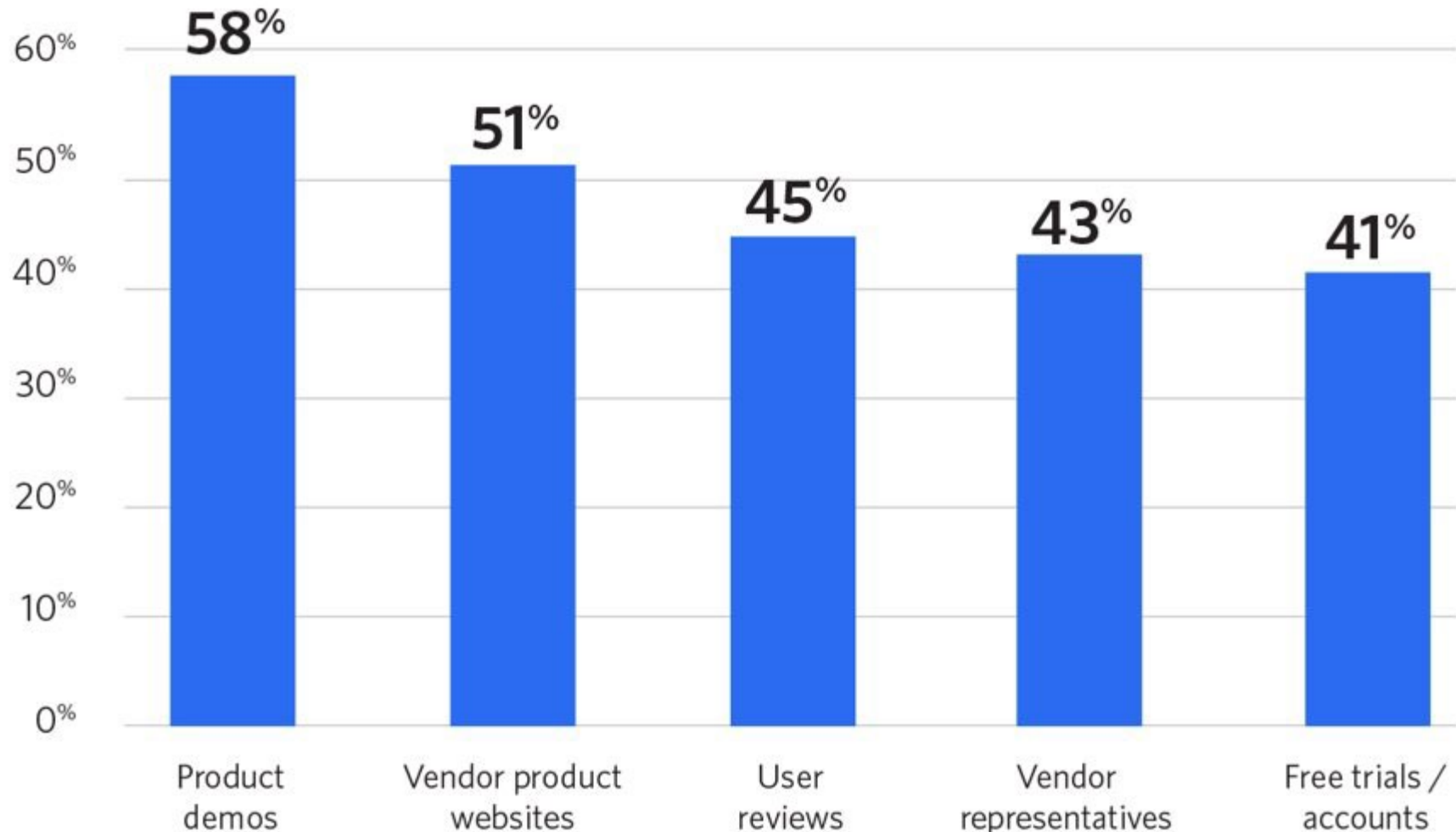
- **58%** Product demos
- **51%** Vendor product websites
- **45%** User reviews
- **43%** Vendor representatives
- **41%** Free trials / accounts

