

# Setting up a Customer Relationship Management System



### SEO 1

SEO is the practice of increasing a websites organic ranking in search engines. But what's rankings without revenue?

### Conversion Optimization 2

SEO brings traffic, but traffic means nothing if it doesn't convert into \$\$\$\$. Digital marketing consultants help bring PROFITABLE traffic. That's why your consultant should also be skilled in ...

### Web Design 3

Digital Marketers skilled in web design not only bring you a beautiful website that reflects positively for your brand, but they also have a solid idea of the web layouts that convert the best.

### Advertising 7

Online advertising such as AdWords and Facebook Ads are much more than set and forget, a skilled digital marketer can lower CPC and increase conversions

### Analytics 6

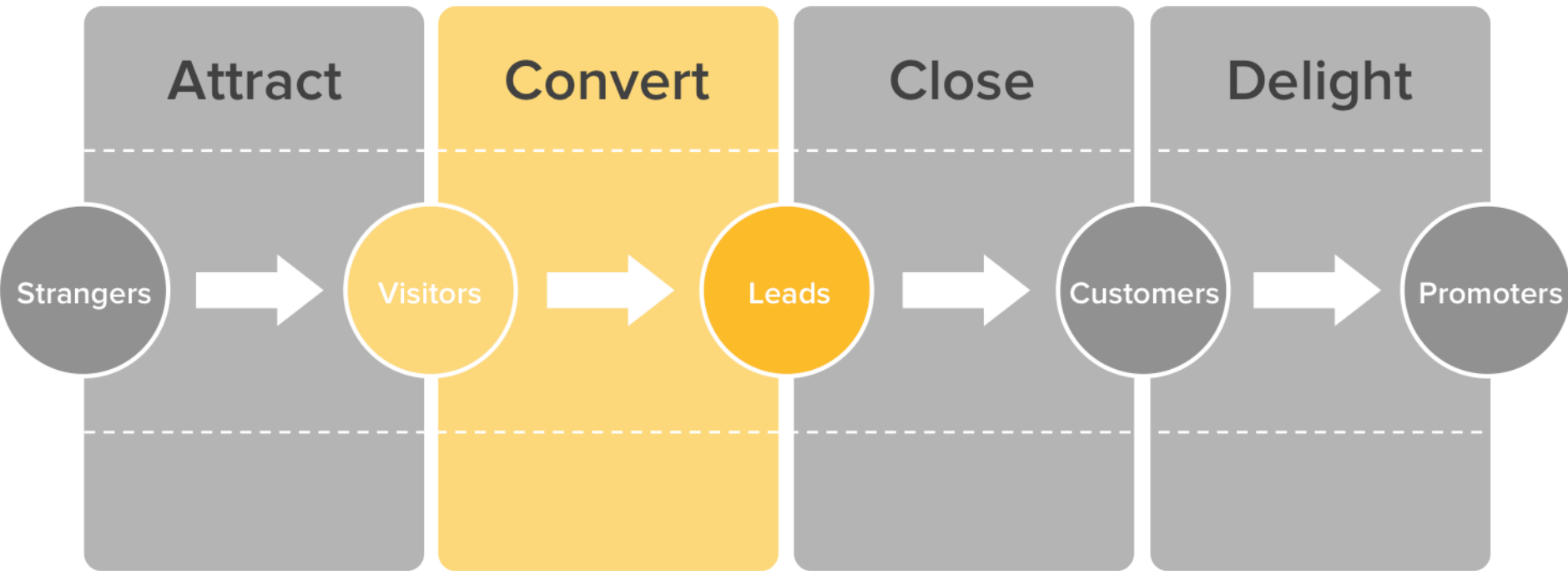
Analytics, combined with conversion optimization can help you determine where traffic is coming from, and which channels are the most profitable.

### Social Media 5

Some niches thrive with traffic from Facebook, Twitter, Pinterest, etc. Many businesses tend to take on social media themselves, but a true digital marketer knows the difference between using social media as a business and as a end user.

