

# Sage ACT! | White Paper

## Sage E-marketing for ACT!

How to Build Successful Email Marketing Campaigns



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**Table of Contents**

**Introduction ..... 3**

**How to Incorporate E-marketing into Your Business ..... 4**

**Ideas for Using E-marketing in Your Sales and Marketing ..... 4**

**Tips for Generating Content..... 5**

**Sage E-marketing for ACT!..... 5**

    Generate Lists Directly From Sage ACT! ..... 6

    Choose Your Content and Template ..... 6

    Survey Your Customers..... 7

    Consider Mobile Devices ..... 7

    Ensure You Are Sending Compliant Email Marketing Messages..... 7

    Deliver Email ..... 8

    Share Your Promotions with Social Media ..... 9

    Track Results and Generate Reports ..... 10

    Marketing Follow Up ..... 11

**Conclusion..... 12**

## Introduction

The most successful businesses today are those that can move fast and stay flexible amid many economic and technological changes. As a small business owner, it can be hard to find the time to fit marketing into your busy day-to-day schedule. Even more daunting, it can seem impossible to come up with marketing ideas that produce results and fit your budget.

Yet marketing is one of the most important functions your company can perform. Marketing communications not only help your business find new customers, but also connect with existing ones. Adam Sutton of MarketingSherpa says, "Growing your email list has benefits beyond the obvious increase in size. For example, new subscribers are often more active than older ones. They just signed up for your emails and want to click and open them. For this reason (and many others) you should always strive to grow your email list. Doing so will help keep your engagement numbers healthy and ensure your brand is connecting with new prospects."<sup>1</sup>

To be successful, your business must build awareness of your products and services, increase sales, and develop a solid reputation as honest and knowledgeable.

Email marketing is a widely used strategy because it offers the ability to:

- Connect with customers quickly.
- Easily reach a large, diverse audience.
- Keep costs to a minimum.
- Measure your results.

The Direct Marketing Association found that the return on investment for email marketing is still about \$41 per dollar spent.<sup>2</sup> More businesses than ever are turning to email marketing as a main vehicle for marketing communication. In 2012, email marketing is projected to drive \$651 billion in sales in comparison to \$642 for direct marketing.

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<sup>1</sup> Adam Sutton, "Email Research: Top 3 tactics to grow your list," MarketingSherpa blog, January 17, 2012.

<sup>2</sup> Direct Marketing Association, "DMA Releases New 'Power of Direct' Report; DM-Driven Sales Growth Outpace Overall Economic Growth," October 2, 2011.

## How to Incorporate E-marketing into Your Business

Email marketing is remarkably easy to incorporate into your day-to-day business activities. Any time your company attends an industry event, develops a new product, or reaches a milestone, it is important to share that information with both your current and potential customers. Delivering efficient and effective communications helps keep your business top of mind and enables you to frequently interact and understand what is important to your customers.

Some information you should communicate to contacts includes:

- Telling all your customers about a new product or service.
- Telling customers who own a particular product about a complementary product or service.
- Promoting sales and special offers.
- Sending a customer a loyalty award.
- Newsletter, industry news, coming events.
- Ask for feedback.

## Ideas for Using E-marketing in Your Sales and Marketing

1. **Follow up with new contacts.** Email is a great way to follow up with a contact after they visit your business or you call them on the phone.
2. **Make a splash with a new product or service.** Let all of your customers know about a great new product by sending them an email.
3. **Celebrate holidays with special promotions.** Do you have special sales around holidays like the 4th of July or after-Thanksgiving? Are some of your products particularly popular gifts at certain holidays, such as chocolate at Valentine's Day? Send out an email letting customers know about great deals.
4. **Create custom industry-specific promotions for certain types of buyers.** E-marketing gives you the ability to easily target groups of customers with specialized messages and promotions, at a very low cost. If you sell business-to-business goods or services, this can be a great way to target individual industries.
5. **Customize promotions by region.** Some products are most popular in certain regions and e-marketing makes it simple to create lots of different promotions, so you can sell snow shovels in Wisconsin and sunscreen in Florida. The faster your customer spots relevant, useful items in your email, the more likely he or she will purchase.
6. **Share achievements.** Has your company been the focus of a review by a newspaper, magazine, or online journal? Have you won any recent awards? Let customers know about your accomplishments—it adds to your company's credibility and expertise.
7. **Mark an anniversary.** Combine a "thank you for your business" email with a Sage ACT! Smart Task to product an automated loyalty email sent to customers on the one-year anniversary of their first purchase. Why not use this opportunity to offer a small gift or discount with your products?
8. **Send a regular e-newsletter.** Share new product information, special offers, and other relevant news with your customers every month, or once per quarter. The repetition will help keep your business on your customers' minds.