© **TrustRadius**

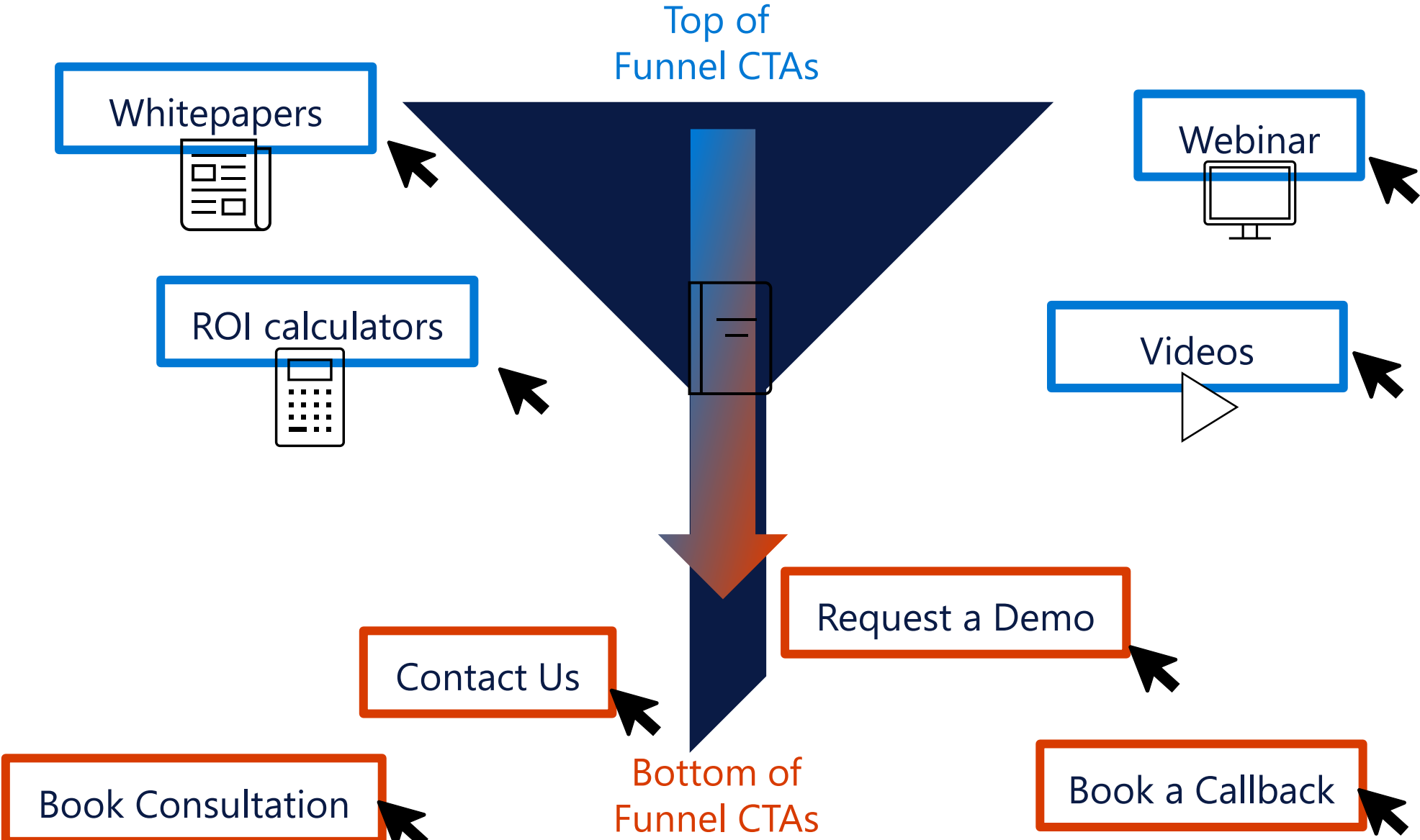Talk to a consultant

Contact us

Book a Call →
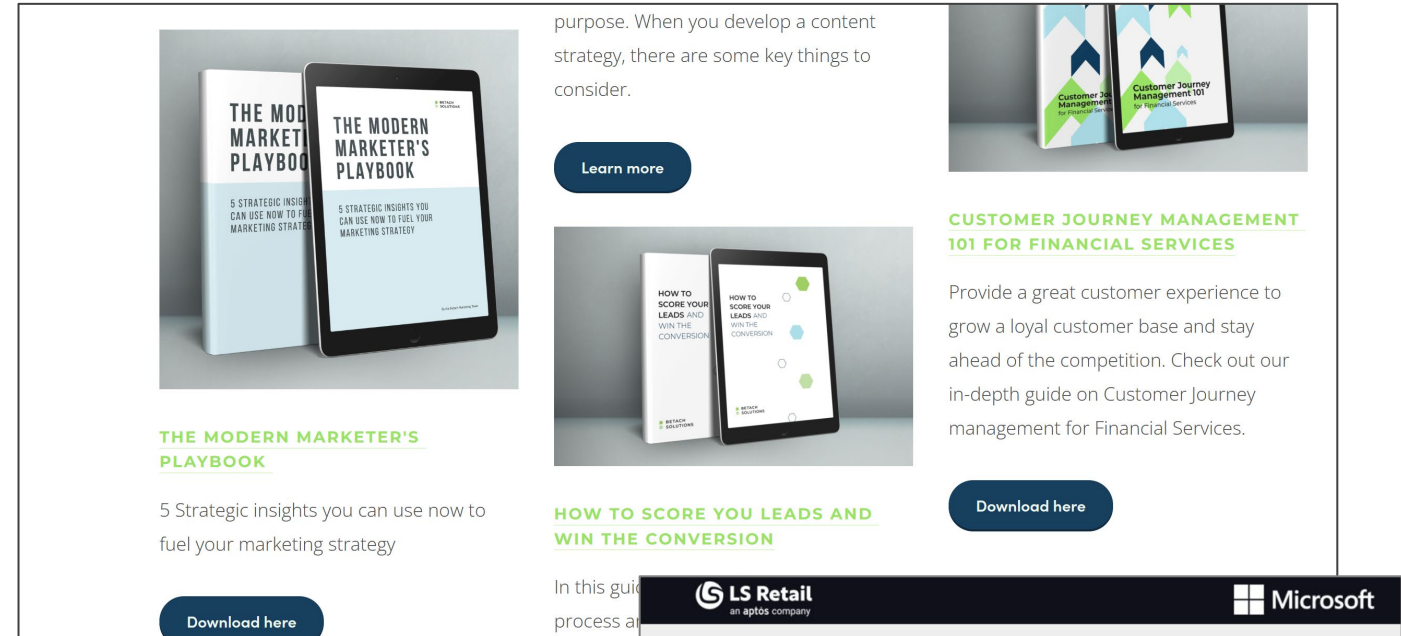
SPEAK TO A SPECIALIST

Improve Conversions: Web Traffic to Leads

Top of
Funnel CTAs

Whitepapers

Webinar

ROI calculators

Videos

Request a Demo

Contact Us

Bottom of
Funnel CTAs

Book Consultation

Book a Callback

Gate: High value educational assets:

- White Paper
- eBook
- Video (long)
- Calculator
- Assessment
- Templates

purpose. When you develop a content strategy, there are some key things to consider.

Learn more

THE MODERN MARKETER'S PLAYBOOK

5 Strategic insights you can use now to fuel your marketing strategy

Download here

HOW TO SCORE YOU LEADS AND WIN THE CONVERSION

In this guide
process a

CUSTOMER JOURNEY MANAGEMENT 101 FOR FINANCIAL SERVICES

Provide a great customer experience to grow a loyal customer base and stay ahead of the competition. Check out our in-depth guide on Customer Journey management for Financial Services.

Download here

[Whitepapers | eBooks — Betach Solutions](#)

LS Retail an aptos company | **Microsoft**

11 KPIs every restaurant owner and CEO should track (eBook)
Discover what restaurant metrics you should track and what data you need for each of them.

Get your free copy now

Name*

Last Name*

Business Email*

Company Name*

How can you measure the success of your restaurant business? You know you need data– but where can you pinpoint your progress? That's where Key Performance Indicators (KPIs) come into play.

Download this e-book to find out:
- What types of KPIs you should track in your kitchen, dining room, and HQ
- How you can use KPIs to determine the most profitable areas of your business
- How you can turn KPI measurements into actionable goals

Do you need help finding technology that will help you reduce costs and stay on track with your KPIs? Contact our experts.

