Project Dissertation Report on

Guide to Building a Successful Marketing Stack

Submitted by

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CERTIFICATE

This is to certify that the work titled "**Guide to Building a Successful Marketing Stack**" as part of the final year Major Research Project submitted by G. Madhavi Ratnam in the 4th semester of MBA, Delhi School of Management, Delhi Technological University during January-May 2020 was conducted under my guidance and supervision.

This work is of her original work to the best of my knowledge and has not been submitted anywhere else for the award of any credits/ degree whatsoever. The project is submitted to Delhi School of Management, Delhi Technological University in partial fulfilment of the requirement for the award of the degree of Master of Business Administration.

Signature of Project Guide

Prof. P. K. Suri

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Signature of Head

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Delhi School of Management

Delhi Technological University

DECLARATION

I hereby declare that the work titled "**Guide to Building a Successful Marketing Stack**" as part of the final year Major Research Project submitted by G. Madhavi Ratnam in the 4th semester of MBA, Delhi School of Management, Delhi Technological University during January-May 2020 was conducted under my guidance of Prof. P. K. Suri is my original work and has not been submitted anywhere else.

The report has been written by me in my own words and not copied from elsewhere. Anything that appears in this report which is not my original work has been duly and appropriately referred/ cited/ acknowledged.

G. Madhavi Ratnam

(2K18/MBA/054)

MBA (Marketing and HR)

ACKNOWLEDGEMENT

It is a great pleasure for me to acknowledge the kind of help and guidance received during the research work. I would like to thank my faculty advisor Prof. P. K. Suri, who helped me to take up the Topic "**Guide to Building a Successful Marketing Stack**" and guided me to complete this project properly. The project provided me with an excellent opportunity to explore the areas of marketing and customer relationship management tools.

I am highly indebted to Delhi School of Management, Delhi Technological University for giving me the opportunity to work on this project. Lastly I would like to express my gratitude to all the honourable faculty members for sharing their experience and expertise on this project.

I have put all my efforts to ensure that the project is completed in the best possible manner and also ensured that the project is error free.

G. Madhavi Ratnam

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ABSTRACT

Until the rise of digital marketing 20+ years ago, the advertising world was relatively straightforward i.e, TV, radio, print, outdoor and below-the-line activities like sales promotion. In the last 20 years, with the birth of digital marketing, new channels, starting with online display, email marketing, search engine marketing, and performance marketing, have become part of a marketer's media mix. And In the last decade, additional marketing channels, most notably social platforms like Facebook, LinkedIn, Twitter, Instagram, Pinterest, WhatsApp and Snapchat, have been added to the media plan.

Herein the Top 10 Digital Marketing Tools in terms of various capabilities and features are spread out in excel sheet that elaborate which tool is best for for small/medium/large organization and what kind of combination you can opt in for preparing the Marketing Stack. Ease of choosing the right combination of tools that match with your organization goals and the budget so allocated in terms of limited resources. And for the same we will be covering CRM (Customer Relationship Management) which is the centre of attraction for all organisation, the reason they chose the marketing tool.

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CHAPTER- 1

INTRODUCTION

This chapter covers all the background information and details of what a marketing stack is, and provides insights on the framework one can use for designing or combining choice of tools for their organisational objectives to be achieved.

1.1 Background to Marketing Stack

"Collection of service one use to improve marketing"

We don't use one big software provider for marketing function. We actually use best point solution to address specific market problems. Sum of these best point solutions as a set is called as Marketing Stack. All tools from marketing automation to data enrichment and analysis.

The MarTech industry has been democratized by the Software-as-a-Service (SaaS) model, a software distribution model pioneered by Salesforce in 1999. Salesforce introduced the business model as an substitute to expensive custom-developed Customer Relation Management systems that only huge companies could afford. Since then, a variety of MarTech products have entered the market, serving different industries and different areas of marketing. The rapid growth of MarTech has empowered marketers to automate and streamline many aspects of their day-to-day marketing activities.

