

# The Campaign Automation Workbook:

*How to Plan Successful Drip Campaigns in Microsoft Dynamics*



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# Introduction

Who likes one-size-fits-all marketing? If you're looking for a show of hands in response to that question, you might be hard pressed to find any raised. Consumers today prefer personalized communications. Automated campaigns help marketers deliver.

Here at ClickDimensions, we use the term campaign automation, but you may have also heard these automated campaigns called nurture or drip marketing. Campaign automations send a series of customized communications to a prospect or customer over a period of time based on their interactions. While these campaigns typically feature email, they can also include direct mail, SMS messaging, phone calls or any other "touch" a company makes with an individual. Automated nurture programs respond to actions taken by those being nurtured, thus creating a more personalized experience.

For example, if an individual shows interest in a product or service by clicking a link in an email, you could then send them on a path within a campaign automation to receive additional emails about that product or service. Or if a lead or customer never opens your emails about attending events, you can automatically remove them from that nurture campaign after a certain number of messages.

Now that we have touched on what campaign automation is, let's move on to the broader goal of this workbook – helping you plan campaign automations that you can use to achieve a variety of goals at your organization. Since ClickDimensions is natively built in Microsoft Dynamics, we will also show you how you can utilize Dynamics functionality in campaign automations to get the most out of your CRM and your automated campaigns.

Let's get started!

# The Building Blocks of Campaign Automations

To give you the flexibility needed to create dynamic and engaging campaigns, the ClickDimensions campaign automation builder includes a wide variety of functionality in the form of triggers, actions, series and timers. You place these building blocks strategically throughout the campaign automation to set paths for participants based on their actions. As we explore these options below, consider how you might use them to connect with and convert your customers and prospects.

## Triggers

Campaign automation triggers look for actions taken by an individual that either adds them to a campaign automation or moves them through it.



**Submitted Form:** The Submitted Form trigger checks to see if someone has submitted a form, then allows you to follow up accordingly. The trigger may be used as an entry point trigger or as an internal trigger. If the trigger is an entry point, individuals will be added to the campaign automation when they complete a form.



**Submitted Subscription:** The Submitted Subscription trigger is used to check for the submission of a subscription management page and can be used as an entry point trigger or an internal trigger. If the trigger is an entry point and a contact or lead has submitted the selected subscription page, the campaign automation will begin.



**Submitted Survey:** The Submitted Survey trigger may be used as an entry point trigger or as an internal trigger. If the trigger is an entry point and a contact or lead has submitted the selected survey, the campaign automation will begin.



**Email Interaction:** The Email Interaction trigger checks whether a specified email has been opened and/or clicked and may be used as an entry point trigger or an internal trigger.



**Added to List:** The Added to List trigger checks if someone is added to a designated static marketing list in Microsoft Dynamics and may be used as an entry point or an internal trigger. If this trigger is an entry point, individuals will be added to the campaign automation as they are added to the specified marketing list.



**Removed from List:** The Removed from List Trigger checks if someone was removed from a specific static Dynamics marketing list and may be used as an entry point trigger or as an internal trigger. If this trigger is used as an entry point, a contact or lead will enter the campaign automation when they are removed from the specified list.



**Registered for Event:** The Registered for Event trigger is used in conjunction with ClickDimensions' event connectors to WebEx, GoToWebinar, Eventbrite and Cvent. It may be used as an entry point or an internal trigger. When used as an entry point, the campaign automation will begin when a contact or lead has registered for the selected event.



**Attended Event:** The Attended Event trigger references an event participation record's Registration Status field to check whether an individual attended a specific event. The trigger can be used as an entry point trigger or an internal trigger within the automation.



**Manual Add:** The Manual Add trigger gives you the ability to add a contact or lead to the campaign automation manually from a contact or lead record in Microsoft Dynamics. The Manual Add trigger can only be used as an entry point for a campaign automation.

## Actions

Actions allow you to incorporate a wide variety of marketing and other activities into your campaign automation – from sending an email to generating a CRM workflow to notifying a sales person.



**Send Email:** The Send Email action is used in campaign automations to send a ClickDimensions email to participants within a campaign automation.



**Add to List:** The Add to List action is used in campaign automations to add a participant to a static marketing list in Dynamics.



**Remove from List:** The Remove from List action is used to remove a lead or contact in a campaign automation from a static-type marketing list.



**Assign Owner:** The Assign Owner action is used to assign a lead or contact record to a Dynamics user or team once they reach this action within the campaign automation.



**Notify User:** The Notify User action is used in campaign automations to notify Dynamics users when a lead or contact reaches that point in the automation. You can send a notification containing a custom message, and if the Notify User action follows a Submitted Form trigger, the notification will include the information submitted in the form. All notifications contain a link to the lead or contact record it is regarding.



**Create Task Activity:** The Create Task Activity action is used to create a task in the Activities area of Dynamics. The task created will be regarding the lead or contact in the campaign automation.



**Workflow:** The Workflow action is used to run a Dynamics workflow on a lead or contact within the campaign automation.



**Notify Team:** The Notify Team action is used in campaign automations to notify a team of users in your Dynamics instance. You can send a notification containing a custom message, and if the Notify Team action follows a Submitted Form trigger, the notification will include the information submitted in the form. All notifications contain a link to the lead or contact record it is regarding.



**Campaign Response:** The Campaign Response action is used in campaign automations to create a campaign response within a specified Dynamics campaign record. Campaign responses allow you to link replies you get from potential customers to a specific marketing campaign to ensure your team can act on the responses.



**Send SMS:** The Send SMS action is used to send an SMS (text) message to an individual lead or contact that is a participant within a campaign automation.

