

# Unlock Marketing Source Data in Microsoft Dynamics

Match data captured from lead generation activity such as web forms, phone calls and live chat with sales data in Microsoft Dynamics to gain end-to-end visibility of the buyer's journey.





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## Who are we?

Ruler Analytics is a visitor level multi-touch marketing attribution product for forms, phone calls and live chat, evidencing every step a visitor makes in their journey and matching revenue back to the source.

By automatically integrating with your CRM, analytics and other products, Ruler 'closes the loop' between leads and revenue. Ruler Analytics call tracking and multi-touch marketing attribution technology enables organisations to attribute revenue to their marketing activity and understand the steps customers make in the decision making process.

By closing the loop between sales revenue and marketing activity, Ruler's platform provides a single point of truth to identify which campaigns are driving revenue, allowing organisations to make meaningful decisions to optimise marketing spend. With 1,000+ integrations with the world's leading applications, Ruler Analytics can sync data back to Google Analytics, your CRM or paid media solutions to give insight where you need it most.



[NEXT]



# What is Microsoft Dynamics?

Microsoft Dynamics has been the CRM of choice for many medium to enterprise organizations and offers a comprehensive list of customer management and reporting tools that allows businesses to streamline and maintain internal operations. It's a one-stop solution for all departments, including sales, marketing, finance and HR.

Dynamics was built by Microsoft for maximum flexibility and extensibility, allowing teams to track prospective leads, set up and maintain automated campaigns, and measure the performance of various lead generation strategies across different channels.



**"The CRM can help increase sales by up to 29%, sales productivity by up to 34% and sales forecast accuracy by 42%."**

Source: Salesforce





# Limitations of Microsoft Dynamics for marketers

Microsoft Dynamics has gone through major changes over the last two decades, evolving into a sophisticated system covering enterprise resource planning, customer relationship management and several other business solutions.

More marketers are taking advantage of Microsoft Dynamics to deliver relevant, engaging and valued experiences to new and existing audiences. However, many aren't using the functionality to its full potential for several reasons.

**" Only 43% of CRM users take advantage of less than half of the features their software has to offer. "**

Source: Salesflare





## 1. Lead Source fields are too broad

Though very handy to have, the Lead Source values available in Microsoft Dynamics aren't very specific. For example, Microsoft Dynamics will typically combine all digital activity under the category “Web”.

As a result, leads are created, but no one knows where they came from as marketing and sales teams struggle to pinpoint the specific digital channels that are driving leads and opportunities into the CRM system.

## 2. Dynamics marketing is expensive and complex

Microsoft Dynamics does provide a list of comprehensive marketing features such as customer journey experiences, multichannel campaigns, email automation, lead and event management, but they all come at a price.

These solutions are not available as part of a predetermined plan. Starting from \$1,920 per tenant/month, Microsoft Dynamics is one of the most expensive solutions for marketing automation. To add injury to insult, it's not very transparent about the cost of its customisation.

## 3. Missing data to connect online leads with offline events

While Microsoft Dynamics does a good job of tracking direct mail and events, it does lack the functionality to match lead generation activity such as phone calls and live chat conversations with marketing source data and sales revenue out-of-the-box.

It's for that reason why many marketers fail to evidence which digital marketing channels lead to the most valuable sales offline.



# Why reporting on leads isn't enough

Marketing attribution, or more specifically, revenue attribution, is how marketers understand the role each channel and campaign plays in pushing a website visitor down the marketing funnel.

**Nurturing new leads can take a village**  
(and a whole load of content).

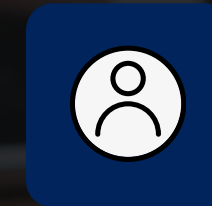
Whether that's PPC ads, social content, email campaigns, SEO blogs, as a marketer, you've got your work cut out to try and understand how each piece of content works to stimulate a conversion.

Have a think about what you currently report on...

## Current vanity metrics:



Clicks



Follower numbers

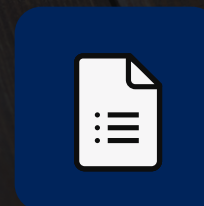


Impressions



Open rates

## Lead Generation metrics:



Volume of form submissions



Clicks to call

When reporting, vanity metrics and lead gen metrics are a great start, but they only tell you so much.

Whether you're analysing campaign performance, looking at ad set performance, or comparing marketing teams, there's only one metric that matters...

**REVENUE**





## Why is revenue the best metric?

Tracking leads in tools like Google Analytics is essential as it can provide an opportunity for improvement, but ultimately, revenue is the most important metric for businesses.

