

Marketing Services that Drive Results

Inside

Getting Started	3
Digital Marketing 101 Fundamentals	5
Digital Marketing 201 Advanced Initiatives	6
Customer Advocacy & Engagement Programs	7
Level-Up Skillsets with Customized Training	8
Migration Services	9
Data Services	9

*“As an owner of a business with a limited marketing budget, I engaged with the ClickDimensions Marketing Services team and can honestly say it has been the best investment I could have made with my marketing dollars. **We have seen full ROI in just four months.**”*

I was hesitant to make this move because of the initial expense but it's been an outstanding service that has already paid for itself. I'm extremely excited to see where we are at the end of the first year.”

**- Walter Silin, Owner & CEO
The Bauen Group**



Getting Started

ClickDimensions Onboarding services are designed for new customers using our software for the first time, or when a new module has been added to an existing license subscription. We take a consultative approach, understanding each customer’s desired business outcomes, as we walk through all necessary steps for a solid start to successful digital marketing.

Onboarding | Technical Installation & Training \$3,500

Our digital marketing specialists walk new customers through a comprehensive project plan to ensure a smooth installation and technical configuration experience, which is designed to optimize the investment in ClickDimensions software so immediate business value is realized. These technical consultants have deep domain expertise, applying marketing-specific context to configuration options, which ensures high email deliverability, prevents unintentional black-listing and bounce-back consequences, and incorporates leading best practices. This two-pronged program covers both technical and training elements to ensure success:

- We walk you through a step-by-step sequence covering all the essential security, web domain and Dynamics settings so you’ll be assured of high email deliverability and flow-through of critical data to your CRM.
- We provide a curated set of online training modules in the ClickDimensions Academy, relevant blog posts and other support resources. During your first four weeks, you have access to schedule 1:1 live sessions with our dedicated trainers at your convenience to apply the knowledge learned from training modules directly in your ClickDimensions instance. Based on the marketing goals you’ve identified, these 1:1 training sessions will focus on the specific features you can apply immediately to put your programs in action. Our team is also happy to review your marketing assets to suggest adjustments based on industry best practices.

Marketing Success Accelerator \$8,999

Do you have aggressive growth goals and multiple marketing initiatives to support, but struggling with implementing new software while still managing current day-to-day responsibilities? Our accelerator program is a proven methodology for jump-starting your marketing success, so you can drive quantifiable results from your marketing programs.

Working together directly in your instance, our digital marketing trainers will walk you through the build process, so you receive hands-on practice while learning the fundamentals of subscription management. Then together we build an additional workstream of your choice, aligned to your marketing goals – email marketing, demand generation or a new customer welcome cadence. We’ll record and send you these 1:1 training sessions, so you can review or share with new hires whenever a refresher is needed. You’ll finish this engagement with customized workflows and dashboards, feeling motivated and confident in implementing tactics such as:

- Send automated campaigns to segmented lists
- Use customer profile data for smarter emails
- Interpret dashboards that visualize KPIs and quantify clear results
- Demonstrate systemic data and privacy compliance
- Measure quantifiable impact

Getting Started

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We understand that demonstrating quick wins is key to any successful software implementation. This accelerator plan is perfect for teams who need help nailing a high-profile project such as a major campaign, and might be battling time constraints, operating with limited resources or missing skill sets yet still eager to quantify marketing's contribution to the business. Our mission is to walk you through the whole process step-by-step while we do the work on your behalf, giving you the independence and confidence to build successful campaigns on your own going forward. You will also receive a specific dashboard and best practices on how to monitor metrics to optimize performance going forward.

Social Marketing Installation & Training..... \$700 (one-time)

We work hand-in-hand with new social marketing customers for essential setup steps. We'll confirm the correct configurations for CRM/ClickDimensions which include the Social CNAME (also requires DNS setup) and the ClickDimensions Domain record.

Social Onboarding starts with the Social Kick-Off call which includes a walkthrough of navigation, functionality, and setup steps. We review how to connect Social Profiles, User Management, setting up and using Social Campaigns, Intelligent Scheduling/ the Autoposter, The Media Library, Streams, Content Creation, Analytics/Reports, Conversion Tracking, etc. Your Technical Consultant will check in weekly to ensure all setup steps have been completed and that you are using all applicable features before the end of the Social Onboarding period. Additional follow-up calls can be scheduled during the one-month period when needed.

