Marketing & Distribution

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Glenn Crawford, Rebecca Dohrn

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April 2021 - ILTCIconf.org

Using Data to Enhance Sales and Secure Customer Relationships

Agenda

- Introductions
- Level Set on CRM, IoT, AI, & Big Data
- Using Data and CRM Processes for Efficiency
- Using Data and CRM Processes for Efficacy
- Building Bridges to Predictive Analytics & Targeted Prospecting

Let’s Level Set

CRM IoT

AI BIG DATA

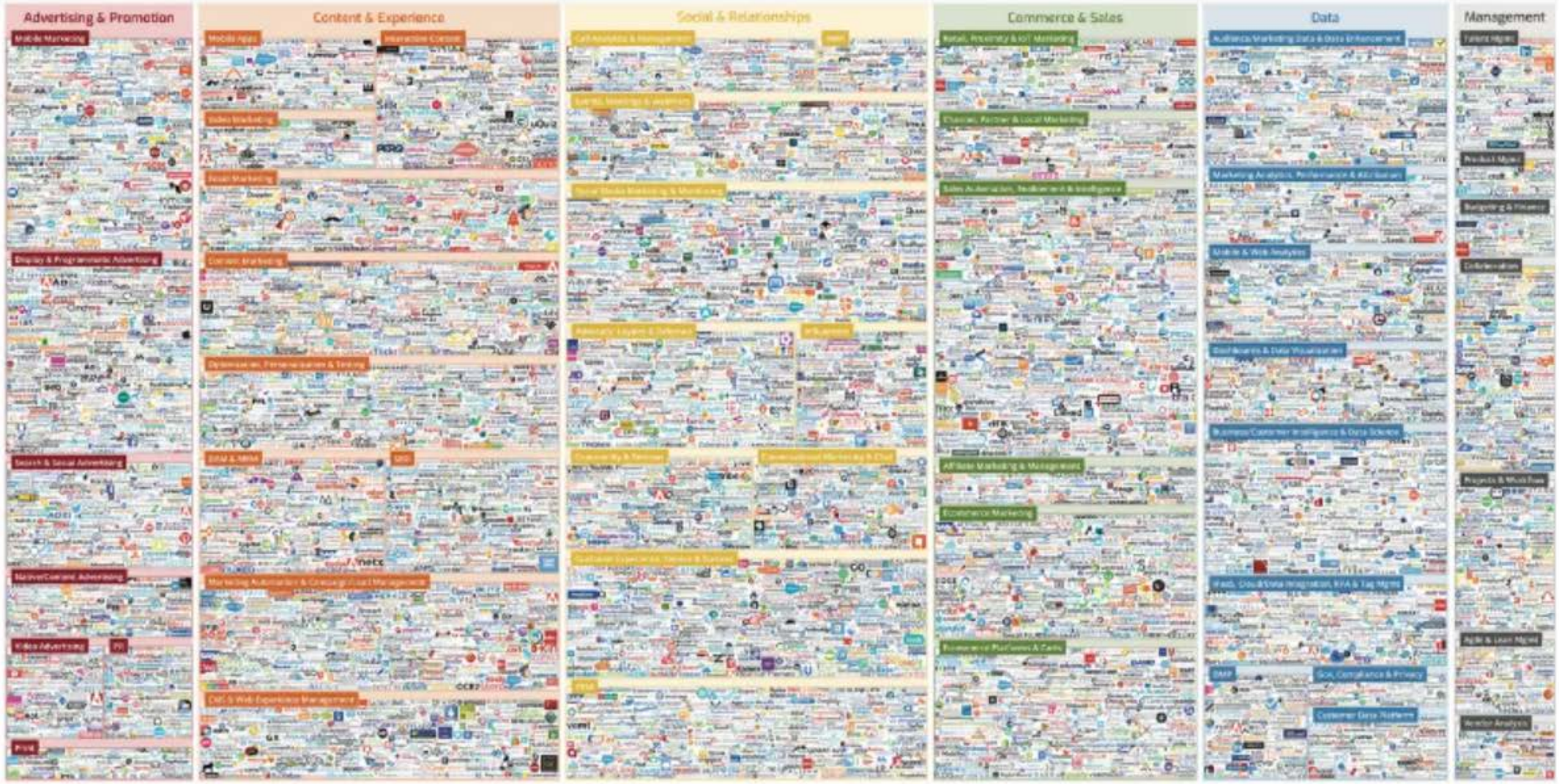
CRM

- Structured data
- Data integrity
- Data hygiene

acrolinx

Customer-Centric MarTech Stack (the 5 C's)

