NetSuite Marketing Automation

{ Email Marketing

Topics

- Features to Enable
- Lead Capture
- Subscription Management
- Email Campaigns
  - Email Templates
  - Saved Search
  - Groups
  - Campaign Assistant
- Lead Nurturing
- Campaign Analysis
- Final Thoughts

Features to Enable

- Setup > Company > Enable Features > CRM tab
  - Basic Features section
    - Marketing Automation
    - Related SuiteApps – Campaign Assistant
  - CRM tab – Marketing section
    - Online Forms
    - Subscription Categories (optional)

Features to Enable

- Setup > Marketing > Marketing Preferences > General tab

  - Unsubscribed to Marketing by Default (optional but highly recommended)

  - Other fields that should be setup (see Help Center for details)
    - Default Reply Email Address
    - Default From Email Address
    - Default Campaign Domain
    - Opt-In Invitation Message
    - Opt-In Confirmation Message

Features to Enable

- DKIM –DomainKeys Identified Mail

  - To protect customers from unsolicited email, many ISPs check the domain key used in an email message to determine whether it is spam or not. DomainKeys Identified Mail (DKIM) is a method of digitally "signing" your email to allow its authentication.

  - When sending email from NetSuite, using your own domain key will increase campaign delivery rates and help enhance your reputation as a legitimate marketer. Without DKIM, you cannot send more than 10,000 messages in a single email campaign.

  - Need access to your website's domain provider for setup

  - See NetSuite Help Center for detailed setup instructions

Features to Enable

- Campaign Email Domains
  - This is a CNAME record setup with your DNS provider
  - If you send more than 10,000 emails each month, then you have to set up a campaign domain.
  - See the NetSuite Help Center for detailed setup instructions.

Lead Capture – 2 methods

- Online Customer Forms
  - Auto generated forms that can be easily embedded in a website. Setup > Marketing > Online Customer Forms > New
    - Select the fields that you want to show on the form – fields can be marked as mandatory (such as First and Last Name and Email address)
    - “Message” shows at the top of the form
    - “Detail Message” shows at the bottom of the form
    - Set Up Workflow tab – important set up here.
    - Set Up Appearance – Find the right color theme to match your websites color scheme.
    - External - copy the Publishable Form URL to embed in to your website.
    - Make sure to mark Enable Online

Lead Capture

- Online Form Templates

  - Custom forms that can look any way you want them to. Quite a bit more involved – NetSuite help center has step by step instructions for setup. Requires HTML and CSS knowledge.

  - Learn HTML basics and test your HTML online
    - www.w3schools.com/html/
    - www.onlinehtmleditor.net

Subscription Management

Status	Receive campaigns?	Receive opt-in message?	Set by
Confirmed Opt-In	**yes**	**yes**	recipient only
Soft Opt-In	**yes**	**yes**	manual or mass update
Soft Opt-Out	no	**yes**	manual or mass update
Confirmed Opt-Out	no	no	recipient only

As a general rule, do not email market to people who have not subscribed to you. If you do this will result in lots of SPAM complaints and get your emails blocked by ISP's. Maintaining your marketing reputation is important for maintaining good deliverability.

Netsuite automatically marks customers as Confirmed Opt-Out if they mark your email as SPAM.

Subscription Management

- "Unsubscribed to Marketing by Default" is a good marketing practice

- Opting-In
  - Through opt-in invite. Send invitation to opt-in via Mass Updates > Marketing > Send Subscription Message to . . .
    - Good for first time opt-in

  - Through opt-in confirmation message. Mass Updates > Marketing > Send Subscription Message to . . .
    - Good for periodic list cleaning

Subscription Management

- Campaign Subscription Categories
  - When you turn on this feature, you can create your own campaign subscription categories in addition to the following default subscription categories—Billing Communication, Marketing, Newsletters, Product Updates, and Surveys. By logging in to the Campaign Subscription Center, recipients can choose which subscriptions they want.
  - You can also set up custom fields to use for filtering. However, the subscription preferences center will not show those fields.

Email Campaigns

- 4 pieces that make up a campaign
  - Campaign –
    - the container that holds the details of each message collection
  - Group – a cross section of Customers or Contacts
  - Saved Search – defines the Group
  - Email Template – the HTML creative that is sent

