**CANDDi**
*who is on your website?*

WHITE PAPER

# DIY MARKETING AUTOMATION WITH CANDDI, ZAPIER, CAPSULE AND FEEDBLITZ
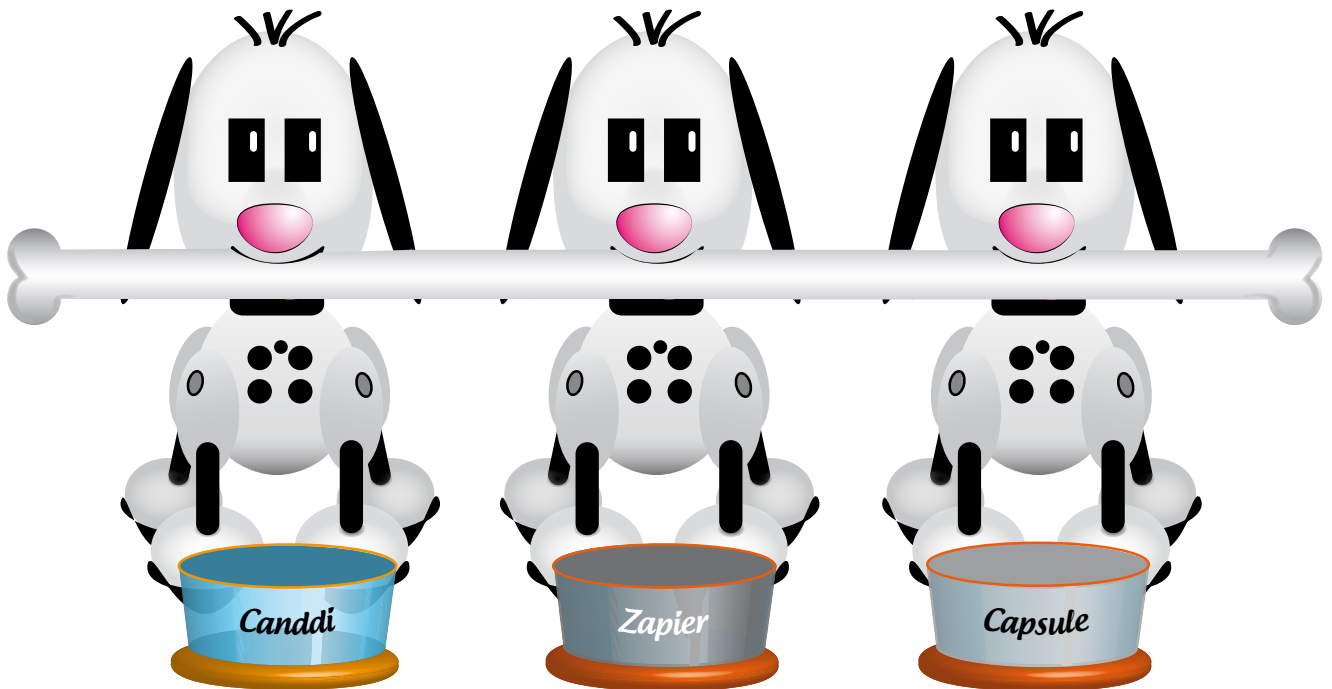
CANDDi
DIY MARKETING
AUTOMATION WITH
CANDDI, ZAPIER,
CAPSULE AND FEEDBLITZ
JUNE 2015
P2

Book of the Future is an 'Applied Futurism' consultancy, offering organisations such as the NHS, ICAEW and Sony advice on how the can best respond and adapt to innovation. Founder, Tom Cheesewright, is also a conference speaker and media commentator, appearing quite often as a panelist on the topic of Futurism.

Here are Tom's thoughts on beta-testing CANDDi's new integration with Zapier.

When you're starting a company, you spend money as and when you need to, and not before. This means you rarely begin with a big outlay, unless you have a great wodge of capital – you build and buy processes and systems as you go.
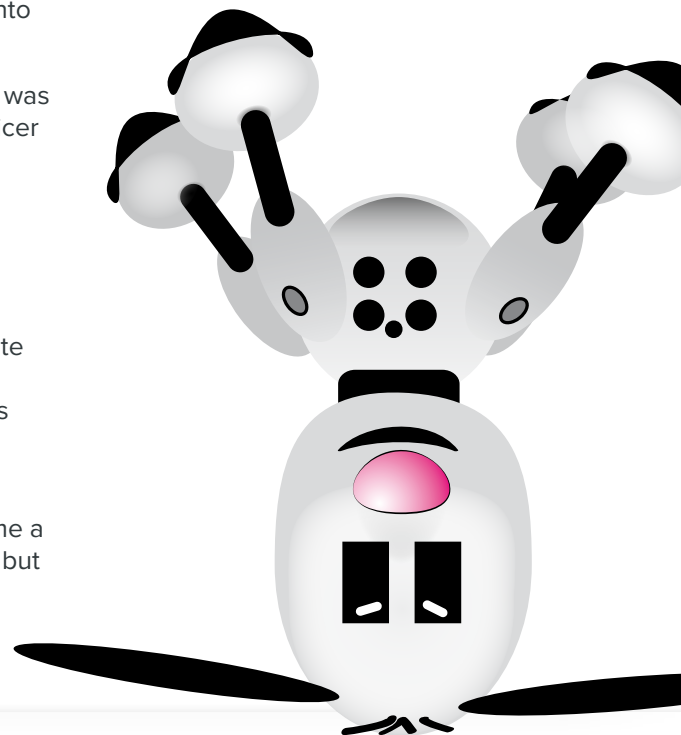
So when it came to launch this business, I started with the tools that were absolutely essential. Email, obviously. A website. And not long after, a CRM. Given that all of our early sales were going to be B2B and relatively high value, it was important to be able to track the ongoing development of prospects, that I knew from experience, may run into months or even years.

