



# Integrating CRM & Website Analytics to Increase Conversion Rates

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# Introduction: Gathering Website Intelligence

Before deciding to launch a data gathering platform and strategy, it is important to identify what you want to track. Once you've outlined what type of intelligence is most important to you (e.g., what keywords people are searching to find your products and services, at what point does a visitor abandon their shopping cart, who is visiting your web pages and when), then you are ready to move forward with tailoring a strategy that best fits your business. This strategy's main objective is to generate valuable data that your organization can use to maximize efficiency and, if applicable, revenue and profit. As business goals and infrastructural components; such as technology, resources and data vary from one organization to another, being able to identify your immediate tracking needs is the first step in defining your strategy.

## What does “tracking” really mean?

Tracking is a term used to define the monitoring and management of consumer activity on your business or marketing platform with the intent to integrate it into marketing and business development strategies. By gathering important data, such as when a prospect is visiting your landing pages, you can modify the way that you communicate with your customers and increase your conversion rates. While almost any web page is “trackable”, you might have certain types of content that is not. This might include PDF files, videos, Flash or sound files like podcasts. Pages that use frames or other features can challenge the successful implementation of analytics.

There are many tools available to you that can generate analytic data from your website, but they can be incomprehensive, complicated and very tedious to implement. Google Analytics, for example, may appear as a simple code with a copy-and-paste implementation process. The reality is that there is an incomprehensible number of ways that one can implement Google Analytics, and if the package is not installed correctly, you could be missing vital data that prevents you from reaching your target audiences.

There could be a number of reasons that you are interested in gathering website intelligence:

- Increase website traffic
- Track shopping cart activity
- Monitor trends on your web pages
- Test the effectiveness of content
- Increase the relevancy of emails

Before you begin any analytics implementation, ensure that you have a full understanding of your needs so that you can generate relevant, useful and actionable data that can help you to streamline and improve your online marketing efforts. This will have a great impact on your decision of which software to use to manage your analytics.

# Customize Your System for Your Organization's Needs

Given the sheer amount of data that you can collect from website traffic, there are many ways to organize, filter and alter data once you collect that data. Customizing that information is critical. These customization elements help you to increase the effectiveness of your campaigns by delivering relevancy through segmentation, while also dramatically effecting how useful the analytics data is over time.

Once you have made the first step and decided that you are ready to implement the customization features of your account, pay special attention to these key points:

- Ensure that you have set up email reporting within your system, so that your data is delivered on an ongoing basis.
- Consider any specific segmentation needs. Do you need information on a specific audience group? This can help you to observe the variations of behavior between audience segments.
- Consider your web page infrastructure. To get customer-specific data, your visitors must already be in your Customer Relationship Management (CRM) or contact management system. You may need to review the way your website generates website traffic data, such as through account log in, event registration, downloads and subscriptions. With almost any tracking system, in order to identify the specific person visiting your site, there must have been a previous interaction in which a web browser cookie was set.
- Consider outlining specific profiles, such as where a prospect is in the pipeline, so that you can track when the prospect visits a sub domain or clicks a valuable link.
- Consider setting up tracking to discern which of your links could be causing you to have drop-offs in traffic; for example, partners, suppliers or sister links.
- To determine which type of content people are looking for on your site and also whether certain content is harder to find, consider setting up internal search tracking features.
- If you have off-site widgets, flash applications or links that point to video, audio or PDF files, create links on your website that can track non-HTML content on your site.
- Not every member of your organization will need access to the analytics information. Don't forget to create profiles with different access privileges to manage the visibility of certain data.

With the right set up, you can tag important links from your outreach efforts and begin discerning valuable information, such as:

- ✓ The performance of your advertising campaigns and keywords
- ✓ The quantity and demographics of people converting from your calls-to-action
- ✓ Shopping cart abandonment rates
- ✓ The number and frequency of visits you get after an email blast
- ✓ The quality of traffic from Facebook, LinkedIn or Twitter

This information can prevent you from wasting your budget and your time on strategies and applications that aren't giving you high returns. The second part of your plan should include converting all of your valuable data into actionable information.

Designate which person on your team is accountable for running analytics reports and analyzing the data. Your team can schedule a set time to review suggestions and also generate ideas for improving the campaign and strategies, as well as your responses to your online audience.

Basic metrics that your team would monitor might include:

- On-Site Searches
- Geographic Locations
- Paid vs. Organic Visitors
- Total, New and Returning Visitors
- Popular Content
- High Traffic Keywords

By generating these simple metrics, you can recommend specific strategies and action items to increase the performance of your website. To be more effective marketers, some bring their data into more sophisticated realms like segmentation, personalization, or integration and tie it to their email marketing strategy.