Country*
- Please Select -

Your industry*
If you work for an IT company or existing LS Retail partner, please select "IT company / Partner"
- Please Select -

Planning to buy/change software system? Need help? Talk to our experts.*
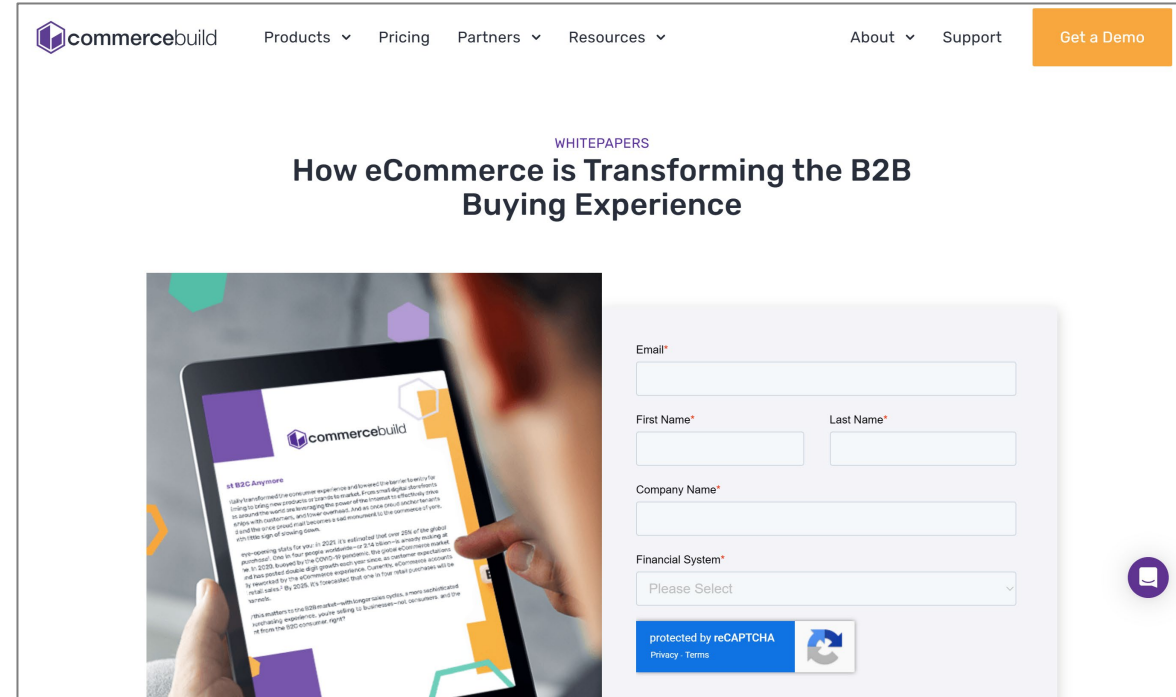○ Yes, please.
○ No, thanks.
○ Still evaluating, maybe later

LS Retail needs the contact information you provide to be able to contact you about the resources and

[11 restaurant metrics you must track in 2023 (ebook) (lsretail.com)](#)

Form Best Practices

- Integrate directly into CRM (and/or Marketing Automation)

- Focus on converting ONLY on the value of this asset (not selling everything)

- Minimize # fields (ideally 3, max 5)

How eCommerce is Transforming the B2B Buying Experience - commercebuild

Contact us vs. Request a Demo
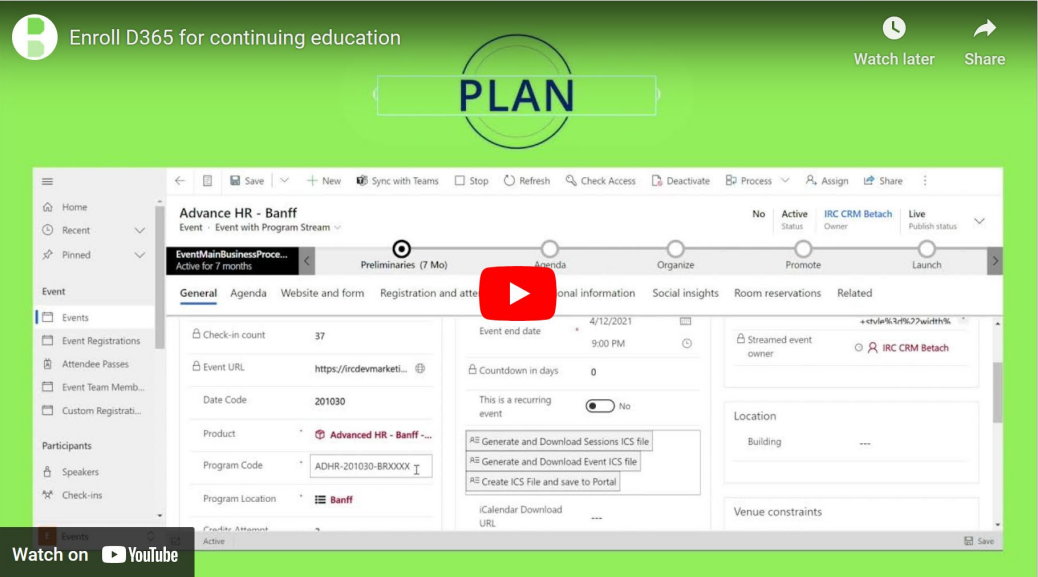
[Microsoft Dynamics for Construction - m-hance](#)

[Enroll D365 For Continuing Education – Betach Solutions —
Betach Solutions](#)

Accelerate Pipeline Generation with Video

Demand Generation Videos	Sales Acceleration & Website Conversion Videos	Proof & Credibility Videos	Acceleration of Onboarding & Delivery	Driving Value & Consumption Videos	Upsell & Renewal Automation Videos	Co-Sell Channel Sales Enablement Videos
On demand webinars	"Why Us" differentiation	Product demos	Self serve training	How to	90 day touch	Why this technology
Thought leadership	Sales rep credentialing	Customer case studies	Self serve questions and answers	Use case scenarios	60 day touch	How it works
Educational – Why migrate to cloud	"Why Buy The Product" differentiation	Meet the company and team	Instructional	ROI customer stories	30 day touch	Pricing
Business insights	Packaging & pricing differentiation	Corporate credentialing and overview	In app tips	New tech: AI, Power Platform	Desire possibility videos	Partner case studies
How it helps with business problems	Services differentiation explainer	Conference & industry speaking sessions			New workload explainer	Competitive positioning & differentiation
Industry credentialing	Assessment & free tools intro & guide					
Video Blog	Why and how migration process					
FAQs						

- \> 1 billion users
- **# of hours people watching/month up 50% YoY**
- Average consumption: 15 minutes
- 60% of a creator's views come from outside their home country

Results with Video:

30 day sales cycle

65-85 customer adds/year

Value: Podcast

Business value

Consistent, fresh content

EMPELLOR CRM

Solutions ⌄   Expertise ⌄   Blog   Videos   Workshops ⌄   Careers   Contact

SALES
LEAD DOG

UNLESS YOU ARE THE LEAD DOG, YOUR VIEW NEVER CHANGES

Sales Lead Dog Podcast

On the Sales Lead Dog podcast, CRM technology and sales process expert Christopher Smith talks with exceptional sales leaders that have separated themselves from the rest and achieved a sales leadership role in their organization. Hear what they did to become the alpha, lead their pack, and how they leverage CRM technology to drive sales for their

Subscribe to receive notifications when new episodes are published.