Being based in Manchester and knowing the CapsuleCRM guys, it was an obvious choice. The recent design refresh has made it all the nicer to use, and I'm liking the progress on merging contacts.

## Seeing CANDDi as a User

As a founder of CANDDi, the tracking code has been on the website from day one, and I'm pleased to say that being a user has totally validated my belief in CANDDi. Even as a standalone product it has proved extremely valuable.

For example, last year one of my Apprentices noticed a particular person had been on the website for good chunk of time, and left me a Post-It suggesting I followed up. Not a very sophisticated process, but it worked: I emailed them, and secured a few hundred pounds worth of work the next week. As traffic has grown, we have seen more and more of this type of anecdotal validation.

CANDDi
DIY MARKETING
AUTOMATION WITH
CANDDI, ZAPIER,
CAPSULE AND FEEDBLITZ
JUNE 2015
P3

# Growing Up

After 24 months or so, I started to understand exactly what we were selling, and how we were going to scale the business around downloadable products, this triggered a shift that meant our processes needed to mature.

I had been manually collating email newsletters from our blog posts each week, but this was proving very time-consuming – time I should have been spending on content! So to handle RSS subscriptions, we added Feedblitz. This isn't the prettiest product in the world, but it has proven reliable and effective. Feedblitz allows us to send out instant emails and weekly digests, as well as doing a lot of automatically triggered campaigns, though we only use this feature to a limited extent today.

Capturing email addresses via Feedblitz subscriptions to the blog, is typically our second touch-point with our prospects, after they have discovered us on Twitter, where we add around 100-140 followers per week. Today only a small proportion of followers convert to subscribers and an even smaller proportion then go on to make a purchase, but having established the flow, we can now begin to improve our targeting and optimise the process

## Prove and Scale

In order to do this, I wanted to pull all of the information we had about prospects into one place.

The natural place for this data is our CRM system, Capsule. After over 15 years in business I have collected a few thousand contacts, some of which live on Twitter, some on email, some on LinkedIn, and some in my phone book! Capsule made it relatively easy to bring all these together, though it left us with a lot of duplicates. The first thing to do was to clean these up and re-awaken old contacts, so I tasked an Apprentice with a tightly controlled programme featuring five touch-points for each contact. She's now processing a few hundred contacts a week, cleaning, merging and re-awakening as she goes.

This was a great start, but it left us with some challenges.

Firstly, I didn't want to be doing multiple manual imports each month, and trying to de-dupe each time: I wanted new contacts across any of our touch-points to be added automatically. Secondly, it didn't give us any of the analytics data from CANDDi, a hugely important tool in determining how rich our engagement was with targets – especially those recently re-awakened.

**CANDDi**
**DIY MARKETING**
**AUTOMATION WITH**
**CANDDI, ZAPIER,**
**CAPSULE AND FEEDBLITZ**
**JUNE 2015**
**P4**

# Integrating with Zapier

Part of the answer to this came in the form of Zapier.

With Zapier, I could automatically create new records in the CRM system from new Twitter followers and LinkedIn contacts. Since I usually connect with everyone I meet at events and talks, this created an instant workflow for new contacts: I can create new cases, or even automatically set myself or my colleagues actions in Trello to follow up with new contacts – and to handle any de-duping against these records.

Setting up the Zaps for Twitter and LinkedIn took a matter of minutes, the tricky bit was Feedblitz.

Feedblitz has no integration with Zapier, and the developers tell me they have no plan to add one... not good! I tried bodging the two systems together with the Zapier email parser, but the formatting of the mails was too irregular for it to work reliably, and even if it did, I wasn't getting a huge amount of data across.

So I started pestering Tim at CANDDi for an integration there.

# Connecting CANDDi

Since CANDDI captures the form fields a prospect enters when subscribing to Feedblitz, it was already holding all of the identity data I needed. Plus it has the social look-up, geo-location and web history – much richer data than was stored in Feedblitz. If they could make this integration work, it would be awesome.

Now that it does work, I'm pleased to say that it **is** awesome!

OK, we still have issues around de-duping, but get this: I now have single records in my CRM system that are connected to all the social interactions, all the email interactions, and all the web interactions I have with that prospect.

Whether I am selling services or products, this is enormously valuable. I can begin to look at proper lead scoring across all of my interactions. I can look at dynamic targeting of prospects based on their interests: "I see you read this blogpost and downloaded that slide deck?" Boom: "Would you like some of this?"

Which brings me back to my point about building as you go along, as opposed to buying. All of this sophistication costs me less than £150 per month. What would the equivalent cost me from an off-the-shelf marketing automation platform? Clue: I have 8,000 contacts in my database. For that I would be paying Hubspot around £1,600 per month!

There's still much work to do on our targeting, our proposition, our website and our systems. But by integrating CANDDi, CapsuleCRM, and (indirectly), Feedblitz via Zapier, we now have the beginnings of a scalable and super-sophisticated marketing automation platform.