## Timers

Timers within the campaign automation allow you to create pauses of a set number of days between actions or schedule an action for a specific date.



**Wait Timer:** The Wait Timer is used to tell a campaign automation to wait a specific amount of time before continuing for the individual participant.



**Date Timer:** The Date Timer is used to tell a campaign automation to wait until a specific date before continuing for the individual participant.

## Series



Actions and timers within a campaign automation can be either dragged directly onto the campaign automation builder canvas or used within a series. A series can be helpful for organizing related actions and timers and can also be helpful in avoiding unnecessary steps for certain participants within a campaign automation.

# Brainstorming Campaign Automation Opportunities

Now that you know a bit more about campaign automation capabilities, think about how to put that functionality to work for your organization. The possibilities for the types of campaigns you can create are virtually endless, but all those possibilities aren't going to be right for your organization. You likely already have a few uses in mind for campaign automation, but you can use the questions below as prompts to generate more ideas for campaigns to automate.

1. What opportunities are there for your business to welcome or onboard customers or prospects when they take a particular action like sign up for a newsletter or make their first purchase?
2. Does your company have any upcoming or recurring events? List them below.
3. What holidays or industry events could you tie a campaign to?
4. How could you nurture prospects who are just starting to express interest in your business? What resources are available?
5. What content such as eBooks, white papers, videos, etc. could you use to create thought leadership campaigns?

6. If someone purchases from your business, what is their next likely purchase from you to be? List cross-sell and upsell opportunities below.

7. What big news, like a new product launch or customer initiative, does your company have on the horizon?

8. What promotions or special offers are you currently offering or will be in the near future?

9. What builds loyalty among your customers?

10. Is there a segment of customers or prospects that tend to get overlooked by your marketing efforts? Who are they and where in the buying cycle does this tend to happen? For example, it could be prospects that aren't ready to buy or one-time customers that have moved on.



# Mapping Out Your Campaign Automation

With so many options for building out a campaign, it can sometimes be difficult to know where to get started building out your campaigns. This exercise is meant to help you think about and map out the goals and purpose of a campaign so you can build it with confidence. Using the ideas that you generated in the last section or some that you had before downloading this workbook, answer the questions below. You will need to complete the exercise separately for each new campaign that you want to create. Once completed, your responses will provide a framework for diving into the campaign automation builder and bringing your campaigns to life.

## 1. What is our goal for the campaign?



*As you build out your campaign automation, refer to this goal – whether it's getting customers to register for a webinar or educating prospects about your company – to ensure you stay on track every step of the way.*

## 2. Who do we want to target with this campaign?



*Depending on your goal and purpose for the campaign, your target audience may be broad (prospects, for example) or more narrow (people who have registered for a specific webinar).*

## 3. Do we need to segment audiences within the campaign If so, how should they be segmented?



*Decision nodes in the campaign automation builder help you segment your audiences by determining which path a participant will follow based on specified criteria. For example, geographic region or previous product purchased.*

4. What is our overall timeline for the campaign?  
When should it be completed?



*What marketing assets will be used in the campaign? Make a list of emails, surveys, forms, events, etc.*

5. How will we add participants to the campaign?



*Review the triggers outlined earlier in this workbook and determine which one makes sense for kicking off your campaign. For example, will a salesperson manually add people or will they be added automatically after completing a form?*

6. What do we want participants to do throughout the campaign?



*Think about the actions that you would like participants to take while they are a part of a campaign automation. Opening or clicking an email, registering for an event, submitting a survey – these are all potential options.*

7. Will there be both positive and negative paths for participants to follow? What will determine which path they will follow?



*Consider whether you want everyone in your campaign to receive the same communications or if an action that participants take or don't take, like clicking a link in an email, will dictate what they receive.*

8. What assets will be a part of this campaign?



*What marketing assets will be used in the campaign? Make a list of emails, surveys, forms, events, etc.*

9. When should each asset be sent?



*Using the list from the last question, assign dates to each asset or the time that should pass between them.*

10. Does anyone in our organization need to be notified or take action during the campaign? If yes, who and what action do they need to take?



*Do you want a member of your or another team to be notified of actions taken by participants? If so, should they do something when they receive notifications?*

11. What do we want to happen in Dynamics based upon the campaign?



*As we outlined in the building blocks section of this workbook, there are several options for linking actions in Dynamics with your campaign automations. Consider whether you want to trigger a workflow or create a task activity, for example.*

12. What should happen at the end of the campaign?



*Do you want your campaign to just end when the last asset is sent or are you looking for something more? You could, for example, add participants in a certain path to a list that you could use in or suppress from a future campaign.*

# Conclusion

Just as marketing isn't a one-size-fits-all proposition, neither are campaign automations. Automated campaigns allow you to create customized experiences for your unique audiences at every stage of the buying cycle. Increased conversions, revenue contributions and efficiency are just a few of the powerful benefits of campaign automations, and we hope this workbook has helped you take the first steps towards realizing these benefits within your organization.

Happy Marketing!

## About ClickDimensions

Founded in 2010, ClickDimensions is the leading marketing platform for Microsoft Dynamics, with more than 3,700 customers around the globe and a partner network that spans 76 countries today. As The Marketing Cloud for Microsoft Dynamics™, ClickDimensions is redefining how marketers work and attain results with the only unified marketing technology, analytics and services platform in the market – made exclusively for and natively built within Dynamics.

To learn more, visit us at [clickdimensions.com](http://clickdimensions.com) or follow us on Twitter at [@ClickDimensions](https://twitter.com/ClickDimensions).