Putting together everything in relation to marketing technology tools, platforms and solutions that serves and supports a Marketing team is referred to as the 'MarTech Stack' of that organization. These activities are carried out with the help of digital tools and technologies; it is very important to gain a full fledge understanding of the tools used in MarTech.

Figure 1 Marketing Stack

Source: https://martechtoday.com/library/what-is-martech

Marketing in an early Internet world was relatively simple, today marketers use solutions for analytics, A/B testing, personalization, lead scoring, CRM and business intelligence, as well as for data, creative and media, one dashboard for each media channel/platform. The marketing technology stack supports every marketer's strategy for how their organization goes to market. It is the collection of software tools that help marketers develop, enable, implement, and manage marketing programs that resonate with prospects and customers. Organizations often purchase technology as they need it. However, a tech stack should be built according to a plan with every component designed to serve a specific purpose. The tools interact with each other in ways that provide maximum efficiency. Technology, along with people and process, is responsible for delivering marketing results. Many of the technologies studied also serve sales and sales development teams, and implementation and management of these software tools can encourage alignment across all three functions.

Goal: To execute, analyse and improve their marketing across the customer lifecycle.

Focus: To improve internal collaboration & measure the impact of marketing activities and reach customers in new ways.

So point herein is "how can we do more with less?"

1. As lean as possible:
    - To execute
    - To analyse
    - To increase the efficiency

Ie. Focus is on creation of stacks that are smarter, more smooth, that would increase connected and dramatically more powerful.

2. Connection:
    - Just the data is not enough, we need to merge it, find patterns and learn.

Figure 1 Tool features growth rate comparison

Source: chiefmartec.com

Data is by far the fastest growing category, up 25.5%. The challenging part is now to figure out how to harness it effectively.. That so said, Customer Data is the Lifeblood of these tools, as they somehow use customer data in one way or the other. Hence, they need to work on these following painpoints:

1. Attracting Customers
2. Customization
3. Lead generation
4. Team management/ alignment
5. Attribution
6. Reporting
7. Analysis
8. Optimizing Customer Lifecycle
9. Engaging Customers
10. Marketing their objectives

1.2 Objectives of Research

Problem Statement:

There are 1000s of tools and software in market for that act as a painkiller for whatever problem you have, there is a tool for it. Whilst said that, it might not solve the specific issue to each one/specific organisation. In short they don't work together.

- Team needs to setup, learn and maintain dozens of these tools

- Budget, there always exist a budget to spend on the tools that impacts differently

- Tools along with the tactics they serve is limited or we can say limited to shelf life

- Integration, it must sync in with the sales, operation as well as the marketing team/department objectives.

Objectives:

In this paper, comparison of the Top 10 Digital Marketing Tools in terms of various capabilities and features is described. Through this paper, you will find an ease of choosing the right combination of tools that match with your organization goals and the budget so allocated in terms of limited resources. And for the same we will be covering CRM (Customer Relationship Management) which is the centre of attraction for all organisation, the reason they chose the marketing tool.
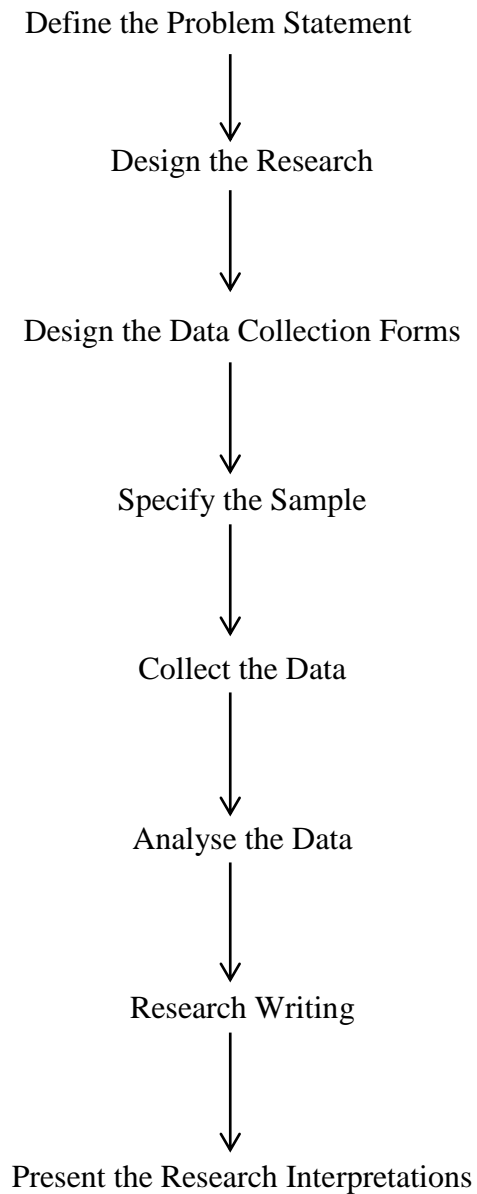
In this paper, compared every Top 10 Digital Marketing Tools in terms of various capabilities and features. Objectives to be achieved:

- To find an ease of choosing the right combination of tools that match with their organization goals and every budget so allocated in terms of limited resources.

- To increase traffic through using right tool for smooth operation and increase profit

- To aid organizations in the customer acquisition, engaging customer and retaining them

- To guide the organizations in choosing the right set of tools from the top ten digital marketing technology available in the market presently.

1.3 Scope of the study

This study is confined only to Marketing Tools only and number of tools so selected for the analysis is the Top 10 tools that are available in the market. This study was conducted to compare, analyse and thereby guide organizations on how to choose the perfect combination or stack of marketing tools for organizational objective.

1.4 Research Structure

Define the Problem Statement

↓

Design the Research

↓

Design the Data Collection Forms

↓

Specify the Sample

↓

Collect the Data

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Analyse the Data

↓

Research Writing

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Present the Research Interpretations

Concluding remarks:

It has covered all the needed information ie. what, why and how about this research. This involves the detailed objectives of this report and the research structure so followed in purpose of the objectives so mentioned above.

CHAPTER 2

MOTIVATION

Though marketers are definitely looking for tools to consolidate their work and make their life easier; at least that is what the ones I meet are telling me that's not what most are doing in practice.

So why do most marketers build their own stack (and find it very difficult to work with a consolidated marketing stack)?

More marketing channels are making marketing much more complicated and challenging: Until the rise of digital marketing 20+ years ago, the advertising world was relatively straightforward – TV, radio, print, outdoor and below-the-line activities like sales promotion. In the last 20 years, with the birth of digital marketing, new channels, starting with online display, email marketing, search engine marketing, and performance marketing, have become part of a marketer's media mix. And In the last decade, additional marketing channels, most notably social platforms like Facebook, LinkedIn, Twitter, Instagram, Pinterest, WhatsApp and Snapchat, have been added to the media plan. Today, spending $1 million on digital marketing is far more labor intensive than spending $1 million on TV, and one must do it to reach the same coveted demographic as, let's say, Millennials.

Though the increased complexity would make the need for a unified, cross-channel marketing stack more pressing, it also makes it more difficult to achieve. Marketing stacks do provide some synergies and enable making part of the process more efficient but they do not provide a holistic solution which enables tracking one user across all platforms / touchpoints and forget about optimizing a campaign across all channels and platforms."

Marketers don't want to compromise by committing to an entire stack: An additional major challenge of marketing consolidation, whether it's selecting an agency to manage your marketing account or building your marketing stack in-house, is that somewhere, you'll end up compromising on one of the agencies or on the "all in one" offerings.

Agencies find it difficult to put together a best-in-class offering that is truly best for all clients. What might work for an automotive client and their needs will be less effective for a consumer packaged goods manufacturer.