### Copywriting 4

Digital Marketers who have maintained their own blogs should have honed their writing skills to write for conversions, people and search engines.



<http://blog.hubspot.com/marketing/beginner-inbound-lead-generation-guide-ht>

# inboundMARKETING

7 STEPS

## Lead Generation Strategy

7 Critical Steps We Guide Our Clients Through for Inbound Marketing Success.

STEP 1

PLAN

Success begins with an Inbound Planning Day.



Assess your current needs



Set objectives and measurable goals



Develop an effective content strategy



Develop personas



Define responsibilities



Brainstorm premium content ideas

STEP 2

CREATE

Develop content that will attract visitors, convert visitors to leads, and position you as a thought leader.



### STEP 3

## DISTRIBUTE

Share content specifically designed to appeal your ideal customer.



Use a Content Calendar to schedule strategic content distribution



Help you get found through keywords for SEO



Promote your posts on social media and beyond



Utilize email marketing to bring visitors back

### STEP 4

## CAPTURE

Convert visitors to leads to generate a list of qualified prospects.



Premium content offers



Compelling calls to action



Landing pages | contact form

### STEP 5

## ANALYZE

Review the data to determine what's working, what's not, and how to adjust.

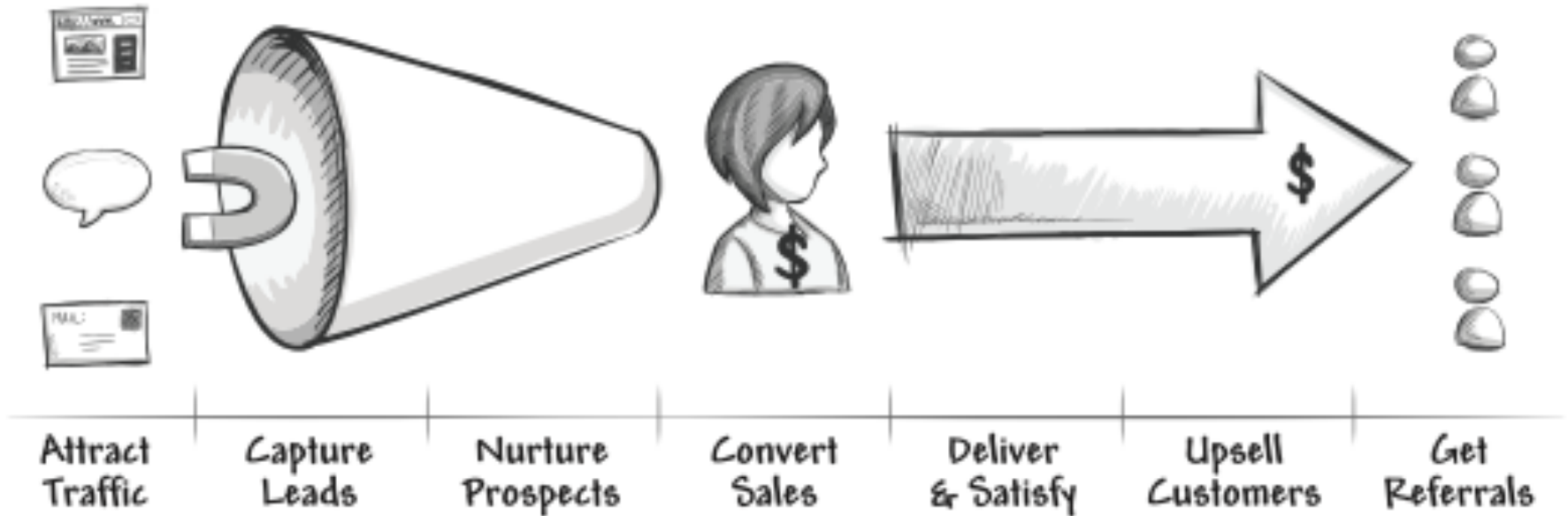


Use Hubspot tools to identify:

- Top lead sources
- Which topics/posts are read most
- Which offers are converting readers to leads

Customer lifecycle process flow for  
sales, delivery, complaints handling,  
and refund

# Problems in the Lifecycle?



A distracted customer is easy to lose. If they lose interest, you lose the sale.



