



act-on USER GROUPS

Welcome

November 14, 2019

WiFi: CitizenM

#ActOnUserGroup

act-on USER GROUPS

Agenda

- 1.
- 2.
- 3.
- 4.

ACT-ON USER GROUPS

We'll Cover...

12.00 - 12.30 - Registration & Networking

12.30 - 12.35 - Introduction

12.35 - 13.35 - Product Roadmap & Vision

13.35 - 14.15 - Understanding & Achieving End Goals

14.15 - 14.45 - Panel Session

14.45 - 15.00 - Summary & Close



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Product Update

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Discussion topics

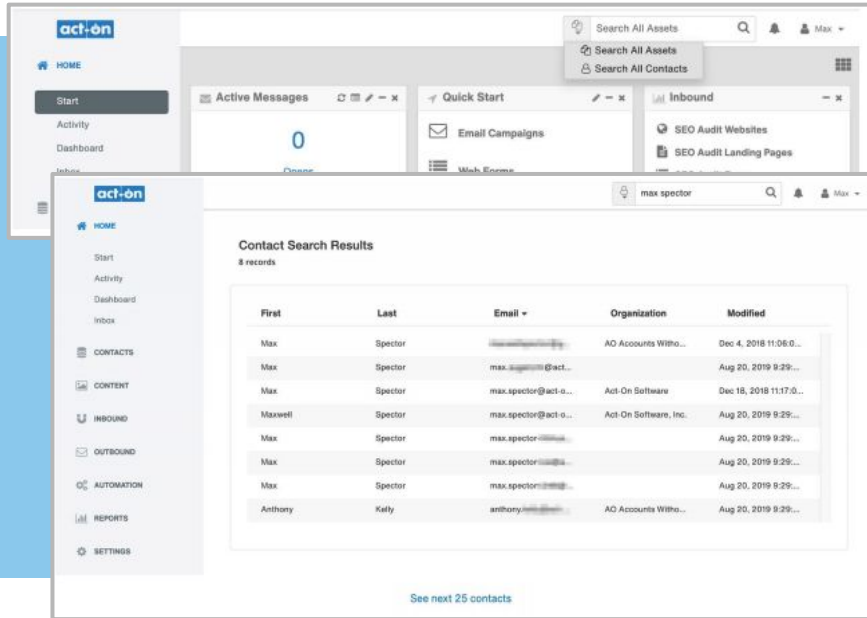
01. Recent customer requested enhancements
02. Customer feedback programs
03. Feedback on Act-On initiatives
04. Q&A: Feature requests | Roadmap



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Recent Customer- Requested Enhancements

Contact Search



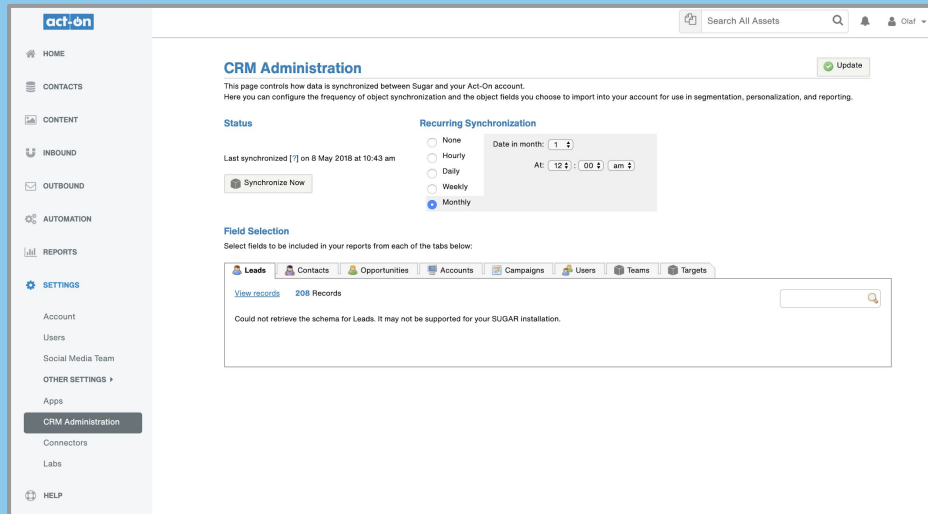
Search for contacts from top navigation bar

View all lists that contain the contact

Customers using this feature in early preview

Roll-out in progress

Faster sync time



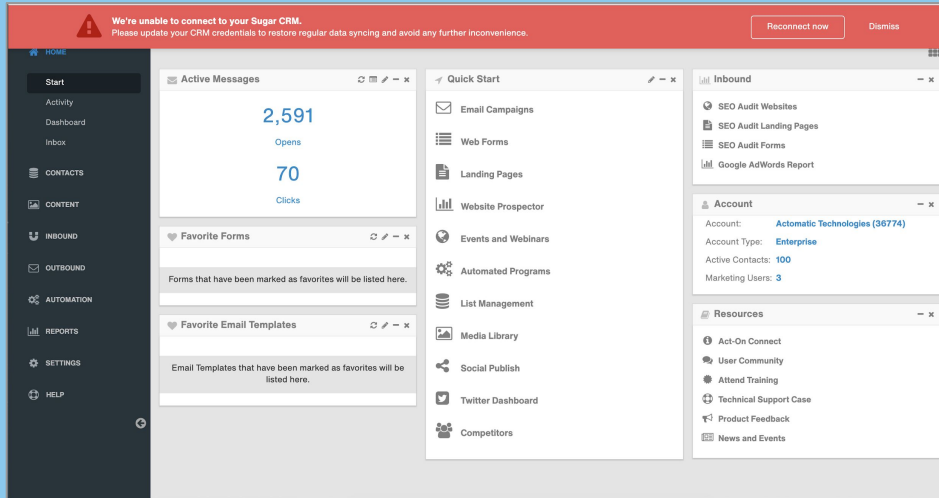
The screenshot displays the Act-On CRM Administration page. The left sidebar contains navigation options: HOME, CONTACTS, CONTENT, INBOUND, OUTBOUND, AUTOMATION, REPORTS, and SETTINGS. The main content area is titled "CRM Administration" and includes an "Update" button. Below the title, there is a description: "This page controls how data is synchronized between Sugar and your Act-On account. Here you can configure the frequency of object synchronization and the object fields you choose to import into your account for use in segmentation, personalization, and reporting." The "Status" section shows "Last synchronized [1] on 6 May 2018 at 10:43 am" and a "Synchronize Now" button. The "Recurring Synchronization" section has radio buttons for "None", "Hourly", "Daily", "Weekly", and "Monthly" (selected). A "Date in month:" dropdown is set to "1", and a time selector is set to "12:00 am". The "Field Selection" section includes a note: "Select fields to be included in your reports from each of the tabs below:" and a list of tabs: Leads, Contacts, Opportunities, Accounts, Campaigns, Users, Teams, and Targets. The "Leads" tab is active, showing "View records 208 Records" and a message: "Could not retrieve the schema for Leads. It may not be supported for your SUGAR installation."

