HOW TO FIND THE RIGHT MARKETING AUTOMATION SOFTWARE FOR DYNAMICS CRM

5 steps to ensure success

> " *Seamless native integration is the key to scaling your business in the long term.* "
> -Trio

> " *Though marketing automation tools promise reporting capabilities, marketers consistently cite this as a sore spot.* "
> - TrustRadius

STEP 01

FIND A NATIVE INTEGRATION

Act-On creates a closed-loop system using a native Dynamics 365 integration so you can analyze and measure marketing efforts and know exactly which campaigns are performing.

STEP 02

KNOW YOUR REPORTS

When connected with your CRM, Act-On offers unique revenue reports, including Marketing Funnel Reports, Revenue Attribution Reports, and Revenue Impact Reports, so you always know your ROI.

STEP 03

CHOOSE YOUR CUSTOMIZATIONS

In an Act-On and Dynamics CRM integration there is a data push to the CRM to add and update records and a data pull to update, add, and remove records in Act-On. There are several push/pull configurations so you can customize your data.

STEP 04

CUSTOMER SUPPORT

Act-On's support engineers and customer success specialists are available to collaborate with your team and investigate, educate, and resolve any topic.

STEP 05

LOOK FOR THE PROOF

Act-On has helped hundreds of customers integrate Act-On and Dynamics 365. Check out our case studies and testimonials from all industries, including technology, manufacturing, hospitality, and business services.

> " *70% of organizations see a direct connection between customer service and performance* "
> - Zendesk

> " *[Act-On's] integration within MS Dynamics has moved us into a proactive pipeline development program, understanding when and how our customers are leveraging our content (or not) and being able to identify great leads.* "
> - Mark K, G2

ABOUT ACT-ON SOFTWARE

Act-On Software is the world's growth marketing leader, offering solutions that empower marketers to move beyond the lead and engage targets at every step of the customer lifecycle. Act-On makes customer data actionable so marketers can strategize smart, effective solutions to grow their businesses and generate higher customer lifetime value – all with the fastest time-to-value.