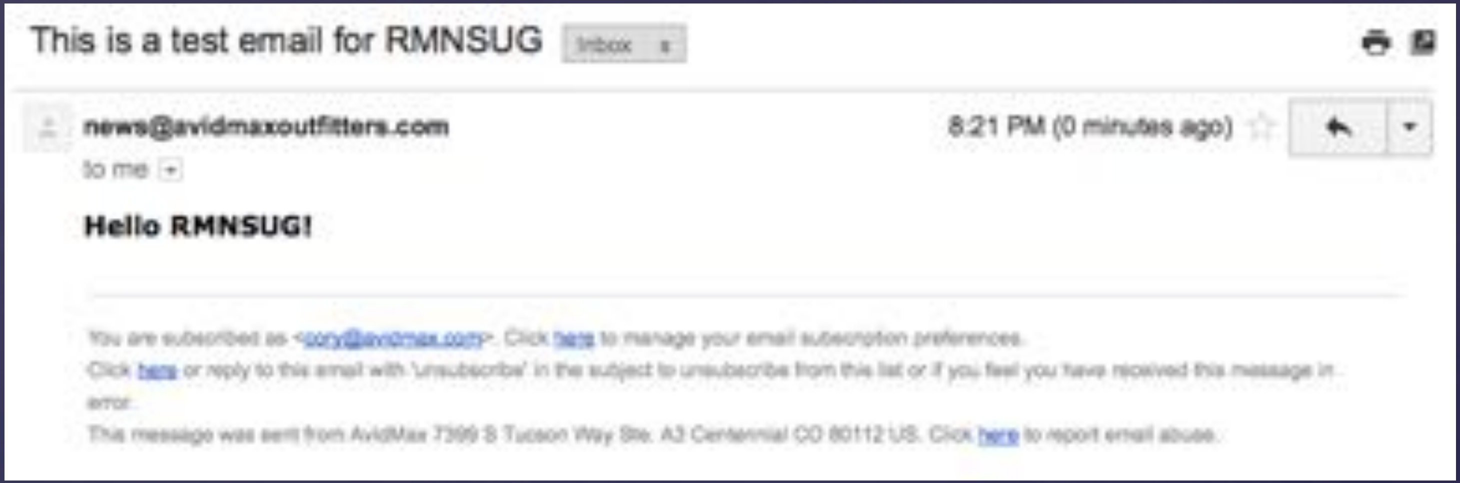
Email Campaigns

- Work backwards
  - Create the Email Template
  - Create Saved Search
  - Create the Group
  - Create the Campaign with the Campaign Assistant

Email Templates

- Global Search = Marketing Templates
  - Click New Template
  - Select Campaign
  - Choose a Template Layout
    - Fill in Name and Subject fields
      - To upload an HTML file, click on the + next to the file name box. Then choose an HTML file to upload.
    - Or choose the text editor to create your own HTML document right in NetSuite
      - Uses FreeMarker syntax for pulling in record fields
      - For more info see "Scriptable Templates" in help center
  - Learn HTML
    - www.w3schools.com/html/

Email Templates



Unsubscribe information at bottom of marketing emails is put in automatically by NetSuite and is not customizable.

Saved Search

- Global Search = New Saved Search
  - Choose Customer (or Contact)

  - Criteria
    - Global Subscription status is any of Confirmed Opt-In, Soft Opt-In
    - Hard Bounced is false (consider scrubbing your email list from time to time)

  - Results
    - At least one field such as Name or Email Address

  - Name the Saved Search and save

Group

- Global Search = New Groups
  - Static is to manually select the Customer records to be in the group
  - Dynamic
    - Fill in the Name field
    - Choose the Saved Search created for the Campaign
    - Save

Campaign Assistant

- Global Search = Campaign Assistant
  - Fill in Title
  - Related Information – gives you areas to track related data for the campaign
  - Next
  - Target Group – choose the Group you created for this campaign
  - Next
  - Template – choose the email template created for the campaign
  - Next

Campaign Assistant

- Promotion – allows you to track a specific promotion code for the campaign
- Status
  - Set to Planning if you are not ready to Execute the campaign but want to save it for now
  - Set to Execute if you are ready to schedule the campaign to go out
    - Set the Date and Time to start sending the campaign
- Next
- Review Campaign
  - Make sure everything looks good and hit Finish

Lead Nurturing

Step 1: Create the Email Templates for the Campaign

Step 2: Create the Campaign manually

- Global Search = Marketing Campaign
- New Campaign
- Add Title
- Go to Events tab, then subtab Lead Nurturing
  - Choose the email templates created for the Campaign (1 or more). As many as you need.
  - The "Title" will be the subject line in the email
- Save the Campaign

Lead Nurturing

Step 3: Create the Workflow (overview – assumes workflow knowledge)

- Global Search = Workflows
- New Workflow
- Required fields
  - Name
  - Record Type – this should be Customer, and then Sub Types depend on your needs
- Set Trigger type
  - Could be Saved Search, Condition, or triggered by another workflow
- In State 1 add a New Action
  - Choose "Send Campaign Email"
  - In the "Campaign Event" box, choose one of the email templates set up on the Lead Nurturing tab of the campaign
- Add as many States as Lead Nurturing Events you have set up
  - Set a transition in between States such as a time delay or a condition

Campaign Analysis

- Global Search = Marketing Campaigns
  - Click View on the campaign
  - Click Statistics tab
    - Stats won’t be accurately populated until 24 hours after campaign send

- Reports > Marketing > Campaign Response
  - Gives a summary of response data for a given time frame

- Reports > Marketing > Campaign Clickthrough Summary (new for 2014.2)

  - Shows the links that were clicked in each campaign in a given time frame
  - Click on a total line to see a detailed view
    - Shows Customer ID, link clicked, and date/time of click

Final Thoughts

- Lead Nurturing emails do not send immediately. Could take up to an hour after triggering to send.
- Bounce Rate challenges. Some ISPs do not play well with NetSuite. A large email list will likely see large bounce rates.
- During peak email season (the holidays), NetSuite emails get even lower priority than normal.
- You are sharing email servers with other NetSuite users. This presents challenges in terms of deliverability.
- 3rd party SMTP server support. 2014.2 now lets you set up your own SMTP server so you don't share with all other NetSuite users. The challenge here is that it takes time to build up your reputation with ISPs. But worth it in the long run.

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