Customer support facilities creation  
for phone call, live chat, email, and  
face-to-face customer service

# Set-up a CRM

- Nimble.com
- Streak.com
- In-house excel file
- InfusionSoft
- Hubspot

# Streak.com

Google pipeline:Sales

Streak +Andrew

Gmail -

COMPOSE

Inbox (2)

Starred

Important

Snoozed

Sent Mail

Drafts (1)

Pipelines + New

Sales

Support

Bugs

Product Development

Fundraising

Hiring

Customer Success

Dealflow

Recent Meetings...

More

65 Count

2 Lead

8 Demo

55 Closed Won

Name	Email	Stage	Notes	Assigned To	
<b>Lead</b>					
<input type="checkbox"/>	Alexander Graham Bell	alexander@bell.com	Lead	Prefers phone conversations to email	Nikola T
<input type="checkbox"/>	Sigmund Freud	sigmund@freud.com	Lead	Has big dreams - great partner	Nikola T
<b>Demo</b>					
<input type="checkbox"/>	Nikola Tesla	tesla@streak.com	Demo	Currently evaluating different vendors, w	Nikola T
<input type="checkbox"/>	Guglielmo Marconi	guglielmo@marconi.com	Demo	Wants 5% discount for being loyal custom	Nikola T
<input type="checkbox"/>	Dmitri Mendeleev	dmitri@mendeleev.com	Demo	Set follow up reminders periodically	Nikola T
<input type="checkbox"/>	Henry Ford	henry@ford.com	Demo	Loves to talk about cars, engage on anot	Nikola T
<input type="checkbox"/>	Marie Curie	marie@radiology.com	Demo	Loves the tracking feature!	Andrew
<input type="checkbox"/>	Alessandro Volta	alessandro@volta.com	Demo	Really charged up about the product, wa	Nikola T
<input type="checkbox"/>	Rosalind Franklin	rosalind@franklin.com	Demo	Excited about mail merge feature	Andrew
<input type="checkbox"/>	Stephanie Kwolek	stephanie@kevlar.com	Demo	Trying to schedule around her business t	Nikola T
<b>Closed Won</b>					
<input type="checkbox"/>	Albert Einstein	albert@einstein.com	Closed Won	Corporate Plan	Nikola T
<input type="checkbox"/>	Benjamin Franklin	benjamin@franklin.com	Closed Won	No demo, straight to signing!	Nikola T
<input type="checkbox"/>	Alan Turing	alan@turing.com	Closed Won		Andrew
<input type="checkbox"/>	Nebuchadrezzar	Nebu@chadrezzar.com	Closed Won		Andrew
<input type="checkbox"/>	Sergey Prokudin-Gorsk	sergey@Sergey.com	Closed Won		Andrew
<input type="checkbox"/>	George Pullman	george@pullman.com	Closed Won		Andrew
<input type="checkbox"/>	David Brewster	david@brewster.com	Closed Won		Nikola T
<input type="checkbox"/>	Peter Durand	peter@durand.com	Closed Won		Nikola T

ALL IMPORTANT

TODAY

Andrew S edited the Email to "peter@durand.com" 6:26p  
Peter Durand

Andrew S edited the name from d to Peter Durand 6:26p  
Peter Durand

Andrew S edited the Email to "david@brewster.com" 6:26p  
David Brewster

Andrew S edited the name from d to David Brewster 6:26p  
David Brewster

Andrew S edited the Email to "george@pullman.com" 6:26p  
George Pullman

# March 20: Digital Marketing for Real Estate Industry (Palawan)

Like 0 Tweet 0 Pinit Share

Real estate service professionals are invited to take part in this exclusive boot camp that aims to tackle how digital marketing can be useful to promote real estate online. This will be on March 20, 2015 at The Legend Hotel Puerto Princesa, Palawan from 9:00 AM to 5:00 PM. (Registration starts at 8 AM)

This learning program will be conducted with Jonabe Daquer of [Palawan Real Property](#).

