Microsoft Dynamics® Jump Start Webcasts

Tips and Tricks to Maximize Your Marketing Effectiveness with this Webcast Lead Generation and Follow-up Guide

October, 2008
Section 1: Program Overview

What are Jump Start webcasts?
The Jump Start webcasts are designed to help Microsoft Dynamics partners easily and quickly add an ongoing, regularly scheduled webcast component to your marketing efforts. The webcasts are specific to the Microsoft Dynamics product line and take place 4-8 times per month. The topics are pre-determined, and the presentations are conducted by Microsoft Dynamics Product Experts with a deep knowledge of their topic and years of presentation experience so you’re assured that your prospects and customers will have a highly polished and professional experience.

Why should you, as a Microsoft Dynamics partner, use webcasts in your marketing mix?
According to Marketing Sherpa, webcasts or web seminars are the second most popular lead generation offer in business-to-business technology marketing this year, second only to whitepapers.

- 66% of technology buyers found webinars “very valuable” or “somewhat valuable”.
- 20% of tech decision makers reported attending webinars on a weekly basis, with 18% taking part in webinars every other week.
- 47% of business technology buyers attend webinars more frequently now than they did two years ago.

How to Produce a Webinar Program, Copyright 2008 by Marketing Sherpa LLC
As you can see, webcasts should be an important part of your lead generation strategy if they’re not already. An engaging, relevant topic delivered electronically to a multiple number of prospects is an excellent strategy for moving prospects down the sales cycle. But have you been challenged to add professionally delivered webcasts to your marketing calendar? The time and resources required to purchase the delivery software, develop the presentation, create the lead generation campaign, design the registration site, and train a presenter can be logistically overwhelming and certainly time consuming.
What are the benefits of the Jump Start series?

- You can reach a larger number of potential prospects and customers in your target market with electronic events by easily adding monthly webcasts to your marketing calendar to fill any gaps in your marketing strategy and increase awareness of the solutions you deliver.

- The webcasts cover Microsoft Dynamics AX, Microsoft Dynamics CRM, Microsoft Dynamics GP, and Microsoft Dynamics NAV topics. **Coming soon – Microsoft Dynamics industry topics!**

- A monthly routine of regularly scheduled webcasts helps you nurture your prospect database, and gives you a good reason to repeatedly “touch” your prospects by inviting, confirming, and following up with them.

- You can leverage the professionally developed and presented topics to drive your prospects to the close without the extensive preparation work of creating and presenting the topic.

- Once you have an account* on Microsoft Partner Events (MPE), it literally takes you three minutes and three clicks to set up one of the Jump Start webcasts.

- When your account has been set up on Microsoft Partner Events, your Click-to-Attend registration page is automatically populated with your logo, your company description and your contact information.

- Prospects who register on your Click-to-Attend registration site remain private to your company and are not viewed by other partners or by Microsoft.

- And there’s no cost to participate! Your only cost is the lead generation effort required to drive your registrants and follow-up on the leads.

What are the Jump Start topics?

Take the time to check out the Jump Start promotional materials on PartnerSource on the Marketing Community site. You’ll not only find the most recent materials and updates to the schedule, but a tutorial on how to effectively use the Microsoft Partner Events site and a case study on partners that have used the Jump Starts to engage their prospects and customers.

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**Microsoft Dynamics AX**

- **Session 1:** Use Microsoft Dynamics AX to Improve Your User’s Productivity with Familiar Tools
- **Session 2:** Use Microsoft Dynamics AX to Manage Rapidly Changing Demands That Affect How You Compete

**Microsoft Dynamics CRM**

Grow Your Business with Microsoft Dynamics CRM

**Microsoft Dynamics GP**

- How Microsoft Dynamics GP Can Help If You Have Outgrown QuickBooks
- Microsoft Dynamics GP Can Help If You Have Outgrown Your Current Accounting Software

**Microsoft Dynamics NAV**

- **Session 1:** Use Microsoft Dynamics NAV to Effectively Manage Operations (Finance through Production Planning) by Leveraging an Integrated Business Solution
- **Session 2:** Learn how Microsoft Dynamics NAV Can Help You Leverage Technology to Optimize and Connect Your Business

*If you’ve never used Microsoft Partner Events before, you’ll have to set up your company information before you participate in a Jump Start event. You will be asked to upload your logo, your company description, your Privacy policy, and contact information, which will be displayed on your Click-to-Attend registration page.
Congratulations! You’ve decided the Jump Start webcast series is a good fit for your marketing initiatives. You’ve checked the webcast calendar on PartnerSource and found the topics most relevant to your audience and the dates. What’s next?