## Tips for Generating Content

The content of your message should be authentic and concise. The key to success is to offer concrete, eye-catching material that sparks the reader's interest. You can send messages about promotions and products, and value-added content about issues or trends affecting your clients' business.

Remember, your ultimate goal with e-marketing is to nurture and grow your contact list. Your email should always have a clear message and call to action so that your contacts know what the next step will be. Encouraging your readers to take action provides you with valuable data that you can use to determine who is most interested and can help your sales team focus on the hottest leads. You can even survey your customers to encourage interaction and to get additional information.

## Sage E-marketing for ACT!

There's a reason why e-marketing is so popular. Emails are easy to create, easy on the budget, and—most importantly—proven to drive sales if done right.



A subscription to Sage E-marketing for ACT! gives you a simple way to grow your business by regularly communicating with your contacts. See how easy it is to create and send professional, eye-catching emails that fit the style of your brand. Extend your reach to Facebook®, Twitter®, and LinkedIn® using social sharing features. Then, take a look at easy-to-analyze

graphs that help you understand the impact of your messages.

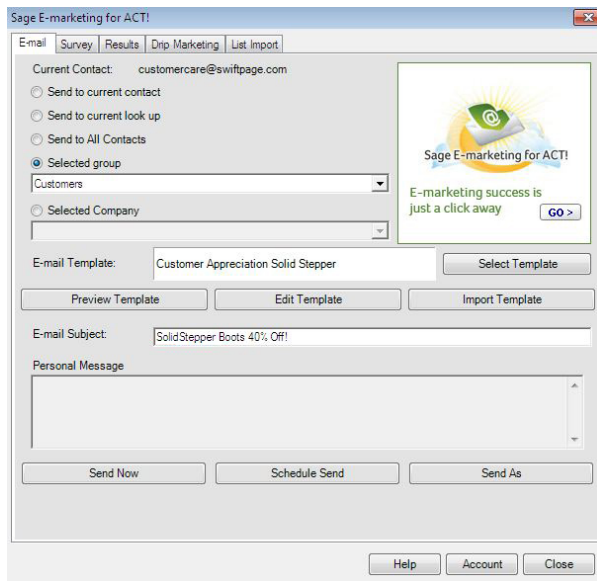
Since Sage E-marketing for ACT! integrates with Sage ACT!, you can take full advantage of your Sage ACT! database by sending emails to the contacts, lookups, groups, and companies you already manage with Sage ACT!. Building your lists with new details from surveys or web forms is a breeze too; Sage E-marketing for ACT! can help fill in contact details and add new contacts to Sage ACT!.

Anyone can send email. The key is to do it smartly and efficiently with Sage E-marketing for ACT!.

Let's follow along with Bob, Owner of XYZ Corporation as he uses Sage E-Marketing for ACT! to grow his business. Bob's company will be unveiling a new, lightweight, waterproof hiking boot—the LiteHiker—later this year. But first, he really needs to sell some of the excess inventory of XYZ's current boot model, the SolidStepper.

### Generate Lists Directly From Sage ACT!

First, Bob thinks about who his target market is. He wants to use his frequent customer list to offer them an exclusive sale on the old SolidStepper boot. The customer profiles show that these customers buy boots several times per year so he has decided to offer a 40% customer appreciation discount. In Sage E-marketing for ACT!, Bob picks his target list directly from Sage ACT!. From here, he can also view contact history and see what communications have been sent to these customers in the past.