## CRM, Website Analytics and Email Integration

The right mix of digital communication can produce a formula that will enhance your entire marketing machine and above all, generate revenue. Just as vehicles have key components to function effectively, like gas, an engine and wheels, your marketing program should be no exception. You will need three key components to enter this competitive marketing environment: CRM, email marketing and website analytics.

The integration of these three powerhouses sets the stage for infinite potential by offering a 360 degree view of customer behavior. Let's define the role of each and explore how the sum can truly be greater than its parts.

### Customer Relationship Management (CRM) System

The goal of the CRM system is to capture and track information pertaining to customer and prospect activity in one central location. Basic features will include the sales pipeline, customer interaction and existing client data. The right CRM system, however, can offer much more than this. Tracking and applying the right CRM data can power more relevant and timely email communications, actively capture real time customer and prospect data, and pull reports by segment, pipeline status or other determinants.

Before marketers establish their game plan and their approach for capturing the necessary data, they should have already examined any data cleanliness issues. This is important when looking at integration, as emails sent to clients, vendors, and prospects will only be as useful as the data that powers them! In order to meet your own expectations of a CRM system, consider what sort of subscriber data you need to have in order to execute the well-thought out communications plan you're dreaming of.

The right CRM system will be infallible in providing you the lead, contact and account data that you need to create, deliver and track compelling email marketing messages, including drip campaigns that can be automated for hot leads. Your CRM integration will also help you to build microsites and landing pages to capture additional subscriber information as well as view which campaigns are driving the most traffic to them. This is why integration and the use of one central and dynamic system is so critical!

## Email Marketing

Many small businesses will be entirely new to online marketing, but to be effective should have a system in place for an email marketing solution. An entry-level solution will deliver messages to opt-in subscribers and allow the organization to view insights such as click rates, bounces and opens. These basic functionalities and features often include audience segmentation capabilities, but make it difficult to manage advanced personalization tools that tailor content based on subscriber data or behavior. Advanced features, like setting triggers based on subscriber data or accessing advanced tracking and reporting tools, help the email marketer to meet key goals, such as:

- ✓ Streamlining the email marketing process with tracking and reporting tools , automated messaging, and subscriber management..
- ✓ Delivering more relevant content, which drives website traffic through segmentation tools that create groups based on subsets of subscribers, profile information or behaviors.
- ✓ Maintaining message and brand consistency throughout the customer life cycle.

Relational data, or data that works together from multiple touch points, allows the marketer to deliver highly relevant and dynamic email content. When empowered by automation, emails are triggered through integration with web analytics, CRM or even content management. At this level, it is important to focus on continuous improvements. Have you automated as many programs as possible? Is your data seamless? Are you nurturing drip and lead campaigns? Have you applied these email techniques to e-commerce?

If you have an e-commerce site, you should encourage potential customers to fill in an email address. While the email address is a critical piece of information needed to track the visitor's behavior when they revisit the site, the sooner you can capture this data, the quicker you will be able to respond to critical issues like shopping cart abandonment. By capturing the email address you can follow up with a discount for their purchase and incentivize them to come back to the site. You can also establish the relationship immediately and begin building trust and credibility. Be consistent! By sending a shopping cart recovery email right away (typically between one to 48 hours after the drop off time), you will increase your chances of making a sale.

## Web Analytics

One of the major benefits of incorporating web analytics software to your CRM is the ability to automatically aggregate data into actionable results. Many marketers opt for free analytics software to avoid higher costs and overwhelming complexity. The result is a basic web analytics solution that monitors simple website traffic metrics and behavior. These tools are used to view overall metrics like website visits, page views, popular pages and traffic sources, they address the overall picture: what happened on the site, when and where? But like most things in life, you get what you pay for. Free is not good enough to effectively improve your business operations.

While free tools are superficially useful and may include basic reporting for email, they often have little to no integration and do not display a holistic analytical view. Typically, these analytics tools will display which pages were visited from the email campaign, but they fail to display what occurs on those pages after the click-through. Getting access to post-click data is not easy with most software packages. First, it takes time to research how to integrate separate systems for email marketing and website analytics. Moreover, technical limits, tight budgets and incomplete information present risks by impeding the potential growth of the marketing integration program. For example, when a marketer with limited technical expertise doesn't have a budget for sophisticated marketing technology they are faced with having to make decisions based on incomplete information that doesn't offer the full 360 degree view of customer or subscriber engagement.