**Event Strategy**

Before you take the next step, there are a few factors to consider in your event strategy:

1. Determine the target audience in terms of their business size, industry, and role. Is the topic relevant to a business decision maker (BDM)? For the most part, the Jump Start topics are targeted at BDMs.

2. What lead generation methods will you utilize? Direct mail, email and telemarketing are the three most common options.

3. Do you have a list or do you need to acquire a list? If you have a list, use the Jump Start Webcasts as part of your nurture, or relationship marketing strategy. If you need to acquire a list, there are many sources on the market today. Some of the more common ones are Dun & Bradstreet, ZapData (a D&B company), Selectory Online, InfoUSA, Harte-Hanks and hundreds of others.

4. The Microsoft Dynamics GP Jump Starts target prospects seeking to move from QuickBooks or another low-end solution to a more robust offering. To successfully promote this topic, your list should be composed of QuickBooks users, or other users of low-end accounting products. A couple of suggested sources for users of competitive products are Lead Intelligence and Edith Roman lists.*

   *Microsoft does not endorse any list sources. The purchaser assumes all liability and responsibility for the quality of the list.

5. Set goals. How many registrants can you generate from your list? How many registrants will turn into attendees? The method you use to reach your audience will determine your results.

   Microsoft used email blasts and telemarketing call-downs to generate interest in the pilots of the webcast series. The email generated a .25% response rate, while the call-downs generated almost 5% response rate. Therefore, strongly consider adding a telemarketing component to your event strategy to ensure registrations meet your established goals.

**Average Business-2-Business Response Rates**

<table>
<thead>
<tr>
<th>Method</th>
<th>Response Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mail</td>
<td>0.71%</td>
</tr>
<tr>
<td>Email</td>
<td>1.62%</td>
</tr>
<tr>
<td>Telephone</td>
<td>2.44%</td>
</tr>
</tbody>
</table>

*The Direct Marketing Association - Response Rate Trends Report 2006*

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Section 2: Generate Interest and Registrations
Promotion Strategy

Now that you’ve determined your event strategy, your next step is to promote your event in order to drive registrations to it. Typically, the event promotion period is 3-4 weeks prior to the webcast.

1. Email

Although email doesn’t necessarily produce a high response rate, it’s easy to execute, has a low cost, and allows an interested prospect to click right through to your Click-to-Attend registration page. Microsoft has developed an HTML email invitation for each of the Jump Start topics that you can quickly customize with your company information as well as the webcast time and date.

You can find the templates on the Microsoft Partner Events site once you set up a webcast topic under Event Opportunities in the left-hand navigation at www.microsoftpartnerevents.com or on PartnerSource on the Jump Start information page.

TIP: Send your email invitation on Tuesday, Wednesday, or Thursday mornings. Email sent on Friday tends to be deleted before the weekend and email on Monday often is deleted with the junk mail that arrived over the weekend.

Once you’ve customized the HTML template to the date and time of the webcast you’ve selected, send the invitation to your email prospect list. You should send it twice:

- once approximately 2 weeks in advance
- and again 2 days prior to the webcast
2. Direct Mail
Direct mail can often be more effective than email simply because of the ease of list acquisition. Your prospect database is likely to have mail addresses for 100% of the prospects, while email aliases are often “hit or miss”.

Leverage the key messages in the HTML email templates to create a direct mail letter or postcard. Focus on the “what you will learn” benefits of the webcast in your mailer. Be sure to include how prospects can register for the event on your Click-to-Attend page and/or contact you for more information.