Intelligent Dashboards Implementation & Training \$700 (one-time)

Are you looking for insights to answer the puzzling "Why?" questions?

- Why is this channel outperforming others?
- Why is a certain program delivering substandard results?

Configuration is simple, and includes any external data sources used, with confirmation that customer data has successfully been loaded and prepared. These dashboards are designed for an intuitive, user-friendly experience, but comprehensive training is provided. We'll guide new users through the dozen+ dashboards available and recommended best practices for optimal use. Introductory webinars and demonstration are conducted, followed by access to schedule 1:1 sessions for up to 3 weeks from purchase date so any customer-specific questions can be addressed.

Digital Marketing 101 | Fundamentals

When you're getting started with digital marketing, it's critical to start with a good foundation. Master the best practices first, which is the key to successful marketing programs.

Subscription Management

A fundamental premise for successful digital engagement is delivering the right message to the right audience, which is made easier when you have a solid subscription management program in place. Learn how to segment your contacts so you send the most relevant, timely content to the appropriate recipients. We create and execute a customized subscription management strategy, including building any required assets and importing preferences from your previous marketing vendor.

Email Marketing Fundamentals

Do you have aggressive growth goals and multiple marketing initiatives to support, but struggling with In our digital-first world, email remains the most popular communication platform for effective engagement of customers and prospects. ClickDimensions will build well-designed email templates to ensure that your corporate styling is applied to every email going forward.

- We'll show you how to configure a custom-branded drag-and-drop template for speedy replication of reusable sections, incorporate personalized components, with consistent logo placement, headers and footers for a professional, on-brand appearance.
- We'll configure for responsive design, using tested layouts that render appropriately on any device your customer uses, including PC, mobile or tablet.
- We'll conduct A/B split testing, send emails, configure an email dashboard for you and report on performance.

The Power of 10 Hours

We perform a comprehensive diagnostic platform health check of your ClickDimensions instance. Drawing on their experience managing thousands of customers, our eagle-eyed marketing specialists are trained to zone in on outliers and anomalies that drag down performance. We deliver a results-oriented action plan and execution support to drive higher email deliverability and open rates, minimize opt-outs and bounce-backs and optimize your existing campaign automations for improved performance.

Digital Marketing 201 | Advanced Initiatives

Ideal for teams eager to increase time to value with “just in time” marketing services resources. If bandwidth or skill constraints are suppressing your results, augment your marketing team’s productivity by leveraging our specialized resources and improving effectiveness with hands-on customized training.

Welcome New Member Program

Ideal for membership associations, non-profit organizations or any business with a steady stream of new customers. Establish an automated welcome and onboarding experience so new members quickly become engaged participants. Gather relevant info on new members to establish a personalized onboarding and communications experience.

Demand Generation Program

A robust pipeline is the lifeblood of any thriving business. We help you build the demand generation infrastructure to keep qualified leads flowing to your sales team. Capture and quickly act on digital interactions that indicate a prospect’s interest in your business, with real-time alerts to sales so they can convert more successfully.

Event Management Program

Virtual and in-person events are the heart of many marketing calendars, and can take a herculean effort to execute professionally. Our marketing specialists will consult on your event strategy, then build the email templates you need for pre-, post- and even SMS messages for mid-event communications. Using campaign automation workflows to remind contacts to register and attend frees up precious time so you can concentrate on delivering a great attendee experience. We’ll segment attendees from non-attendees to conduct a post-event survey, making sure they receive relevant content and stay engaged well after the event concludes.

SMS/Text Communications Program

An SMS marketing campaign offers infinite opportunities for delivering your company’s message to your customers through mass texting. When it comes to sending SMS messages to your customers, we advise on and execute subscription management strategy for this channel and send text messages. This program also includes a report on performance to make sure you get the most out of this valuable communications channel.