### Choose Your Content and Template

Bob wants to clear out as much inventory as possible this week. He selects a clean template design that announces the sale. Bob customizes the text so that the headline reads: Customer Appreciation Days: SolidStepper Boots 40% off! He customizes the bottom line to read: Order SolidStepper today and explore the outdoors!



## Survey Your Customers

If you want to know what interests your customers, how they think, or what they prefer, you will find e-marketing is a great way to quickly field a survey and receive rapid results. To his Bob also adds a link to a customer survey so he can collect information about his customers' hiking frequency and the types of trails they visit. He hopes this information will be useful when sending out product announcements for the SolidStepper.

The image displays two components of an email marketing campaign for XYZ Corporation. On the left is a promotional email template for 'Customer Appreciation Days' featuring a 40% discount on SolidStepper boots. It includes three images of boots, a 'TELL US ABOUT YOUR HIKING' button, and contact information. On the right is a survey form titled 'SHARE YOUR STORY Tell Us How You Hike'. The form contains fields for Name and Email Address, radio buttons for hiking frequency (Daily, Weekly, Monthly, 3-4 Per Year), a 5-point rating scale for hiking ability (1=Needs Improvement, 2=Fair, 3=Good, 4=Excellent, 5=Outstanding), and a checkbox for future product updates. A 'SUBMIT' button is located at the bottom of the survey form.

## Consider Mobile Devices

When Bob selects his template, he knows from experience that his customers are active and a large percentage of them use smartphones. In fact, approximately 35% of U.S. adults use smartphones and 87% of those browse the Internet and read email.<sup>3</sup> He picks a template that is simple and concise so that his message will be clear to recipients. Think about mobile devices as you send out your email.

## Ensure You Are Sending Compliant Email Marketing Messages

Nobody wants to send or receive spam. If a user reports Bob's email message as spam, his company could be blacklisted and worse, subject to penalties of up to \$16,000 for each violation. With Sage E-marketing for ACT!, Bob reduces his risk. He also runs his email through a free tool before sending it to make sure that spam filters won't junk it.

### *Free Spam Check Tools*

[www.swiftpage.com/spamcheck](http://www.swiftpage.com/spamcheck)  
[www.spamcop.com](http://www.spamcop.com)  
[spamcheck.sitesell.com](http://spamcheck.sitesell.com)

<sup>3</sup> Anusha Sethuraman, "Looking back at 2011: The year of the mobile," SmartOnline, January 3, 2012.

## Deliver Email

Bob has finished editing the template and is ready to send the sale message. In Sage E-marketing for ACT!, Bob chooses the send now option. It is a Monday.

There are several options to choose from when sending an email communication including:

- Send now—send the message right away.
- Schedule send—send the message at a specified time. For example, Tuesdays and Thursdays at 3:00am have statistically shown to have higher open rates than emails sent during business hours. Bob typically uses this option when sending out the company's hiking newsletter.
- Send as—send the message from someone else in your company who has a team account. Bob uses this option when he wants his customers to respond directly to his product design team when they are conducting product tests.

The banner features the XYZ Corporation logo on the left and a background image of a forest path on the right. The text 'Special Offer' is positioned in the top right corner. The main headline reads 'Customer Appreciation Days: SolidStepper Boots 40% off!'. Below this, there are three images of the boots: a large side view on the left and two smaller images (top-down and side view) on the right. At the bottom, there is a call to action: 'Order SolidStepper today and explore the outdoors!' followed by 'Hurry, offer ends August 15th!' and a blue 'ORDER' button with a mobile phone icon. The footer contains the website URL, phone number, and email address.