Previously, lead volume was an acceptable way of measuring your performance when sales, marketing and success teams sat in silos, divided by different goals, processes and systems. But, by focusing on lead quantity over quality means you're misguided, as a result, end up focusing on the wrong activities that fail to generate any value.

Take your sales team for example, they won't be reporting on the number of calls they fielded alone. They'll be reporting on how many calls they had, how many converted into sales, and how much revenue that equates to.

“

**Inbound marketing  
budgets are cut 12%  
more for companies that  
don't calculate ROI**

”

Source: Marketo



# Why marketing should report on revenue

Marketing and sales are two cogs in a machine. They don't have an easy way to bridge the data gap.

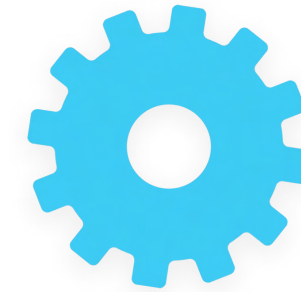
You know that marketing impacts sales, but you can't prove it. And even worse, you can't see which channels and campaigns are working best.

**Revenue attribution is the missing piece.**

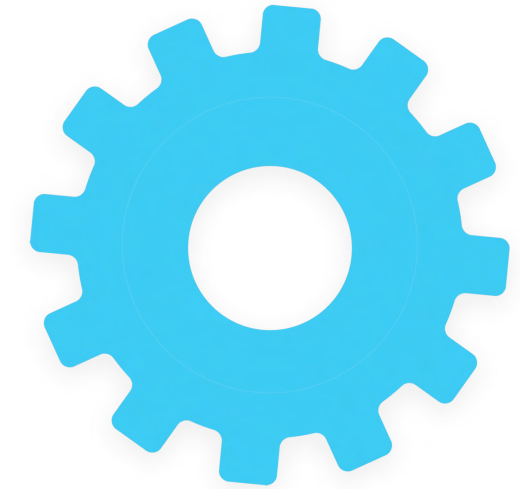
By having revenue data assigned to each and every lead in MS Dynamics, and all of that data being sent to your GA dashboard, you can start to understand what's working.

From there, the gears start turning. Revenue attribution provides you key data to grow and optimise your marketing, which in turn affects sales.

## Without Revenue

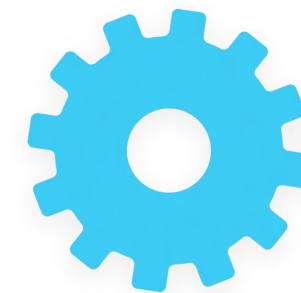


Marketing

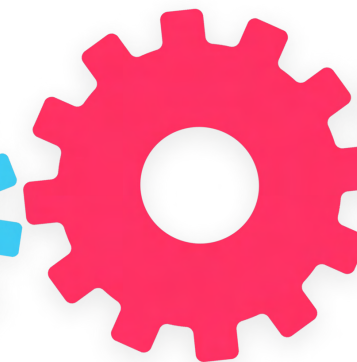


Sales

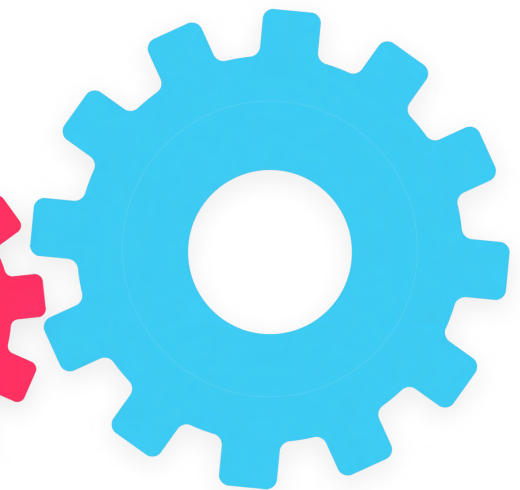
## With Revenue



Marketing



Revenue



Sales



"

**87% of sales and marketing leaders say collaboration between sales and marketing enables critical business growth.**

"

Source: LinkedIn 2020



## Why marketers struggle to measure by revenue

A lot of marketers miss out measuring with revenue because they:

- Generate leads that sit in Microsoft Dynamics for sales to pick up
- Operate with a long sales cycle with many touch-points

And so, these marketers can't measure all of their marketing efforts with one metric. Instead, reports become fragmented. Reports segment into channels with their own individual metrics.