Reduced sync time for CRM connectors

Only changed records are synced

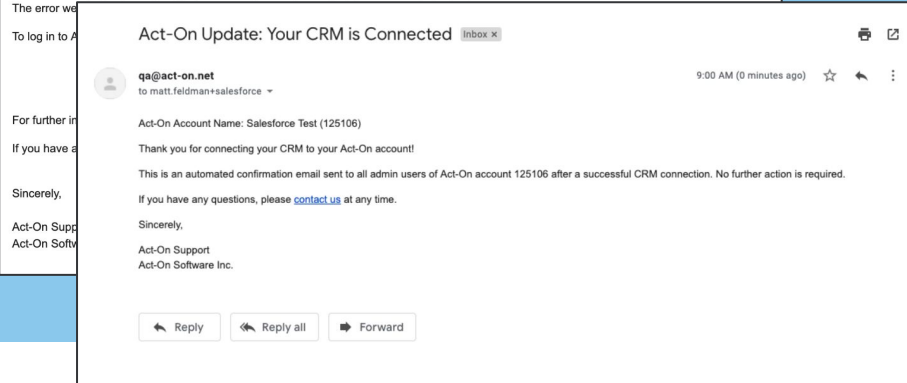
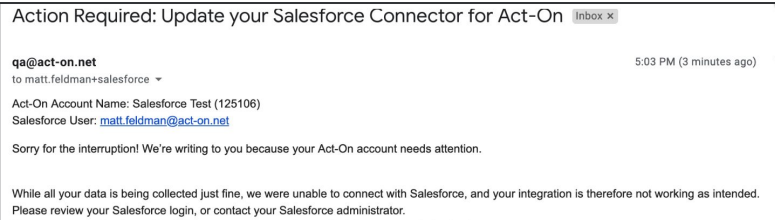
1 hour sync interval available for Marketing Lists

CRM connection error notification



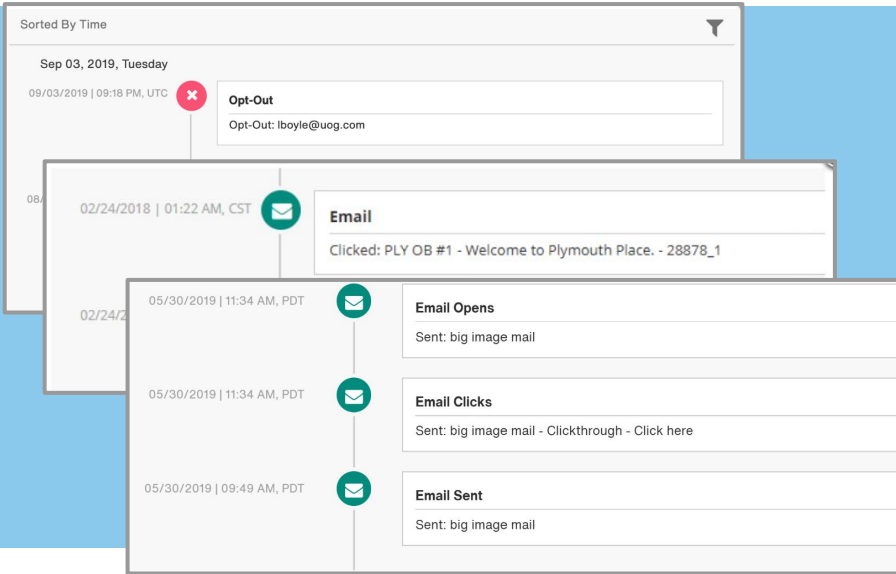
An error message banner is displayed when a CRM connector is disconnected

CRM connector status emails



Notification when a CRM connector is disconnected
Confirmation when a CRM connector is re-connected

Contact report improvements

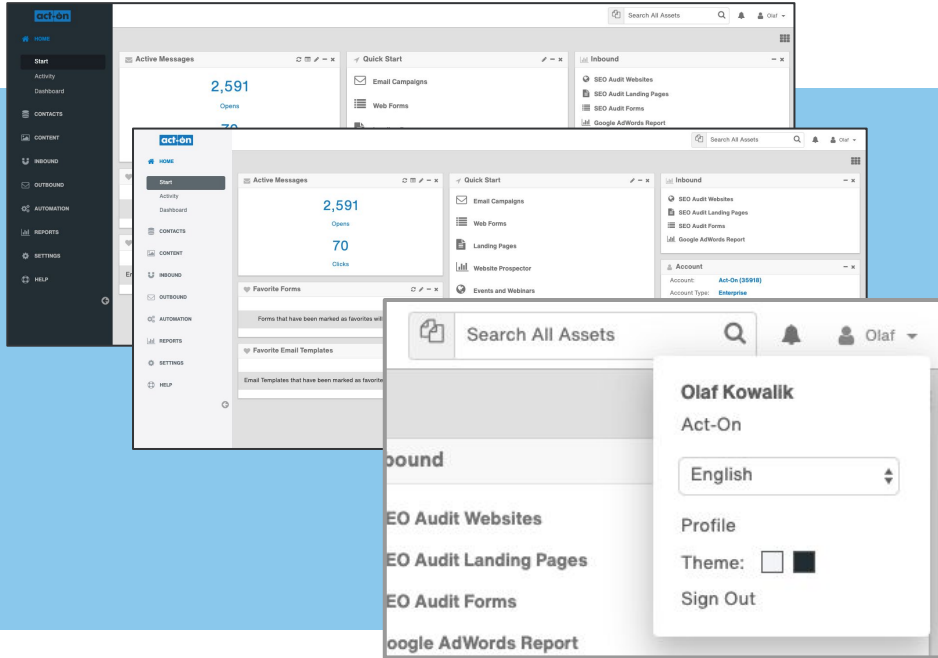


Show soft and hard bounces

Show media links for clicks

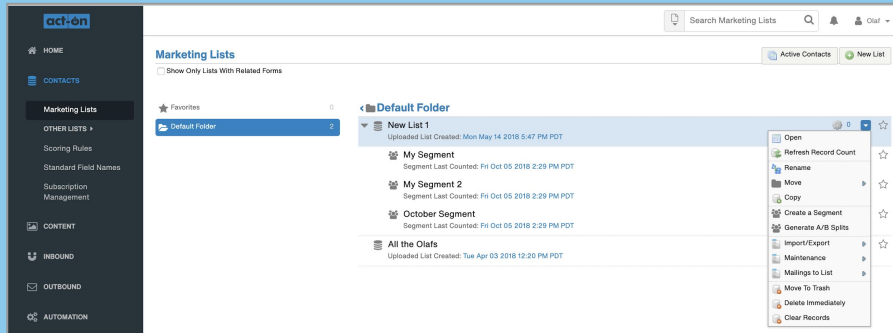
Filter timeline by email sent, email opened, email clicked actions

Left nav color picker



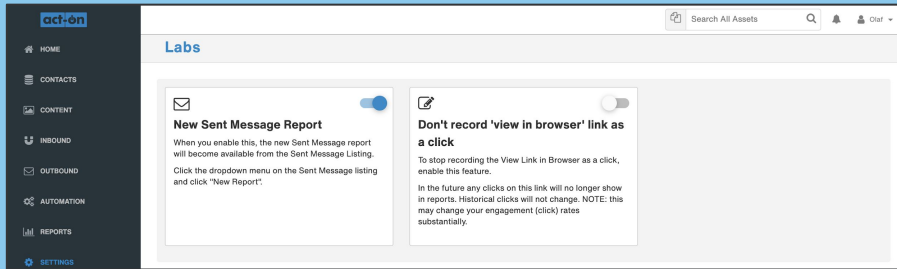
Select left nav bar color from Theme picker

Marketing List scrolling behavior



After working with a Marketing List, we'll bring you back to where you were

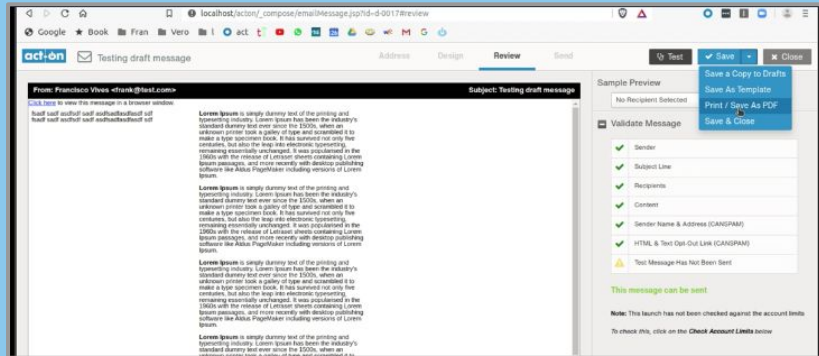
Don't count clicks on "View in Browser"



