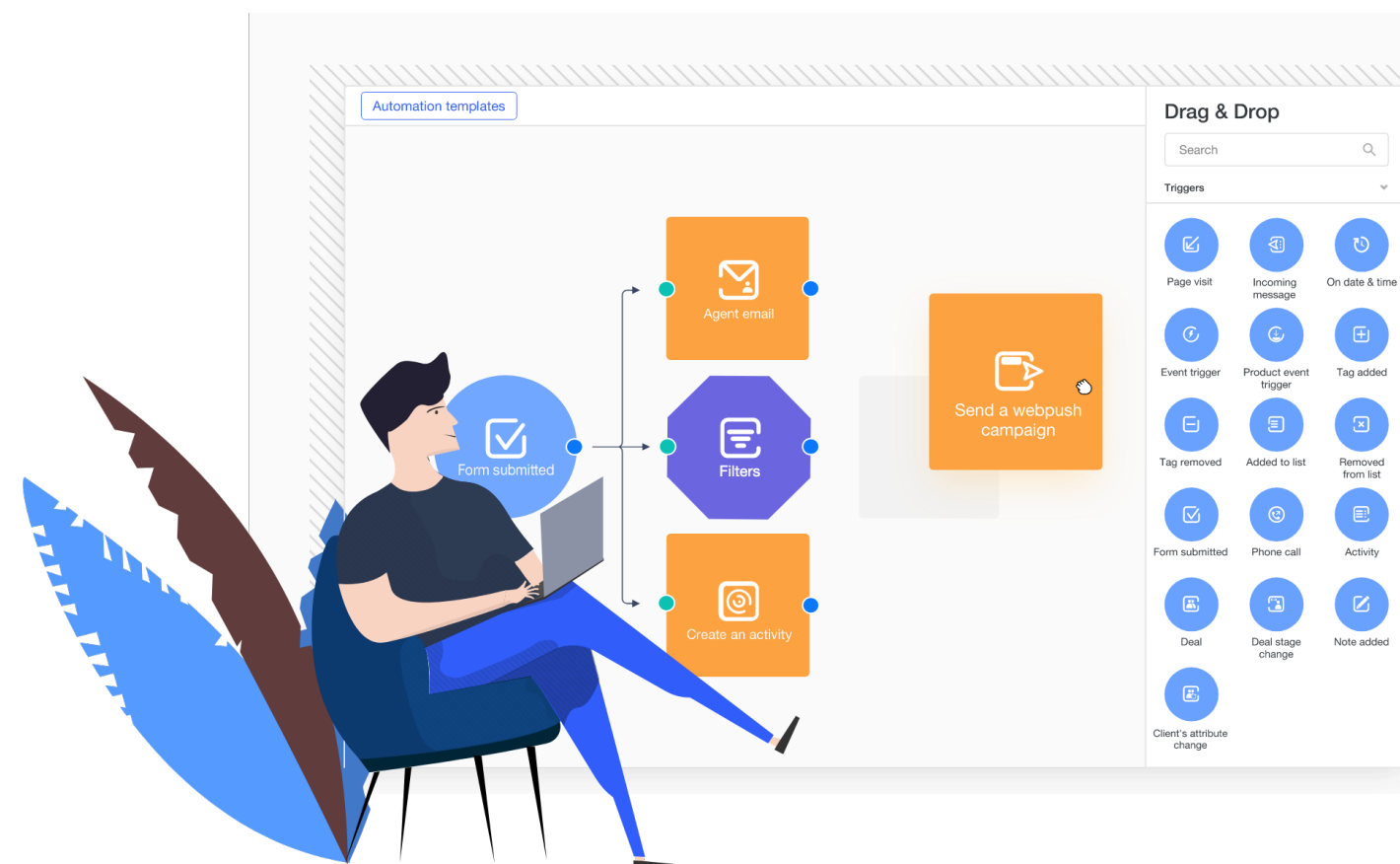


Marketing automation w SaaS-ach

AGENDA



- Demo narzędzia
- Personalizowanie komunikacji w Marketing Automation
- Automatyzacje które sprawdzają się w SaaS-ach Instrukcja
- Planowanie wdrożenia Marketing Automation w Twoim SaaS-ie

One tool for the whole company



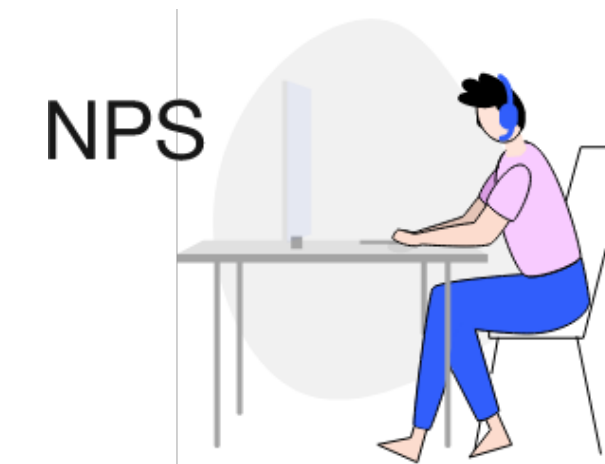
Marketing

Make communication with users in all channels personalized, automated, efficient.



Sales

CRM, activities, reports- all of this can be fully automated. Allow your entire team to focus on selling.



Support

More satisfied clients with less work. Advanced chat, predefined answers and a comprehensive knowledge base.



Page Views



Mobile activity



Clicks and events



Communication history



Custom data



user.com

Cross-channel communication



DMP & Tracking

CRM

Email marketing

Push notifications

Pop-ups

Mobile SDK

Marketing Automation

Live chat

Call center & SMS

Dynamic page content

Analytics

user.com

user.com

Personalizacja

To **NIE** jest personalizacja

Hello **{{ receiver.first_name }}**,
I've checked your Website, and you
guys at
{{ receiver.company_name }} are
just great. I'm really impressed.

PRAWDZIWA personalizacja



Segmentacja

DO KOGO



Kontekst

KIEDY

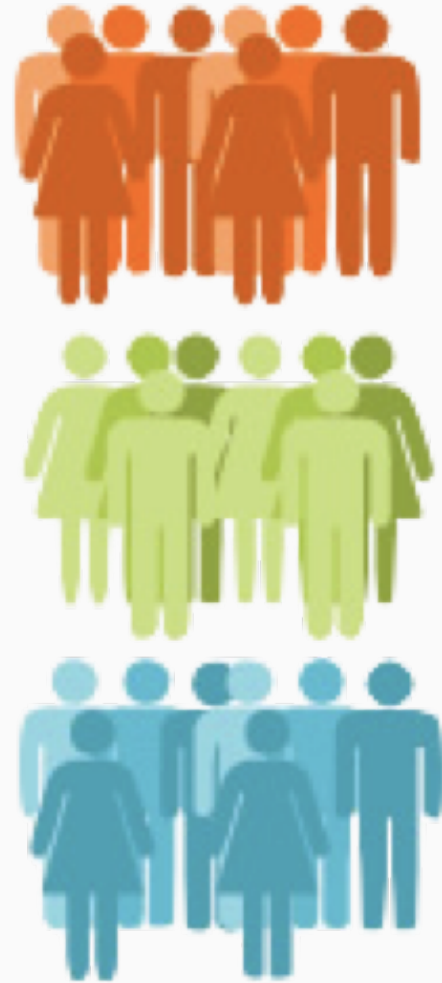
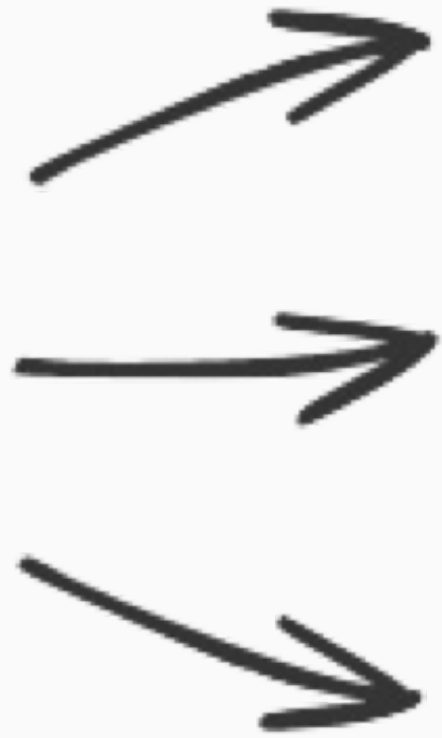


Kanał/Sposób

JAK



Segmentacja (DO KOGO)



SaaS

Marketing

Free

Ecommerce

Sales

Business

Service

Support

Enterprise

Segmentacja na bazie różnych danych


- Danych o klientach
- Danych o aktywności klientów
- Danych sprzedażowych


branża/ kategoria / model biznesowy

- B2B, SaaS, e-commerce
- Enterprise, Mid-market, Startup
- Webhosting / Travel / Education etc.


FOR INDUSTRIES


 **SaaS**
Generate more leads and boost conversion rates

 **E-Commerce**
Potent segmentations to promote cross and upselling

 **Finance**
Take already proven and efficient tech to the next level

 **Travel**
Customized web experience for each and any explorer

 **Healthcare**
Unified and omnichannel data put to utilization

 **Web Hosting**
Present contrasting communication based on history

 **Real Estate**
Gain extra foresight to make advantageous decisions

 **Education**
Effective insights to strengthen a stable student base

Segmentacja na bazie **danych o klientach**
STATYCZNA

technologia której używa

- Intercom, Drift, HelpScout
- Hubspot, Pipedrive, ActiveCampaign
- SalesManago, Autopilot, aWeber, InfusionSoft