**XYZ CORPORATION** Special Offer

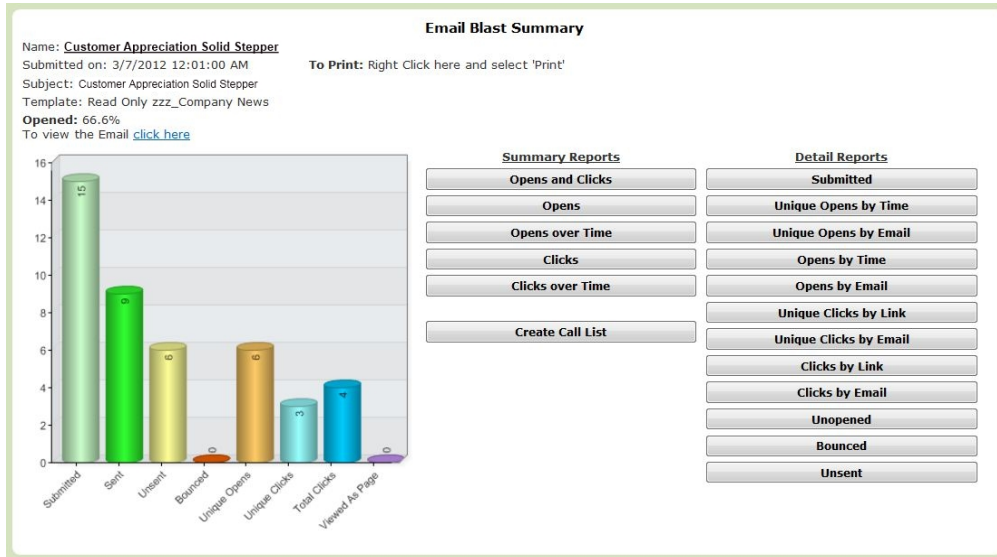
**Customer Appreciation Days:**  
**SolidStepper Boots 40% off!**

Order SolidStepper today and explore the outdoors!  
Hurry, offer ends August 15th! **ORDER**

[www.xyzcorporation.com](http://www.xyzcorporation.com) | 1-800-800-8000 | [sales@xyzcorporation.com](mailto:sales@xyzcorporation.com)



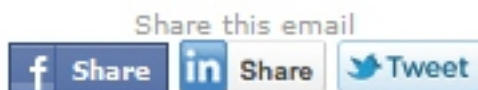
Once Bob sends his email, he receives a report of the total number of addresses and compares it to his list for accuracy. He has named the email blast “SolidStepper Customer Appreciation Sale” so that he can track and report on the results of the campaign.



This email blast information is automatically written into Sage ACT! history so he can check to see what messages have been sent to contacts, who has opened them, who responded to the survey, and more.

### Share Your Promotions with Social Media

Bob can spread the message further to Facebook®, Twitter®, and LinkedIn® using social sharing features to get even greater visibility. He can include links to XYZ Corporation’s social media sites in the email message and can post or tweet them directly. Bob’s customers can then share the message with others.



### Track Results and Generate Reports

On Tuesday, Bob checks on his “SolidStepper Customer Appreciation Sale” results. He tracks the open rates, click rates, delivered versus sent, bounced, and opt-outs.

#### Email Reports - Opens and Clicks

Submitted on: 3/7/2012 12:01:00 AM

To Print: Right Click here and select 'Print'

Name: **Customer Appreciation Solid Stepper**

Emails Sent: 9, Opened: 6

- Summary
- Opens and Clicks
- Opens
- Opens over time
- Clicks
- Clicks over time

Total recipients with at least 1 open: 6 (Page: 1)

Email Address	First Name	Last Name	Phone	Opened Time	Opens	Clicks	Forwards
Sample1@swiftpage.com	Sample1	Doe	987-654-3210	6/22/2007 11:46:06 AM	3	1	0
Sample10@swiftpage.com	Sample10	Smith	877-228-8377	6/22/2007 11:45:01 AM	1	1	0
Sample2@swiftpage.com	Sample2	Doe	303-978-1000	6/22/2007 11:46:03 AM	3	2	0
Sample3@swiftpage.com	Sample3	Doe	123-456-7890	6/22/2007 11:50:49 AM	1	0	0
Sample6@swiftpage.com	Sample6	Smith	303.978.1000	6/22/2007 11:51:23 AM	5	0	0
Sample8@swiftpage.com	Sample8	Jones	303-978-1000	6/22/2007 11:46:06 AM	1	0	0

Email list as an attachment to:

To view the Email [Click here](#)

The data is also sent back to XYZ Corporation’s Sage ACT! database, so Bob can generate call lists for the sales team.

**Sage E-marketing for ACT! Call List**

This is a ranked list of your most interested contacts based on their interaction with included campaigns.