Or reports highlight the potential of marketing alone.

For those who don't have the luxury of a purely eCommerce website, data is lost at the point a user becomes a lead. The data is passed over to the CRM and the marketer loses all sight of it.

Marketing attribution allows you to rectify that.





# How can marketers supercharge Microsoft Dynamics?

To get the most out of your marketing and conversion data, you need to ensure that all decision-makers have timely access to the same multi-channel data, as this will allow them to make credible business decisions based on reliable insight.

By using marketing attribution tools like Ruler, you can unlock more data and justify the effectiveness of your marketing, which can:

**01**

**Capture all interactions throughout an individual customer journey.**

**02**

**Integrate with MS Dynamics along with other data sources, such as Google Analytics and Google Ads to gain complete visibility of the conversion path.**

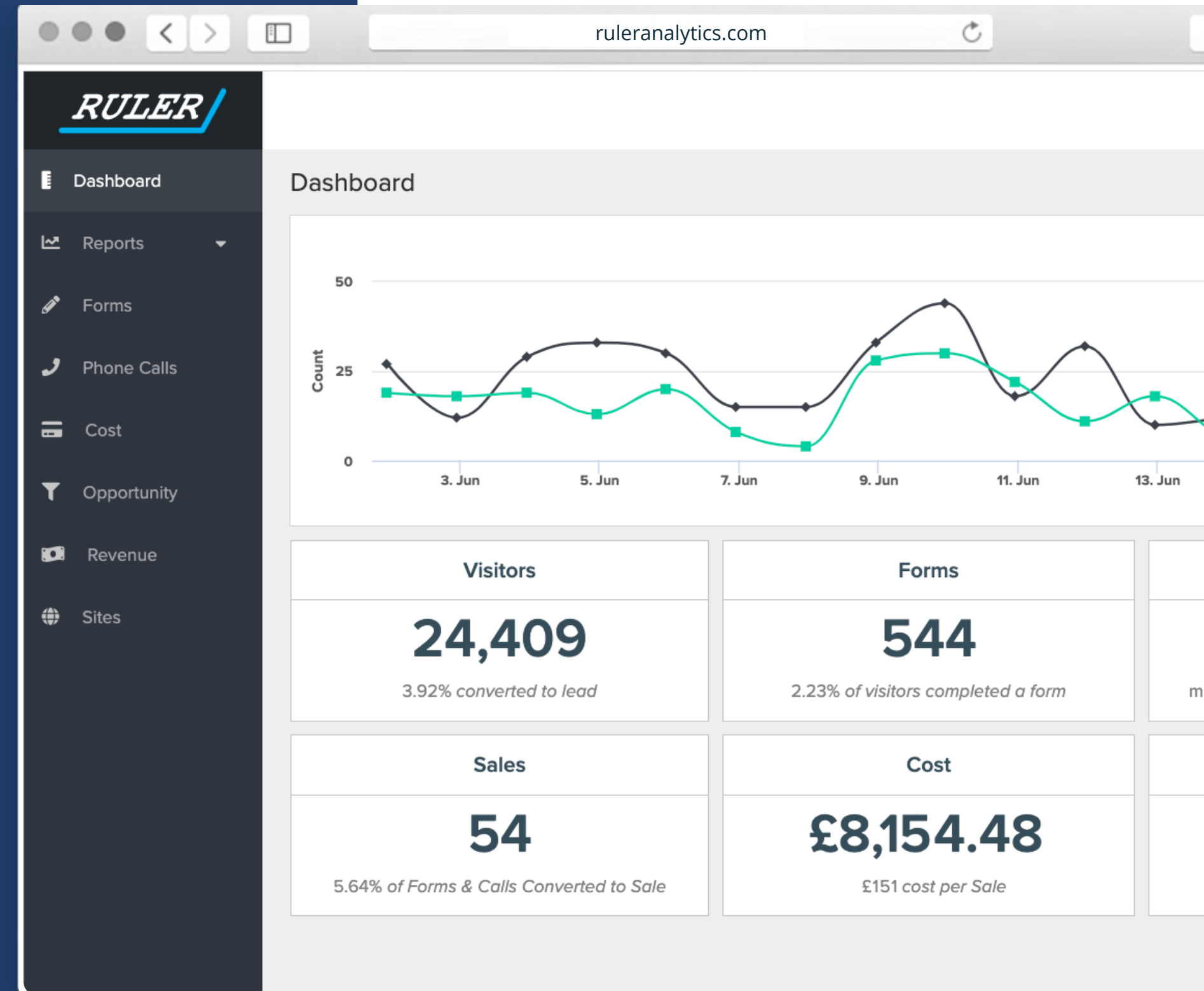


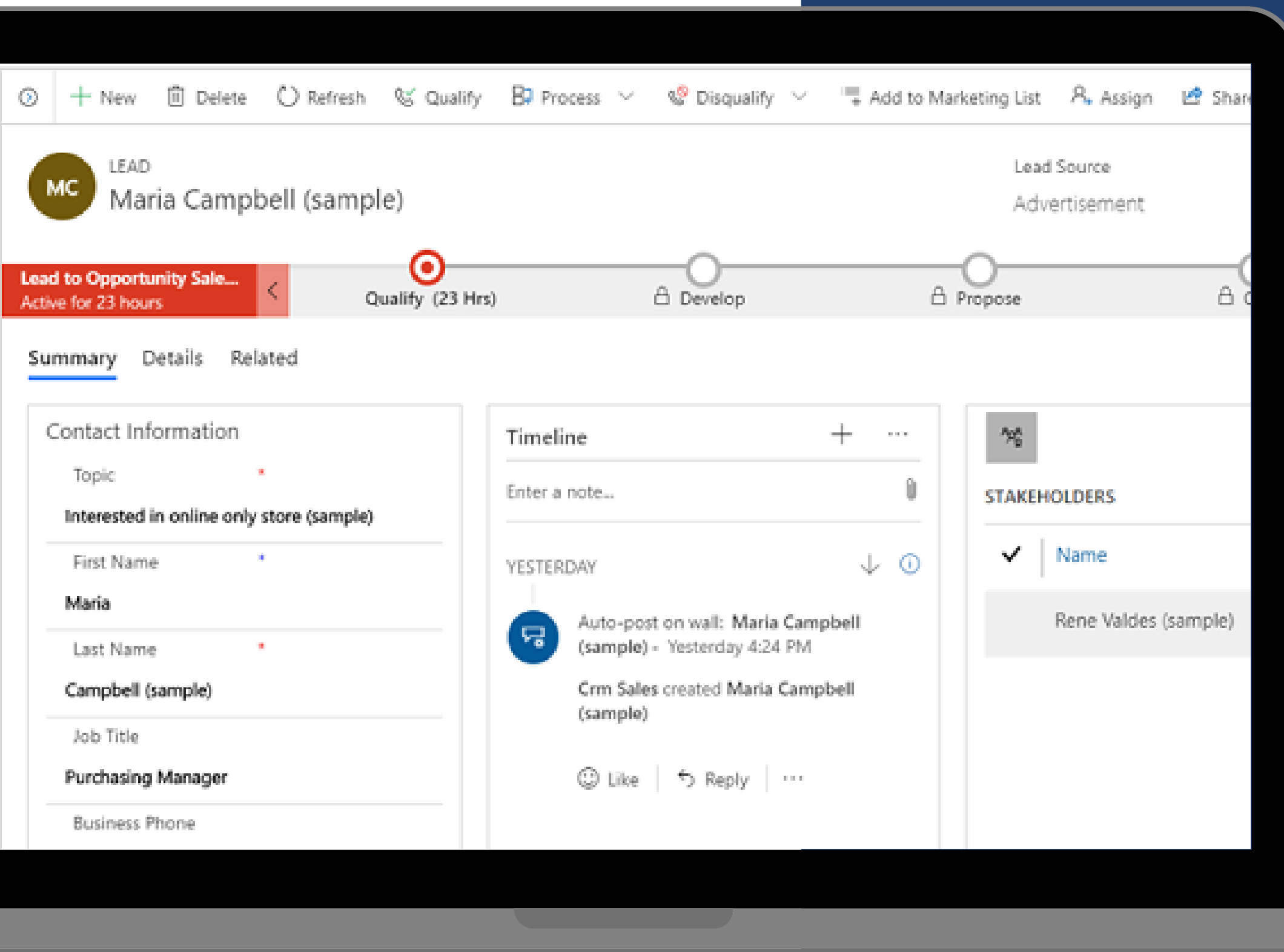
# Closed-loop reporting with Ruler Analytics

Ruler is a closed-loop multi-channel attribution tool that helps you definitively prove your marketing ROI. It enables you to connect all of your marketing efforts directly to revenue.

Ruler Analytics does this by identifying your website users and tracks their unique journey over multiple touchpoints. Once an anonymous visitor converts into a lead, Ruler Analytics matches the user's details to their marketing touchpoints and sends all this data to your CRM.

