



Setting up a CRM you'll actually use

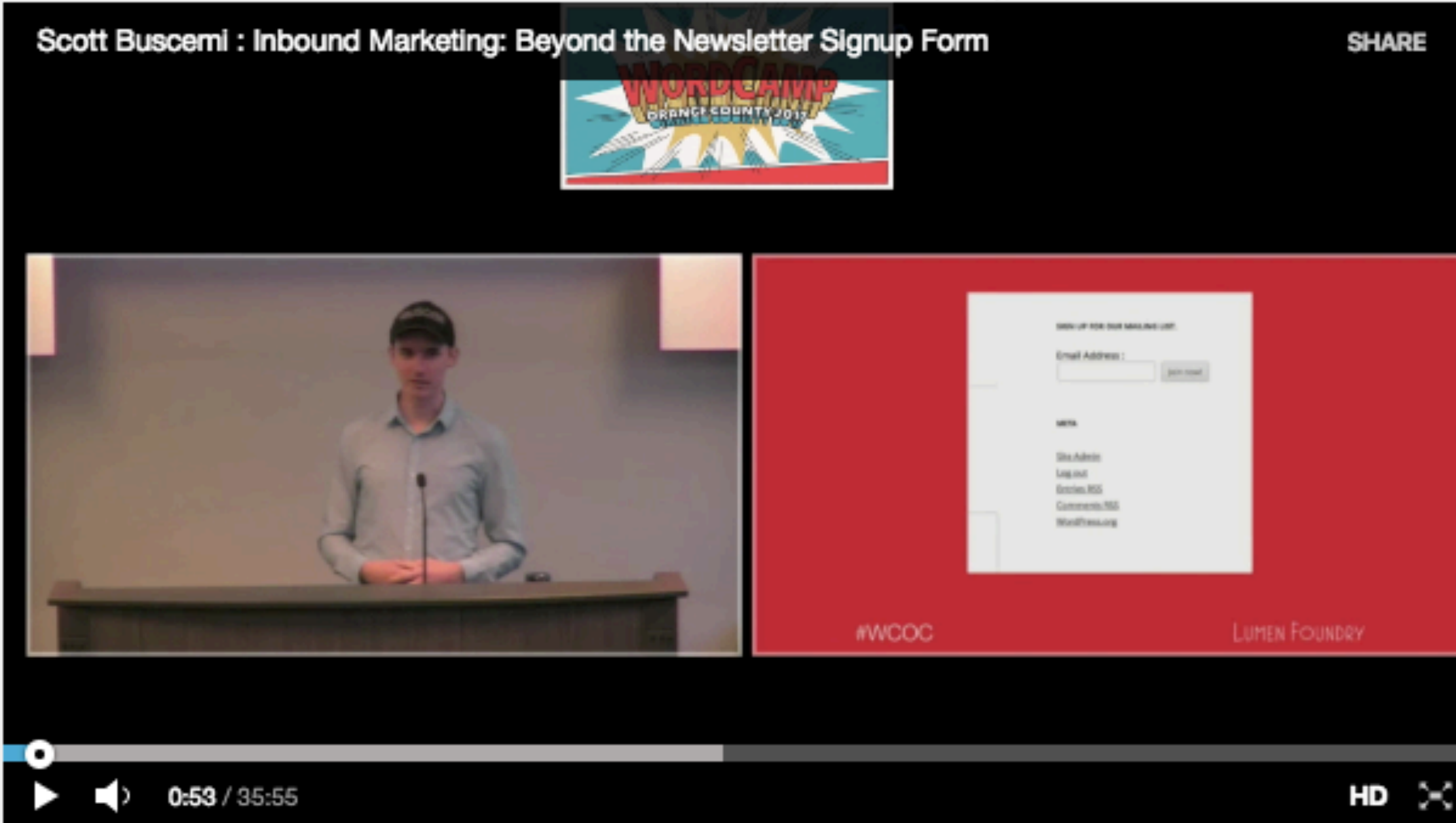
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WordCamp OC 2017