3. Telemarketing
As a lead generation method, telemarketing is more costly than email or direct mail, but also more effective in generating a response. A good telemarketing team can “sell” the benefits of the webcast in addition to probing for additional needs or challenges the prospect might have.


In other words, whether you outsource the call-downs or conduct them with an in-house team, telemarketing should be an important part of your lead generation strategy. A sample telemarketing script is posted on Microsoft Partner Events: [https://www.microsoftpartnerevents.com/partners/readiness_center_item.aspx?r=98](https://www.microsoftpartnerevents.com/partners/readiness_center_item.aspx?r=98)

**TIP:** Instruct your telemarketing team to take registrations over the phone when they speak with an interested prospect. Don’t ask the prospect to go to your registration page unless you want to risk “losing” them in the process. Secure the registration information while they’re interested, and when the name is imported into Click-to-Attend, the prospect will automatically be emailed an event reminder.

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Other Ways to Promote Your Webcast
- Post it on your website home page and events page
- Add it to your email signature
- Include it in your newsletter (electronic and/or printed)
- Banner ads
- Blog article
- Add it to your voice mail recording

Other Templates and Event Planning Guides from Microsoft Partner Events
- Sample [Event Budget](#) - Use this as a template to help you plan for your event costs.
- Sample [Event Work Back Schedule](#) - Use this sample schedule as a template to help you determine the time you will need to plan an effective event.
- Sample [Pre-Event Checklist](#) - Use this checklist as a starting point to help you remember all of the details of your event.
- Sample [Event Confirmation Letter](#) – Use this sample confirmation letter as a template to remind registrants or your upcoming event.
Good news! Now you have registrants for your webcast. You’ve sent email and/or direct mail. You’ve dedicated a portion of your budget for telemarketing and have seen the results of your lead generation efforts. How do you ensure your registrants become attendees?

According to various sources, approximately 40%-60% of your registrants will attend the webcast. How can you ensure that the conversion from registrant to attendee is the best it can be?

- **Confirmation Email**: The Click-to-Attend registration system automatically sends an email the moment your prospect is registered with the webcast details.
- **Reminder Email**: The Click-to-Attend registration system automatically sends a reminder email 2 days prior to the webcast.
- **Follow-up with your own email reminder 3-4 days before the webcast**: Due to the many spam filters in place today, it’s very possible that the automated reminders from Click-to-Attend may not get through, or would be relegated to the Junk Mail folder.
- **One day before the webcast place a reminder call to your registrants to ensure they’re aware of the webcast time and date. Leave a voice mail if they’re unavailable.** It’s easy to overlook an email reminder in an already overflowing inbox. Leave your contact information so they can reach you if they cannot find the event login information.
- **One hour before the webcast, send a reminder email with a “Hope you can join us” message.**

### Other Ways to Encourage Attendance

- **Offer an incentive to all attendees such as a $10 gift card.** If 20 prospects attend, it would be well worth the $200 investment. Plus, sending the gift card after the webcast gives you just one more good reason to communicate with your prospect.

- **Offer a larger gift item as a drawing (must attend the webcast to be eligible).** GPS systems or other electronic gifts are in high demand. Select a gift item with broad appeal, and expensive enough to encourage their attendance.

### TIP: Personal items such as gift cards, gift certificates, electronics, and tickets to sporting events will motivate your prospect to attend more than a business gift such as a free assessment or free consulting hours. At this stage, the prospect has not yet decided to do business with you, so the business offer has less appeal than an item the prospect can personally use.
Section 4: Post-Event Follow-Up

As critical as the pre-event planning is, the post-event follow-up ranks just as high in terms of importance. Without post-event tactics to nurture your registrants and attendees, you could diminish the effectiveness of your lead generation efforts.

Send event follow-up emails the day after. For those that attended, recognize their interest in the topic. A new enhancement to the Microsoft Partner Events site is the ability to track, in real-time, which registrants attended the webcast. You’ll now have the ability to tailor your follow-up messages to those that attended, and those that didn’t.*

Simply select “Update Attendance” in the drop-down box for your selected event.

If it says “True” under Live Meeting access, that particular registrant clicked on the Live Meeting event URL at the time of the webcast.