Customer Advocacy & Engagement Programs

Surveys that Serve up Results

There's a reason surveys feature prominently in the savvy marketer's playbook – is there a more cost-effective way to drive customer engagement and conduct invaluable primary research all at the same time? Rely on our experts to build the survey in alignment with your program goals, design the email templates to promote your survey and the follow-up confirmation communications, supporting social posts, and the campaign automation workflow to execute the entire sequence seamlessly. Coupled with 1:1 training session so you can confidently develop and deploy surveys in your future programs.

Refer a Friend Promotion

Personal referrals are widely acknowledged as the most credible and valuable source of new customers, often outperforming even the best documented case study. We combine custom-designed refer-a-friend email templates along with the all-important social share email footer and corresponding social posts, and bring it together with the campaign automation workflow to execute the entire sequence seamlessly.

A review and refresh (if needed) of your subscription management strategy ensures new respondents are properly opted in and enrolled in appropriate subscription and marketing lists aligned with your program goals. Coupled with a 1:1 training session so you can confidently launch new referral programs as you expand your product line, enter new markets, or embark on other growth initiatives.

Birthday & Other Significant Client Dates

Extending a personal touch to your clients doesn't have to be difficult or time-consuming. Acknowledging important dates such as your client's birthday, anniversary or even an upcoming regional holiday are great ways to stay engaged and assure your clients they are top of mind throughout the year.

Level-Up Skillsets with Customized Training

Is your company ready for the “Great Resignation”? If you feel like everyone around you is giving their two-weeks notice, you’re not alone. A Microsoft study found that 41% of the global workforce would consider leaving their current employer within the next year. According to the US Labor Department, Americans quit their jobs at a record pace for the second straight month in September 2021, and job openings are close to an all-time high. This dynamic is echoed in economies around the world.

Just hired a talented team member that doesn’t have experience with ClickDimensions?

For new colleagues who may need help getting up to speed, we’ll make sure they understand how to leverage the essential platform features to cover email marketing basics, other useful functionalities along with best practices.

If you face this challenge, let’s set up an customized training! Based on your business objectives, together we’ll define the priority training elements for your team. We’ll make sure they understand how to leverage the most important platform features to support your specific marketing program goal.

ClickDimensions Product-Specific Training \$2,100

Based on your business objectives, we define together which are the most priority topics for your team. Our experienced trainers will deliver 5 hours of 1:1 online live sessions. We’ll record and send you these training sessions, so you can review or share with new hires whenever a refresher is needed.

No commitment is required. Hours must be used within 90 days of contract. Overage rate \$175/hr. The content is coupled with a curated syllabus of online training modules in our ClickDimensions Academy, and relevant blog posts and other support resources.

Migration Services

For customers migrating to ClickDimensions from HubSpot and MailChimp, our marketing operations specialists lead a comprehensive project plan to ensure critical data, subscription and marketing lists are replicated intact. We rebuild your subscription management, webforms, gated content workflows and other campaign automations as needed to ensure a smooth transition and minimize hiccups in your marketing programs.

Count on our Marketing Services team to streamline your migration process so you can make a stress-free shift to your new platform.

Data Services

Stymied by data-related disruptions and anomalies, but not clear about where to start? It's one thing to understand the causal relationship between dirty data and its drag on marketing campaigns, but knowing how to nip it in the bud is a fine art.

Clean & Activate Data for Maximum Marketing Impact..... \$5,000

Our data gurus help you quickly get to the root of customer data issues, and develop a prescriptive, achievable roadmap to get you on the right path towards data maturity. The three core data entities in Dynamics 365 Sales are lead, contact and account. By focusing on the depth and quality of these data elements, quantifiable improvements in your communications and engagement programs can be achieved.

We conduct a rigorous review of your current data in Dynamics CRM, zeroing in on duplicates, blank, incomplete or orphaned records. We'll teach you up-to-date best practices for data cleansing relevant for both Dynamics and ClickDimensions, including how to establish a recurring internal data audit, defining a data retention policy that aligns with your business operations, enhancing incomplete data, and consolidating duplicate data.

Ideal for teams with the objective of reducing the financial waste that dirty data can cause. Make the first move to tackle data decay and help your company make better business decisions!

ClickDimensions has helped hundreds of clients design and implement marketing programs that drive measurable results.

For more information on how our Marketing Services team can help you get the most value from your ClickDimensions software [contact us today!](#)