## Target audience:

- Aspiring and current real estate service practitioners (licensed broker, appraiser, consultant, salesperson).
- Real estate developers trying to build a database that services external customers and internal agents. Those who would like to build a site with a bigger database back-end meant for external customers and internal agents.



Can we help?

Rece

- March Estate
- Febru E-Com Indust
- Febru Estate
- Digital Hospit Bever
- Januar Estate

Thanks for coming back. Is there anything I can do to help?

Message

Navigation icons: speech bubble, envelope, twitter, facebook

Name	Email	From URL	Referrer	Location	Department
	-	6 Tax Guidelines for E-Commerce Transac...	<a href="https://www.google.com.ph/">https://www.google.com.ph/</a>	Manila, Philippines (112.208.4.253)	Default Department
	-	DigitalFilipino E-Commerce Education Cen...	<a href="http://www.e-commerceadvocate.com/stu...">http://www.e-commerceadvocate.com/stu...</a>	Makati, Philippines (49.149.48.105)	Default Department
	-	Digital Marketing for the Real Estate Indus...	<a href="https://www.google.com.ph/">https://www.google.com.ph/</a>	Quezon, Philippines (112.200.148.39)	Default Department
	-	February 27: Digital Marketing & E-Comm...	<a href="https://www.facebook.com/">https://www.facebook.com/</a>	Cebu, Philippines (121.96.234.158)	Default Department
	-	Electronic Payment Acceptance and Fraud...	-	Quezon, Philippines (125.212.122.141)	Default Department
	-	Top 100 Websites - Philippines 2011 - Dig...	-	New delhi, India (107.167.107.242)	Default Department
	-	16 Cybercrimes covered	-	-	-

Agent Dashboard window showing the URL <https://digitalfilipino.clickdesk.com/agent/home#livechat>

new chat  
Hello. I have a question.

Incoming Chats

Visitor 1  
Hello. I have a question.  
29 minutes ago

Chat with Visitor 1

Proactive Message  
Thanks for visiting our site. Is there anything I can do to help?  
8:50:39 AM

Visitor 1  
Hello. I have a question.  
8:50:39 AM


Type a message to answer chat...

Visitor 1  
Firefox on Mac  
Default Department  
Visiting <http://influencerbootcamp.digitalfil...>

Edit Block

Google  
Terms of Use  
Iloilo, Philippines (119.92.153.149)

Add Lead Add Note

 new chat  
Hello. I have a question.

ClickDesk | Admin Settings | digitalfilipino@gmail.com

Incoming Chats

Visitor 1  
Hello. I have a question.  
29 minutes ago




Chat with

**Add Lead**

Visitor Email\*

Note




**Today's Top Contacts**

 <b>Francis Dolojan</b> 17 - Pawnshops, Music, Pinoy, Tagalo...	 <b>Will Garcia</b> CEO, Blogger Matched keywords: ceo, blogger	 <b>Rick Balbuena</b> Financial Advisor, Sun Life of Canada (Phi... Matched keywords: financial, advisor
Is this contact important? <input type="button" value="Yes"/> <input type="button" value="No"/>	Is this contact important? <input type="button" value="Yes"/> <input type="button" value="No"/>	Is this contact important? <input type="button" value="Yes"/> <input type="button" value="No"/>

Engagement Opportunities From Important Contacts

**Uh oh! No top ranked opportunities today!**  
Assign contacts to [tasks](#) or [deals](#), tell us who are your important contacts and Nimble will help you find more!