First Name

Last Name

E-mail

Persona/Content Alignment

Why
Leadership –
results oriented
($, risk and control)

Analyst reports,
Infographics, Videos
(testimonials, impacts)
(1 page, 2 minutes)

What
IT/end user features
product specifications,
webcasts, whitepapers

Product comparisons, calculators
(<10 pages, 30-60 minutes)

How
Managers –
business process/
departmental focus

Case studies,
product videos
(<5 pages, 15 minutes)

Map & Plan your Content (by Persona by Stage)

Persona	Executives (Why)	LOB/Dept Managers (How)	Technical End Users (IT, End-User) (What)
Titles	[CEO, CFO]	[VP Sales, VP Manufacturing]	[IT Manager]
Concern	$, Risk, control	How are we going to achieve benefits?	What am I getting?
Content Types	Analyst Reports, Infographics, Video Testimonials	Case studies, product videos	Features, Product Specs, Whitepapers, Webcasts
Length/Attention	1 page, 2 min	<5 pages, 15 min	< 10 pages, 30-60 min
Stage: Awareness			
Educational ebook			
Blog posts			
Infographics			
Podcast			
Webinar			
Video			
Stage: Evaluation			
Comparisons			
Assessments, quizzes			
Demos			
White Paper			
Calculator			
Stage: Conversion			
Case study			
Customer testimonials			
Product spec sheet			

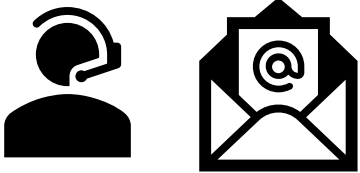# Inbound + Outbound Ex: Attract, Engage, Convert

Content Marketing
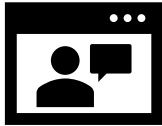
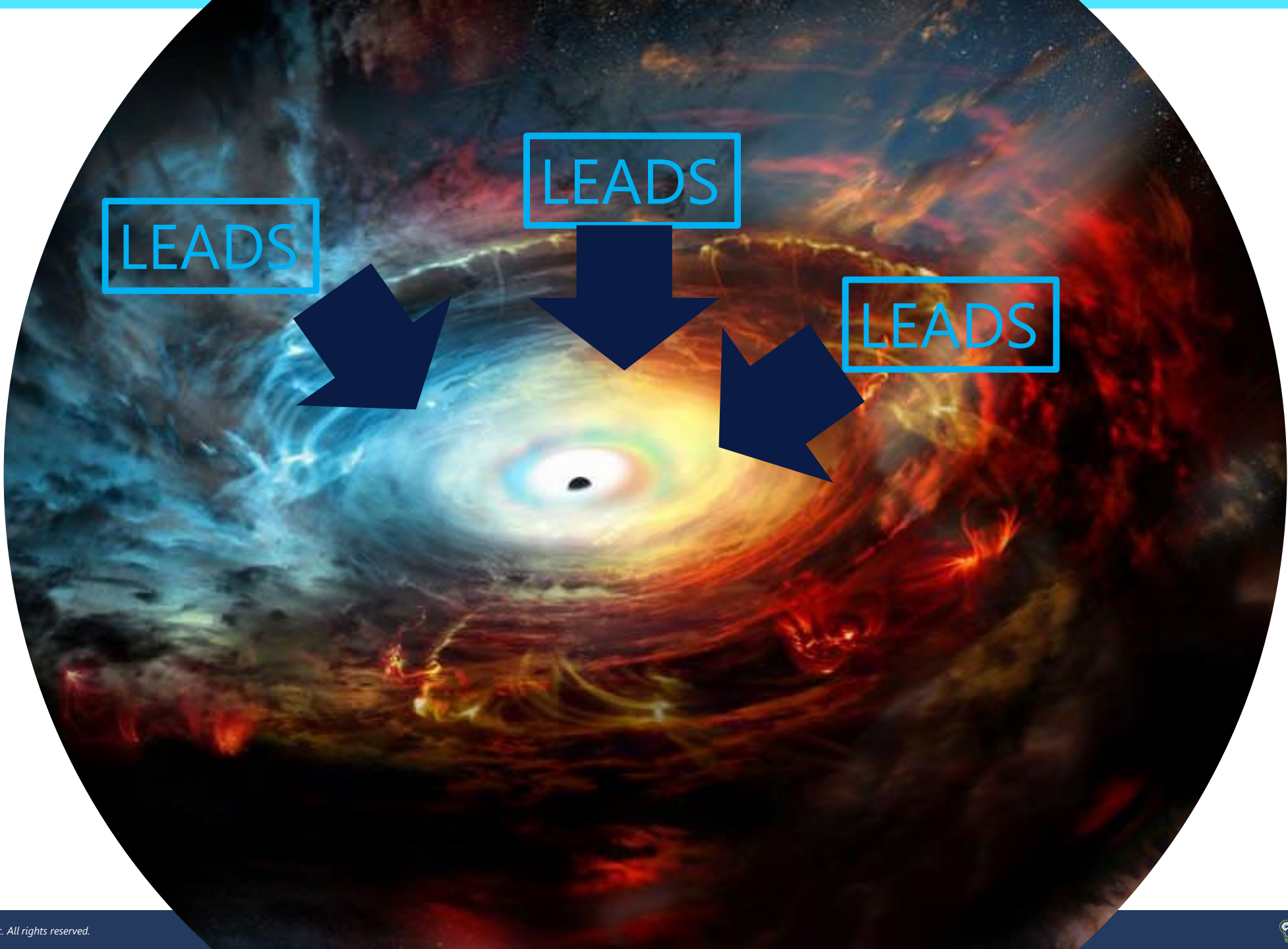SEO-optimized blog: Drive traffic → Gated eBook: Engage, Teach → BDR Outreach: Convert

Inbound + Outbound Ex: Attract, Engage, Convert

Account-Based Marketing

DM or EDM campaign to target list → Landing Page + Gated eBook → BDR Outreach: Convert

Nurture to Convert

Optimize Your Lead Follow-Up to Convert More

1. Define responsibility and sequence per lead type

2. Hyper-Personalized: to the individual person, company

3. Persistence (6-10)

4. Short: 1 fear or pain per message

5. Multi Mediums: Email, Phone, LinkedIn

6. Automate with Technology

7. 1:Many Nurture

Sample Follow-Up Sequence

- Persistence: 6-10 touches
- KISS: 1 fear or pain per message
- Email, Phone, LinkedIn ….

Nurture cycle

Regardless of the nurture track, the following types of emails are effective during the nurture cycle:

Welcome Email

It is important to welcome your trial user. This type of email has the highest open rate of any email at 60%. Within the email, explain the value that users can expect from your solution, and provide resources or guidance on how to easily get started. Tell them you will be keeping in touch with them to ensure they have a positive learning experience.

Education Email

Send a recurring email containing useful content designed to help users get the most out of your trial. Send practical guidance and tips that encourage testing of your key features. Links to videos can be helpful as well.