And if a marketer does most of his work in-house, each marketing team has its own culture and way of doing things, which makes it more difficult to find a one-solution-fits-all. For an SMB or a startup, the cost of an enterprise solution from Adobe or Oracle will be prohibitive.

The rise of behavioral analytics solutions to enable inputting and analyzing data from multiple sources/technology solutions or stacks: There is a new kind of company that is rising out of the world of big data to empower marketers to better manage their data. Companies like Interana and CoolaData are enabling marketers (and other kinds of organizations) to input an unlimited quantity of data from multiple sources and analyze it in order to derive insights immediately. These companies were founded by teams with experience in behavioral

analytics and business intelligence, not marketing, and they won't provide marketing-specific answers like a marketing stack would; for example, reallocate budget from Facebook to local TV.

Concluding Remarks:

As a Marketer in this time, there is a massive array of digital tools and technology. The so called "marketing stack" promises to deliver new sophistication and improved performance. In fact, many institutions struggle in choosing the right combination of marketing tools and services. Even if it is put on use, another challenge that pops up is of "integration'.

However, we must note that even if it all falls in right way, the solutions do not come with the appropriate skill and analytical intelligence required operating.

CHAPTER 3

LITERATURE

Mr. Balram and Bhidav Adhikari (2009) in their research paper "*Managing Customer Relationships in Service Organisation*"said "Acquiring new customers is important for business success, but maintaining customer relationships is just as crucial."

Oracle CX Cloud Case Study, talks about how they succeeded in implementation of Oracle CX Cloud Solution by proper strategy and techniques applied with the tool at Atradius Collections. The detailed case study on this can be seen in this report later. This case study helped in understanding how and what type of companies/organization can use this for their benefit.

Kuo Lane Chen and Huei Lee, *Miscrosoft Dynamics for BPM* in this research explained how Using Microsoft Dynamics CRM for Business Process Management is beneficial for overall efficiency and achieve organizational objectives using the software. This gave a clear view about Miscrosoft Dynamics CRM working along with its functioning.

Migration to Open Source Sugar CRM- Case Study- Herein Aspire explained how seamlessly they migrated their internal systems to Sugar CRM without any disruption to existing business operations and customized existing Sugar-CRM modules to meet the customer's specific business requirements. Tis case study helped me analyse the pros and cons of the Sugar CRM.

Discover SAP CRM - Covered the major components of SAP CRM Marketing, including how it assists organisations in planning, budgeting, executing, analysing, and optimizing all aspects of marketing and campaign execution as well.

Utilities Field Service Case Study: *PERC Streamlines Operations with Service Pro and NetSuite-* 2019 the whole case revolves how PERC faced operational issues and explains how NETSUITE CRM helped in improving overall efficiency and reduced the operational issues and the slowdown.

GoDaddy Experience Case Study- herein can understand in depth how Nimble to support their strategies and processes to position their advocacy and evangelism team to scale effectively for growth so that they can assist more customer to achieve their goals.

Burleson Orthodontics Automates its Way to 10X Growth shares their experience of using Infusion Soft by combining automation with a passion of customer service , the business has enjoyed explosive growth and a stellar reputation.

Amazon India Helps Retailers Flourish through Zoho CRM, Amazon India shares it experience of how and why they chose ZOHO to find a CRM that was customizable and easy to learn at the same time.

Getting on the Road with an Inbound Approach- Suzuki's marketing success using HubSpot to take a deeper dive into the online arena to drastically increase its profile in the marketplace along with explains how they achieved remarkable results.

22 Must have Marketing Tools for Marketing Stack- by Neil Patel He tried to provide loads of information on various tools and their uses and features. This helped me knowing the perspectives of various business users.

According to Scott Brinker, author of chiefmartec.com's "*Marketing Landscape Super-graphic*" -2016 these tools can be selected from a dizzying array of 3,874 solutions… and counting. And that's not even the real proble.

Concluding Remarks:

The citations ar the sources that I have referred throughout in the completion of this report. Study being Descriptive asks one to have an extensive knowledge about the field, here it area being Digital Marketing.