MarTech Stack


Advertising & Promotion
Content & Experience
Social & Relationships
Commerce & Sales
Data
Management

Hi, Suzanne

Customer since 2006

Recommendations for you

Your Orders

Grocery & Gourmet Food

Recently viewed

Buy it again from Fresh

"Alexa, play today's hits."

Shop Bose QC 35 II with Alexa

SIENNA

Create New Moments

Start a Prime Video Watch Party - and get an Amazon credit, compliments of Toyota

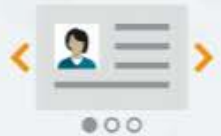
Structured Data Sources

Invoices and receipts

Sensor data

Online forms

Spreadsheets



CRM profiles

Unstructured Data Sources

Social media content

Emails

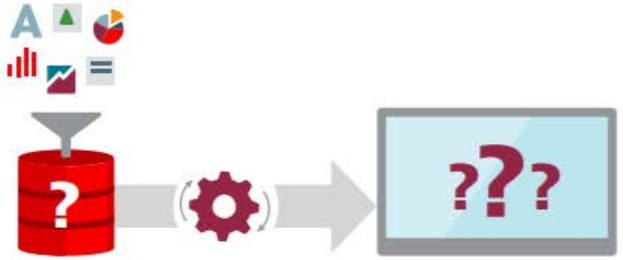
Podcasts

Security footage

Transcripts

DATA LAKES IN USE

Data comes from many types of sources. In fact, businesses rarely come to a data-driven decision with just one source. Instead, it takes numerous inputs, and much of that can be unstructured.



Data Lakes place these all in a single repository, saving **time**, **effort**, and **cost**

5

Average number of data sources consulted to reach a data-driven decision

80%

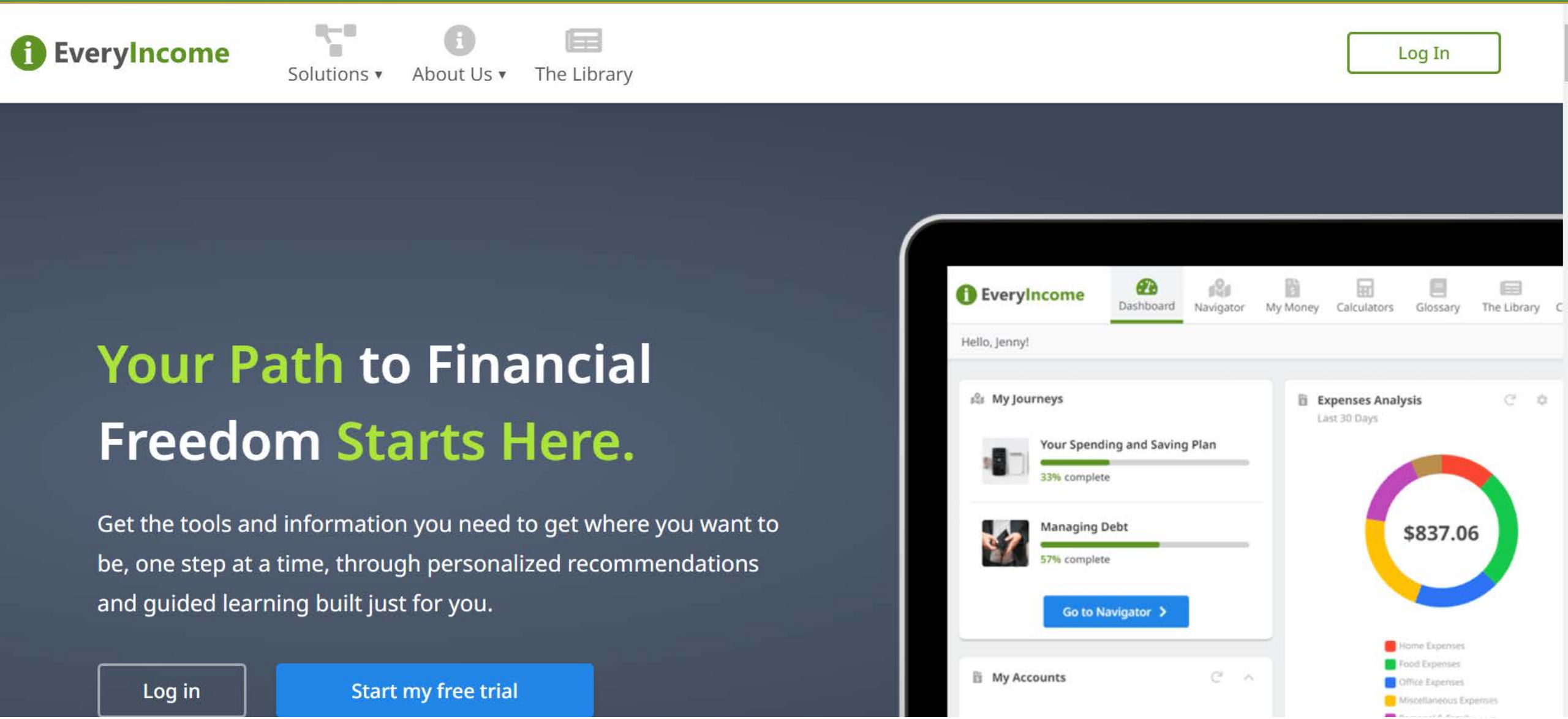
Amount of data that is unstructured and incapable of being handled by a data warehouse