Aspiration Email

In this email, describe an inspirational customer case that provides social proof and aligns with the outcomes your prospect is looking for.

Trust & Thought Leadership Email

Send an email that highlights your company's expertise, experience, and awards, and shows you are a safe choice. Create a sense of fear if prospects choose someone else or if they miss out on this opportunity to join the hundreds of other companies just like theirs that have enjoyed significant benefits with your solution.
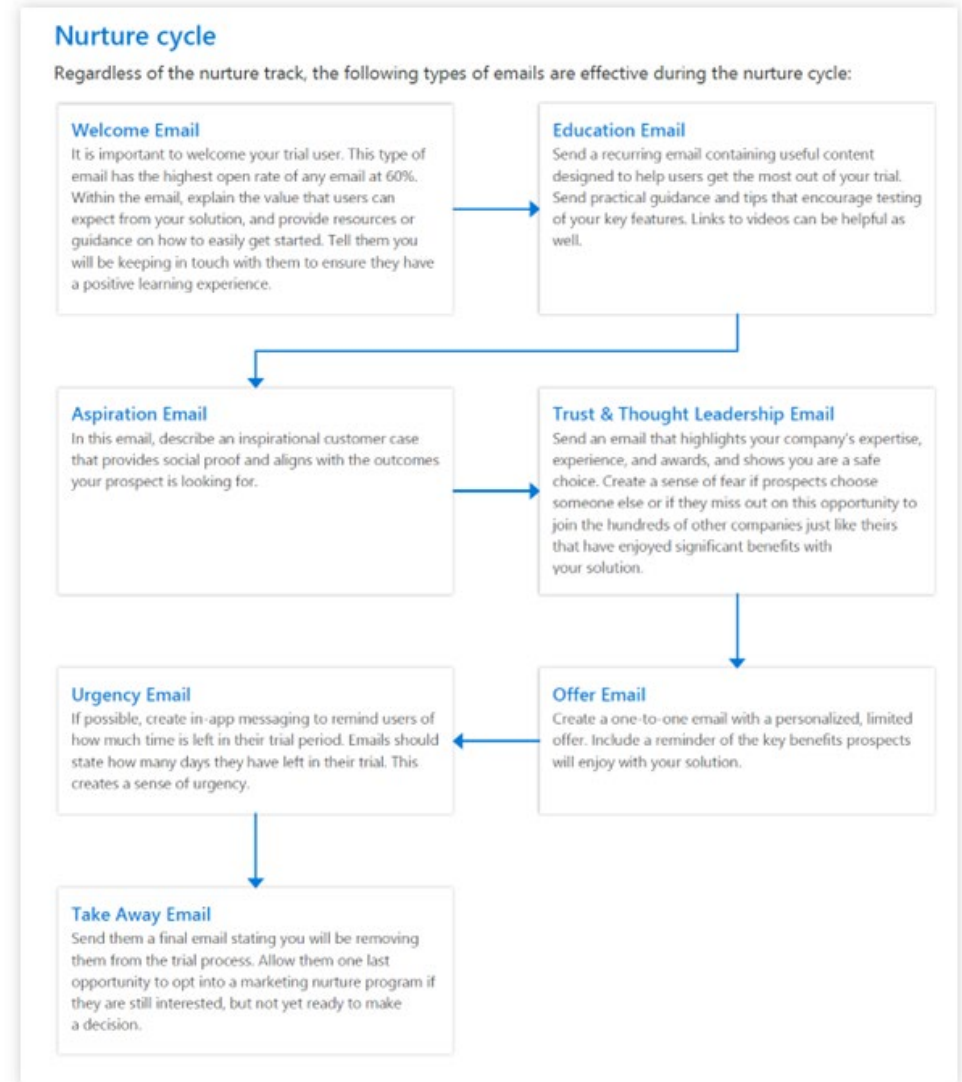
Urgency Email

If possible, create in-app messaging to remind users of how much time is left in their trial period. Emails should state how many days they have left in their trial. This creates a sense of urgency.

Offer Email

Create a one-to-one email with a personalized, limited offer. Include a reminder of the key benefits prospects will enjoy with your solution.
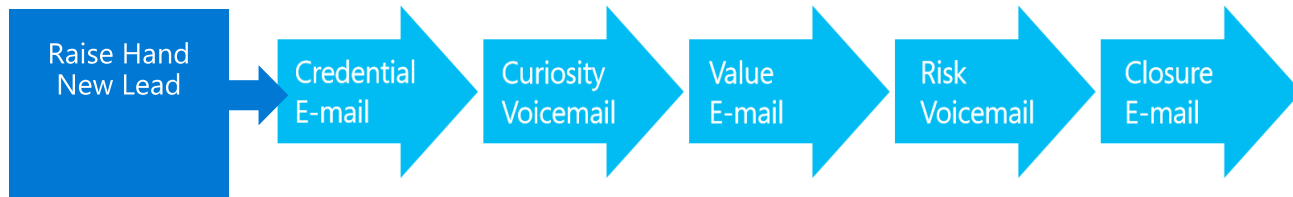
Take Away Email

Send them a final email stating you will be removing them from the trial process. Allow them one last opportunity to opt into a marketing nurture program if they are still interested, but not yet ready to make a decision.
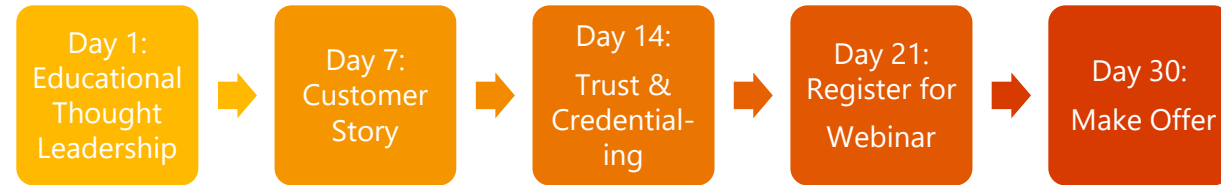
Define Lead Follow-Up & Nurture

Sales Lead Follow-Up

Automated Marketing Nurture Cycle

Raise Hand New Lead → Credential E-mail → Curiosity Voicemail → Value E-mail → Risk Voicemail → Closure E-mail

Day 1: Educational Thought Leadership → Day 7: Customer Story → Day 14: Trust & Credential-ing → Day 21: Register for Webinar → Day 30: Make Offer

