Integrity Data
www.integrity-data.com

Integrity Data
Your people. Our priority.

Challenges
- Using a solution only designed for email marketing prevented Integrity Data from growing in their marketing efforts
- Reaching new audiences due to an acquisition was not possible without more robust marketing technology
- Updating customer data between disparate systems was time-consuming and potentially inaccurate

Solution
- Implemented the ClickDimensions marketing application and tapped into ClickDimensions' expertise in Dynamics and marketing to transform the company's marketing processes
- Grew their marketing technology usage beyond email marketing thanks to ClickDimensions' broad toolset for marketers
- Switched to the ClickDimensions social marketing platform to broaden Integrity Data's social media capabilities

Results
- Improved insights have led to more successful targeted campaigns and a better understanding of the customer journey throughout the organization
- Saved time, increased productivity and prevented lost leads in the lead generation process
- Streamlined social media marketing efforts and enhanced social presence

Integrity Data has been a leading solution provider and partner for Microsoft Dynamics payroll and human resources solutions for more than 20 years. From small businesses to some of the largest and fastest growing organizations, Integrity Data serves more than 12,000 customers worldwide.

A Need to Move Beyond Email Marketing

As a technology provider, Integrity Data knows a great deal about how business systems can become the trusted, integral backbone of the organizations that utilize them. In 2014, it became obvious that their email marketing technology was not such an indispensable system.

"I knew we had outgrown our email marketing system. We wanted to expand our customer and prospect base, which seemed impossible without making a change," recalled Lindy Belley, Marketing and Communications Manager at Integrity Data. "Email was an important part of our marketing efforts, but we needed multichannel marketing technology in order to grow."

An acquisition on the horizon meant that Integrity Data would be pursuing a new target audience for the first time in more than 15 years. That put pressure on the marketing team to fully engage this audience and do their part in ensuring the acquisition was successful.

In addition, as a seller of solutions that integrate with Microsoft Dynamics, Integrity Data needed a marketing platform that would do the same. "Microsoft Dynamics is pivotal to our business in so many ways, and yet our email marketing system was not integrated with our CRM," added Belley.

With no integration between the two systems, updating lists in their email marketing system with information from Dynamics was extremely time-consuming. It also left the Integrity Data team questioning whether their contacts' email preferences in one system were updating correctly in the other system, potentially creating compliance issues and hindering their confidence in creating successful targeted marketing campaigns.

Broadening Their Marketing Capabilities

Knowing that they needed to grow beyond email marketing, the Integrity Data marketing team began to explore more robust marketing technology options. "Even back then, in my limited understanding of what incredible things could be accomplished in a marketing automation solution, I knew that was the way we needed to go to achieve our goals and keep pace with our competition and our audiences," said Belley.

"After using ClickDimensions, I have no interest in ever using a marketing automation tool that isn't natively built in Microsoft Dynamics."

Lindy Belley
Marketing and
Communications Manager
Integrity Data

As they began to evaluate marketing automation platforms, one solution emerged as a favorite among the Integrity Data team. "We were really impressed with so many things about the ClickDimensions marketing automation application and the things we knew it could help us achieve, but we especially appreciated that it is seamlessly integrated with CRM, it was a great value and that ClickDimensions is in the Microsoft Dynamics space like we are," said Belley.

Following their implementation of the ClickDimensions marketing automation application, the Integrity Data team wasted no time getting started with their push to move beyond email marketing alone. Within the all-in-one platform, they have transformed their marketing efforts by adopting campaign automation, event management, subscription management, reporting, surveys and lead scoring. Integrity Data has also taken advantage of ClickDimensions' commitment to open architecture by utilizing an integration to Gravity Forms.

In addition, after using another social media marketing tool for more than 10 years, Integrity Data made the switch to ClickDimensions Social Marketing, which is designed to meet the unique needs of B2B social marketing.

"What a Relief!"

Following implementation of ClickDimensions marketing automation, Integrity Data quickly realized one of the biggest benefits of the system's native integration with Microsoft Dynamics – cross-functional insights into customers.

"The tools, functionality and integration of the ClickDimensions marketing automation solution allows for true cross-company insight. No matter what department someone works in, they can understand each customer's journey, which makes Integrity Data a more successful business overall," Belley remarked. "This integration between marketing automation and CRM has been especially beneficial to our sales teams as they have conversations with their customers and prospects."

Having better access to performance data via ClickDimensions reporting has also made a tremendous difference for Integrity Data. Added Belley, "As a marketing team, we have created more targeted campaigns based on data in the ClickDimensions marketing automation platform. We have changed emailing strategy to do less frequency and focus on educational content and resources, with a sprinkling of sales pitch. The open rates continue to increase and better yet, the click-throughs are much higher."

"We have also improved our productivity after making the switch to ClickDimensions," said Belley. "I used to spend hours each month just updating and importing/exporting lists. Now that time can be spent on achieving our marketing goals."

ClickDimensions marketing automation further supports the Integrity Data team in the pursuit of those goals by ensuring that no leads are lost. Belley commented, "What a relief from a lead generating department! It has allowed us to ensure every form submission was being assigned to someone and tracked with a paper trail, not just getting lost in someone's inbox."

Integrity Data has also realized efficiencies and broadened their social presence with ClickDimensions social marketing. "There are so many features in the ClickDimensions social marketing platform that have streamlined our social efforts," said Belley. "That combined with analytics from our various social channels all in one place has really helped us improve our social media marketing, and all without a significant time investment from our team."

Visit www.clickdimensions.com to learn more about how our solutions can help your organization.