Optional setting available in Labs

Clicks on "View in Browser" link are not counted in email reports

Print/Save to PDF from the Email Composer



Print or Save to PDF option available in Review and Send tabs of Email Composer

Automatic and free SSL certificates

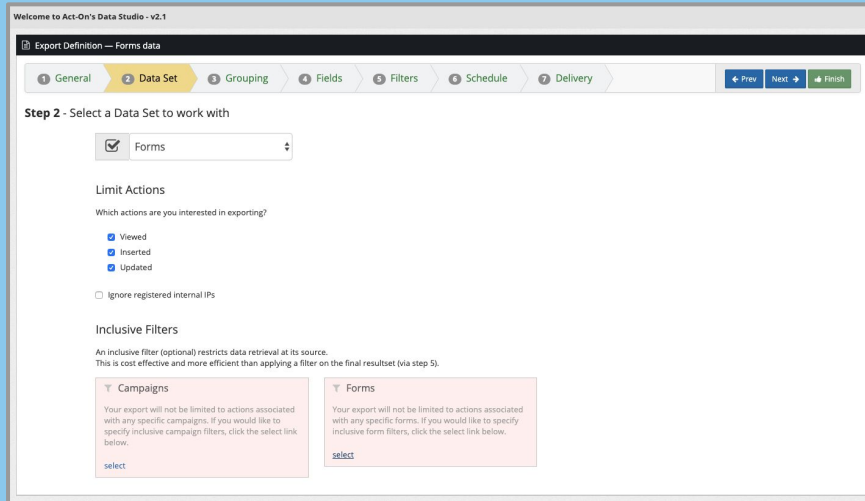


Automated SSL provisioning for new customers

Uses Let's Encrypt certificates

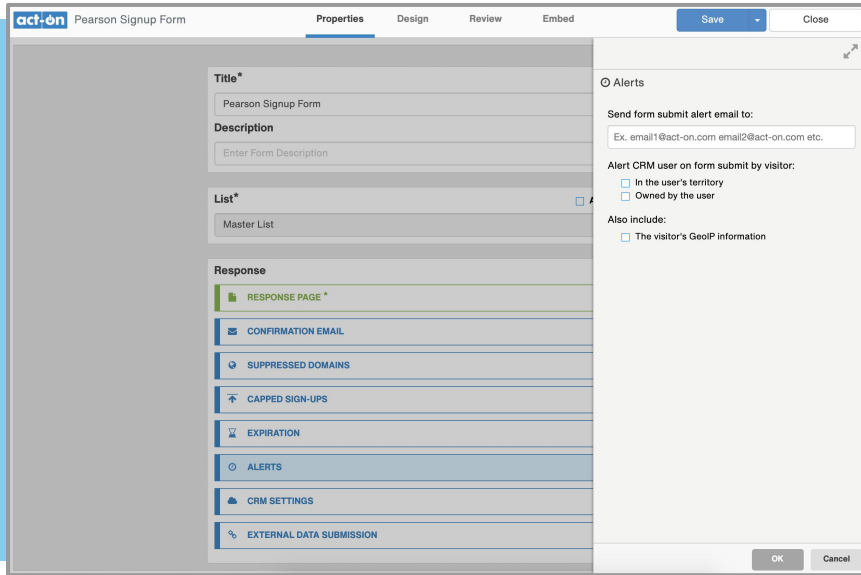
Automated renewals

New Forms data available in DataStudio



New Forms data available for export via DataStudio

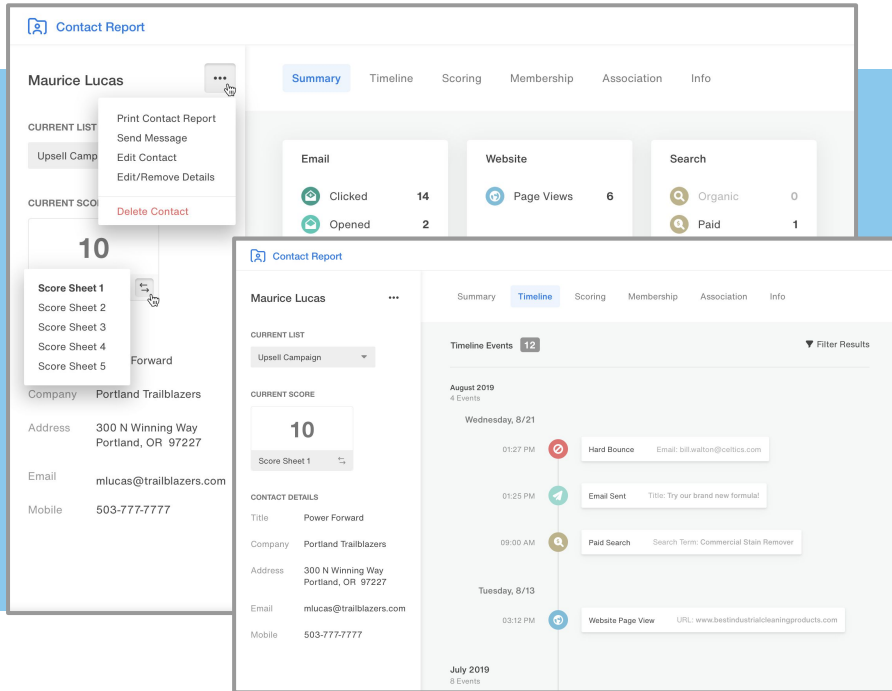
Multiple e-mail addresses in Form alerts field



The screenshot shows the 'act-on' form editor interface for a 'Pearson Signup Form'. The 'Properties' tab is active, and the 'Alerts' section is expanded. The 'Alerts' section includes a text field for 'Send form submit alert email to:' with the example 'Ex. email1@act-on.com email2@act-on.com etc.'. Below this is a section for 'Alert CRM user on form submit by visitor:' with two checkboxes: 'In the user's territory' and 'Owned by the user'. The 'Also include:' section has a checkbox for 'The visitor's GeoIP information'. The left sidebar shows a list of response actions, with 'ALERTS' selected.

