

P2 Automation

www.p2automation.com



Challenges

- Each bank required uniquely branded emails be sent to their respective customers
- Replicating marketing efforts for dozens of banks was inefficient and time consuming

Solution

- Integrating ClickDimensions with the customer's existing Microsoft Dynamics CRM platform
- Releasing email marketing campaigns to the customer's customer from within the same marketing automation solution
- Customizing each email message dynamically with the company's logo and branding

Benefits

- Providing marketing messages that appear to be coming directly from the bank versus being generated by a third party
- Replicating the same campaigns seamlessly across multiple clients, each branded to the respective customers
- Sending customized, automated "what if" responses, down to the individual email

P2 Automation provides small and medium-sized businesses with turn-key automated business process and business productivity solutions based upon the latest cloud and desktop-based technologies, including Microsoft Dynamics CRM.

Exponential Customers

P2 Automation has a client that is a leading provider of back-office insurance solutions for banks nationwide. P2 Automation needed a way to seamlessly send out marketing emails on behalf of this software provider to customers of each of the banks that use their solution.

The challenge was that each communication needed to look like it was coming directly from the bank and not from a third party provider. While there are numerous email marketing solutions that can accomplish this task, those solutions would require each bank to have its own stand-alone program. When managing accounts for dozens of banks, that becomes a daunting, expensive and time-consuming task.

P2 Automation sought a solution that could deliver email marketing on behalf of multiple end-user customers without the need for managing multiple programs.

Seamless Integration

P2 Automation recommended ClickDimensions to this software developer as the perfect solution to meet their need to deliver personalized email for each of their many customers. Since they were already using Microsoft Dynamics CRM to manage their client information, adding ClickDimensions as a marketing automation solution made perfect sense. ClickDimensions is fully embedded inside Microsoft Dynamics CRM, which meant that the client could manage their entire marketing automation process right from within their familiar CRM platform.

P2 Automation's client was able to design a marketing campaign, construct it in CRM using ClickDimensions, and simultaneously release email marketing messages on behalf of dozens of banks to thousands of each bank's respective customers – all customized with the banks' individual logos and branding. The client was able to develop multiple campaigns efficiently and cost-effectively, executing the same model for all of their bank customers



“The end user doesn’t realize that they are using two different products; ClickDimensions and Microsoft Dynamics CRM are so tightly integrated.”

Steve Pestillo
CEO & Owner
P2 Automation

within one marketing automation solution.

“With ClickDimensions, we can make the logo, the text, the ‘from’ address, the subject line, the toll-free number, the website that shows up, all variable depending on the recipient,” explains Steve Pestillo, P2 Automation’s chief executive officer.

In addition, P2 Automation was able to further customize their client’s marketing programs by including “what if” scenarios. For example, if a bank’s customer responded “yes” to an offer, they automatically received a follow-up email based on that response. When another customer responded “no,” they received a different email, again directly linked to their response and customized with that specific bank’s branding.

Banking on ClickDimensions

P2 Automation’s recommendation, customization and installation of ClickDimensions resulted in a tremendous expansion of marketing services available to this software developer’s banking clients. Armed with this ability to customize marketing programs down to the response level – and fully automate the process – meant they could easily outshine and outperform their competition when presenting marketing services to banking clients.

“While there are a number of technology and software choices on the market, the key is finding the right one that will offer the best solution for a client’s needs,” says Pestillo. In this case, the combination of Microsoft Dynamics CRM and ClickDimensions enabled P2 Automation to provide their client with a turnkey solution that utilized existing CRM software that the management team and employees were already familiar with, expediting the adaption of these business tools into their work environment.



Visit www.clickdimensions.com to learn more about how our solutions can help your organization.