- Google Tag Manager, HotJar, Google Optimize

Segmentacja na bazie **danych o klientach**
STATYCZNA

wielkość firmy

- ilość pracowników
- ruch posiadany na stronie
- przychody

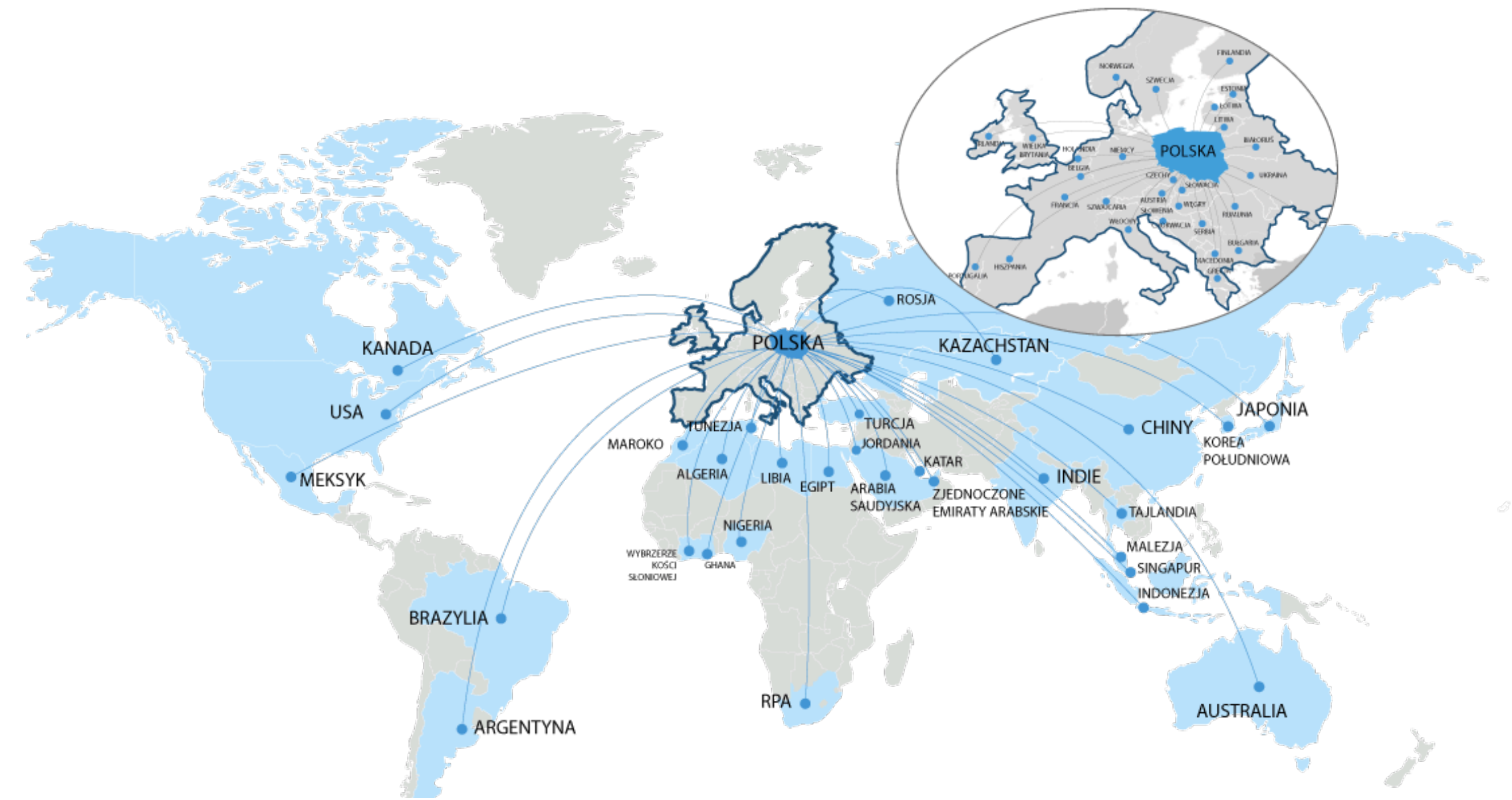
Segmentacja na bazie **danych o klientach**
STATYCZNA

etap rozwoju firmy



Segmentacja na bazie **danych o klientach**
STATYCZNA

kraj pochodzenia



Segmentacja na bazie **danych o klientach**
STATYCZNA

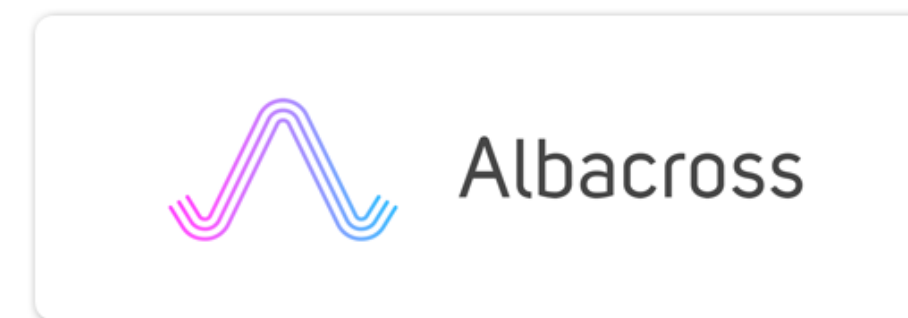
Sposoby pozyskiwania danych

Segmentacja na bazie **danych o klientach**
STATYCZNA

Sposoby pozyskiwania danych

user.com

Zakup baz lub technologii

The logo for 'builtwith' is displayed in a bold, green, lowercase sans-serif font.The logo for 'Datanyze' features the word 'Datanyze' in a blue, italicized sans-serif font, followed by a small black line-art icon of a person's head and shoulders.The logo for 'zoominfo' consists of a stylized 'Z' icon made of black lines, followed by the word 'zoominfo' in a bold, black, lowercase sans-serif font. Below it, the text 'Powered by DiscoverOrg' is written in a smaller, gray, lowercase sans-serif font.The logo for 'crunchbase' is written in a bold, blue, lowercase sans-serif font.

Segmentacja na bazie **danych o klientach**

STATYCZNA

The logo for 'user.com' is written in a bold, black, lowercase sans-serif font.

Sposoby pozyskiwania danych

user.com

Deklaracja ze strony klienta

user.com 1. Setup project 2. Tell us more about you 3. Start growing!

Tell us more about your business ●●

This process will help us create a better starting experience.

How many people work at your company*

1 2-5 6-20 21-50 51-100 101-150 151-250 250+

How many contacts in your customer base?*

less than 500 500-1k 1k-2,5k 2,5k-5k 5k-10k 10-25k 25k-50k 50k-100k 100k-250k more than 250k

What industry is your business in?*

What is your business website?*

Segmentacja na bazie **danych o klientach**
STATYCZNA

user.com

Automatyczne wzbogacanie danych



Clearbit

zapier*

Segmentacja na bazie **danych o klientach**
STATYCZNA

Sposoby pozyskiwania danych

**Ręczny research
np. via Linked**



Segmentacja na bazie **danych o klientach**
STATYCZNA

user.com

Segmentacja na bazie danych o aktywności klientów

DYNAMICZNA

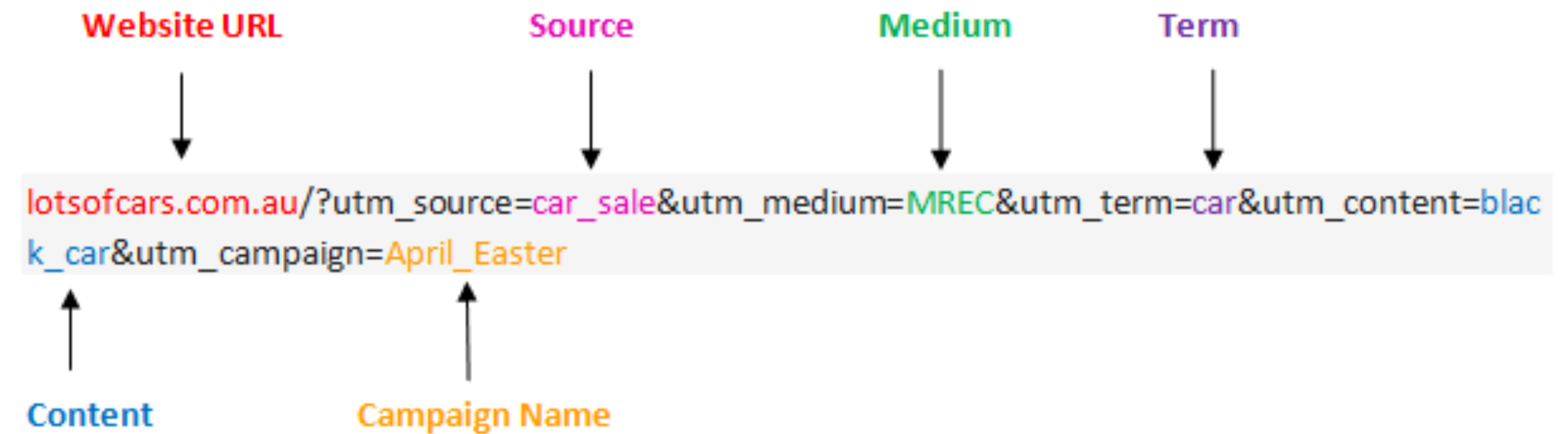
- etap lejka konwersji
- poziom zaangażowania
- źródło ruchu
- dotychczasowa historia zakupowa
- konkretne aktywności (ściągnięcia ebooka etc.)

etap lejka konwersji



Segmentacja na bazie **danych o aktywności klientów**
DYNAMICZNA

źródło ruchu



Segmentacja na bazie **danych o aktywności klientów**
DYNAMICZNA

poziom zaangażowania

Page visits

greater

20

ADD NEXT FILTER

Score

greater

100

ADD NEXT FILTER

Segmentacja na bazie **danych o aktywności klientów**
DYNAMICZNA

konkretne aktywności (ściągnięcia ebook-a, obejrzenie video)

The screenshot displays the User.com configuration interface. At the top, a 'Trigger Configuration' dialog is open, showing 'YouTube Video' as the trigger type. Under 'Capture', 'Start' and 'Complete' are checked. Under 'Advanced', 'Add JavaScript API support to all YouTube videos' is unchecked. The trigger is enabled on 'DOM Ready (gtm.dom)' and is set to fire on 'All Videos'. Below this, a 'Tag Configuration' dialog is open for a tag named 'tag_youtube_video'. The tag type is 'Custom HTML'. The HTML code is as follows:

```
1 <script>
2   userengage('event.youtube_video_played',{
3
4     'video_duration': '{{Video Duration}}',
5     'video_percent': '{{Video Percent}}',
6     'video_current_time': '{{Video Current Time}}',
7     'video_provider': '{{Video Provider}}',
8     'video_status': '{{Video Status}}',
9     'video_title': '{{Video Title}}',
10    'video_url': '{{Video URL}}',
11    'video_visible': '{{Video Visible}}',
12  });
13 </script>
```

At the bottom, a 'Triggering' section shows an event occurrence for 'youtube_video_played' that occurred 'a few seconds ago'. The event data is as follows:

video_current_time:	1
video_duration:	207
video_percent:	0
video_provider:	youtube
video_status:	pause
video_title:	UserEngage Marketing Automation Implementation Course Part 1, section 1: Introduction
video_url:	https://www.youtube.com/watch?v=K5l0l8yX4X8
video_visible:	true

Segmentacja na bazie **danych o aktywności klientów**
DYNAMICZNA

Segmentacja na bazie danych o sprzedażowych

- LTV
- wybrany plan
- najbardziej rentowni klienci
- najszybciej konwertujący



Kontekst (KIEDY)