(original source IDC)

Today's Consumer: IoT

Data-Driven Lead Generation

Lead Generation for FAs



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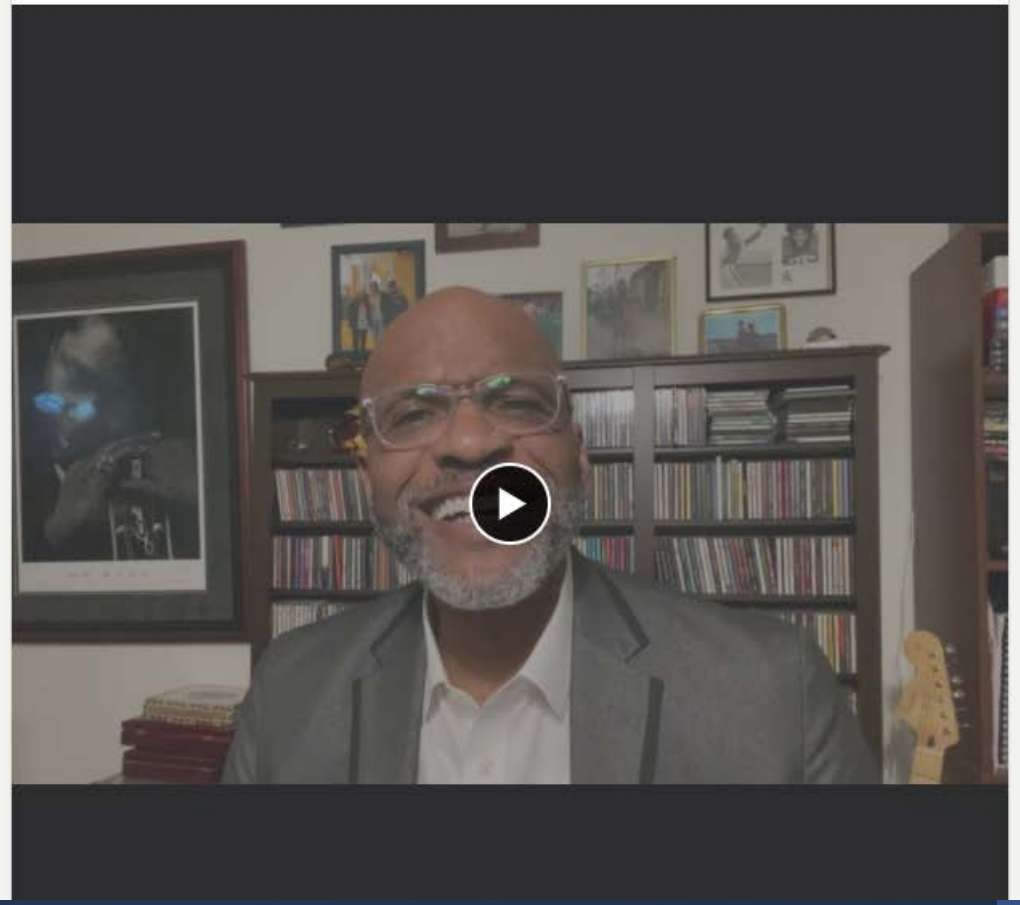
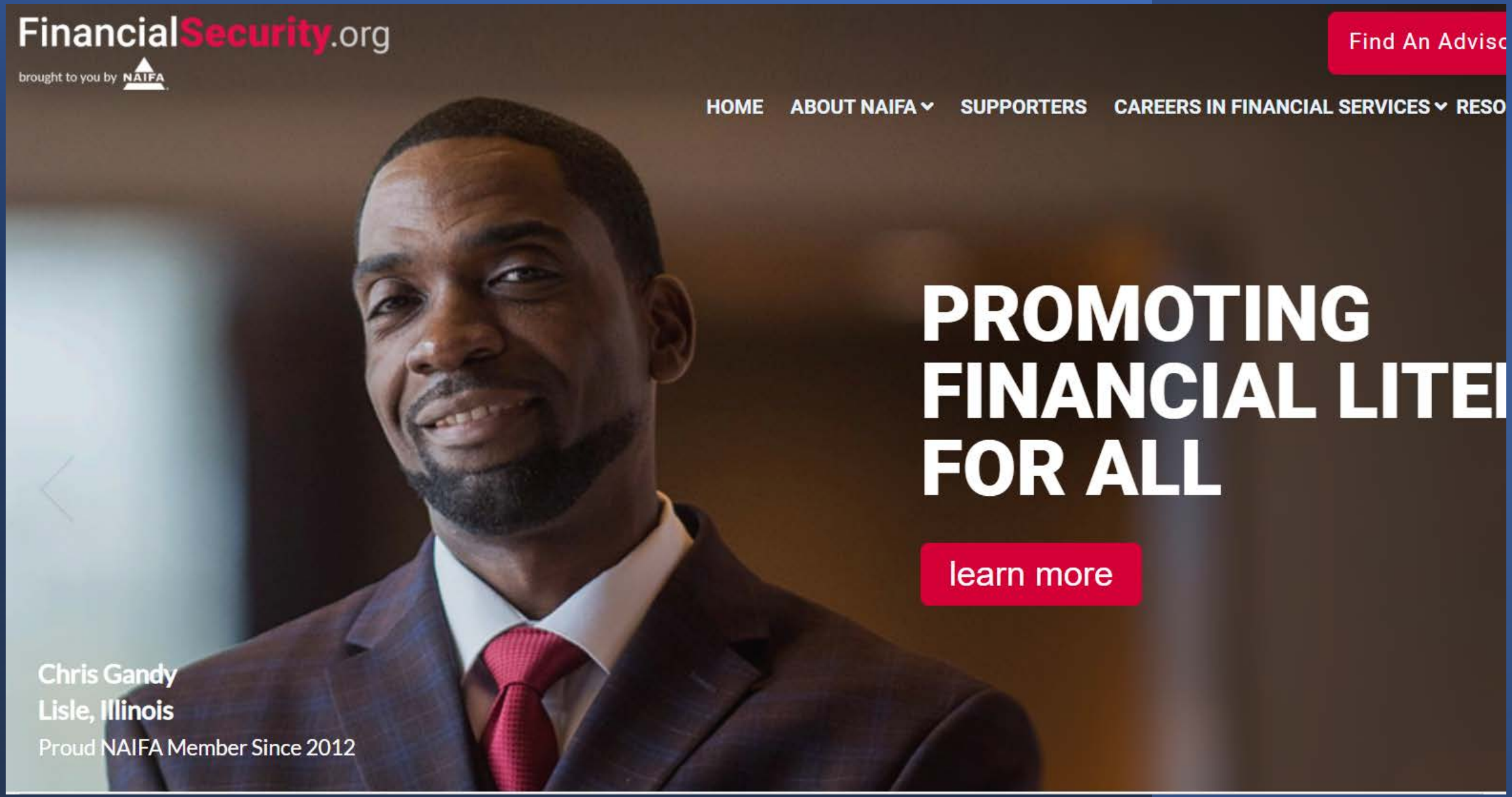
Happy Wisdom Wednesday - The Crawford Coach Approach