Next Steps with Attendees

Plan to call the attendees within 1-2 days after the webcast with a quick survey:

- Did they like what they saw and heard?
- Was the time/date conducive to attending?
- Was the information valuable to them? (If appropriate, take the time to qualify their interest in the Microsoft Dynamics solution.)
- Do they have suggestions for future topics?

Send a link to the recorded webcast in the event they want to share it with others in the organization. You can request the link by emailing jmpstweb@microsoft.com with the Jump Start date and topic.

Call the attendees within 2 days to further qualify their interest.

For attendees who want more information, invite them to additional Jump Start webcasts. Check the schedule on the Jump Start information page on PartnerSource, and set up your Click-to-Attend registration page on Microsoft Partner Events.

You can also send them information on additional webcasts that may be of interest on the worldwide Microsoft Events page. You can sort by the type of event (on-demand, live, podcasts, etc) as well as by topic and product.

* Note: This new enhancement will only work for events created after 9/23/2008.
Next Steps with Non-Attendees (Registrants)

For those that weren’t able to attend, send a link to the recorded webcast. You can request the link by emailing jmpstweb@microsoft.com with the Jump Start date and topic.

Plan to call the registrants within 1-2 days after the webcast to qualify their interest and provide any additional relevant information. Ask for a response to a very quick survey:

- Was the time/date not conducive to attending?
- Was the topic not compelling?
- Do they have suggestions for future topics?

Prepare an offer to help move them forward in the sales cycle. Sample offers could be:

- The next in the series of Jump Start webcasts you set-up on Microsoft Partner Events.
- Additional webcasts that may be of interest to them on the worldwide Microsoft Events page. You can sort by the type of event (on-demand, live, podcasts, etc) as well as by topic and product.

Informational whitepaper from the Microsoft Dynamics public website or the Partner Vertical Resource Center.

Information about the Economic Stimulus Act and the importance of moving up purchases planned for 2009 into 2008.

An offer for a free business assessment.

A closing offer from the Microsoft Incentives website such as the “Big Easy” or a financing offer.

For QuickBooks users, introduce them to the resources on the “A Smart Move” website.

The PowerPoint deck from the webcast – you can find the decks posted on Microsoft Partner Events by selecting Event Resources under “Actions” for your webcast.

For All Registrants

- Assign the high priority leads to your sales force for follow-up.
- For the prospects that need to be nurtured for a longer period of time, plan your strategy to ensure a consistent “touch” over the next 12 months. See next section on Nurture Marketing.
Nurture Marketing (aka Relationship Marketing)

A critical component of your lead generation efforts is nurture marketing. According to the Direct Marketing Association, you need to reach a prospect a minimum of 3 times to achieve name recognition and a minimum of 9 times to make a sale. And with the lengthening closing cycles, you may need to reach your prospect even more often.

Research shows people consume information in different ways. Therefore, create a contact strategy that includes direct mail, email, telemarketing and events. Some people respond better to email than direct mail. Others are overwhelmed with email and would prefer a phone call instead. Incorporate several methods and vary them each time to ensure you’re reaching your audience in multiple ways.

A typical contact strategy might look something like this:

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Offer</th>
<th>Delivery Mechanism</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month 1</td>
<td>Link to recorded webcast for non-attendees, free assessment for attendees</td>
<td>Email, Phone</td>
</tr>
<tr>
<td>Month 2</td>
<td>Offer for subsequent Jump Start topics</td>
<td>Email and/or Direct Mail, Phone</td>
</tr>
<tr>
<td>Month 3</td>
<td>Offer for Role Tailored whitepaper, case studies or analyst reports</td>
<td>Email, Phone</td>
</tr>
<tr>
<td>Month 4</td>
<td>Big Easy Offer or industry-specific whitepaper from the Partner Vertical Resource Center</td>
<td>Email and/or Direct Mail, Phone</td>
</tr>
<tr>
<td>Month 5</td>
<td>Jump Start webcast</td>
<td>Email and/or Direct Mail, Phone</td>
</tr>
<tr>
<td>Etc</td>
<td>Offer for whitepaper, case studies or analyst reports</td>
<td>Email and/or Direct Mail, Phone</td>
</tr>
</tbody>
</table>

Remember, according to Marketing Sherpa, whitepapers are the #1 most popular lead generation offer in business-to-business technology marketing!

