ZOOMIO
gain and retain customers

ZOOMIO Connector for Microsoft Dynamics® CRM 3.0

ZOOMIO Connector for Microsoft Dynamics 3.0 enables companies to leverage the advantages of CRM combined with multi-channel marketing. The primary advantage is the ability to more quickly and easily generate qualified sales leads by automatically converting campaign responses into CRM Activities that are assigned to CRM users in real time.

The ZOOMIO Connector (version 3.3) lets you maximize your CRM investment. Whether your objective is simplified mass communication using email marketing or lead generation using CRM Activities, the connector provide an easy-to-use solution that closes the loop between sales and marketing.

Key Capabilities

- Easy execution of email marketing
- Response tracking for emails, web forms, telemarketing scripts, landing pages, and SMS
- Generate CRM Activities from campaign responses
- Record and view campaign responses in Contact and Lead history
- Generate CRM lists using campaign responses
- Easy installation and use
- Flexible configuration options

Generate hot sales leads in real-time

Using the combined solution, you are able to specify one or a combination of campaign responses that generate hot leads. For example, a web form wherein a submitted response is “ready to buy” immediately generates a Phone Call CRM Activity that can be assigned to a specific CRM user. In the same way, campaign responses such as email open, email link click as well as answers to telemarketing questions can immediately generate a CRM Activity so that a sales person can take instant action.

Better sales follow up with targeted lists

Campaign responses such as email open and link click can be used to generate targeted lists in MS CRM. These lists can be used for CRM purposes as well as for campaigns executed using ZOOMIO Campaigner and Easy Campaigner. For example a CRM user can generate a CRM list based on all emails opened in a specific campaign or a list of all email clicks for a given period.

Email marketing and trigger-based campaigns

The combined solution lets you execute email campaigns that can be created using a variety of ZOOMIO campaigning tools. This makes it easy for marketing users to create highly professional emails and web forms. Email campaigns can be created, tested and executed in minutes.

For even more targeted campaigns, ZOOMIO campaigning tools can be used to design and execute trigger-based campaigns that are fully integrated with Microsoft Dynamics CRM.

Generate qualified leads using multichannel marketing

Easy to install and configure

The ZOOMIO Connector runs as a Microsoft Windows service and can be installed and ready to use in less than an hour. The Connector Manager enables the CRM administrator to control a variety of parameters, such as which types of campaign responses to transfer to CRM as well as field mapping and behavior.