Edukacja

Onboarding

Promocje

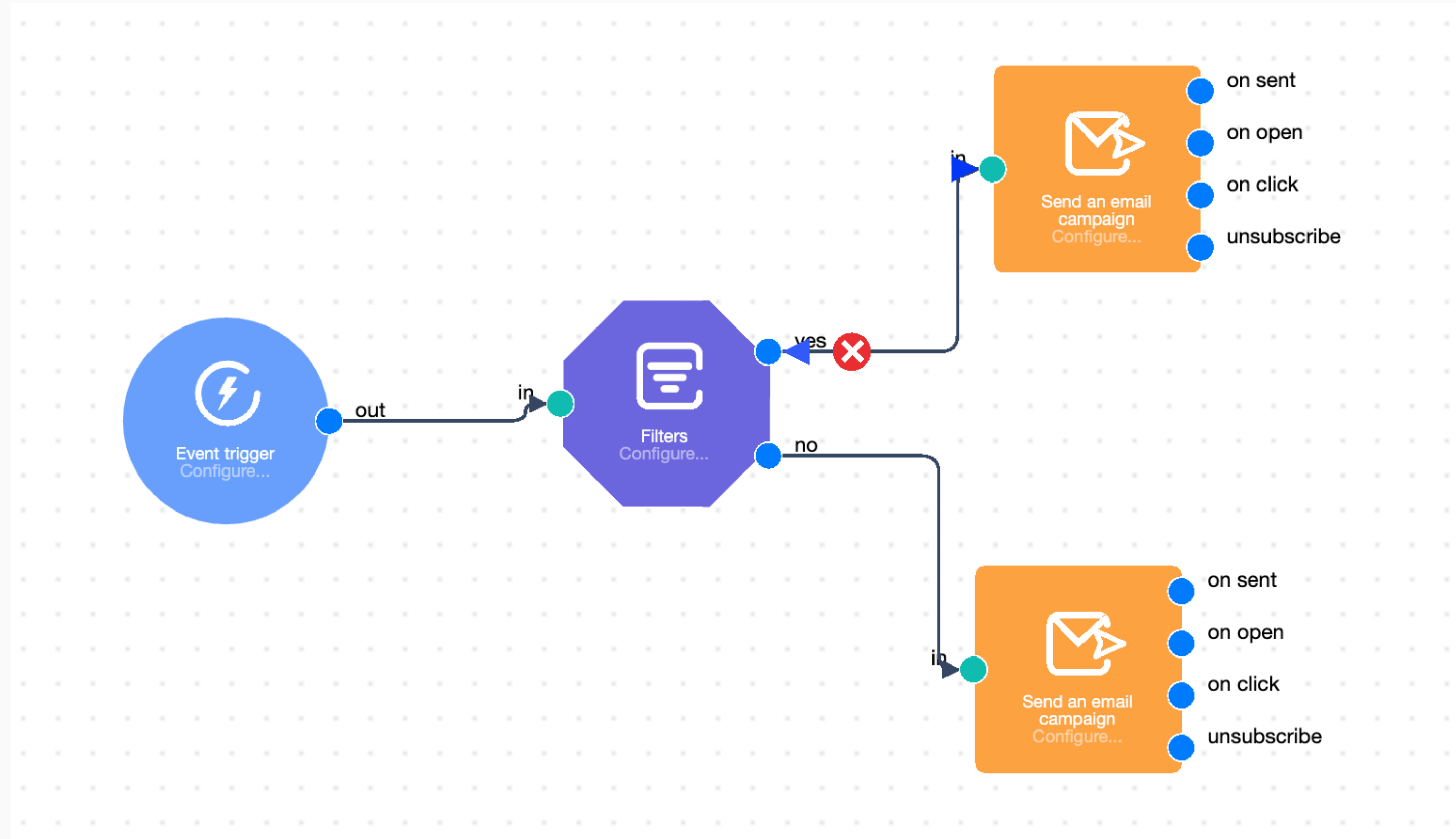
Best Practices

Tips & Tricks

Triggered
&
Drip



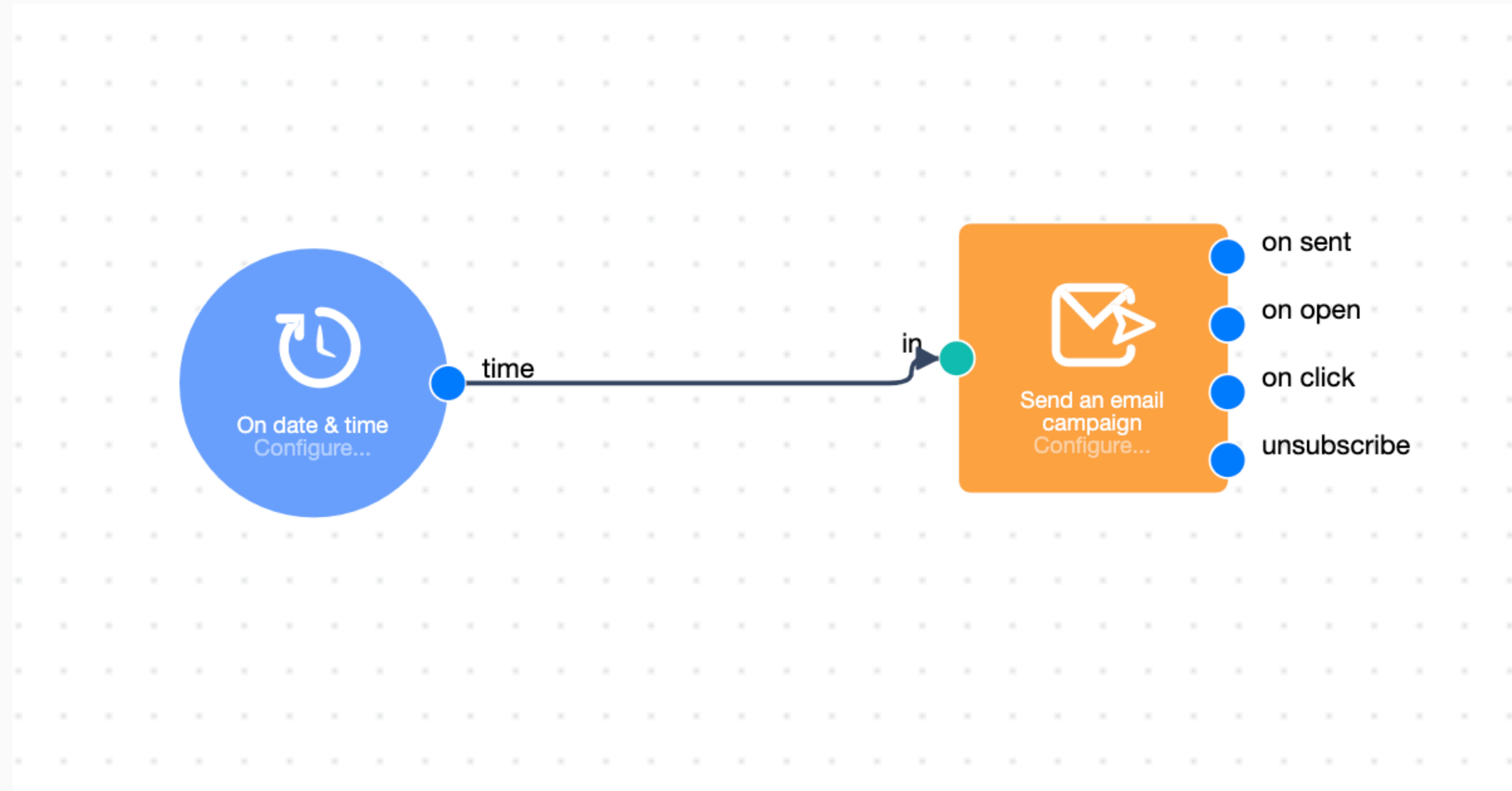
Kontekst (KIEDY)



Triggered
&
Drip



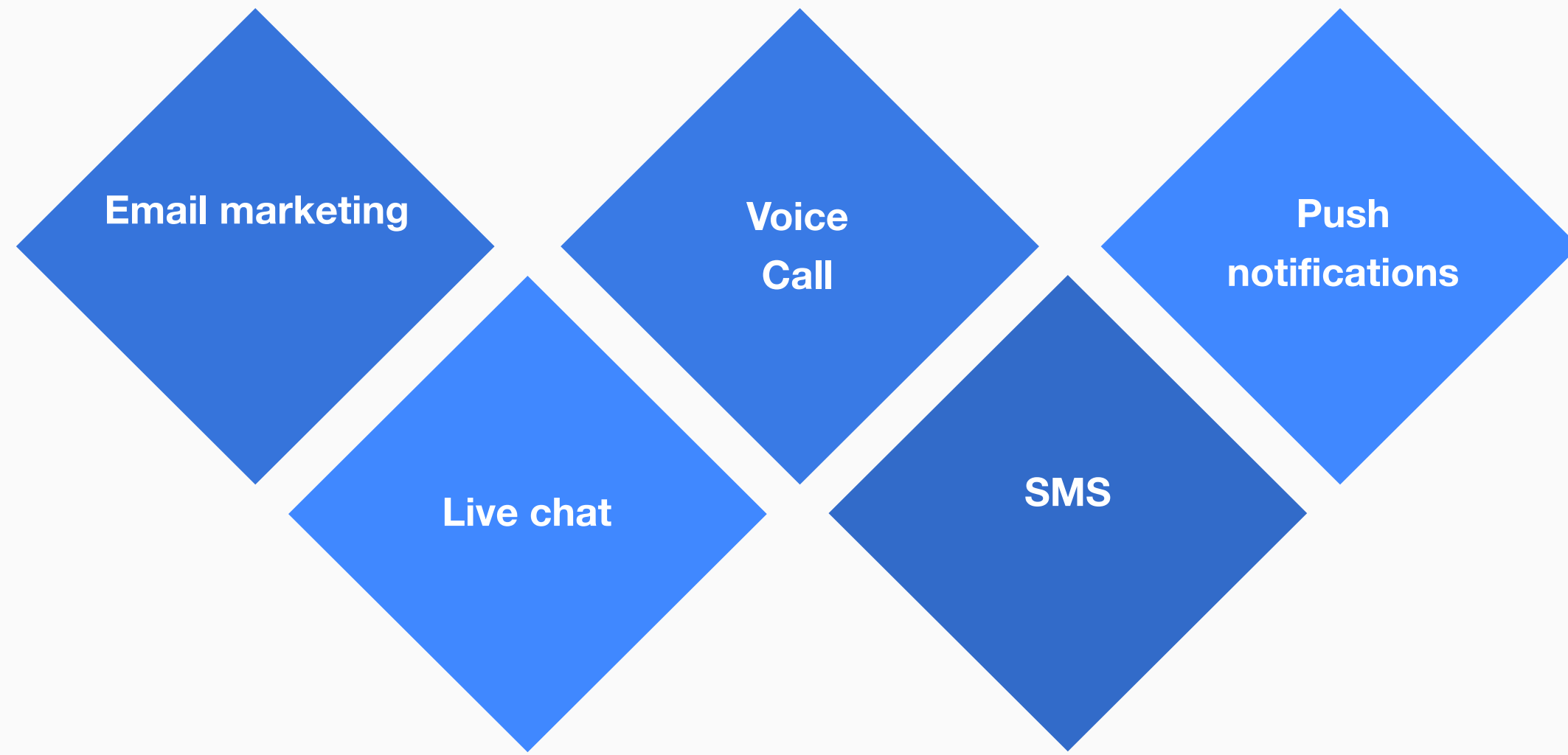
Kontekst (KIEDY)



Triggered
&
Drip



Kanał/Sposób (JAK)



Manual

Automated

Formal

Personal



Jak personalizować komunikację marketingową

Snippety tags

Native attributes	
Name	Snippet
Full name	<code>{{ receiver.name }}</code>
First name	<code>{{ receiver.first_name }}</code>
Last name	<code>{{ receiver.last_name }}</code>
Email	<code>{{ receiver.email }}</code>
Id	<code>{{ receiver.id }}</code>
User ID	<code>{{ receiver.user_id }}</code>
Gender	<code>{{ receiver.gender }}</code>
City	<code>{{ receiver.city }}</code>
Country	<code>{{ receiver.country }}</code>
Page visits	<code>{{ receiver.page_views }}</code>

Toggle preview

Hi {{ receiver.first_name }}!