Web analytics integration with a CRM and email marketing help the marketer to fully understand subscriber behavior and act on it accordingly. Capturing the right data is a critical point of being able to justify important marketing investment decisions for the future. Marketers must build a solid foundation by following some of these important practices:

- You can determine how to customize your unique analytics strategy by identifying key performance metrics, such as:
  - what determines campaign success for your organization
  - what is necessary to capture in order to view performance
  - what are the website activity trends saying about performance
- Set up a conversation with your analytics vendor to determine if they can provide the metrics, which you are looking for.
- Set up integration and be sure it's automated. This is critical for the email marketing and web analytics system, as it enables you to also consolidate those metrics into a single system.
- Instead of just collecting general data, set the stage to generate intelligence for a behavioral analysis on a segment level. Specific data like this will help you to predict behavior and respond to your email marketing campaigns. How do different segments of your audience respond to different segments of your website?
- Create specific reports for your initiatives across various mediums: e-commerce, website, email, organic search and more.

Advanced marketers often look to top-of-the-line analytics software to fully integrate their email and CRM data. They are able to access detailed web analytics reports and dashboards while examining behaviors on an individual level, to capture valuable information such as the profile of each visitor based on their score and frequency of visits, campaign responses, content interests, inquiries and more.

An integrated web analytics system that captures and reports your key performance indicators and unique visitor behavior focuses on these main points:

- ✓ Captures and analyzes the behavior of unique visitors.
- ✓ Automates key marketing programs that are preformed on a recurring basis
- ✓ Identifies all the points of conversion on your site
- ✓ Integrates with advanced features like financial data, on-site searches and social media

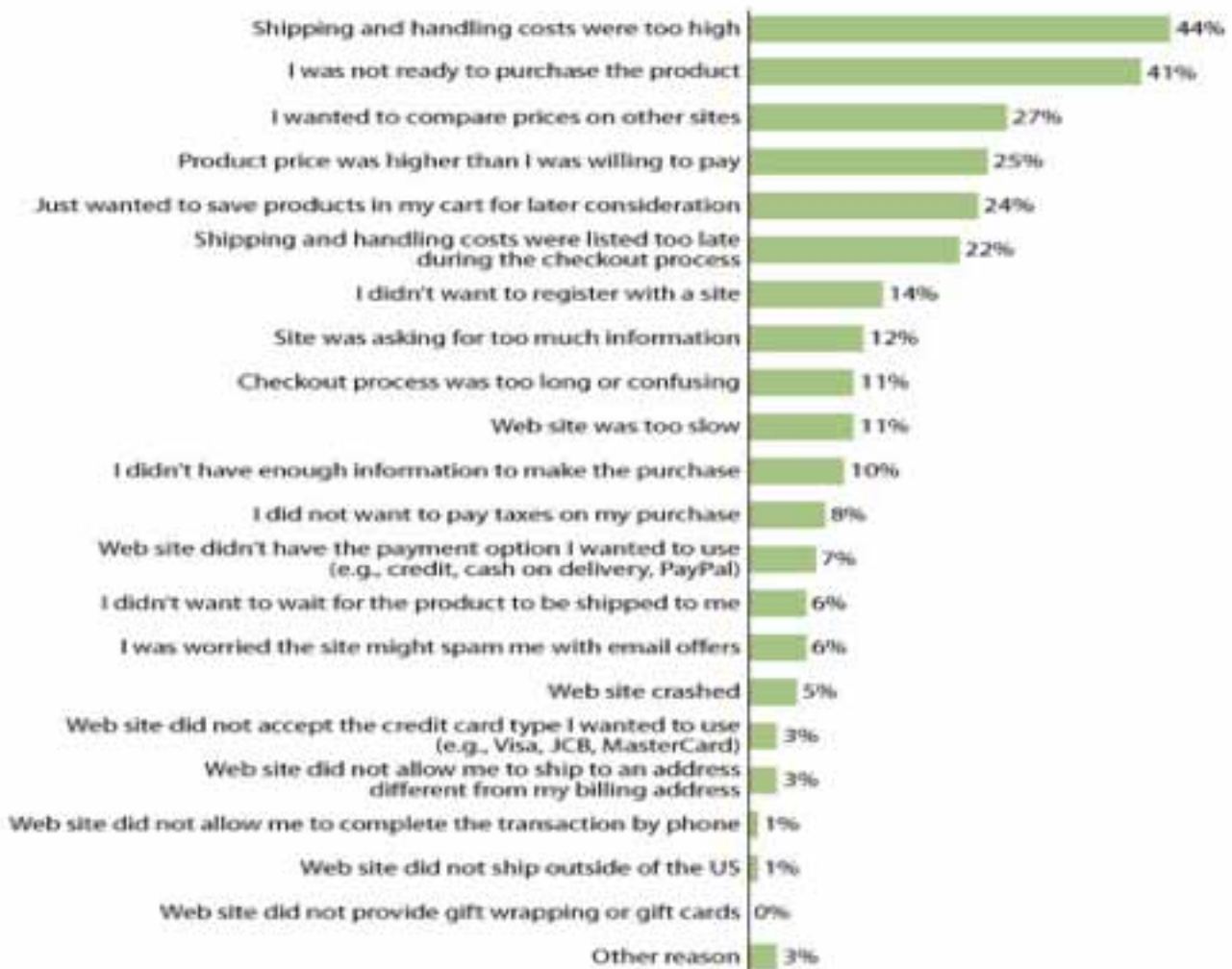
To communicate effectively in a cluttered online world, the data that you house in your CRM and web analytics systems should be actionable and stable. This is why email marketing is such a powerful one-to-one platform that can connect your data to a tangible outcome. The integration of these key systems is also an important component of getting a grasp on your consumer's business cycles in order to integrate and optimize them effectively. Remember, the key to great CRM, email marketing and web analytics integration is the ability to act on the data!