Enter multiple e-mail addresses in Form Alerts field

Contact Report redesign



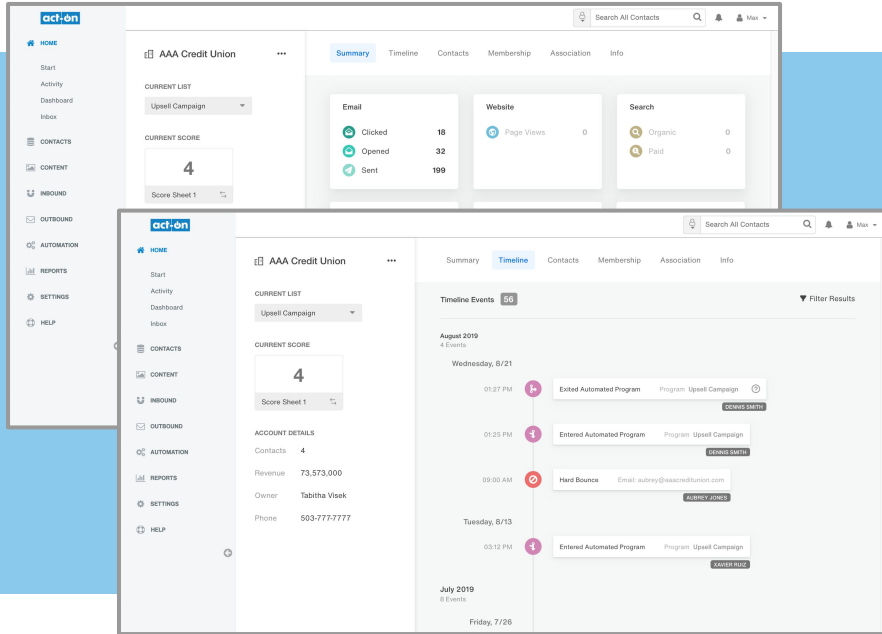
New UI

Detailed scoring view

Focused activity history

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Account report redesign

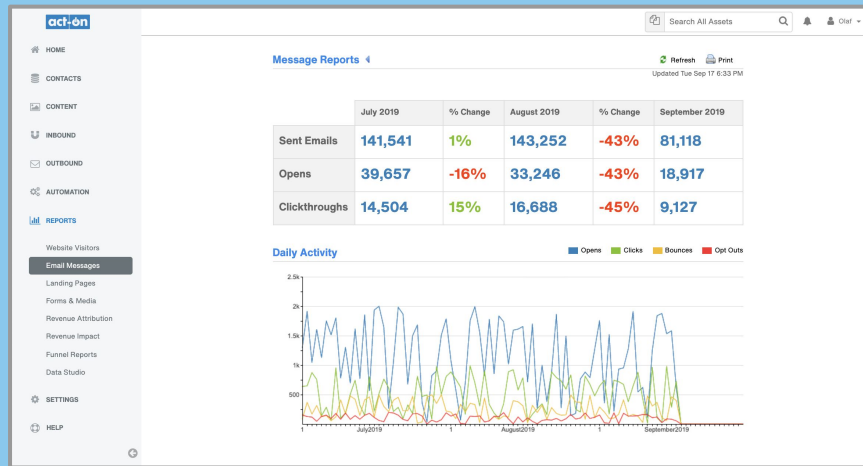


New UI

Detailed scoring view

Focused activity history

Email Report redesign



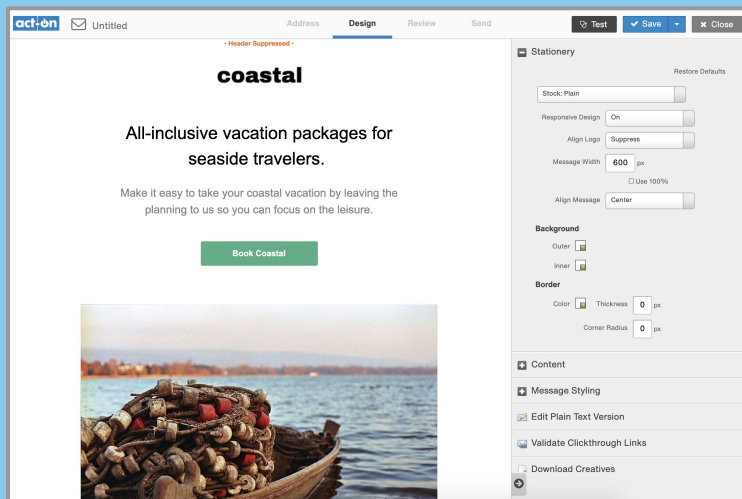
Upgrading charts

Adding interactive elements

Starting development in Q4

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Auto-save for composers



Auto-save feature

Email, Forms, Landing Page composers

Starting development in Q4



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Customer Feedback Programs

Customer feedback programs

Design Partner Program

- Participate in usability tests with Act-On Design Team
- Provide feedback on prototypes, design concepts, and software under testing
- Sign up at **design.act-on.com/dpp**

Early Access Program

- Participate in concept testing with the Act-On Product Management Team
- Provide feedback on product and feature concepts
- Sign up by sending email to **olaf.kowalik@act-on.com**



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Act-On Initiative feedback

Reporting

We'll be investing a lot in improving our reports.

Which metrics are most important to you?

What pain points do you have related to reporting?

Who uses DataStudio? How?

CRM connectors

How many of you
use one of our
native CRM
connectors
(salesforce,
Dynamics, Sugar,
Netsuite)?

*If you're not using a
CRM connector: do
you use an
unsupported CRM or
do you keep your
contacts elsewhere?*

Account Based Marketing

How many of you
use an Account
Based Marketing
strategy?

*Does it work for
your?*

*How do you
measure success?*

Other data sources

Does anyone use
third party data to
augment data in
Act-On?

*How do you use this
data?*

Channels

What channels
other than email,
web, and social do
you / your
customers / clients
use?

*Does anyone use /
want to use SMS?*

*Do you have an SMS
provider already?*

Automated Programs

Is anyone not using
Automated
Programs?

*What's the most
effective Automated
Program you've
created?*

Integrations

We review third party integrations on a regular basis.

Which integrations are missing for you?

Have you built any of your own integrations?

User experience consistency

There are several different user interface styles in Act-On.

We're planning on making the UI more consistent.

How does this issue relate in priority to your other needs?

Form attachments

Classic Forms supported file uploads. New Forms don't.

We're considering adding an attachment feature that would email attachments rather than store them.

Would that work well for you?

Event-based email

We're considering adding a feature that would allow for transactional emails to be initiated via API.

Do you have that need?

If so, how would you use it?

Act-On API

Do any of you use
our API?

*What use cases did
you implement?*

*Have you run into
any problems?*

Sub-folders and list sorting

Our top requested
feature is
sub-folders.

Also, list sorting is
quite popular.

*Where does this land
on your top request
list?*

*Any details you'd
like to add to this
request?*

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Act-On Anywhere

How many of your
teams use Act-On
Anywhere?

*What's been your
experience?*

Sales users

**How many Act-On
Sales users does
your company
have?**

*What feedback do
your sales teams
have on Act-On?*

Paid media

How many of you
use paid media in
your digital
campaigns?

*How do you manage
that today?*

*Would expect to
manage / integrate
that with Act-On?*



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Q&A

Feature Requests & Roadmap

What are we missing?

Data	Features / UX	Integrations	?
<ul style="list-style-type: none">• Reporting• Third party data	<ul style="list-style-type: none">• ABM• Automated Programs• Consistency• Form attachments• Event-Based Email• Sub-folders / lists• Sales use cases	<ul style="list-style-type: none">• Other channels (e.g., SMS)• API• CRMs• Act-On Anywhere• Paid media	<ul style="list-style-type: none">•

Up-vote in the Community

The screenshot shows the Act-On Connect interface. At the top, there's a navigation bar with the Act-On logo, the word 'CONNECT', and a user profile for Olaf Kowalik. Below the navigation bar, there's a search bar and a breadcrumb trail: Act-On Connect > Community > Product Idea Board. The main heading is 'Product Idea Board' with a 'New post' button. Below the heading, there are filters for 'Follow' (26) and 'Filter by status' (Sort by votes). The main content is a table of submissions:

Submission	Votes	Comments
Sorting of segments by name Anders Hermansson 4 months ago	26	0
Universal Contact Search (Across Marketing, Opt Outs, Hard Bounces, Soft Bounces) In Development Sara Theurer 4 months ago	21	1
Don't auto-scroll to top of Marketing Lists page Released Sara Theurer 4 months ago	14	1
Download an Email to Word or PDF Released Nic Babi 4 months ago	11	2

We review submissions each week.

Your vote counts!

The background of the slide is a photograph of a group of people in a meeting or workshop setting. They are seated around a table, some looking at laptops and others talking. The entire image is covered with a semi-transparent blue overlay. In the upper right background, a whiteboard with some text and diagrams is partially visible.