You've just earned {{ receiver.last_loyalty_points }} points!

Having {{ receiver.all_loyalty_points }} points on your account, you've almost reached our Gold Customer status.

Spend \${{ receiver.purchase_value_to_gold }} more and you'll receive **20% permanent discount** valid till the end of this year.



SHOP NOW

Toggle preview

Hi Mike!

You've just earned **375** points!

Having **3455** points on your account, you've almost reached our Gold Customer status.

Spend **\$123** more and you'll receive **20% permanent discount** valid till the end of this year.



SHOP NOW

Metody obróbki snippetów tagów

Useful tags

`{{ receiver.last_name|capfirst }}`- capitalizes the first character of the value

`{{ receiver.value|center:"15" }}`- centers the value in a field of a given width; if value is **client**, the output will be **client** .

`{{ receiver.value|cut:" " }}`- removes all values of argument in given string; if value is **e x a m p l e**, output will be **example**

`{{ receiver.value|date:"D d M Y" }}`- formats a date according to the given format; this will return **Wed 15 Jan 2018**

`{{ receiver.first_name|default:"Friend" }}` - if the *receiver.first_name* is empty then use default value **Friend**

`{{ receiver.value|linenumbers }}`- displays text with line numbers

`{{ receiver.attribute|title }}` - converts a string into titlecase by making words start with an uppercase character and the remaining characters lowercase

`{{ receiver.attribute|truncatechars:10 }}` - truncates a string if it is longer than the specified number of characters

`{{ receiver.attribute|truncatewords:2 }}` - truncates a string after a certain number of words; **It's great to see you** will be **It's great ...**

`{{ receiver.attribute|upper }}` - converts a string into all uppercase; value **hurray** will become **HURRAY**

Warunkowanie if/else

```
{% if receiver.first_name and receiver.last_name %}
Hello {{ receiver.first_name }} {{ receiver.last_name }}

{% elif receiver.first_name and not receiver.last_name %}
Hello {{ receiver.first_name }}

{% elif not receiver.first_name and receiver.last_name %}
Hello Mr. {{ receiver.last_name }}

{% else %}
Hello friend

{% endif %}
```

```
{% if receiver.Car.Renault %}
Hello {{ receiver.receiver.first_name }}, how are you?
```

This is what you can do with the Bonus Points accumulated using our Renault fleet.

```
{% elif receiver.Car.Honda %}
Hello {{ receiver.receiver.first_name }}, how are you?
```

Here is a link to enroll to our Bonus Points Program, make sure to take part today and show the love for Honda!

```
{% endif %}
```

Learn More

Learn More

Snippety firm / autora / deals

Toggle preview

DESICLOTH

Dear Mr. {{ receiver.last_name }},

We still haven't received payment from {{ receiver.company.name }} of an overdue invoice (no. {{ receiver.company.last_invoice_number}}).

If you don't settle the invoice by {{ receiver.company.overdue_invoice_date }}, we will be forced to freeze your account.

Yours sincerely,

{{ author.name }}

Toggle preview

DESICLOTH

Dear Mr. Tom Berstein,

We still haven't received payment from Aquafare Ltd. of an overdue invoice (no. N/2323).

If you don't settle the invoice by April 29, 2020, we will be forced to freeze your account.

Yours sincerely,

Brad Connor


Loopy renderowanie danych z eventów

Toggle preview

Oh {{ receiver.first_name }}, it seems you've left something in your cart!

Did you know you will get it within 24 hours if you complete your purchase now?

```
{% events 'add_to_cart' for_last_days=1 count=3 order=-1 as event_occurrences %}  
{% for event in event_occurrences %}
```

 {{ event.title }}
\${{ event.price }}
{{ event.color }} W: {{ event.weight }} sku: {{ event.sku }}



{{ event.quantity }}

+ Add

```
{% endfor %}
```

Go to your cart

Toggle preview

Oh Gabrielle, it seems you've left something in your cart!

Did you know you will get it within 24 hours if you complete your purchase now?



Blue whale
\$1999999

Blue

W: 140 tons

sku: #321



2

+ Add

Go to your cart

Renderowanie danych z typu danych JSON

```
{
  "glossary": {
    "title": "example glossary",
    "tag": {
      "title": "S",
      "GlossList": {
        "GlossEntry": {
          "ID": "SGML",
          "SortAs": "SGML",
          "SGML": "Standard Generalized Markup Language",
          "Acronym": "SGML",
          "Abbrev": "ISO 8879:1986",
          "Test": {
            "para": "A meta-markup language, used to create
markup languages.",
            "Vall": ["GML", "XML"]
          },
          "Type": "markup"
        }
      }
    }
  }
}
```

```
{{ receiver.attribute_name.glossary.tag.GlossList.GlossEntry.ID }}
```

PRAWDZIWA personalizacja



Segmentation

DO KOGO



Kontekst

KIEDY



Kanał/Sposób

JAK

**The good news is that
marketing takes an hour to
learn. The bad news is that it
takes a lifetime to master.**

Philip Kotler

**There are real people on the
other side of the screen**

**Be human, and leave
technology what can be
repeatable**

Automatyzacje dla SaaS-ów w user.com



Automate your SaaS business to grow faster with less work

Test out the platform SaaS companies around the world use to boost their marketing activities and generate up to 200% more leads.

Enter your email address [Sign up](#)



Improve conversions

For SaaS Marketing Teams →



Close more deals

For SaaS Sales Teams →



Reduce churn

For SaaS Support Teams →



Improve conversions

For SaaS Marketing Teams →

- Generowanie leadów za pośrednictwem Pop-upów, Landing Page'y i Formularzy



Improve conversions

For SaaS Marketing Teams →

- Generowanie leadów za pośrednictwem Pop-upów, Landing Page'y i Formularzy
- Nurturing Leadów (kampanie drip mailingowe)



Improve conversions

For SaaS Marketing Teams →

- Generowanie leadów za pośrednictwem Pop-upów, Landing Page'y i Formularzy
- Nurturing Leadów (kampanie drip mailingowe)
- Scoring leadów



Improve conversions

For SaaS Marketing Teams →

- Generowanie leadów za pośrednictwem Pop-upów, Landing Page'y i Formularzy
- Nurturing Leadów (kampanie drip mailingowe)
- Scoring leadów
- Segmentacja bazy



Improve conversions

For SaaS Marketing Teams →

- Generowanie leadów za pośrednictwem Pop-upów, Landing Page'y i Formularzy
- Nurturing Leadów (kampanie drip mailingowe)
- Scoring leadów
- Segmentacja bazy
- Aktywność Newsletter'owa



Close more deals

For SaaS Sales Teams →

- Automatyczne tworzenie deali i activity



Close more deals

For SaaS Sales Teams →

- Automatyczne tworzenie deali i activity
- Umawianie spotkań poprzez kalendarz



Close more deals

For SaaS Sales Teams →

- Automatyczne tworzenie deali i activity
- Umawianie spotkań poprzez kalendarz
- Planowanie procesu sprzedażowego (end trial - follow-up)



Close more deals

For SaaS Sales Teams →

- Automatyczne tworzenie deali i activity
- Umawianie spotkań poprzez kalendarz
- Planowanie procesu sprzedażowego (end trial - follow-up)
- Notyfikacje handlowców o wizycie na kluczowej stronie



Close more deals

For SaaS Sales Teams →

- Automatyczne tworzenie deali i activity
- Umawianie spotkań poprzez kalendarz
- Planowanie procesu sprzedażowego (end trial - follow-up)
- Notyfikacje handlowców o wizycie na kluczowej stronie
- Dashboardy dla menedżerów sprzedaży



Reduce churn

For SaaS Support Teams →

- Kampanie on-boardingowe (drip email)



Reduce churn

[For SaaS Support Teams →](#)

- Kampanie on-boardingowe (drip email)
- Wiadomości na chacie in-app (on-boardingowe)



Reduce churn

[For SaaS Support Teams →](#)

- Kampanie on-boardingowe (drip email)
- Wiadomości na chacie in-app (on-boardingowe)
- Healthcheck (activity I praca na CRM-ie)



Reduce churn

[For SaaS Support Teams →](#)

- Kampanie on-boardingowe (drip email)
- Wiadomości na chacie in-app (on-boardingowe)
- Healthcheck (activity I praca na CRM-ie)
- Baza wiedzy i chat support



Reduce churn

[For SaaS Support Teams →](#)

- Kampanie on-boardingowe (drip email)
- Wiadomości na chacie in-app (on-boardingowe)
- Healthcheck (activity I praca na CRM-ie)
- Baza wiedzy i chat support
- Lejek anty-churn
- Ankieta NPS (chatbot, email)