This populates the sales team's system with conversion and marketing data, which helps them learn more about each prospect before reaching out to them. Then, when a lead closes into revenue, the sales data is sent back into the Ruler Analytics dashboard. You can integrate this with Google Ads, Google Analytics and more so that you can measure marketing ROI straight from your favourite reporting tools.





# How Ruler integrates with Microsoft Dynamics

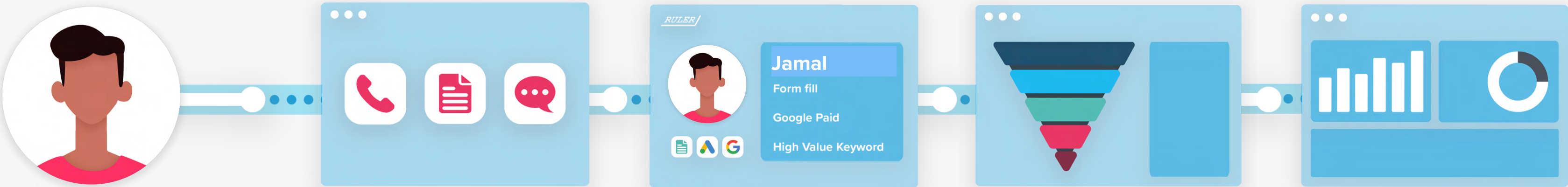
You can synchronise Ruler Analytics with MS Dynamics in order to set up a flow of data between the platforms. You will gain an end-to-end visibility of your sales process, from the lead generation activity to the moment when your deals are won.

Equipping your team with over 60 marketing variables gathered by Ruler Analytics offers them an advantage in understanding how to win their deals. Your sales team will have access to data such as First/Last Click marketing source, landing page, keyword, GCLID, page views and sessions, as well as a link back to view the lead's page journey through your website.





# How Ruler's closed loop works



01

## Traffic

Ruler tracks each anonymous visitor to the website over multiple sessions, traffic sources and keywords.

02

## Website

When a visitor converts via form, call tracking or live chat on your website, their data is captured.

03

## Matching

Ruler matches the real user's details with their marketing touchpoints.

04

## Integration

The marketing and conversion data is sent to Microsoft Dynamics. Marketing data includes channel, source, campaign, keyword and/or landing page.

05

## Close the Loop

Upon conversion, revenue is attributed to the channels, campaigns and keywords that influenced it.



Try searching “Top countries by users”

Secondary dimension

Sort Type: Default

advanced

Grid, Pie, Bar, Funnel, Table, Map, Custom

Default Channel Grouping	Acquisition			Behaviour			Conversions		
	Users ?	New Users ?	Sessions ?	Bounce Rate ?	Pages/Session ?	Avg. Session Duration ?	Webchat transcripts (Goal 9 Conversion Rate) ?	Webchat transcripts (Goal 9 Completions) ?	Webchat transcripts (Goal 9 Value) ?
	10,372,668 % of Total: 100.00% (10,372,668)	10,216,635 % of Total: 100.01% (10,215,779)	14,863,661 % of Total: 100.00% (14,863,661)	69.80% Avg for View: 69.80% (0.00%)	1.24 Avg for View: 1.24 (0.00%)	00:00:41 Avg for View: 00:00:41 (0.00%)	0.07% Avg for View: 0.07% (0.00%)	9,806 % of Total: 100.00% (9,806)	£9,806.00 % of Total: 100.00% (£9,806.00)
Display	7,924,011 (75.23%)	7,724,907 (75.61%)	11,578,023 (77.89%)	75.20%	1.15	00:00:32	<0.01%	569 (5.80%)	£569.00 (5.80%)
Organic Search	1,072,878 (10.19%)	1,032,642 (10.11%)	1,326,803 (8.93%)	31.50%	1.60	00:01:17	0.38%	5,016 (51.15%)	£5,016.00 (51.15%)
Paid Search	848,005 (8.05%)	800,823 (7.84%)	1,118,323 (7.52%)	60.90%	1.66	00:01:16	0.25%	2,805 (28.60%)	£2,805.00 (28.60%)
Direct	470,494 (4.47%)	474,797 (4.65%)	568,747 (3.83%)	69.70%	1.35	00:00:43	0.10%	586 (5.98%)	£586.00 (5.98%)
Referral	79,845 (0.76%)	54,662 (0.54%)	99,368 (0.67%)	52.43%	1.78	00:01:17	0.47%	466 (4.75%)	£466.00 (4.75%)
Paid Social - Non RT	61,666 (0.59%)	58,023 (0.57%)	72,219 (0.49%)	81.99%	1.23	00:00:45	0.20%	148 (1.51%)	£148.00 (1.51%)
Social	54,751 (0.52%)	52,692 (0.52%)	60,629 (0.41%)	74.41%	1.20	00:00:27	0.23%	142 (1.45%)	£142.00 (1.45%)
Paid Social - RT	7,495 (0.07%)	6,670 (0.07%)	9,222 (0.06%)	82.39%	1.33	00:00:35	0.00%	0 (0.00%)	£0.00 (0.00%)
Affiliates	4,956 (0.05%)	4,152 (0.04%)	6,468 (0.04%)	52.10%	1.81	00:01:46	0.63%	41 (0.42%)	£41.00 (0.42%)
(Other)	4,554 (0.04%)	3,938 (0.04%)	7,561 (0.05%)	36.91%	1.83	00:02:19	0.16%	12 (0.12%)	£12.00 (0.12%)