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Marketing Strategy

Understanding and Achieving the End Goal

Agenda

1.

2.

3.

4.

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We'll Cover...

01. Guiding Principles
02. Developing a Strategy
03. Building with Act-On

Marketing Automation: Where to Begin

STRATEGIC ROADMAP



1. Company's Strategic Initiatives
2. Measurable Marketing Objectives
3. Buyer Decision Making Journey
4. Target Persona Development
5. Content Strategy



MARKETING AUTOMATION STRATEGY



- Attract and Capture
- Build Stronger Engagements
- Ensure Alignment Between Sales and Marketing
- Track & Measure Campaign Metrics



PLATFORM

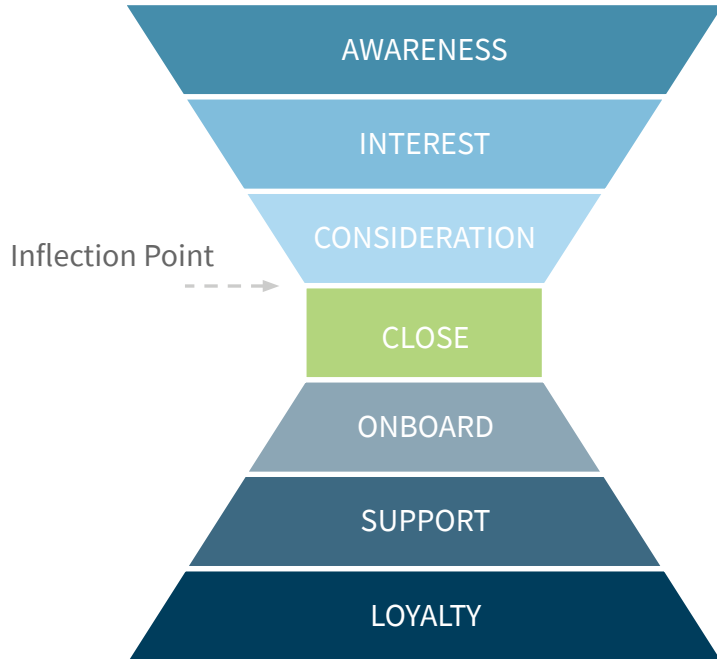




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Developing a Strategy

The Buyer's Journey & Measurable Objectives



Acquisition & Nurturing

- Increase acquisition by [xx]
- Increase prospect to lead conversions (xx)
- Deliver [xx] MQL to Sales



Financial Growth

- Track activity/lead to revenue
- Shorten time to Revenue
- Increase opportunity win rate



Customer Retention & Growth

- Track satisfaction levels (Net Promoter Score)
- Increase retention by [xx]
- Increase engagement by [xx]

Connecting Marketing and Sales



Addressable Market

- Do you have enough market share to reach your revenue goal?
- Is the market big enough to support revenue goal?



Prospect to Lead Engagement

- How many MQLs needed to convert to SQL?
- # of leads required in pipeline to reach MQL?
- Prospect to lead conversion to reach MQL?



Financial Growth

- Revenue Growth Target YOY/Where will it come from?
- How many opps are needed to close? /What is the current opp win rate?
- How many SQL do you need to convert to opps?

Create a Defined Audience

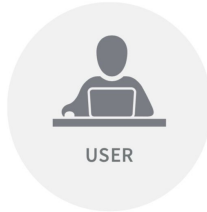
B2B:



The person who owns
the budget approval

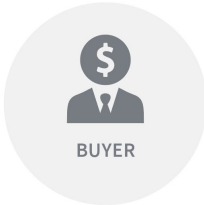


The person who
recommends the solution



The user or participant
of a product/service

B2C:



The person who owns
the budget approval



The person who
recommends the solution

The 3 Most Important Questions :

The Challenge

What problem does this person have
that will cause them to need you?

The Value Proposition

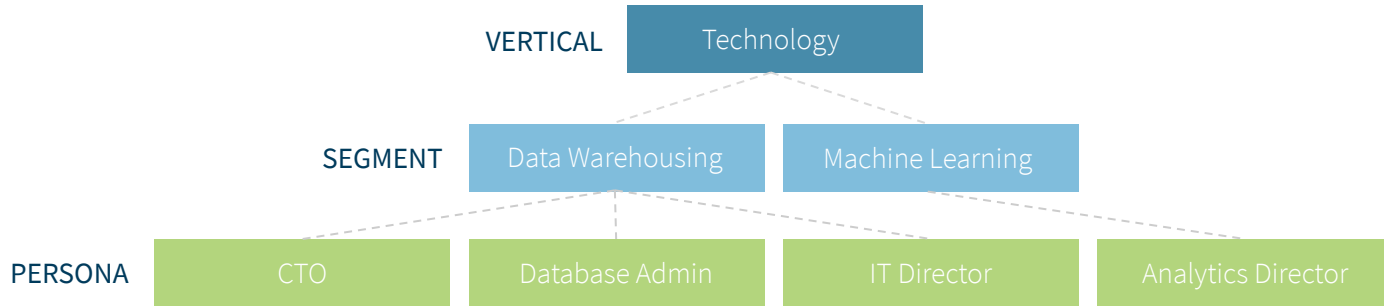
What value (solution) do I
provide to their problems

The Benefit

Why am I their best option?

B2B Target Market & Persona Development

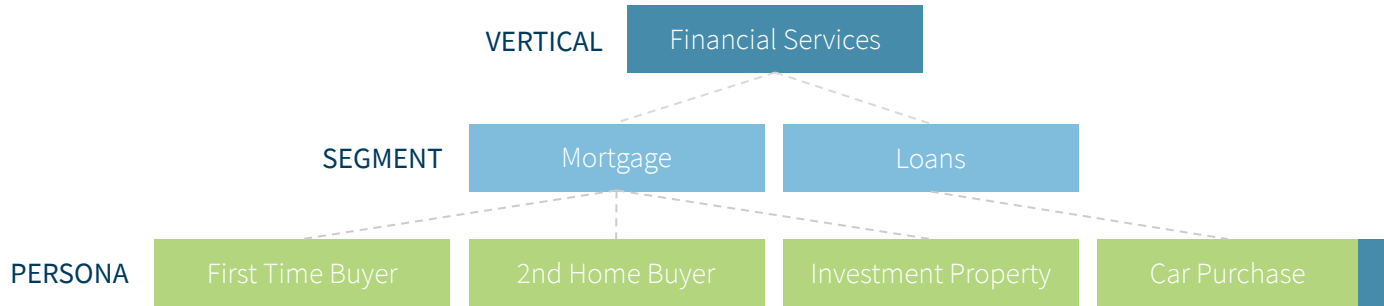
Though we are developing mass communications, the goal is to engage in “*person to person*” marketing and communication.



Defining the audience by who they are, and the specific interests and challenges that they have, is critical to success.

B2C Target Market & Persona Development

Though we are developing mass communications, the goal is to engage in “*person to person*” marketing and communication.



Defining the audience by who they are, and the specific interests and challenges that they have, is critical to success.

BREAKING DOWN THE FUNNEL

Building Engagement: Content Strategy



01

Position your brand as a thought leader as you address the audience's pain points and challenges.

02

Make the connection between industry topics, best practices, etc. and your brand — mixing thought leadership with subtle promotion.

03

Aid in evaluation. Content is designed for direct engagement and will speak to your organization's expertise, features, and benefits.

04

Provide critical info.
Address risks and close deal.

05

Welcome! On board, address what's needed for success. Over time prevent disruption that causes churn and continue thought leadership to instill deep engagement.