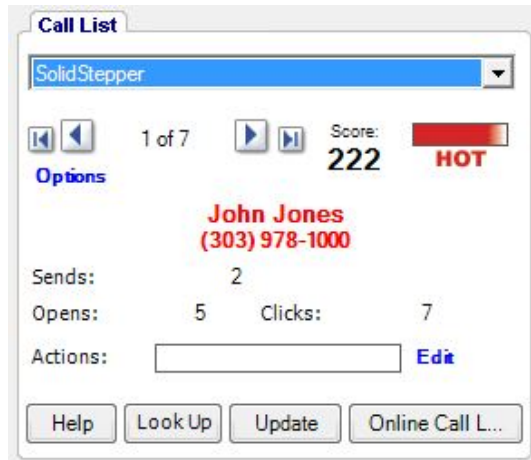
Call List: **SolidStepper**      Sender: **rs\_030512\_spe**      Rows: 2 of 7

#	Action	Strength	First Name	Last Name	Phone	Company	Email Address	Score	Sent	Opens	Clicks		
1	<a href="#">Edit</a>	<div style="width: 100%; height: 10px; background-color: red;"></div>	Ryan	Sullivan	(303) 978-1000	Swiftpage	rsullivan@swiftpage.com	222	2	5	7	<a href="#">Select</a>	<a href="#">Details</a>
2	<a href="#">Edit</a>	<div style="width: 100%; height: 10px; background-color: red;"></div>	Sample2	Doe	303-978-1000	Swiftpage	Sample2@swiftpage.com	83	1	3	2	<a href="#">Select</a>	<a href="#">Details</a>

View modes:  Hide 'Actioned'  Hide 'Assigned'  Show Assign column

Rows per page: 15    Page: 1 of 1    Goto page:

Each email is given a score based on the number of times a contact opens and/or clicks on links in the message. Someone who opened the email three times and clicked on four links is given a higher score than another person who only opened the email once. A ranked, qualified call list is produced for XYZ's sales team—viewable from the contact record in Sage ACT!—so they know who to follow up with first.



From the survey responders, Bob's sales team plans to call the hot leads first. Before calling each lead, the salesperson can pull up each customer's history in Sage ACT! to see how many times they opened the email, what links they clicked on, how they answered the survey questions, as well as other data about the customer. The salesperson can record any notes from the call into Sage ACT!

### Marketing Follow Up

Based on the campaign results, Bob tests additional email messages to customers about the SolidStepper sale. He tries changing subject lines, offers, when he sends the email, and targets a specific segment of the customer base. Bob also tests an entirely new template to see what improves the open and click rates and ultimately the sales!

Additionally, Bob uses data from the survey responses to build his campaign to launch the company's new boot, the LiteHiker.

**XYZ CORPORATION**

**New Arrival: LiteHiker**

**Introductory Price: \$99.00**

COMFORT. AGILITY. VALUE

Great light-weight option that offers supreme comfort with arch support that conforms to your feet with ease.

Available in Men's 6-14, Women's 5-11

Explore the outdoors with LiteHiker!

**BUY NOW**

www.xyzcorporation.com | 1-800-800-8000 | sales@xyzcorporation.com

## Conclusion

Email marketing is an effective, inexpensive tool that can benefit your organization's marketing efforts. With a subscription to Sage E-marketing for ACT!, you can easily send professional-looking email communications to your customers and prospects and confidently track the results. Because Sage ACT! integrates with your Sage ACT! database, you can automatically keep your contact database up to date with valuable, actionable data for your sales force. You will also learn more about your contacts so you can keep them informed and engaged.

Further, options such as Drip Marketing<sup>4</sup> can help you take email marketing a step further. Make the automation work for you intelligently by designing multi-step campaigns that reach out to the right customers at the right time—so they get timely communications that are relevant to their interests. Sage E-marketing for ACT! not only helps you easily deliver email communications, but also nurture and grow your prospects and customers so you can turn your leads into loyal customers.

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<sup>4</sup> Drip Marketing is purchased in addition to the Email Marketing service level. Each additional user is an additional cost. View plans and pricing at [www.act.com/SEMA](http://www.act.com/SEMA).

