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Sales and Marketing Automation

- Automation
 - Emails and tasks that are fully, or partially automated
 - Ensure we are connecting with all customers and potential customers and useful, consistent and appropriate ways
 - Save you from repetitive work



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Sales and Marketing Automation (continued)

- Sales automation (transactional)
 - Applies to the sales process in CRM, opportunities -> quotes -> reservations
- Marketing (non-transactional)
 - Pre-sales activities – e.g. newsletter, marketing with major accounts, initial response to inquiries
 - Post-sales activities – soliciting feedback, confirming satisfaction with services
 - Follow up – following up with opportunities that did not convert, targeted marketing at previous customers



Understanding Transactional Emails

- Transactional emails are those that form a clear part of a sales process where the customer is already engaged
 - Include sending quotes, follow up messages, confirmation (on bookings or cancellations) emails, emails related to arrival and departures, emails related to billings
 - Transactional emails are not subject to legal issues around SPAM, transactional emails are not “unsubscribed” from
- Non-transactional emails – are those that are outside the scope of sales transactions (more marketing)
 - These emails are subject to spam laws
 - These email can be unsubscribed from



Automation Phases

1. Auto-responses to web inquiries
2. Marketing automaton (ongoing)
3. Basic sales process emails (today)
 1. Opportunity stage emails – request information, wait list and no booking
 2. Quote stage emails – follow up
4. Extended sales process emails
 1. Quote stage email – with product details and links to property sheets, with reservation contract
 2. Reservation stage email – Confirmation email, arrival and departure email templates



Sales Emails Basics

- Emails are created as drafts (not sent), you decide when to send and can edit before sending
- Emails are sent to contacts
 - For opportunities (and quotes) – the requested by, or the contact if present
 - For orders – the reserved by, or the customer (if a contact)
- Emails are created by you clicking buttons or performing certain actions



Emails on Opportunities

- Requesting more information
 - Click “Request Information” button in Ribbon
 - Click email to open, review, edit and send
- Priority List
 - Created automatically when an opportunity is moved to the priority list
- No Booking
 - When the opportunity won't be going ahead
 - Click “No Booking” button on the ribbon



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Emails on Quotes

- Follow up
 - Generic follow up email
 - Click “Follow Up” in the Quote Ribbon



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