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Scott Buscemi : Inbound Marketing: Beyond the Newsletter Signup Form

Scott Buscemi : Inbound Marketing: Beyond the Newsletter Signup Form SHARE



The video player displays a split-screen view. On the left, Scott Buscemi is speaking at a podium. On the right, a slide is shown with a red background and a white box containing a newsletter signup form. The form has an 'Email Address' field and a 'Sign Up' button. Below the form, there are social media icons for LinkedIn, Facebook, and Twitter. The slide also includes the text '#WCOC' and 'LUMEN FOUNDRY'. The video player interface shows a progress bar at 0:53 / 35:55, a play button, a volume icon, and an HD icon.

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#WCOC

LUMEN FOUNDRY

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And then... nothing.

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There must be another way.

#WCOC

LUMEN FOUNDRY

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Sound relevant?

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You signed up for...



[ActiveCampaign >](#)

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You imported all your data...

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And then... nothing.

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Why?

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Why?

- Too time-consuming
- Feels like boring data-entry
- No instant gratification or success metrics
- No notifications / reminders
- Current work takes priority over the pipeline

Why “should” we use a CRM anyway?

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What's a CRM good for?

- Centralizing communications
- Checking the health of your pipeline quickly
- Preventing lead leaks (#leadleaks)

BONUS ROUND

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Bonus: **Modern** CRM benefits

- Proactive, automatic communications
- Newsletter integration
- Website integration
- Task integration

The platform isn't the problem.

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But while we're at it...

ActiveCampaign ➤

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Tips Time

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Tip #1

Only import contacts that
matter

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Tip #2

Tasks for every deal.
Tasks for every contact.

Tip #3

Schedule daily CRM check-ups

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Tip #4

Don't send newsletters.
Send messages.

Hey !

Just a quick heads up ...

In a couple of months, Chrome will start showing a "Not Secure" warning if your site doesn't use SSL (aka show "https" in the address bar) and has any sort of form field. That includes if you have a search field or email signup form on any page.

<https://lumenfoundry.com/chrome-will-soon-mark-non-ssl-sites-not-secure/>

Reach out if your site needs some SSL love.

Cheers,
Scott



Scott Buscemi
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Sent to: _t.e.s.t._@example.com
Lumen Foundry, 555 W 5th St, Fl 35, Los
Angeles, CA 90013, United States
Don't want these emails? [Unsubscribe](#)

- Personalization
- Appears like a regular email
- Simple link to blog post / read more
- “Reply” call to action

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Cheers,
Scott



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Sent to: _t.e.s.t_@example.com
Lumen Foundry, 555 W 5th St, Fl 35, Los Angeles, CA 90013, United States
Don't want these emails? [Unsubscribe](#)

- 71% open rate
- 10% click rate
- 18% reply rate
- 0% unsubscribe rate

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Tip #4

Hook up your contact form
with your CRM

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Is your contact form working?
Is the listed email current?

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Tip #4.1

Use your password manager
to test your contact form

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Tip #4.2

“From”: noreply@your-domain.com

“Reply-to”: im-a-lead@gmail.com

Tip #5

CRM + Marketing Integration =
Sales insights on steroids

Tip #6

Create a closed-loop pipeline

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Lead Stages



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Tip #7

Set up drip sequences &
automations

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Contact form submission automation

- Use CRM for autoresponder (track open/clicks)
 - Send recent portfolio items, next steps
- If form submission indicates a high-quality lead, send out Calendly link for scheduling
- Zapier can tightly integrate Calendly+ActiveCampaign

Project launch automation

- Add a tag to the contact
- Send a congratulatory email on project launch
- A few days later... an email requesting a testimonial

Project launch automation

- A few days later... a follow up about warranty/maintenance/etc
- Proactive emails are better than emergency emails

Lost deal automation

- Add a tag to the contact
- Keep the contact in the regular newsletter list
- Send an email months later asking how the project went

A successful CRM is an
automated CRM.

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Links & Stuff

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Questions?