## ASIA

210 Middle Road  
#06-04  
IOI Plaza  
Singapore 188994  
+65 6336 6118  
[www.sageasiapac.com](http://www.sageasiapac.com)

## AUSTRALIA / NEW ZEALAND

Level 6, 67 Albert Street  
Chatswood, NSW 2067  
Australia  
+61 2 9921 6500  
[www.sagebusiness.com.au](http://www.sagebusiness.com.au)  
[www.sagebusiness.co.nz](http://www.sagebusiness.co.nz)

## BELGIUM / LUXEMBOURG

Rue Natalis 2  
4020 Liège  
Belgium  
+32 4 343 77 46  
[www.sage.be](http://www.sage.be)

## CHINA

Suite 2605,  
Liu Lin Tower No. 1  
Huaihai Zhong Road  
Shanghai 200021  
People's Republic of China  
+ 86 21 63850097  
[www.sagesoft.cn](http://www.sagesoft.cn)

## FRANCE

Ciel – Service Commercial ACT!  
35, rue de la Gare  
75917 Paris cedex 19  
France  
+33 1 55 26 34 77  
[www.MonAct.fr](http://www.MonAct.fr)

## GERMANY

Emil-von-Behring Str. 8-14  
60439 Frankfurt am Main  
Germany  
+49 69 50007 6260  
[www.sage.de](http://www.sage.de)

## INDIA

100, Second Floor  
Okhla Industrial Estate Phase-III  
New Delhi 110020  
India  
+91 11 4071 2488  
[www.sagesoftware.co.in](http://www.sagesoftware.co.in)

## IRELAND

3096 Lake Park Drive  
Citywest Business Park  
Dublin 24  
Ireland  
+353 (0) 1 642 0800  
[www.sage.ie](http://www.sage.ie)

## MIDDLE EAST

Office No. 315, Building 12  
P O Box 500198  
Dubai Internet City  
Dubai  
United Arab Emirates  
+971 (4) 3900180  
[www.me.sage.com](http://www.me.sage.com)

## POLAND

Sage sp. z o.o.  
Ul. Berna 89  
01-233 Warszawa  
Poland  
+48224555600  
[www.act.sage.pl](http://www.act.sage.pl)

## SOUTH AFRICA

Softline Technology Park  
102 Western Services Road  
Gallo Manor Ext 6  
Johannesburg, 2191  
South Africa  
+2711 304 3000  
[www.pastel.co.za](http://www.pastel.co.za)

## SPAIN

Labastida, 10-12  
28034 Madrid  
España  
+34 91 334 92 92  
[www.sagecrm.es](http://www.sagecrm.es)

## SWITZERLAND

Sage Schweiz AG  
D4 Platz 10  
6039 Root Langenbold  
Switzerland  
+41 58 944 19 19  
[www.sageschweiz.ch](http://www.sageschweiz.ch)

## UNITED KINGDOM

North Park  
Newcastle Upon Tyne  
NE13 9AA  
0800 44 77 77  
[www.sage.co.uk/act](http://www.sage.co.uk/act)

## UNITED STATES

8800 North Gainey Center Drive  
Suite 200  
Scottsdale, Arizona 85258  
1 866 903 0006  
[www.act.com](http://www.act.com)

### About Sage ACT!

Sage ACT! is the #1 Contact and Customer Management choice of small businesses and sales teams designed to help you build the long-lasting, profitable relationships your business thrives on. With Sage ACT!, it's easy to manage anything and everything related to your contacts and calendar. Think of it like your business' command center that serves up relevant relationship details and also connects you to powerful, subscription-based sales and marketing services, desktop and web-based productivity tools, and social media. Unlike other solutions that claim to get results, you can actually accomplish more, faster, by simply choosing to use Sage ACT!.

**Important Notes:** Sage E-marketing for ACT! requires an additional subscription and is powered by Swiftpage™. Review Sage ACT! system requirements at [www.act.com/systreq](http://www.act.com/systreq). You must purchase one license of Sage ACT! per user. Scalability varies based on hardware, size, and usage of your database. Visit [www.ActSolutions.com](http://www.ActSolutions.com) or contact your add-on product provider to determine compatibility for your add-on products.

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