Planowanie wdrożenia Marketing Automation w Twoim SaaS-ie

Marketing Automation

Sales Automation

Support Automation

Success Automation

Many Departments

Many Participants

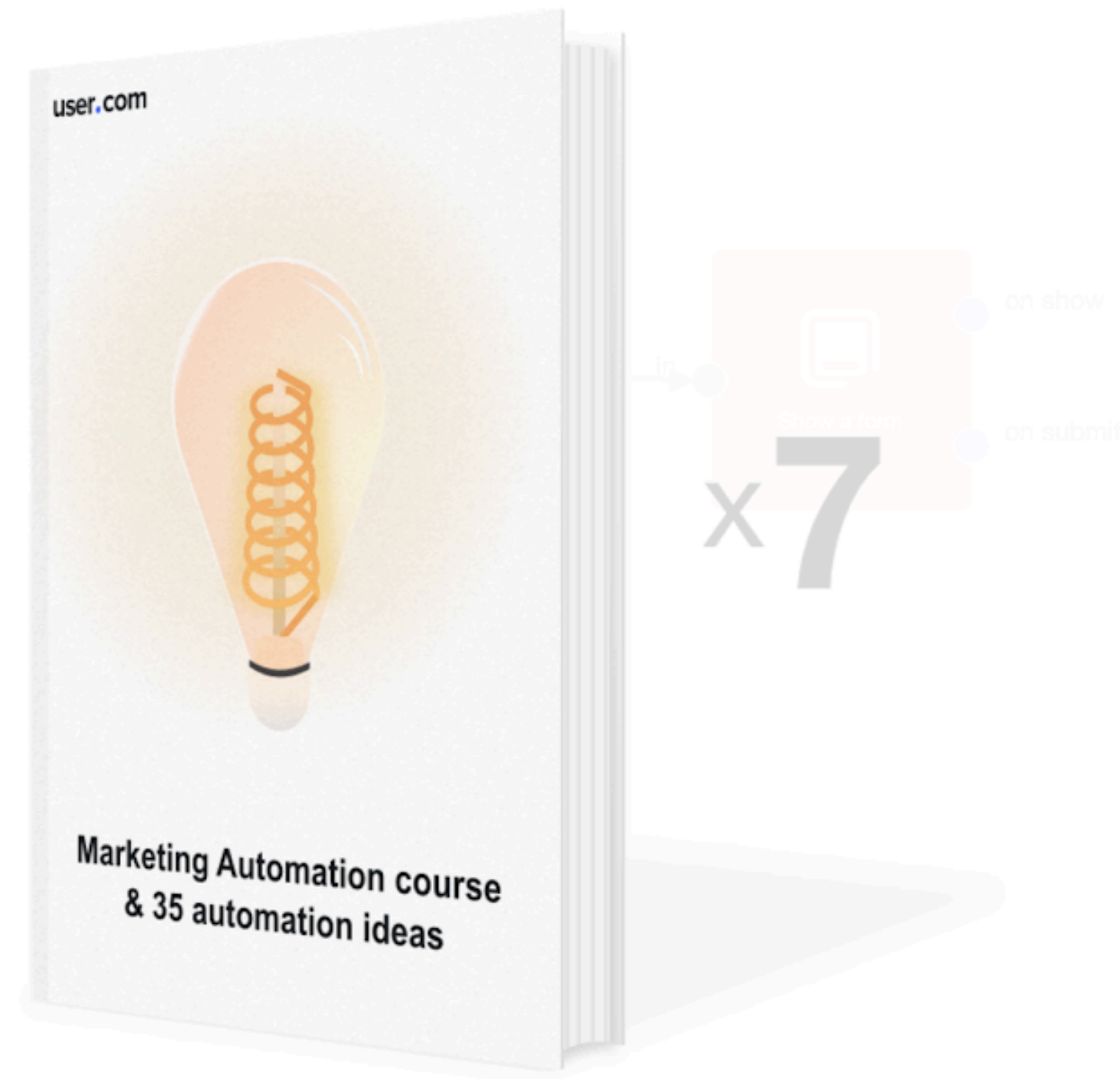
Many Resources

Many Processes

**Co możesz zacząć
automatyzować**

Lead Generation

Pop-up



TEST - pop-up

Save

Save and exit

🔥 2-Week Email Course

Convert Visitors to Customers

Get 7 guides to Marketing Automation, Segmentation, Scoring, Nurturing and access to an open app to see how it all works in real life.

I agree to receive educational and marketing communication.

Join for Free 👍

[I don't need to learn.](#)

Call Back



WE CAN CALL YOU BACK

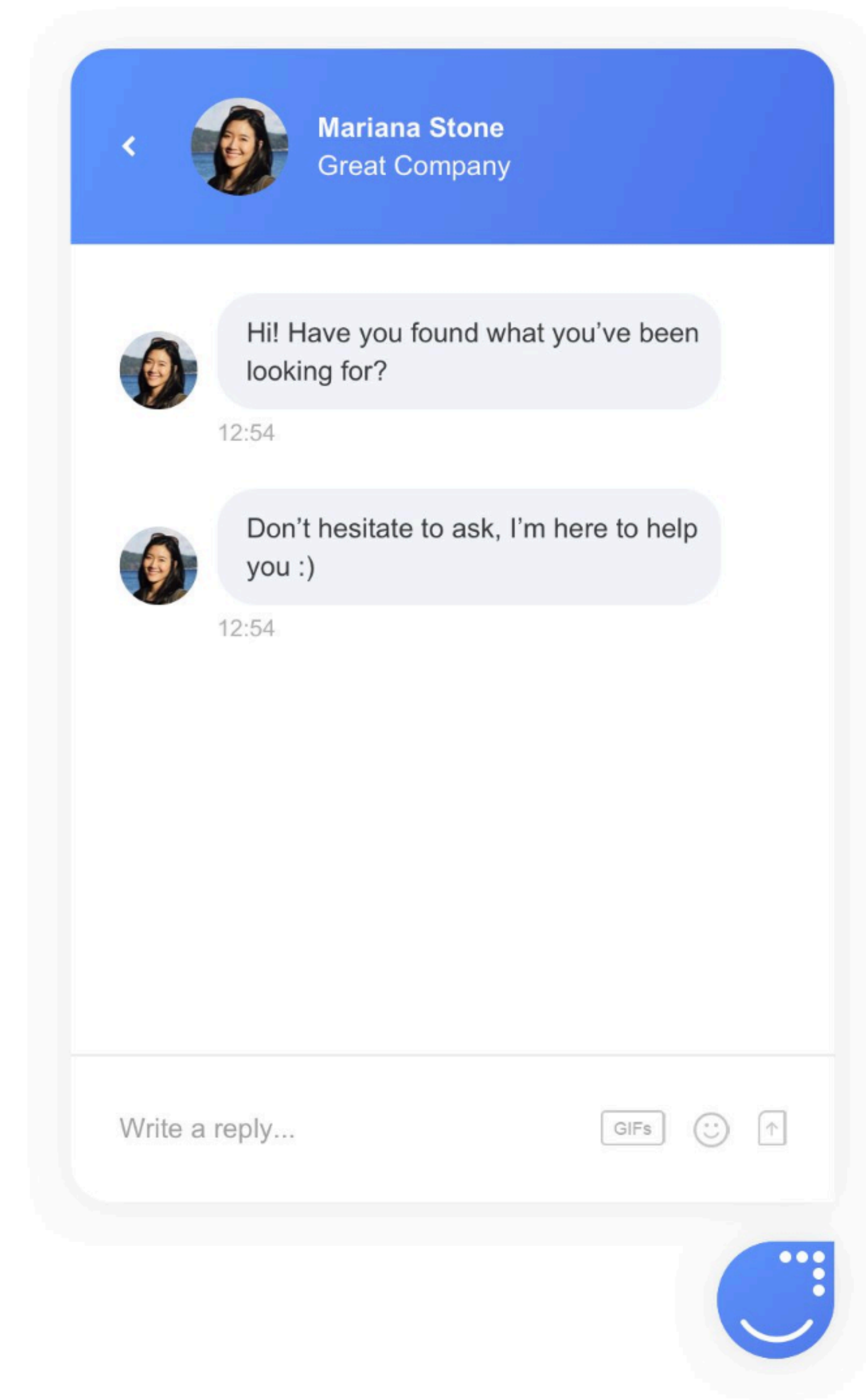
Please provide your phone number and we will call you back for free!

+1 123-213-423

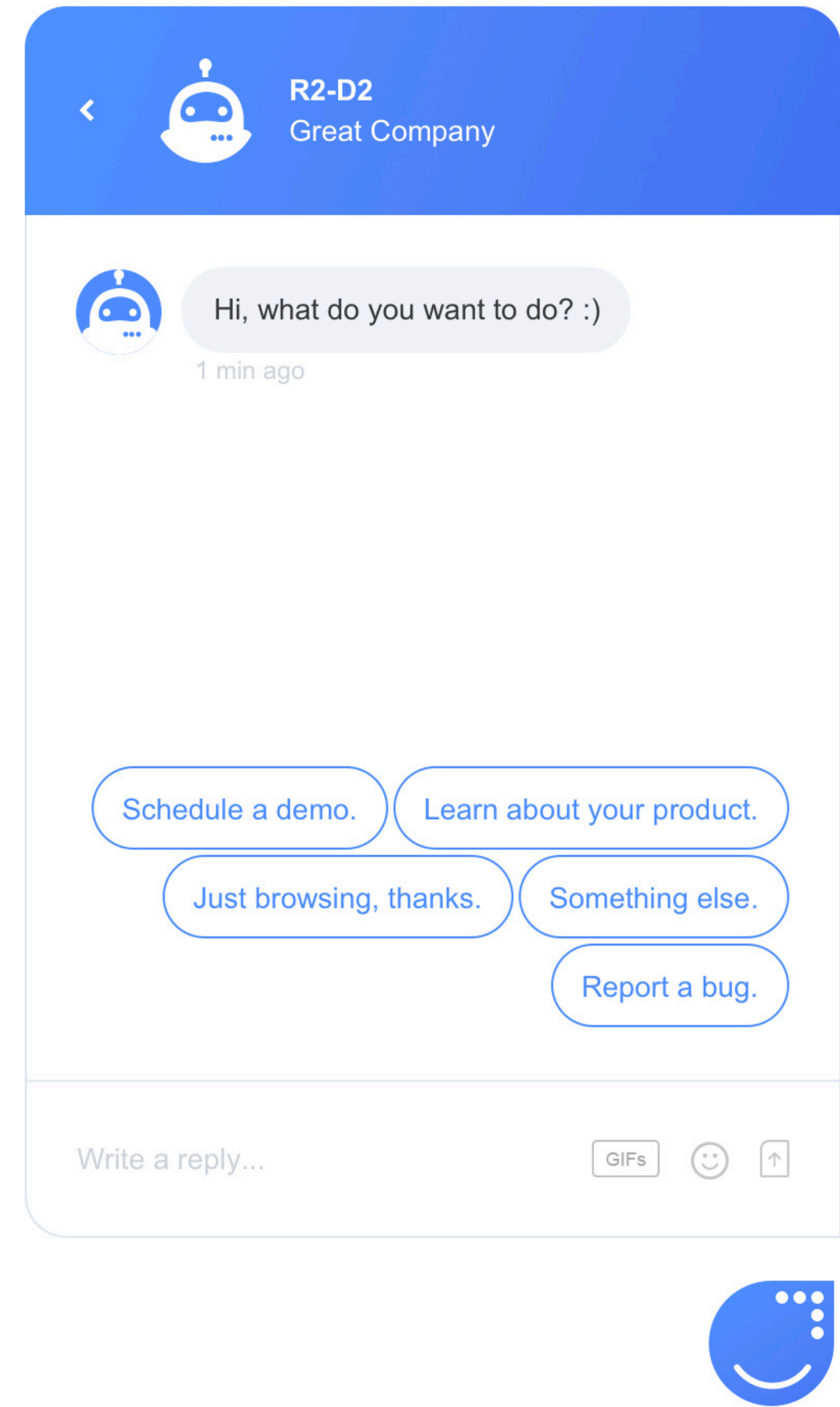
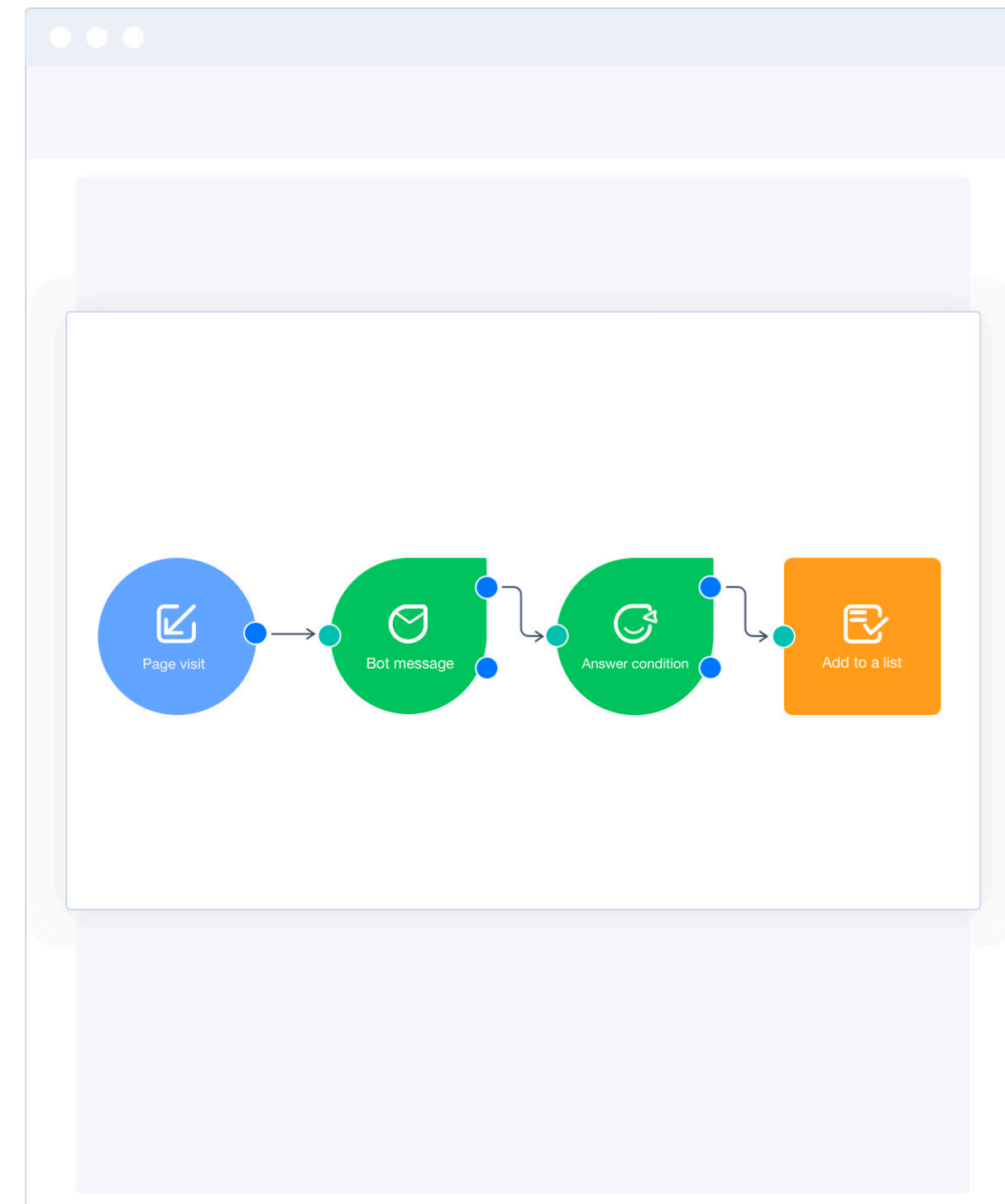
CALL ME