Focus: Education
Objective: Create Bias

Hot Lead

Active Opportunity: Sales Engagement

Research Prospect → Engage Contact → Qualify

Focus: Validation
Objective: Decrease Risk

The Unrealistic Expectation Placed on Salespeople
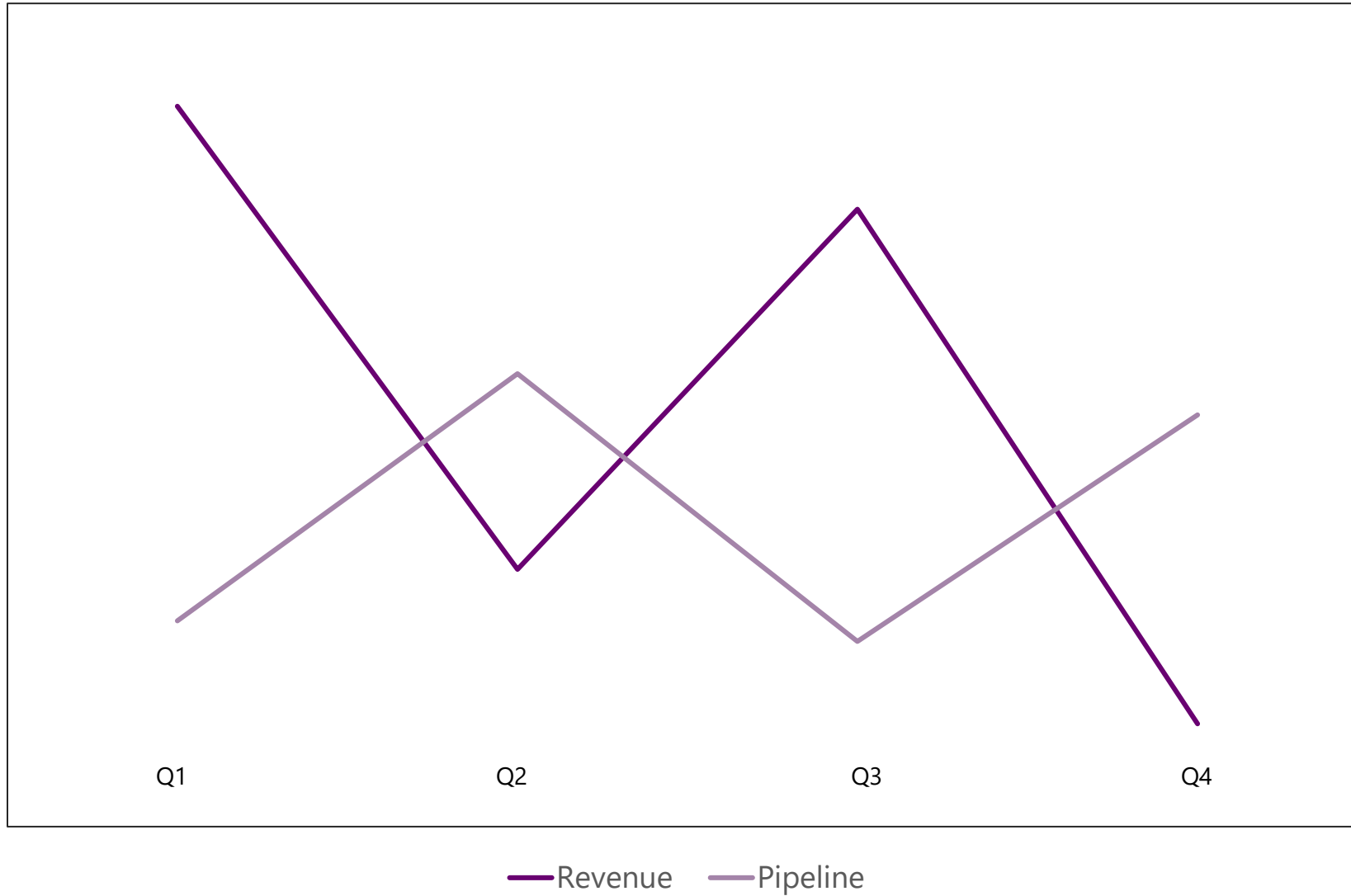
Cross the Bridge from Marketing (Leads) to Sales (Opps): BDR/SDR

Outbound Prospecting

Inbound Lead Follow-up

Always working the top of the funnel

Tips for Successful BDR Results

Buy-in from the Org	Incentive Model Matters	Hire the right talent, clear career path
Structure, Role Clarity and Focus	Use Emotional Messaging	Manage Tightly

Gain More Insights & Productivity with Technology

1:1 Sales Engagement Automation

- Automation + manual personalization
- NOT 1:Many Marketing
- NOT Outlook/Gmail

- Use Sequence Feature in CRM OR
- Sales Engagement Platform

Data is the New Oil: WHAT

WHAT are Visitors
Doing on your Site:

- Reading
- Scrolls
- Clicks
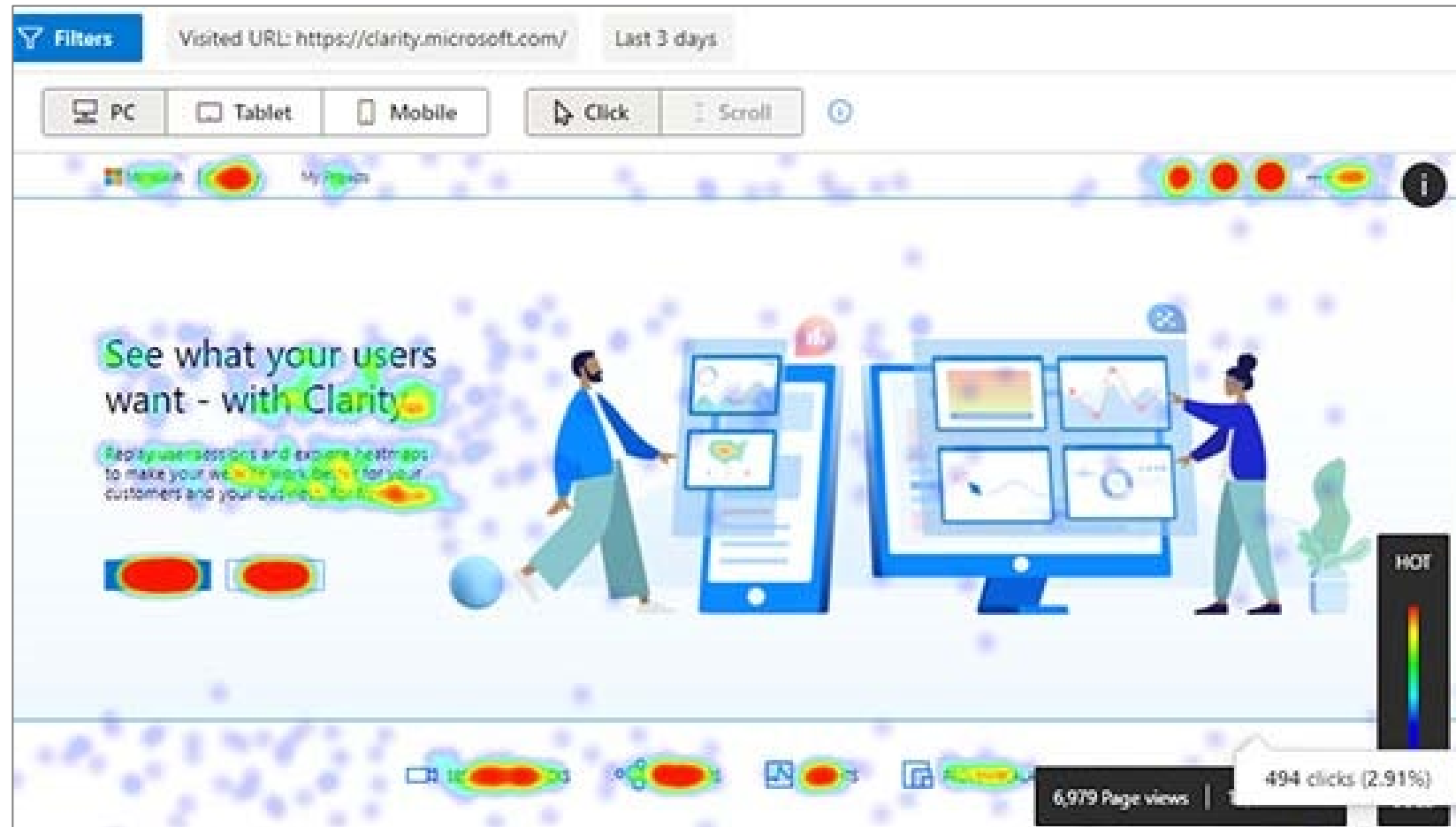
Data is the New Oil: WHO