## E-commerce Tracking and Shopping Cart Abandonment

While website tracking and analytics deliver highly valuable information on customer trends and preferences, it is e-commerce sites that can see instant revenue from an integrated marketing system. Setting up e-commerce tracking has one primary goal and that's to track a customer's purchase. The marketer is better able to tailor relevant communication at appropriate times by placing an analytics tracking code on transaction data such as the items ordered, the shopping cart, item categories, sales source, keywords and basic data such as visitors and page views.

A large issue for e-commerce marketers is shopping cart abandonment. Once you have managed to drive a potential customer to your site, encouraged them to shop and purchase a product, you want to maximize the chance of that turning in to a purchase (or, in marketing-speak, a "conversion"). By first understanding the integral reasons as to why someone has abandoned a cart or registration page, you will be able to develop strategies that address their concerns.

**"Thinking of the last time you put items in your shopping cart but did not finish the online purchase, which of the following best describes why you did not complete the transaction?"**



Base: 2,921 Web buyers who have ever abandoned an online shopping cart (multiple responses accepted)

Source: North American Technographics® Retail Online Survey, Q3 2009 (US)

56827

Source: Forrester Research, Inc.

While Forrester Research estimates that cart abandonment rates have risen to 71 percent in 2010 and reached 75 percent in 2011, a considerable increase in conversion rates is often observed when behavioral data is captured and then applied by making applicable changes and sending out relevant and timely communication. The question is: How can a marketer discern why their customer has abandoned their cart or failed to complete registration? The best way to get this data is to ask! Some CRM systems, like GreenRope, include advanced features like survey builders that will allow you to survey your users on the web page or through a pop up window after they leave the site. You will be able to look at real-time results and make any necessary changes to your site.

McAfee, an authority on web security, performed a recent study on “digital window shopping”. Similar to shopping cart abandonment, digital window shopping refers to a user that returns to the website to complete their purchase. After looking at 160 million transactions, they concluded that the average time between first visit and final purchase was 33 hours and 54 minutes. The study provides valuable insight into the mindset of online shoppers and is invaluable in helping marketers tailor appropriate real-time actions based on real-time behaviors. Expert marketers understand that being able to leverage a tracking feature that triggers an email campaign within a specific time period after cart abandonment, can make all the difference between a sale, a relationship and a loss in revenue.

According to MarketingSherpa’s “2011 Email Marketing Benchmark Report”, the most significant challenge to effective email marketing is targeting recipients with relevant content. The report continues to state that the most effective tactic for increasing relevance is to send triggered emails. 70% of consumer-marketers agree, stating that using email was “very effective” while 47% of B2B email marketers felt the same way. These focused marketing emails can be very effective. For example, sending an email after a customer abandons a shopping cart and encourages the customer to return and complete the purchase, instantly strikes a relevant and personalized conversation. Companies that do not have shopping cart abandonment strategies in place are potentially missing a terrific opportunity to convert abandoned sales. According to these studies, automating cart abandonment email solutions can convert anywhere from 20 to 35 percent of lost sales.