NO THANKS

LiveChat

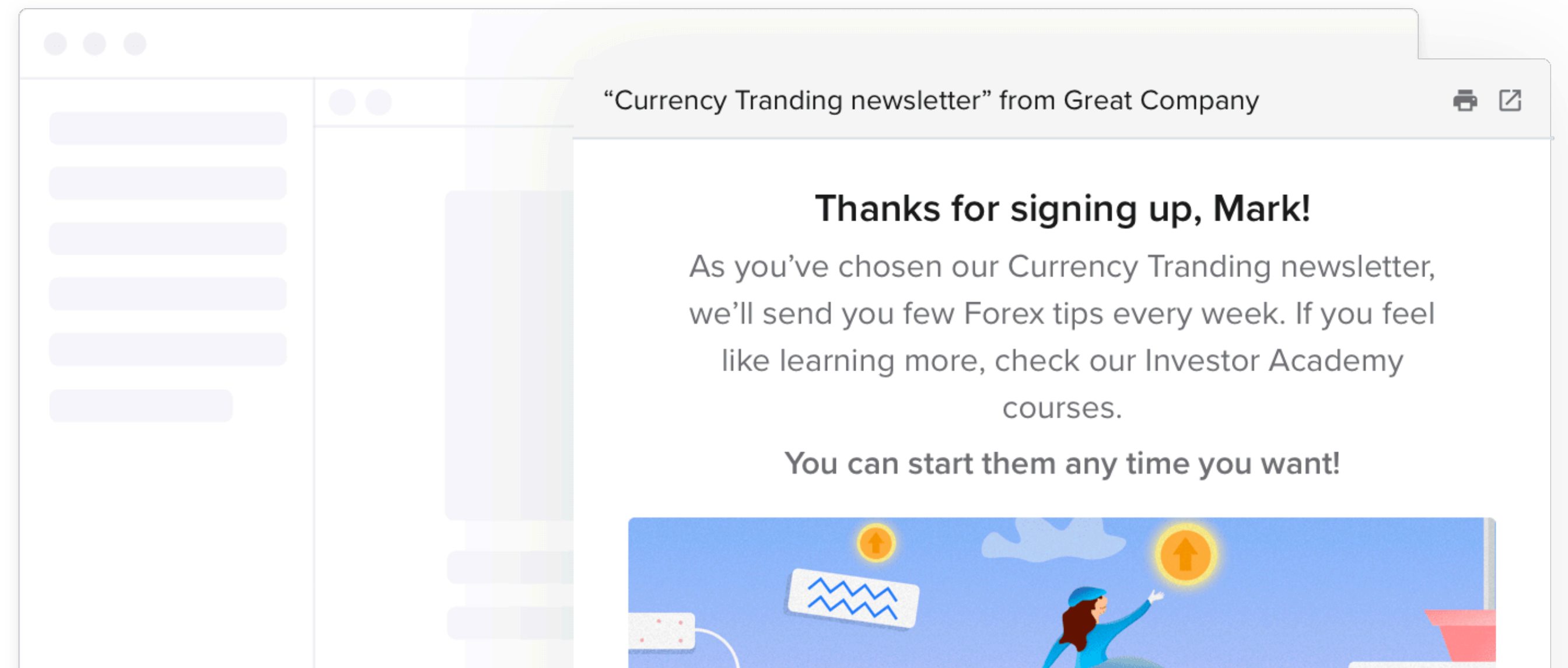


ChatBots

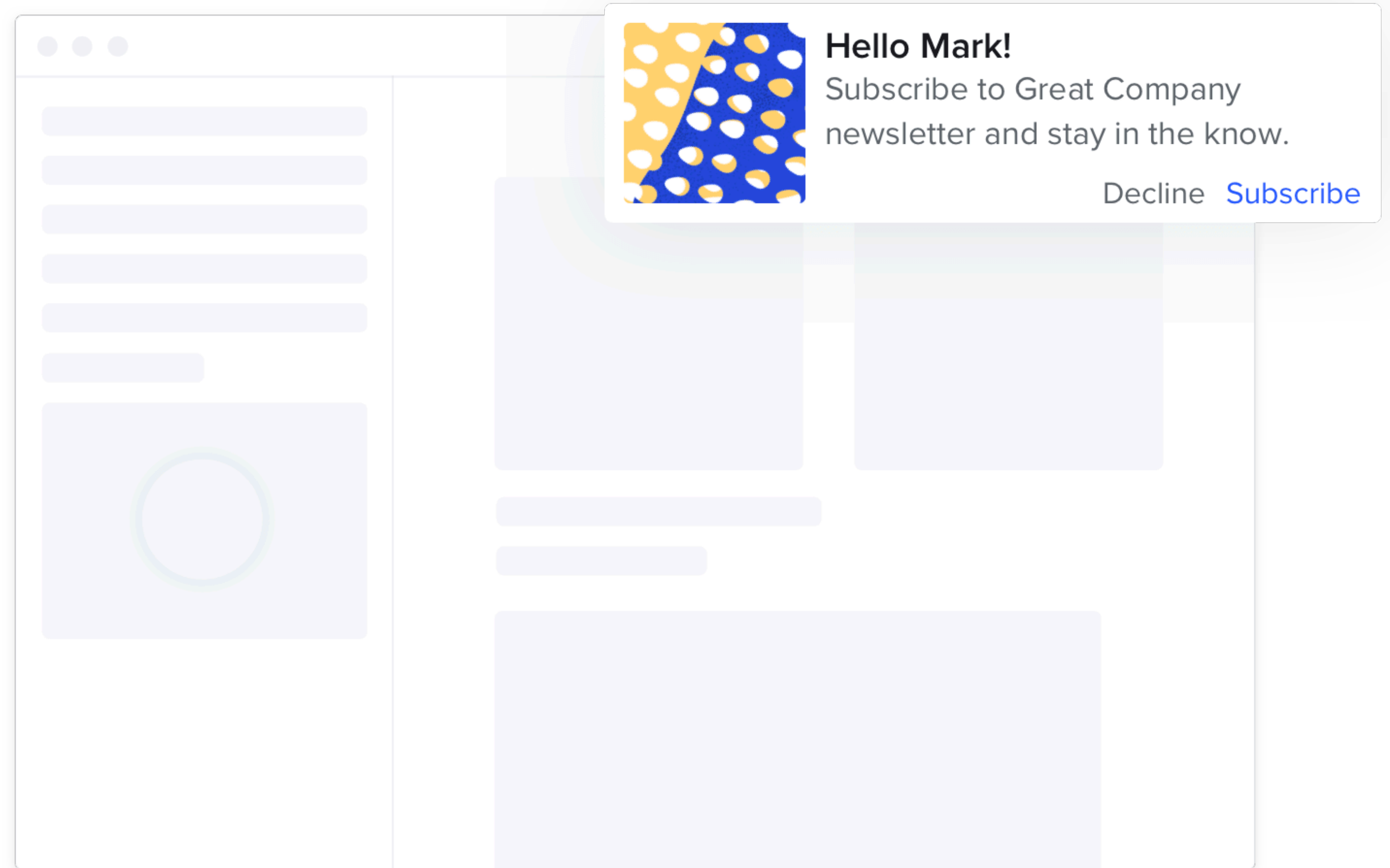


Lead Nurturing

Emails



Webpush



SMS

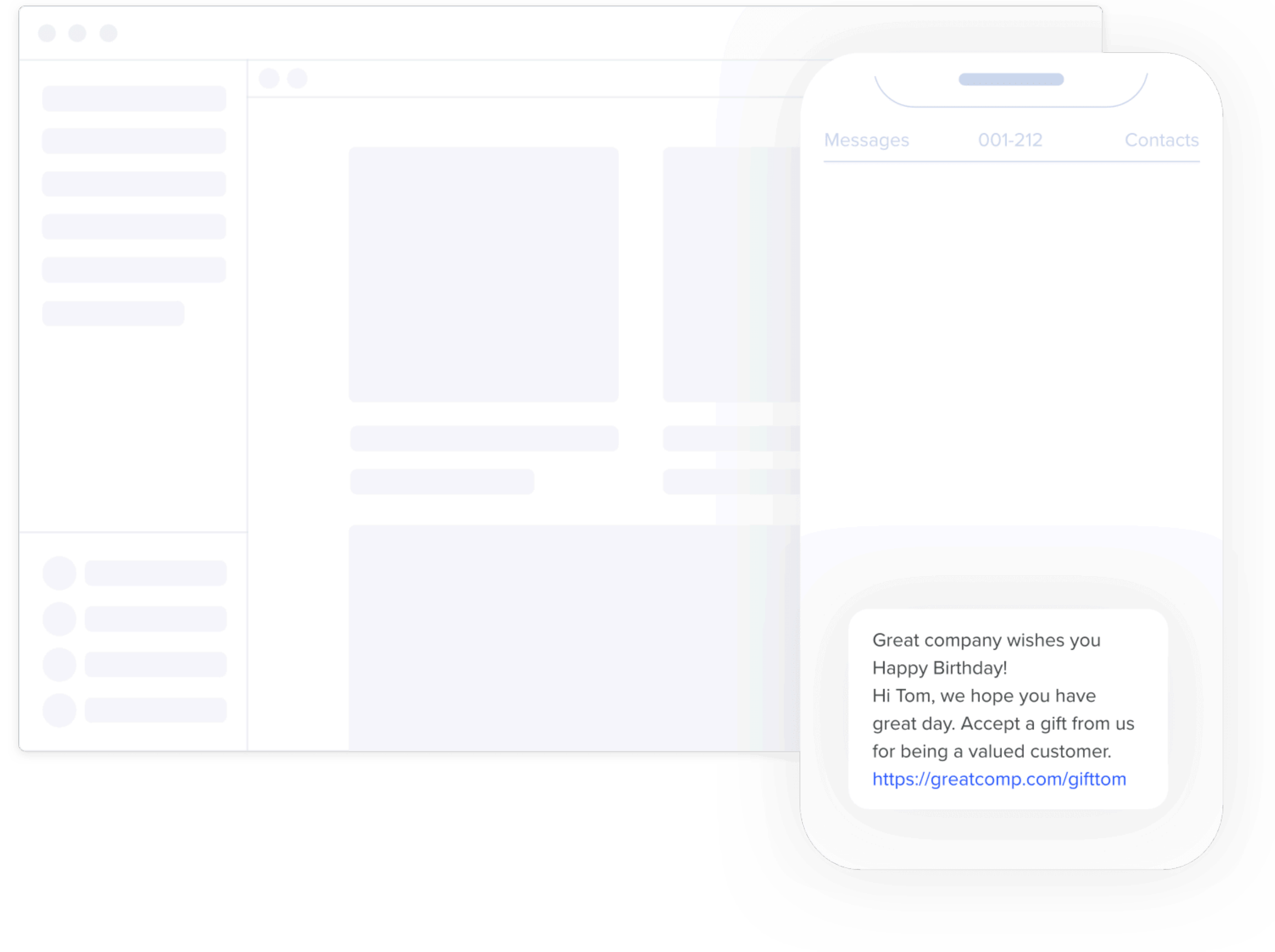
 MESSAGES

now

Techpod

John, we've got a special offer for you. Sign up for a 3 month plan today and receive 50% discount! [Click here.](#)

Mobile Push Notifications



In-app Notifications



Discount unlocked!

You can now access discounts
only available to our premium
customer

[OPEN DISCOUNTS](#)

Sales follow-ups

On-boarding

Scoring

Pre-Qualification

Up Sell

Cross Sell

Educational campaigns

Bring-back campaigns

Enriching Data Campaigns

Measuring Satisfaction Campaigns

Many Processes

X **Many** **Processes**
Many **Channels**

X **Many** **Processes**