BREAKING DOWN THE FUNNEL

Strategic Marketing Roadmap





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Building with Act-On

Attract & Capture

Engage

Sales

Loyalty

Analytics

01

Lead Scoring

02

Segmentation

03

Nurturing

Customer Insights: Actionable Data

Merck And Co. Inc. Woodbridge, NJ United States	4	31 minutes ago
Rcs & Rds Business Bucuresti, Bucuresti Romania	11	34 minutes ago
Ovh Sas Paris, Paris France	1	an hour ago

Form Submit
OR
Email Click

Contact Report

Will Taylor

CURRENT SCORE

132

Default

Title
VP of Marketing

Company
Wells Fargo

Address
220 Apple Way Springfield, CA 98765

Email
wtaylor@actomatic.com

Mobile
555-789-4598

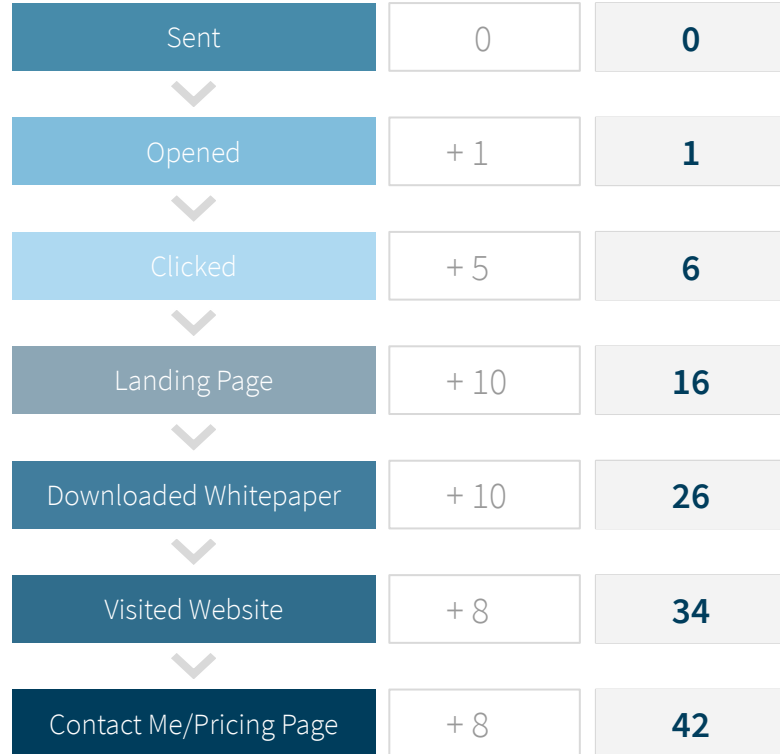
Summary | Timeline | Scoring | Info

Email <ul style="list-style-type: none">Clicked 5Opened 5Sent 17	Website <ul style="list-style-type: none">Page Views 2	Search <ul style="list-style-type: none">Organic 1Paid 0
Media <ul style="list-style-type: none">Downloads 1	Landing Pages <ul style="list-style-type: none">Page Visits 5	Social Media <ul style="list-style-type: none">Facebook 0Twitter 4LinkedIn 0
Webinars <ul style="list-style-type: none">Attended 0	Form <ul style="list-style-type: none">Submits 1	Custom Events <ul style="list-style-type: none">All

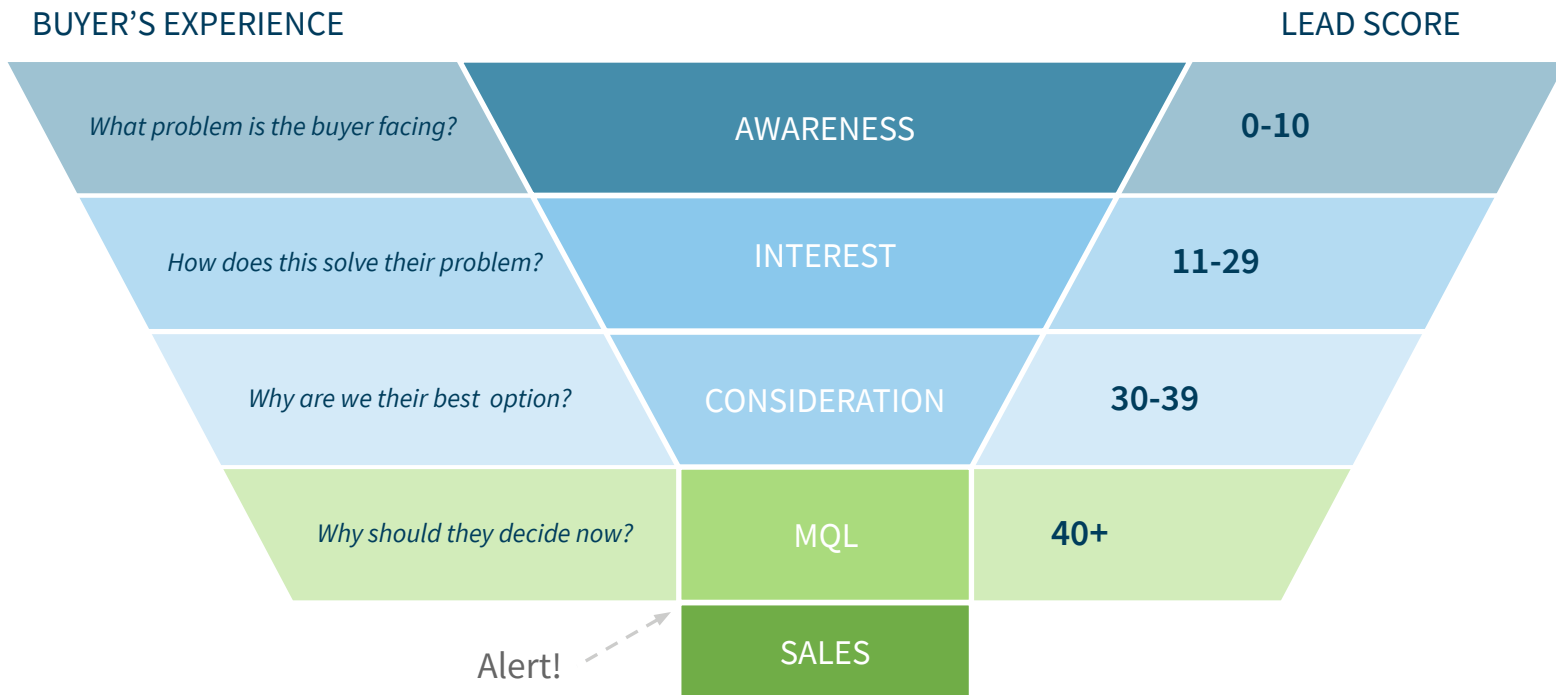
Nurture: Identify with Lead Scoring

Lead Scoring Values	
Sent a Message	0
Opened a message	1
Clicked on a message	5
*Viewed a form	0
Submitted a form	10
Downloaded media	5-20
*Visited a landing page	2
Visited a web page	8
Registered for a webinar	5
Attended a webinar	35
Clicked on an organic search listing	5-10
Clicked on a paid search ad	5-10