WHO are the Visitors
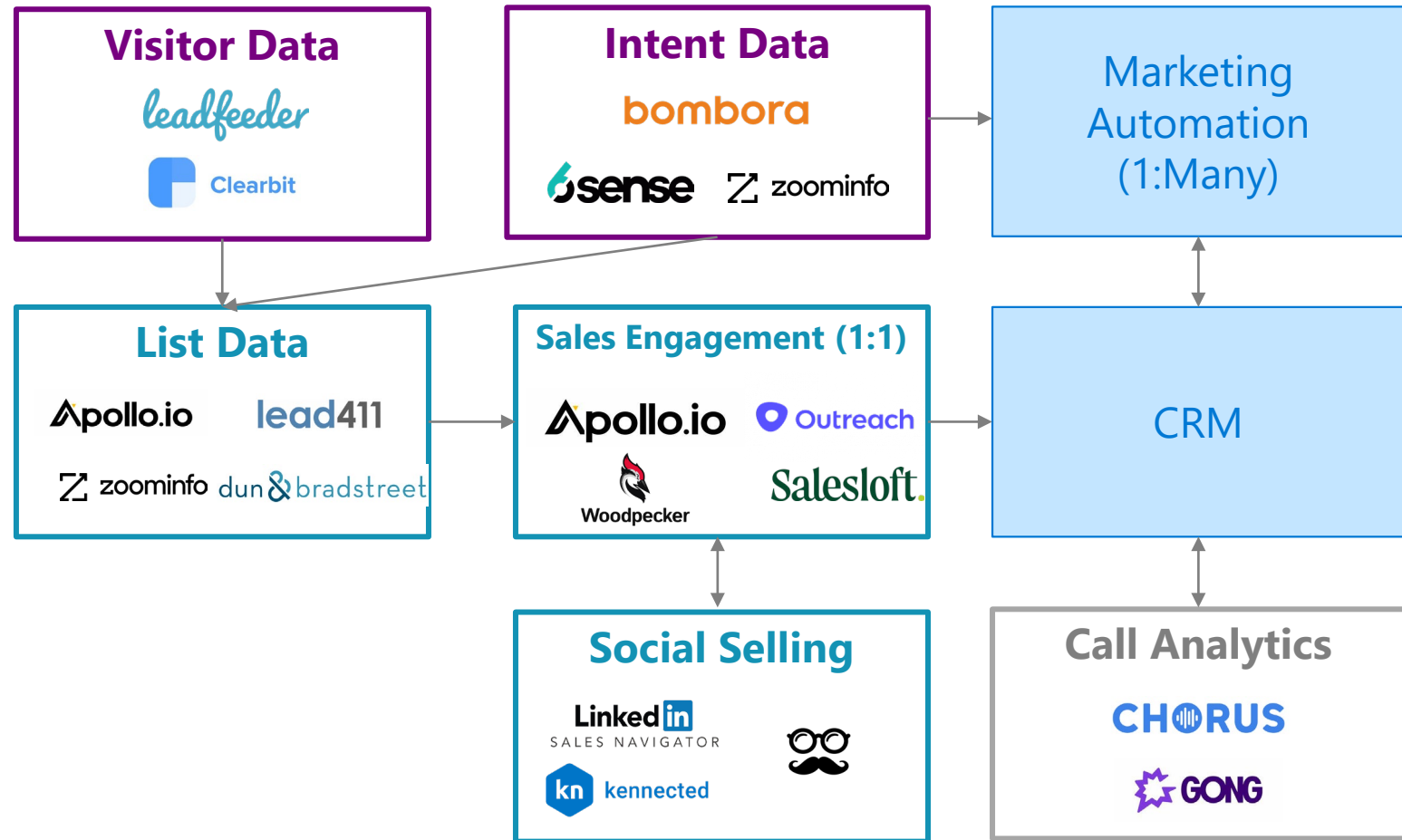on your Site:

- Company
- Location
- Pages
- Keyword

Technologies to Accelerate & Automate

Closing Thoughts

1. Up-level your marketing team and spend.
2. Max impact with Emotional Engagement.
3. Content. Content. Content.
4. Consider a BDR.

Directions Attendee Limited Exclusive Offer

**High Volume
Acceleration Program**
50% off
https://forms.office.com/r/cK1HdPBKwg

❑ Limited to **first 5 partners only**
❑ Must register April 16 -19
❑ Applicable to April 2023 Cohort Only

Come & See Us at Directions!