How Football is like a Sound Financial Game Plan? ...see more

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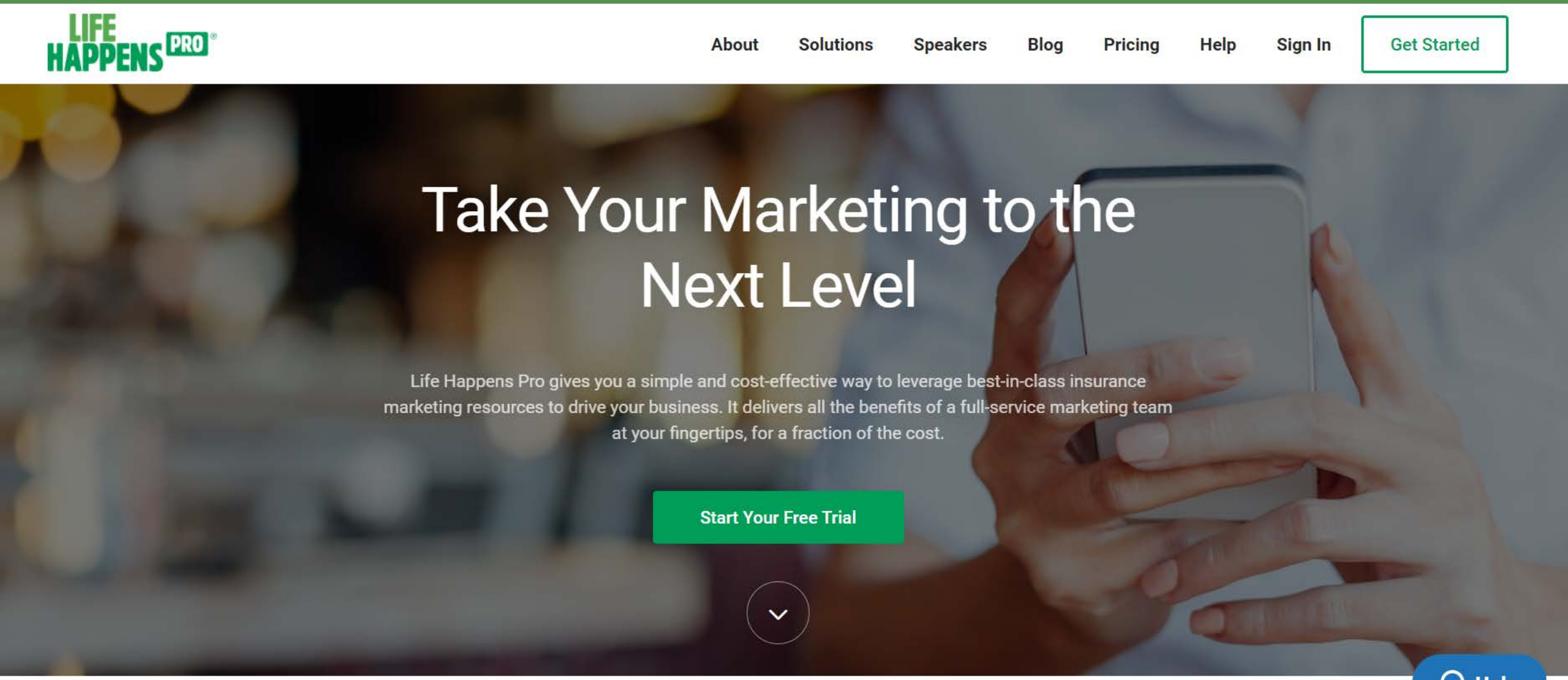
Using Data for Efficiency