Birthdays & Job Changes

 <b>Anj Nacorda</b> has a birthday today!	<input type="button" value="Congratulate"/>
 <b>Marky Go</b> Writer has a birthday today!	<input type="button" value="Congratulate"/>
 <b>Brenjoe Paningbatan</b>	<input type="button" value="Congratulate"/>

To Do Today

**Activities**

12:00am Pope's Visit (Public holiday in Manila)

[Add a New To-do](#)

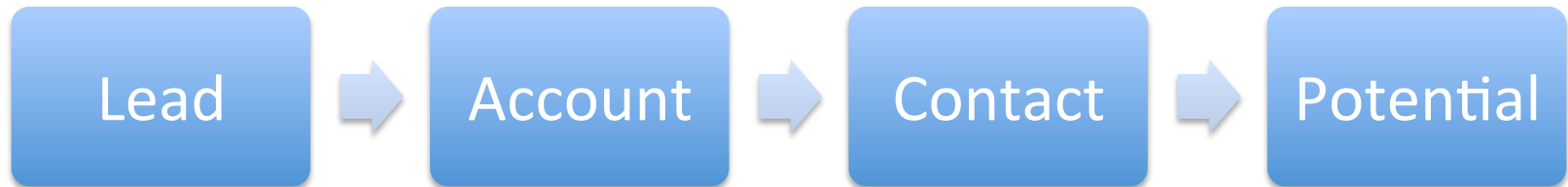
**Stay in Touch**

Today You have 30 people to stay in touch with

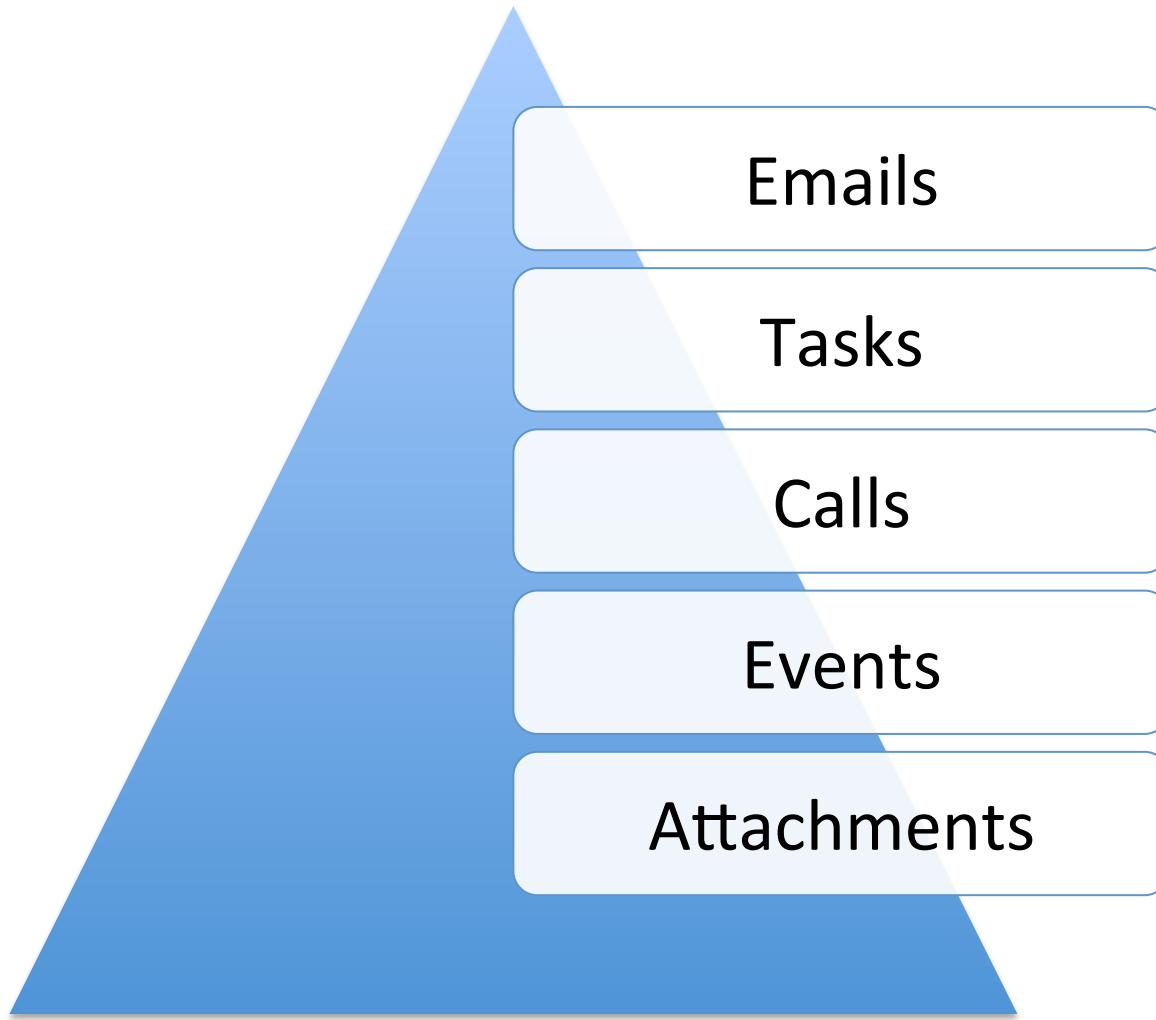
**Upcoming Deals** [See all](#)