Sharka Chobot


Dr. Christian Lehmann

Angie Hirata

Microsoft + NEURAL IMPACT	Speakers	Time	Location
8 Steps to Double Your Customer Ads	Sharka Chobot	Sunday, April 16 3:30 to 4:15	Windsong 1-2
Secrets to Driving and Converting More Leads From Appsource	Angie Hirata	Monday, April 17 2:15 to 3:00	Magnolia ABC
Marketing Best Practices to Generate Pipeline	Angie Hirata	Monday April 17 6:00 to 6:45	Magnolia ABC
High Volume Acceleration Round Table Discussion	Sharka Chobot + Fredrik Heitala	Tuesday, April 18 11:15 to 12:00	Regency 5
8 Go-to-Market Steps to Launch a Proactive Migration Strategy That Accelerates Moving Your On-Prem Customers to Cloud	Sharka Chobot Dr. Christian Lehmann	Tuesday, April 18 5:00 to 5:45	Regency 6-7
Best Practices for Building a High Volume Dynamics Practice	Sharka Chobot + Andrew King	Wednesday April 19 9:15 to 10:00	La Coquina & Alcove
Getting Started on Leveraging Power Platform to Build Low Code Industry Specific Solutions and Drive More Customer Value	Dr. Christian Lehmann	Wednesday April 19 10:15 to 11:00	Magnolia ABC
Build a low code partner practice - Opportunities & Guidance	Sharka Chobot, Dr. Christian Lehman , Christian Baek, Fredrik Hietala	Wednesday April 19 11:15 to 12:00	Palm A-F
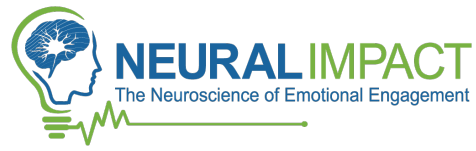
Download Session Slides and Resources:

https://neuralimpact.ca/directions-orlando-2023
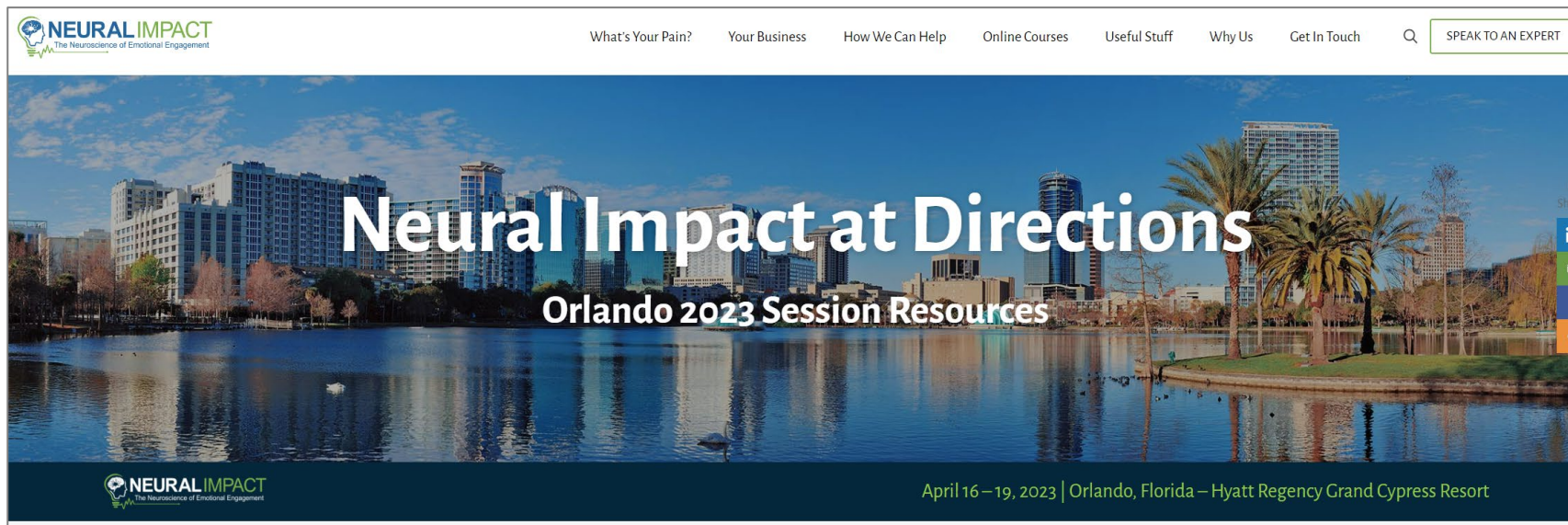
Please Take 1 Min to Rate this Session Now

Thank you!

Marketing Goals to Fill the Funnel

- Start with the end in mind (# and $ of deals)
- To figure out how many opps & leads you need
- Know your numbers:
  - Conversion ratio (lead to opp)
  - Win ratio
  - Sales cycle length
  - How much of your pipeline will come from marketing? From sales?
- **Marketing target = $ or # Pipeline contribution**

VISITS
LEADS
MARKETING QUALIFIED LEADS
SALES ACCEPTED LEADS
OPPORTUNITIES
CUSTOMERS
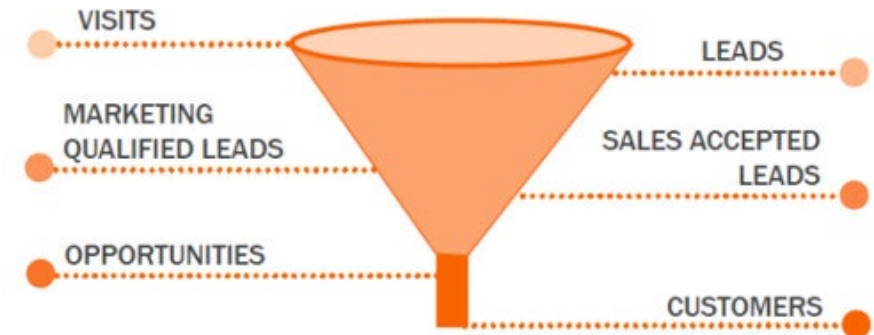
What Gets Measured Gets Done

- **Set** your Targets (template resource)
- **Monitor** your Progress (Dashboard in CRM)

FY23 New Business Pipeline Requirements

Assumptions

Avg Deal Size	$200,000
Avg Sales Cycle Length	6 months
Marketing Attribution/Sourcing	50%
MAL - SAL Qual Ratio (blended avg)	10%
Win/Loss Ratio (opp to close)	10%

	Q1-2023	Q2-2023	Q3-2023	Q4-2023	Q1-2024
Quarterly Sales Targets	$ 500,000	$ 500,000	$ 1,000,000	$ 1,000,000	$ 1,500,000
# Closed Won Deals	2.5	2.5	5	5	7.5
Pipeline Creation Req'd ($)	$ 10,000,000	$ 10,000,000	$ 15,000,000	$ 15,000,000	
Pipeline Creation Req'd (# Opps)	**50**	**50**	**75**	**75**	
Marketing Attributed Pipeline Req'd ($)	$ 5,000,000	$ 5,000,000	$ 7,500,000	$ 7,500,000	
Marketing Attributed Pipeline Req'd (# Opps)	25	25	37.5	37.5	
# Leads Req'd	250	250	375	375	
# Leads Req'd per Month	83	83	125	125	