Nurture Marketing Tips

- Remember to incorporate multiple mechanisms to reach your audience. The figures are for B2B and B2C marketing, but the overall ranking illustrates that dimensional mail (the puffy envelope, the box, the tube) followed by telemarketing will pack the 1-2 punch your direct marketing efforts deserve.

- Use an electronic newsletter service like Constant Contact to send your event email invitations and e-newsletters. Using a newsletter service will allow you to track delivery metrics such as bounces, opens, spam reports, etc. It will also ensure your recipients have a means to opt-out of future communications.

<table>
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<tbody>
<tr>
<td>Dimensional Mail (non-flat mailer)</td>
</tr>
<tr>
<td>Telemarketing</td>
</tr>
<tr>
<td>Direct Mail</td>
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<tr>
<td>Email</td>
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<tr>
<td>Catalog</td>
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<tr>
<td>Coupons</td>
</tr>
<tr>
<td>Radio</td>
</tr>
<tr>
<td>Magazine</td>
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<tr>
<td>Newspaper</td>
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</table>
You can design a newsletter with the templates posted on Office Online.

For information on creating effective newsletters, check out the article, How Effective is Your E-Newsletter, on the Small Business Center.

Incorporate a theme. The best marketing campaigns have an ongoing theme that ties together the messaging along with the offers. The Distinction in Marketing Award winning case studies (posted on the Marketing Community Site) prove that an interesting, engaging theme can capture the attention of your target audience more effectively than non-themes.

Clearly advertise an expiration date. A deadline drives a sense of urgency!

Use the Microsoft sponsored promotions to drive interest and move your prospects along in the sales cycle. Check out Microsoft Incentives as well as Global Promotions for information you can add to your sales calls and email communications.

Lastly, don’t give up! Nurture marketing is a long-term strategy and one that will reap rewards if executed consistently over time.

14 Tips for Maximizing Email Success

1. People read email in preview panes. Keep your message “above the fold.”

2. Recipients scan email. Make it short and easy to scan.

3. Subject line must communicate value.

4. Always offer something of value in the email. Relationships should go two ways.

5. Carefully craft your message to your target audience.

6. Recipients should be able to read email without graphics.

7. Offer newsletter sign-up on your website home page.

8. Make it easy to unsubscribe.

9. The best day for distribution is Tuesday or Wednesday: 10am to noon is the best time.

10. Create multiple messages for different targets.

11. Avoid excessive use of punctuation and capitalization.

12. Use email to keep on-going contact with old customers, cool leads and referral sources.

13. Email works best in conjunction with other marketing activities.

14. Test, test, test – always conduct tests on your campaigns to improve future results.

From the Quick Guide to Online Marketing for Microsoft Partners
In summary, the Microsoft Dynamics Jump Start webcast series provides an excellent platform for launching your own “branded” webcasts. Not only are the webcasts easy to use as part of your lead generation strategy, prospects who register on your “personalized” Click-to-Attend site see your company name, logo and company description.

Use the webcast opportunity to move your prospects through the sales cycle. Remind them of the value you bring to their organization, and continue to reach them through relevant offers via email, direct mail and telemarketing. According to Lead Generation for the Complex Sale,

“...you cannot rely on a single marketing medium for generating leads. For strength and stability, a table requires all four legs. To lose one is to become less sound, less secure. So too with lead generation.”

_Lead Generation for the Complex Sale, Brian J. Carroll, 2006_

Remember, _out of sight, out of mind_, is never more true than when you have long sales cycles as you do today.

For more information on Microsoft Partner Events as well as Click-to-Attend, check out the resources on the Jump Start page on PartnerSource. Download the Microsoft Partner Events Users Guide, as well as a Partner Case Study showing how other partners have benefitted from the program.

**Questions?**

Contact the Jump Start program manager at jmpstweb@microsoft.com.

Authored by Cheryl Strege, President, The Partner Marketing Group, 2008