This month	CBSME or E-Commerce	\$500.00
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# Customer information

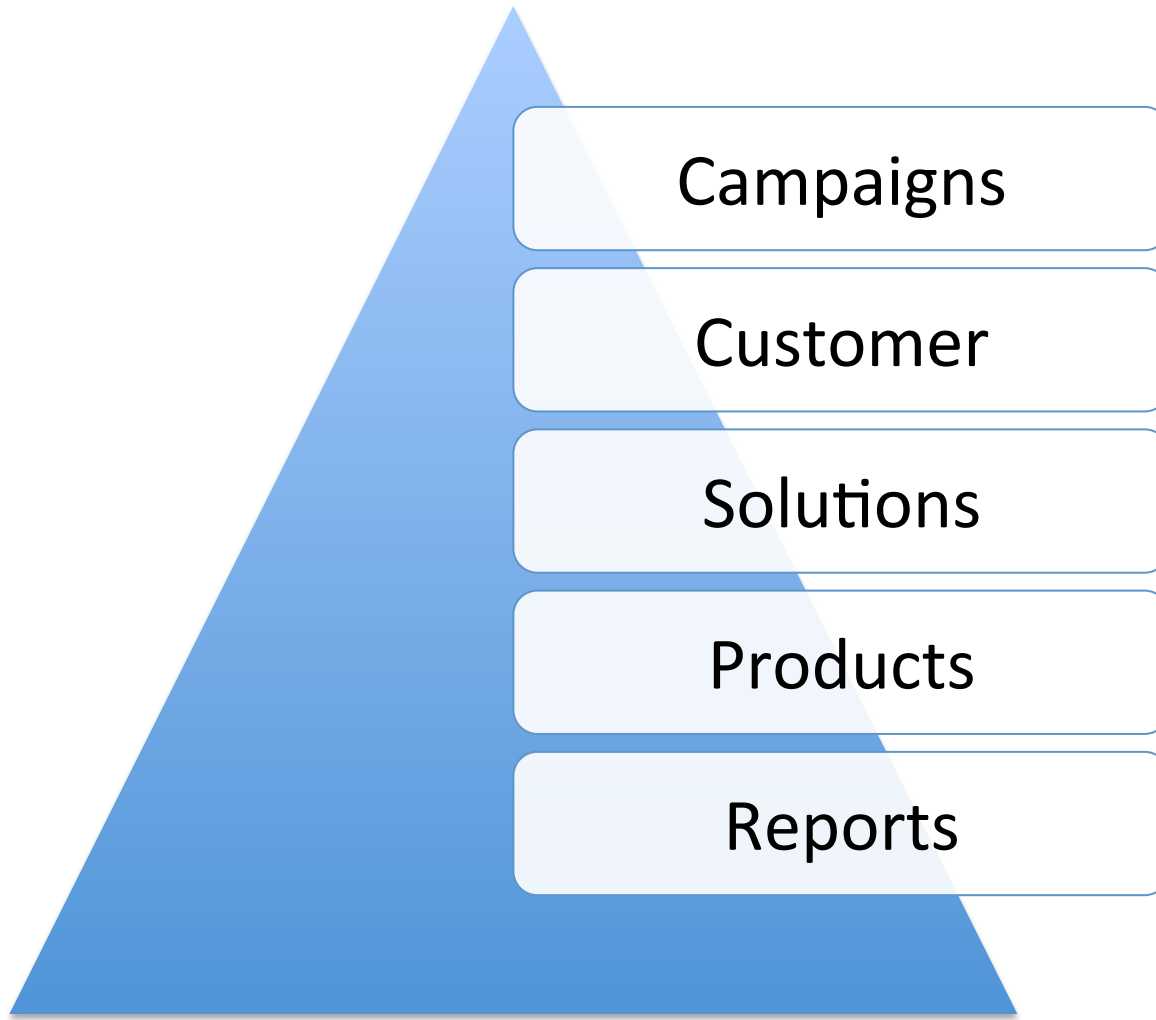


# Activity information





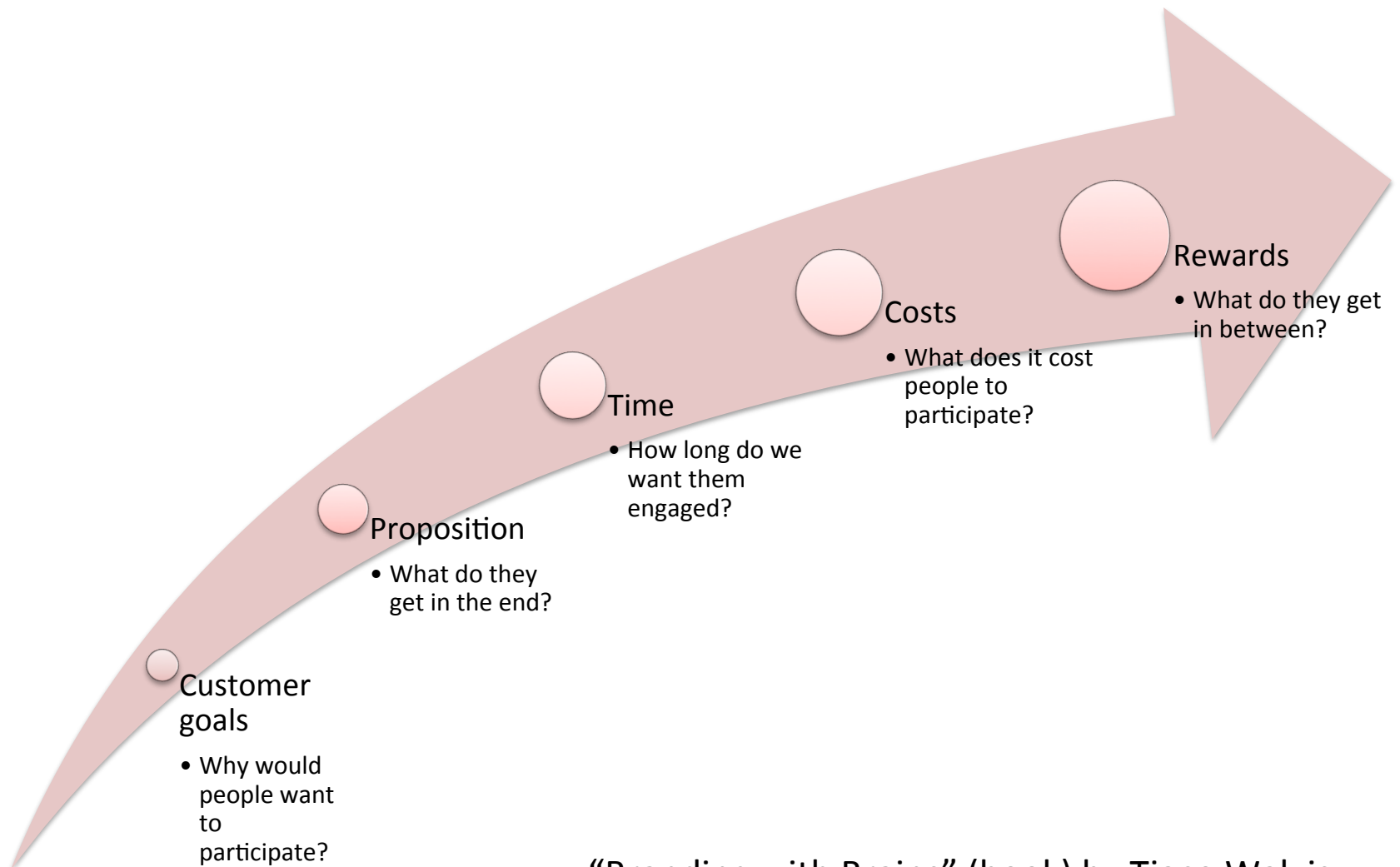
# Additional building blocks



# Spark participation



# Blueprint for participation



“Branding with Brains” (book) by Tjaco Walvis

## Engagement levels



<http://www.freshnetworks.com/files/freshnetworks/FreshNetworks%20-%20Social%20Media%20Influencers%20Report.pdf>