Of course, there is a sea of uses for email triggers based on website behavior. Consider:

- Including relevant pictures of items and links to product reviews
- Adding security icons in your communications
- Including a toll-free number for customer support
- Attaching links to your privacy and return policies
- Providing an easier, instant way for them to complete the purchase
- Adding personal information, such as the shopper’s first name



# Action Checklist: Increase the Effectiveness & Performance of Your System Features

Overall, automated and integrative systems for website tracking will tell you exactly who is on your site and what they're doing, give you a remarkable understanding of your prospects and their trends to help you to generate qualified leads, increase sales effectiveness and improve marketing ROI. The following steps should help you to leverage your analytics program and help improve the performance of your web channel:

- Be clear on the content that you would like to track and how you will manage it
- Always talk to your technical staff to cover any possible technical challenges
- Integrate your web analytics to CRM and email for increased intelligence
- Set up profiles to track the specific information, as well as filters to track external visitors only
- Implement segmentation of key audiences
- Set up a tracking strategy to discern why people are leaving your site
- If you have non-HTML content, be sure to set up links to track the activity
- Identify authorized personnel to view or manage the analytics reports
- Outline any outreach and advertising to be tracked, such as social media
- don't forget to tag each advertising or social media link
- Ensure that your website's privacy policy is up to date

## About GreenRope CRM and Website Analytics Integration

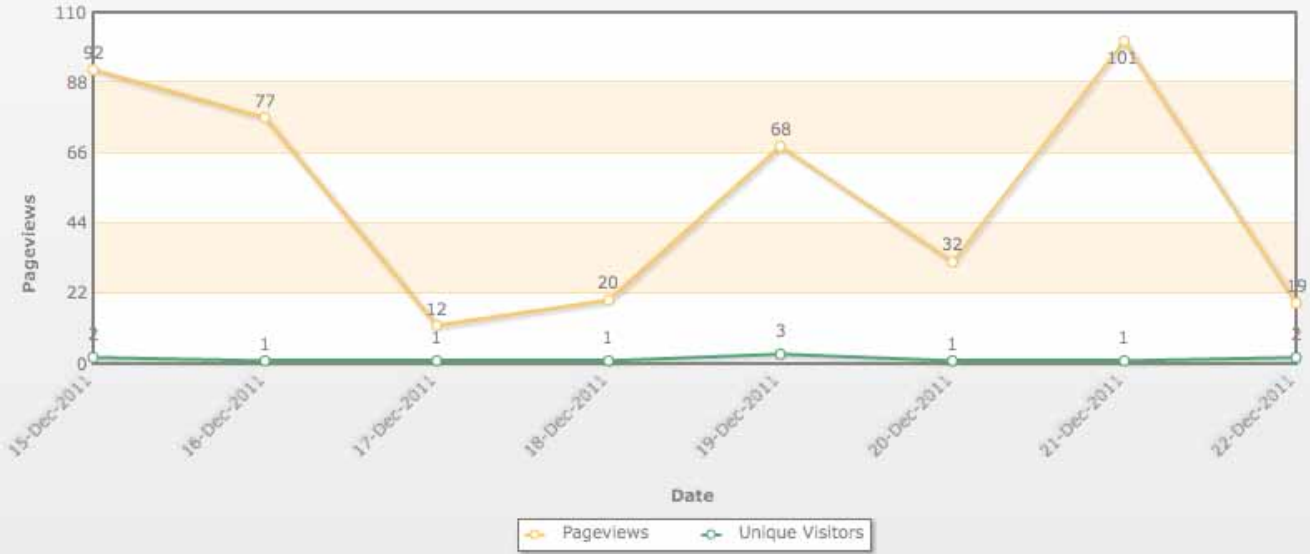
GreenRope is a premier integrated software solution that allows users to manage their customer relationships, email marketing, website analytics, social media and more, all from one platform.

The management system includes sophisticated features that offer valuable insight into an organization's marketing and sales activity. Advanced tracking capabilities allow users to:

- Build websites and track activity, or track activity on existing websites
- Track specific individuals, such as existing contacts to monitor interaction and detailed website activity
- E-commerce tracking for shopping cart abandonment and product views
- Sales lead management tools include scoring capabilities to score the contact's interactions such as interaction with a highly important page versus a jobs and careers page.
- View SEO and PPC analytics tools to assess performance of campaigns.
- Integrate email marketing with the website analytics features and CRM system

### Unique Visits and Pageviews By Day of Known Contacts

Visits to your Website by contacts in your CRM



### Unique Visitors and Pageviews By Month

Visits to your Website in the past year



### Pageviews By Hour

Number of visits to your Website based on hour of the day