X **Many** **Channels**

X **Many** **Participants**

X	Many	Processes
X	Many	Channels
X	Many	Participants
X	Many	Departments

X	Many	Processes
X	Many	Channels
X	Many	Participants
X	Many	Departments

A lot of Work

PLAN

1. Techniczna implementacja

The background of the image is a dark, stormy sky. Several bright, jagged lightning bolts are visible, striking down from the top right towards the bottom left. The lightning is rendered in shades of white and yellow, with some blue and purple hues at the edges, suggesting a powerful electrical discharge. The overall atmosphere is dramatic and intense.

WHEN THE
TRUTH
COMES
OUT

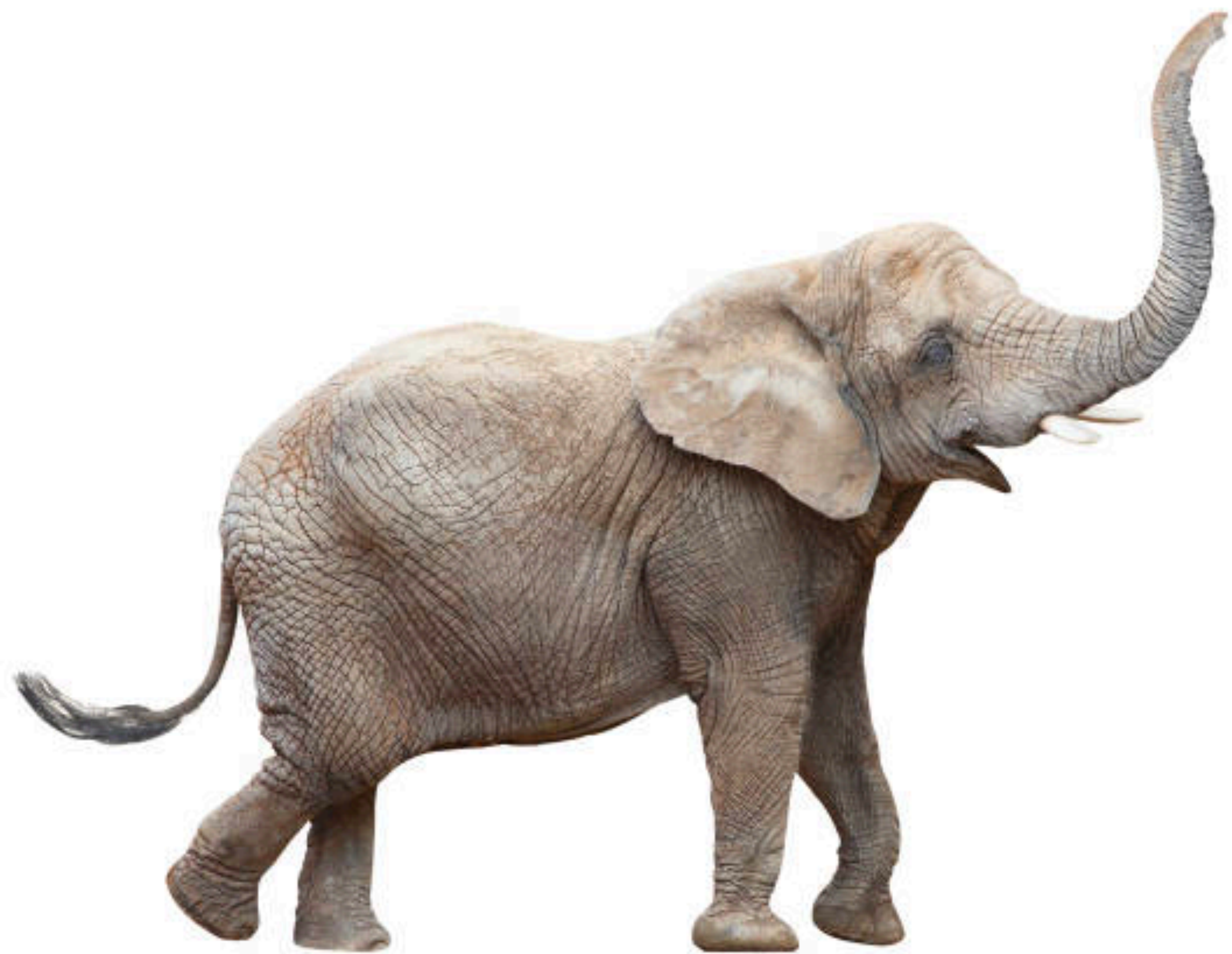
1. Techniczna implementacja
- 2. Zdefiniowanie celów oraz zakresu implementacji**