Automation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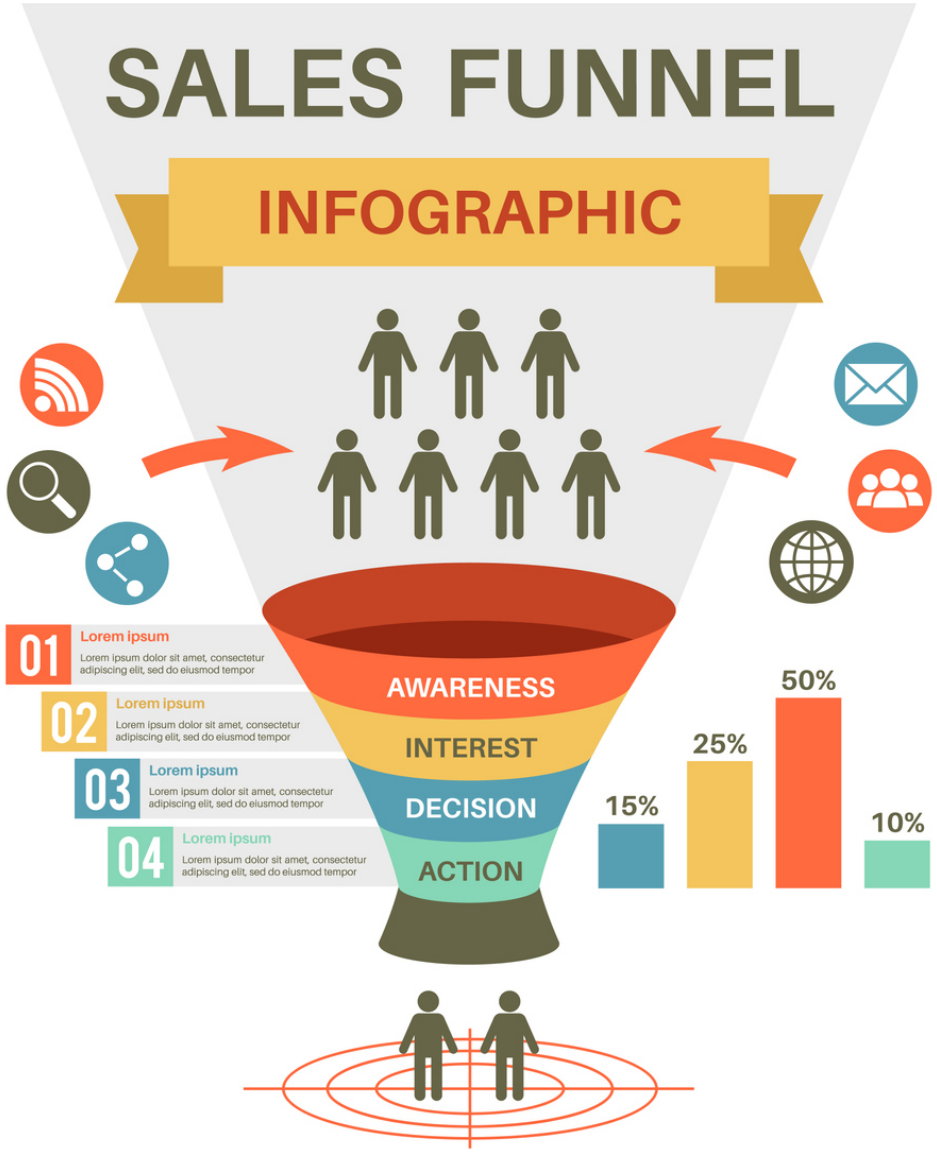
SALES FUNNEL
INFOGRAPHIC
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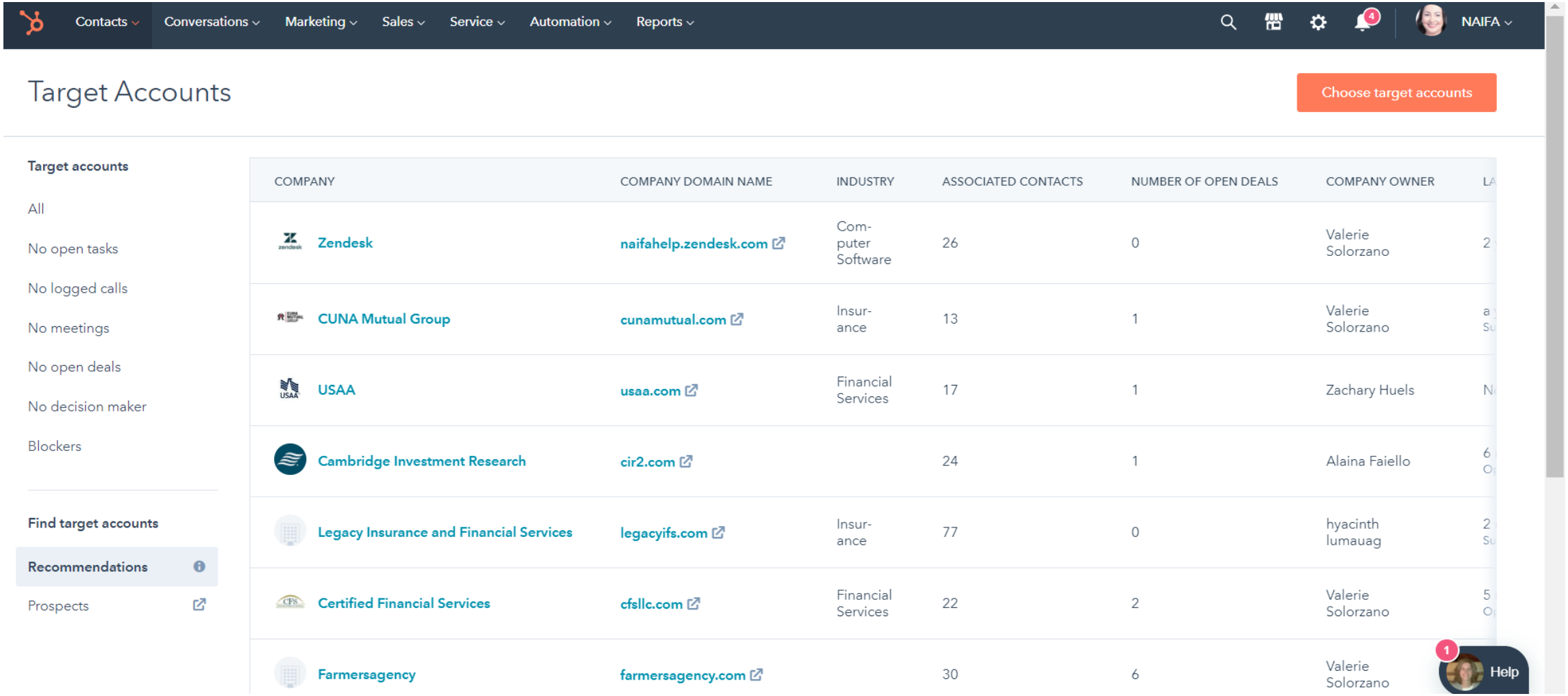
AWARENESS
INTEREST
DECISION
ACTION
15%
25%
50%
10%


Contacts
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Automation
Reports
NAIFA
Target Accounts
Choose target accounts
Target accounts
All
No open tasks
No logged calls
No meetings
No open deals
No decision maker
Blockers
Find target accounts
Recommendations
Prospects
COMPANY
COMPANY DOMAIN NAME
INDUSTRY
ASSOCIATED CONTACTS
NUMBER OF OPEN DEALS
COMPANY OWNER
Zendesk
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Com-puter Software
26
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How Will We Use Data for Maximizing Time to the Right Audience with the Right Ask?

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