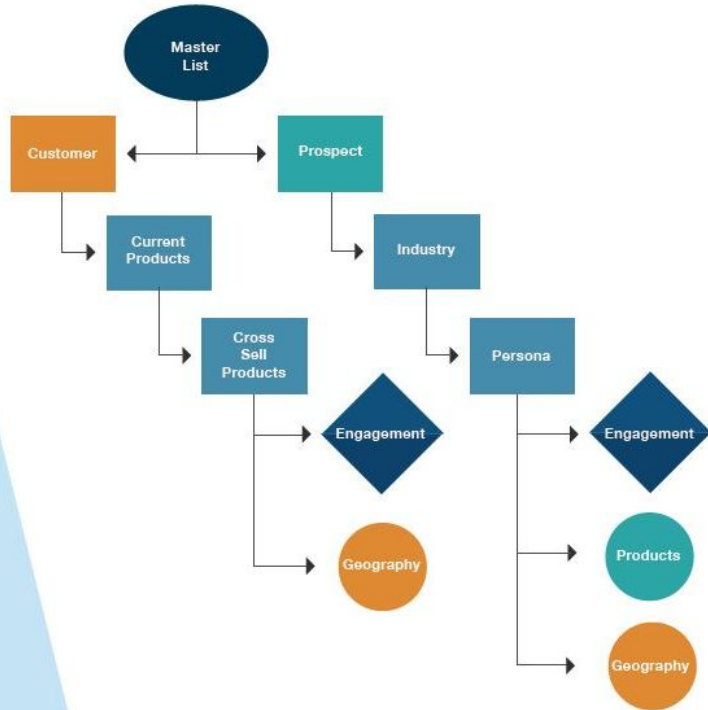
**Also has "Visited a web page" scoring applied.*



Pinpoint Hottest Prospects



Rule #1: Start with a Master List



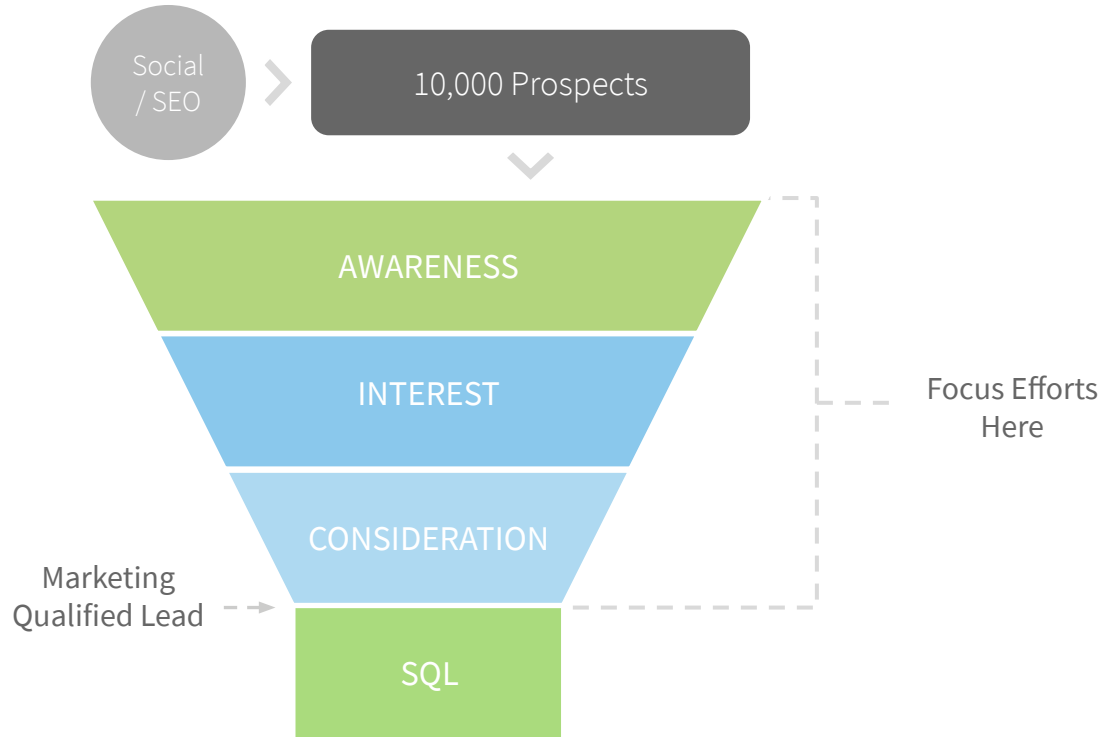
Grouping your contacts based on behavior and profile characteristics facilitates your nurturing efforts by providing direction about who you want to target and how.

GOAL: *Minimize manual efforts while maximizing nurture personalization*

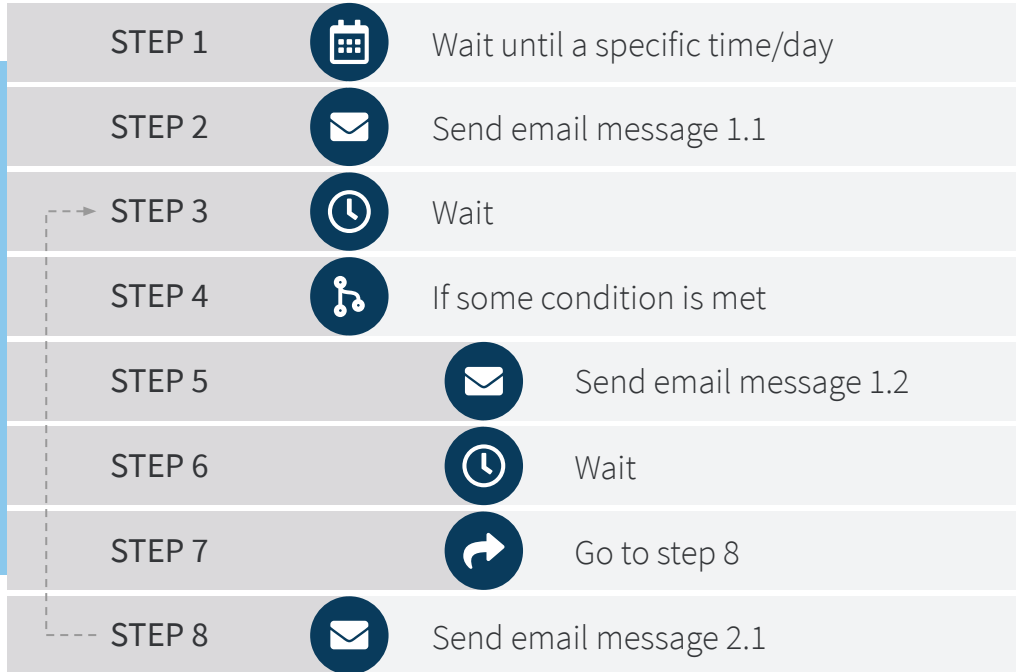
▼ 📄	2018 Training Master List	11,055
	<i>Uploaded List Created: Wed Oct 11 2017 10:55 AM PDT</i>	
▶ 👤	Customer	5,541
	<i>Segment Last Counted: Wed Oct 11 2017 10:56 AM PDT</i>	
▼ 👤	Prospects	5,514
	<i>Segment Last Counted: Wed Oct 11 2017 10:57 AM PDT</i>	
▼ 👤	Industry: Engineering	1,111
	<i>Segment Last Counted: Wed Oct 11 2017 11:04 AM PDT</i>	
▼ 👤	Engineering Persona: Decision Maker	439
	<i>Segment Last Counted: Wed Oct 11 2017 11:07 AM PDT</i>	
▶ 👤	EngDM Funnel Stage: Awareness	358
	<i>Segment Last Counted: Wed Oct 11 2017 11:37 AM PDT</i>	
▶ 👤	EngDM Funnel Stage: Interest	25
	<i>Segment Last Counted: Wed Oct 11 2017 11:38 AM PDT</i>	
▶ 👤	EngDM Funnel Stage: Consideration	38
	<i>Segment Last Counted: Wed Oct 11 2017 11:38 AM PDT</i>	
▶ 👤	EngDM Funnel Stage: MQL	18
	<i>Segment Last Counted: Wed Oct 11 2017 11:39 AM PDT</i>	
▶ 👤	Engineering Persona: Influencer	506
	<i>Segment Last Counted: Wed Oct 11 2017 11:08 AM PDT</i>	
▶ 👤	Engineering Persona: User	187
	<i>Segment Last Counted: Wed Oct 11 2017 11:08 AM PDT</i>	
▶ 👤	Industry: Manufacturing	1,116
	<i>Segment Last Counted: Wed Oct 11 2017 11:04 AM PDT</i>	
▶ 👤	Industry: Natural Resources	1,096
	<i>Segment Last Counted: Wed Oct 11 2017 11:05 AM PDT</i>	
▶ 👤	Industry: Services	1,097
	<i>Segment Last Counted: Wed Oct 11 2017 11:05 AM PDT</i>	