Show rows: 10

Go to: 1

1-10 of 15

◀ ▶

This report was generated on 06/11/2020 at 09:50:17 - Refresh Report

# Send revenue data to the apps you use daily

Ruler retrieves information from your won deals and feeds the data into your marketing platforms such as Google Analytics, Google Ads, Facebook and Microsoft Advertising.

Integrating your Microsoft Dynamics with Google Analytics allows you to connect leads generated via web form, live chat or the telephone directly back to the campaigns that generated them. As a result, this allows you to create and deliver marketing-generated ROI reports to clients and executives.





# Benefits of tracking marketing source data in Microsoft Dynamics

By tracking marketing source data in Microsoft Dynamics, businesses can match data captured from lead generation activity such as web forms, phone calls and live chat with sales data to gain end-to-end visibility of the buyer's journey. Here are more benefits to consider when tracking marketing data in Microsoft Dynamics.

01

## Provide sales with better intelligence

Sending marketing source data to Microsoft Dynamics allows sales teams to have more targeted and personalised conversations with prospects, allowing them to increase overall sales effectiveness.

02

## Create a common thread between teams

When everyone in your organisation has access to the same data, you make smarter and collaborative decisions to optimise processes for increased efficiency.

03

## Identify most effective campaigns

By providing credible data on the success of your marketing channels, you will be able to identify the most valuable platforms in terms of revenue generated.

04

## Attribute sales revenue to marketing spend

Remove any speculation and guesswork from your marketing and engagement spend and propose uplifts or increased budgets in the upcoming financial year.



## How Optionis use data from Ruler to prove ROI

Optionis Group provides accountancy, tax and umbrella employment solutions to contractors and small businesses across multiple brands.

We spoke to Chris Shepherd, Ecommerce Manager, who manages a wide range of digital channels to deliver campaigns, with leads pulling into his CRM.

Chris said, “A high proportion of our leads like to engage with us through telephone numbers. They prefer to speak to a human rather than communicate and transact digitally.”

This posed a challenge as the team couldn’t prove which campaigns were driving offline leads for the business. And even more so, they couldn’t prove which of those leads went on to convert into to a sale.

With Ruler’s marketing attribution solution in place, Chris was able to evidence how the team had exceeded targets including the number of leads generated, call volume, paid and direct traffic volume and brand awareness mentions via referral sites and social channels.

Chris continued, “Ruler’s tracking allows us to monitor if campaigns are driving sufficient call volumes and help better understand which sources have the strongest conversion metrics for both conversion to lead and conversion to sale.”

“We’ve also identified areas where we can focus our efforts. For example, Ruler’s data highlighted inefficient spend in a campaign, resulting in our cost per lead coming in over budget. With access to this data we were quickly able to realign messaging and improve conversion rates across all channels.”





# How can Ruler Analytics help you?

By understanding where your most valuable leads are coming from in Microsoft Dynamics, you can optimise your channels and campaigns to generate more high-quality leads and sales.

Using a tool like Ruler Analytics, you can unlock powerful data across the entire sales cycle, and more importantly, evidence the effectiveness of your marketing campaigns based on actual revenue, and not just the number of conversions you've generated in Google Analytics.

Want to know more about integrating marketing variables into Microsoft Dynamics and other applications? Book a demo today and learn more about the possibilities of Ruler Analytics.



## Want to find out more?

Book a demo with Ruler's attribution experts today at

[www.ruleranalytics.com](http://www.ruleranalytics.com)