## WELCOME EMAIL CONTENT



Welcome emails offered an explanation of **website features** and tools.



Most welcome emails provided **information** regarding the store's services.



Promotional **welcome offer**, which tended to be a percentage-off or free shipping offer.



Later emails often included a **reminder** of soon-to-expire welcome offers.



Some emails included a prompt to follow the brand on **social media** channels.



Welcome emails also often included a prompt to download a **mobile app**.

EMAIL NAME

[VIEW CAMPAIGN](#)

SUBJECT

Back

Aug 11 2014 Event  
Invitation Email 3

Are you joining this August 23 - Certified Blog and  
Social Media Entrepreneur Program?

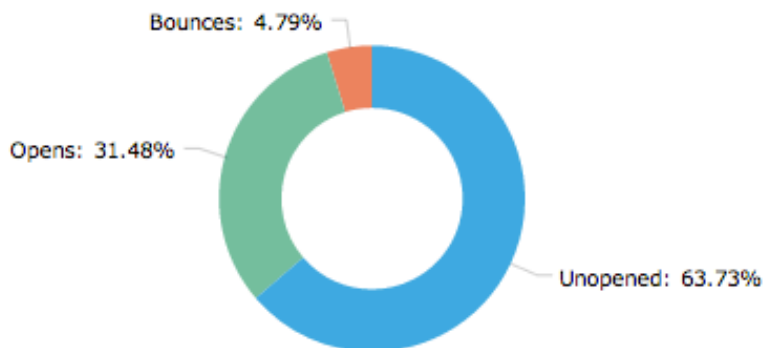
RESEND EMAIL

COPY EMAIL

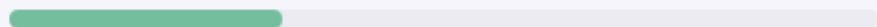
[+](#) Share | [f](#) [my](#) [g](#) [t](#) [in](#)

# 1,420

Emails sent



Opened Emails 447 31.5%



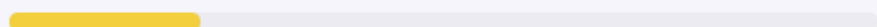
Emails Bounced 68 4.8%



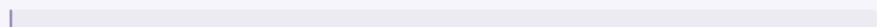
Unopened 905 63.7%



Links Clicked 98 21.9%



Unsubscribes 4 0.3%



Emails Forwarded 0 0.0%