Nested Segments In Act-On

Automated Programs

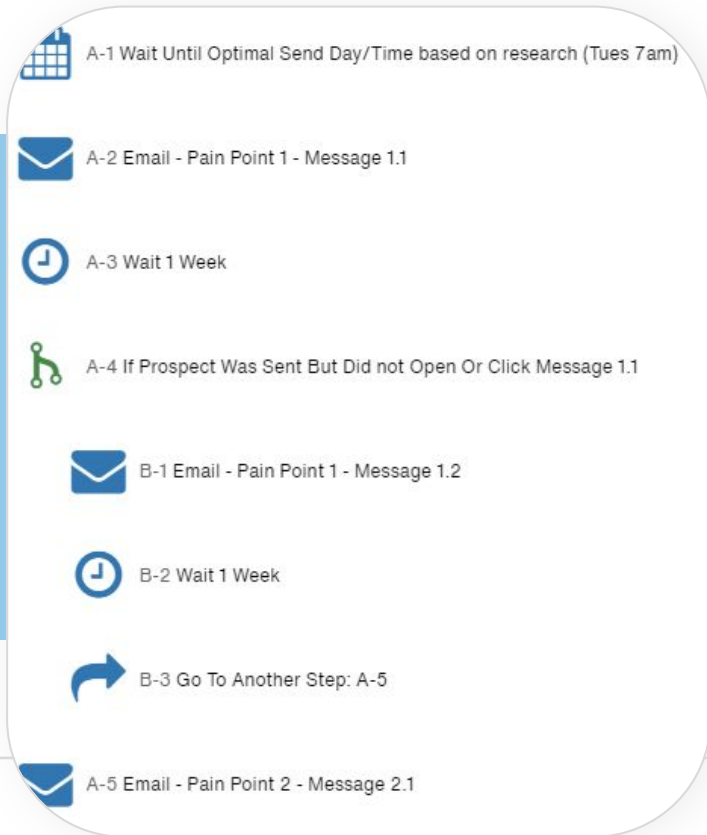


Example: Lead Nurturing Workflow



This simple workflow
can increase engagement
by up to 50%

Nurture: Automate with Programs



Top of Funnel: AWARENESS

Goal:

- Drive Engagement

Requires:

- 3-5 Messages

Problem-Oriented:

- 10 Tips
- 5 Ways to improve
- 32% of CEO's say...

Nurture: Automate with Programs



A-1 Wait Until A Weekday at 7AM



A-2 Email - Solution 1 - Message 1.1



A-3 Wait 1 Week



A-4 If Prospect Was Sent, But Did not Open Or Click Message 1.1



B-1 Email - Solution 1 - Message 1.2



B-2 Wait 1 Week



B-3 Go To Another Step: A-5



A-5 Email - Solution 2 - Message 2.1

Middle of Funnel: INTEREST

Goal:

- Nurture Prospects

Requires:

- 3-5 Messages

Solution-Oriented:

- Solutions to pain
- You have ABC problem
- We have XYZ solution

Nurture: Automate with Programs



A-1 Wait Until A Weekday at 7AM



A-2 Email - Differentiate 1 - Message 1.1



A-3 Wait 1 Week



A-4 If Prospect Was Sent, But Did not Open Or Click Message 1.1



B-1 Email - Differentiate 1 - Message 1.2



B-2 Wait 1 Week



B-3 Go To Another Step: A-5



A-5 Email - Differentiate 2 - Message 2.1

Bottom of Funnel: CONSIDERATION

Goal:

- Inform the Decision

Requires:

- 3-5 Messages

Difference-Oriented:

- Why choose us?
- Customer references
- Product offering
- Trial/Demo

Convert: Track MQLs



A-1 Send an Alert to Selected Users



A-2 Copy Qualified Leads to a new List



A-3 Send contact information through an API call



A-4 Create Leads in CRM



A-5 Exit the Program

Early Exit Conditions + Add

Marketing Qualified Leads
Send to CRM for Sales

Programs

- Create alerts
- Add to other lists
- Update Field
- Create in CRM
- Assign CRM Task

Which looks like this in Act-On

Program / Top of Funnel - Awareness (Lead Score 0-10)

General Settings Program Messages Lists & Segments **Program**

- A-1 Wait Until Tues 7am
- A-2 Send Email 1 Subject 1
- A-3 Wait 1 Week
- A-4 If no Clicks or Opens on Email 1 Subject 1
- B-1 Send Email 1 Subject 2
- B-2 Wait 1 Week
- B-3 Go To Send Email 2 Subject 1
- A-5 Send Email 2 Subject 1
- A-6 Wait 1 Week
- A-7 If no Clicks or Opens on Email 2 Subject 1
- C-1 Send Email 2 Subject 2
- C-2 Wait 1 Week
- C-3 Go To Send Email 3 Subject 1
- A-8 Send Email 3 Subject 1
- A-9 Wait 1 Week
- A-10 If no Clicks or Opens on Email 3 Subject 1
- D-1 Send Email 3 Subject 2

Program / Middle of Funnel - Interest (Lead Score 11-29)

General Settings Program Messages Lists & Segments **Program**

- A-1 Wait Until Optimal Send Day/Time based on research (Tues 7am)
- A-2 Send Email 1 Subject 1
- A-3 Wait 1 Week
- A-4 If no Clicks or Opens on Email 1 Subject 1
- B-1 Send Email 1 Subject 2
- B-2 Wait 1 Week
- B-3 Go To Send Email 2 Subject 1
- A-5 Send Email 2 Subject 1
- A-6 Wait 1 Week
- A-7 If no Clicks or Opens on Email 2 Subject 1
- C-1 Send Email 2 Subject 2
- C-2 Wait 1 Week
- C-3 Go To Send Email 3 Subject 1
- A-8 Send Email 3 Subject 1
- A-9 Wait 1 Week
- A-10 If no Clicks or Opens on Email 3 Subject 1
- D-1 Send Email 3 Subject 2

Program / Bottom of Funnel - Consideration (Lead Score 30-39)

General Settings Program Messages Lists & Segments **Program**

- A-1 Wait Until Optimal Send Day/Time based on research (Tues 7am)
- A-2 Send Email 1 Subject 1
- A-3 Wait 1 Week
- A-4 If no Clicks or Opens on Email 1 Subject 1
- B-1 Send Email 1 Subject 2
- B-2 Wait 1 Week
- B-3 Go To Send Email 2 Subject 1
- A-5 Send Email 2 Subject 1
- A-6 Wait 1 Week
- A-7 If no Clicks or Opens on Email 2 Subject 1
- C-1 Send Email 2 Subject 2
- C-2 Wait 1 Week
- C-3 Go To Send Email 3 Subject 1
- A-8 Send Email 3 Subject 1
- A-9 Wait 1 Week
- A-10 If no Clicks or Opens on Email 3 Subject 1
- D-1 Send Email 3 Subject 2

Program / Sales Qualified - Alert (Lead Score 40)

General Settings Program Messages Lists & Segments

- A-1 Send Alert to Sales
- A-2 Exit the Program

act-on USER GROUPS

Panel Discussion

#ActOnUserGroup