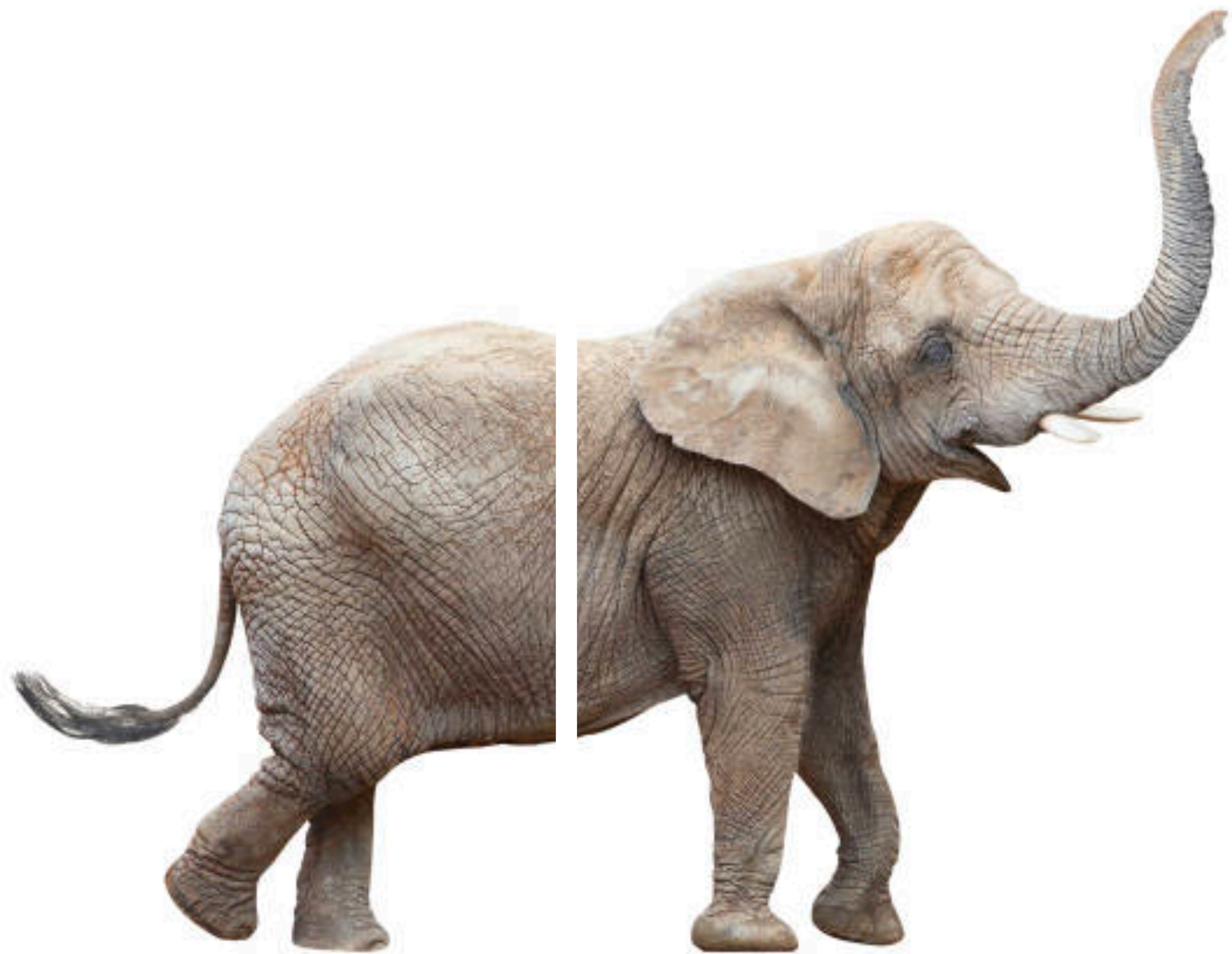
**I
WANT
IT
ALL**

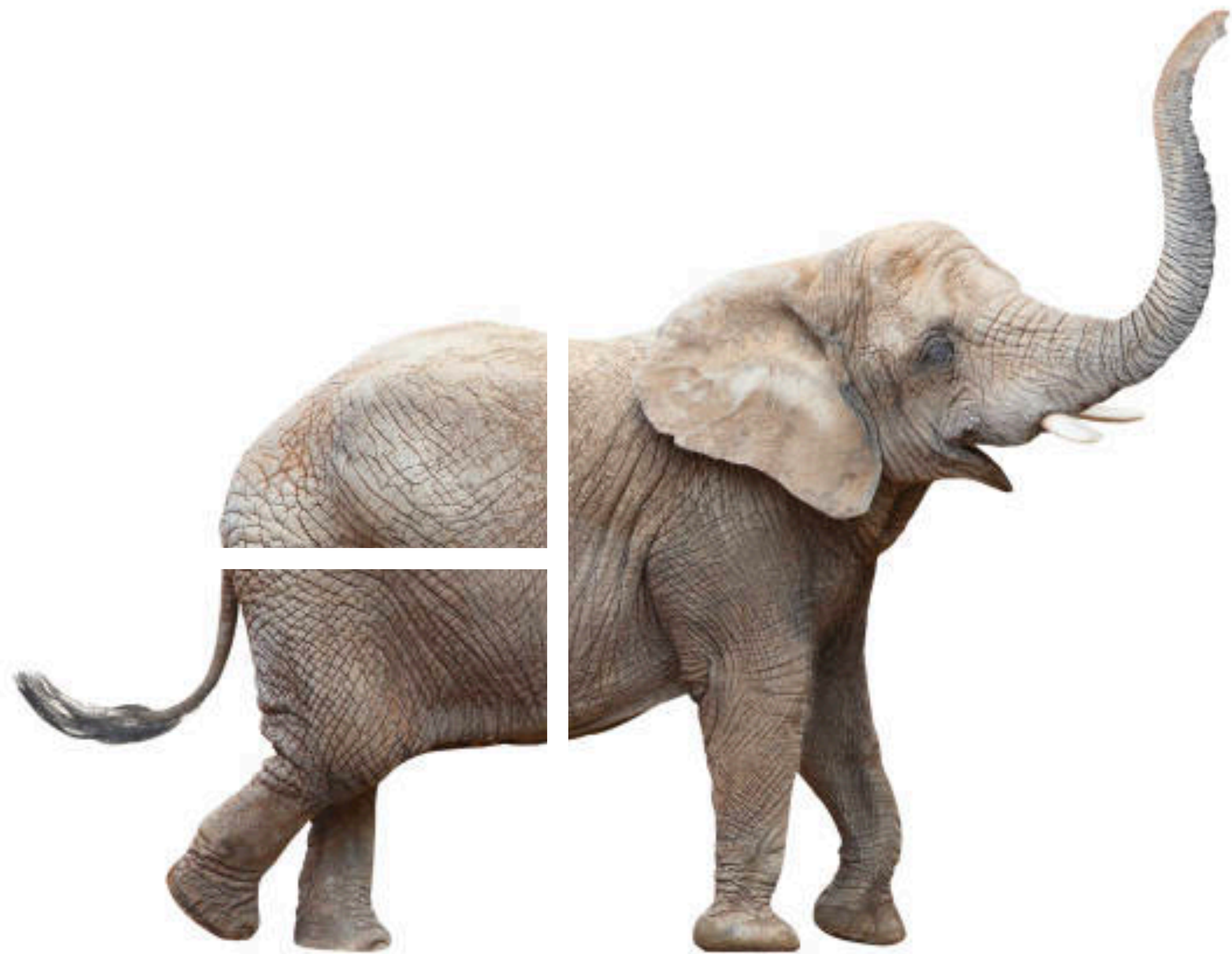
I WANT IT ALL

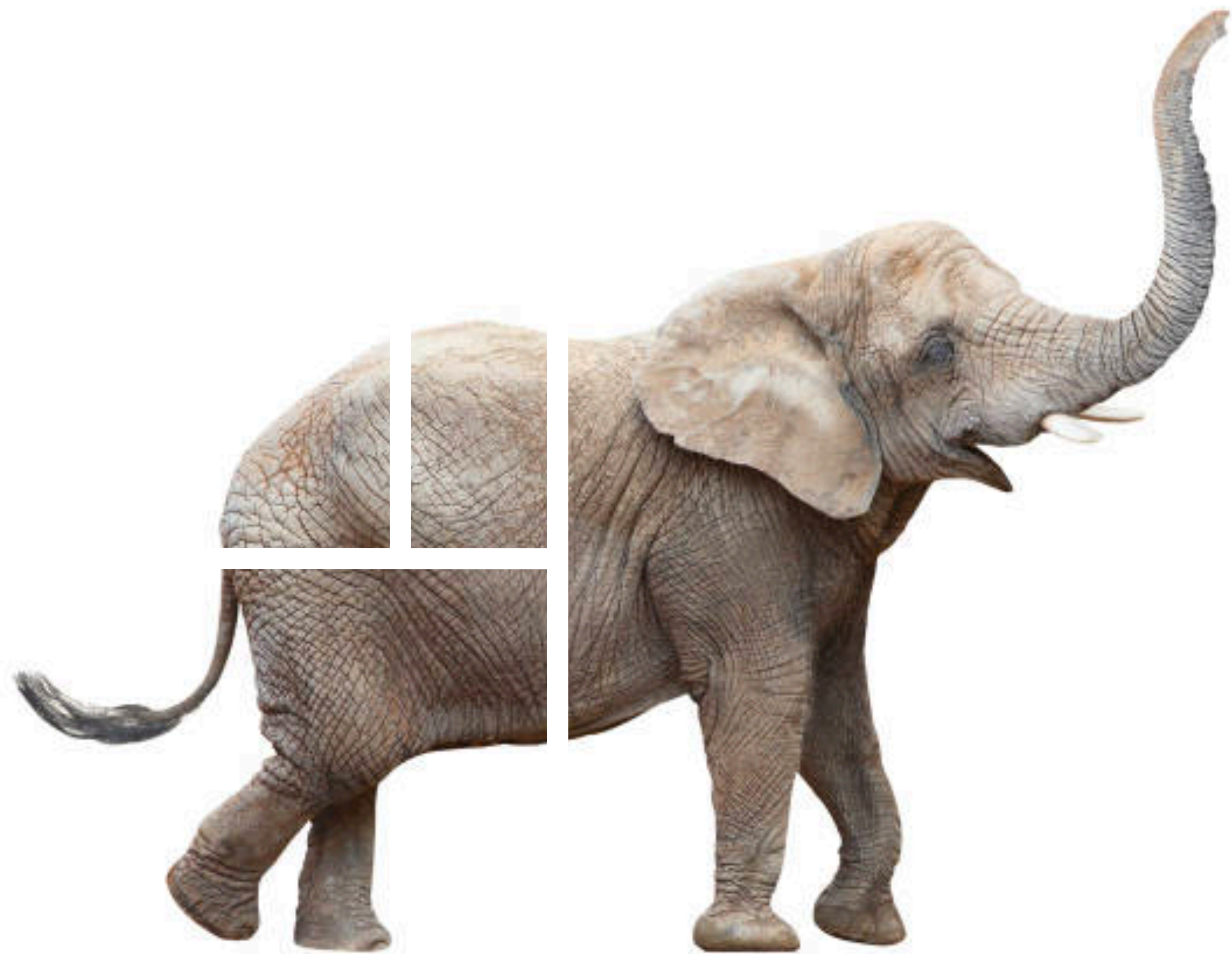
AND I WANT IT

NOW!










1. Techniczna implementacja
2. Zdefiniowanie celów oraz zakresu implementacji
3. **Zdefiniowanie „User Stories”**

A close-up photograph of a person's hand holding a black pen over a spiral-bound notepad. The word "SCRIPT:" is written in black ink on the notepad and is underlined. The notepad is placed on a wooden surface. Several pieces of crumpled white paper are scattered around the notepad, suggesting a process of editing or discarding ideas. The lighting is warm and focused on the hand and the notepad.

SCRIPT:

1. Techniczna implementacja
2. Zdefiniowanie celów oraz zakresu implementacji
3. Zdefiniowanie „User Stories”
- 4. Zdefiniowanie struktury danych i zasobów**



1. Techniczna implementacja
2. Zdefiniowanie celów oraz zakresu implementacji
3. Zdefiniowanie „User Stories”
4. Zdefiniowanie struktury danych i zasobów
5. **Wdrożenie automatyzacji**



1. Techniczna implementacja
2. Zdefiniowanie celów oraz zakresu implementacji
3. Zdefiniowanie „User Stories”
4. Zdefiniowanie struktury danych i zasobów
5. Wdrożenie automatyzacji
- 6. Pomiar i optymalizacja**



Pobierz darmowego e-booka

Boisz się, że wdrożenie marketing automation jest zbyt skomplikowane? Nie wiesz od czego zacząć? A może szukasz inspiracji i konkretnych przykładów?

Pobierz nasz praktyczny poradnik i dowiedz się, jak skutecznie zaplanować i wdrożyć system do automatyzacji w Twojej firmie.

Twoje imię:

Twój numer telefonu:

Twój email:

Strona www Twojej firmy:

- Zaznaczając to pole wyrażasz zgodę na otrzymywanie komunikacji marketingowej od User.com. W każdej chwili możesz się wypisać przez kliknięcie "Unsubscribe" w dowolnym mailu.

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Thank you for attention :)



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