CHAPTER 4

RESEARCH METHODOLOGY

4.1 The Research Design used in this project is <u>Descriptive</u>.

Descriptive Research helps us in understanding the candidate and their behaviour in most precise way. It is about describing people/organization who takes part in the research study. It is also used to explain statement of affairs as they are present with the researcher having no control over variable factors.

This type of research may be identify as simply the attempt to determine, describe what is, while analysing to establish why is it that way or how it came that way. The aim of this type of research is to highlights problems through data that we have collected and it allow us to report the situation more precisely than what is possible without using this method.

It is a well-used format and is used in expressing the characteristics / behaviour of organizations taken into consideration.

Advantage of using this type of research:

1. A huge amount of data is collected under this type of research and it gives us a lot of information.
2. It gives us the opportunity to combine the methods of data collection i.e. the qualitative and quantitative.
3. Takes little time when compared with quantities experiment.
4. It is relatively cheaper way of collecting sample data.

Disadvantages using this type of research:

1. These type of research cannot prove statistically the research problem.
2. The findings of the research can show a level of bias as there is no statistical test used.
3. These type of research might not helpful when we have to identify the cause behind described phenomenon.

Information has been collected from the organization who have used any of these tools (at least once in a while), for this research. The data so collected in for research is purely based on online data like that of case studies/blogs/articles/reports/testimonials of clients.

4.2 Research Technique:

Four main stages followed in a research are

Problem-it is the first stage that decides the topic. Objective and the motivation as described above.

Data Collection- Collected Data of Top 10 Digital Marketing Tools available in the market which 80% of the organization chooses from.

Data Analysis- this is the third stage where the collected data are analysed, in order to find a solution to the problem. It has got two steps: Organisation of Information and Analysis of results. Compared all 10 software tools in terms of their capabilities and features they offer.

Action- The final conclusion wherein using the Analysis I have drawn over here ie. The features , capabilities, usage, prices and more for choosing the right combination of tools for your specific goals and needs.

Concluding Remarks:

This chapter elaborates about this research data and the way the study has turned out in sense, how the data aka case studies/testimonials/reviews/ have aided in final completion of this report. Also to note, organizations don't reveal fully the details in terms of confendiality.

CHAPTER 4

Interpretation from Case Study

Key components of Marketing Stack:

Components	Needs
Email Marketing	To manage email campaigns
Content Management System	To host sites and blogs
Mobile Marketing	Tools and apps
Advertising	To help customers and reach new segments
Automation Tool	To ease the operation functioning
Integration	To sync with other tools for efficiency
SEO Tools	To provide guidance on reaching audience
Analytics Tool	To analyse and organise

"Strategy First, Technology Second"

Commonly 47% buyers buy software this way:

Head straight to Google/G2 compare features various sets and pricing and that starts with free trials to see if it fits in.

But the thing is → a tool is not a strategy.

The Real Value Marketing Software offers strategy and approach it enables plus how it impacts customer experiences (desired end result).

Ie. When someone uses a software, they're not just looking for features instead they lookout for the approach. They are looking for a vision. So, we can catch that vision and run through it.
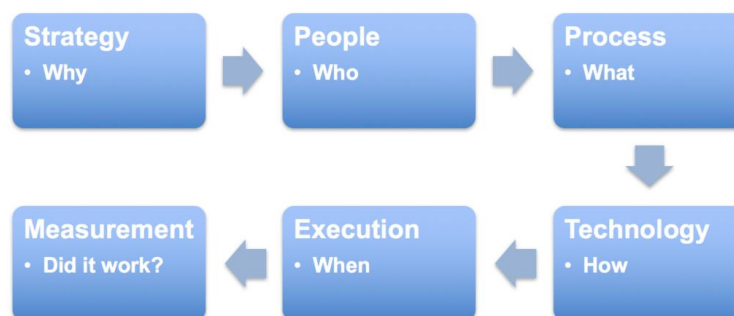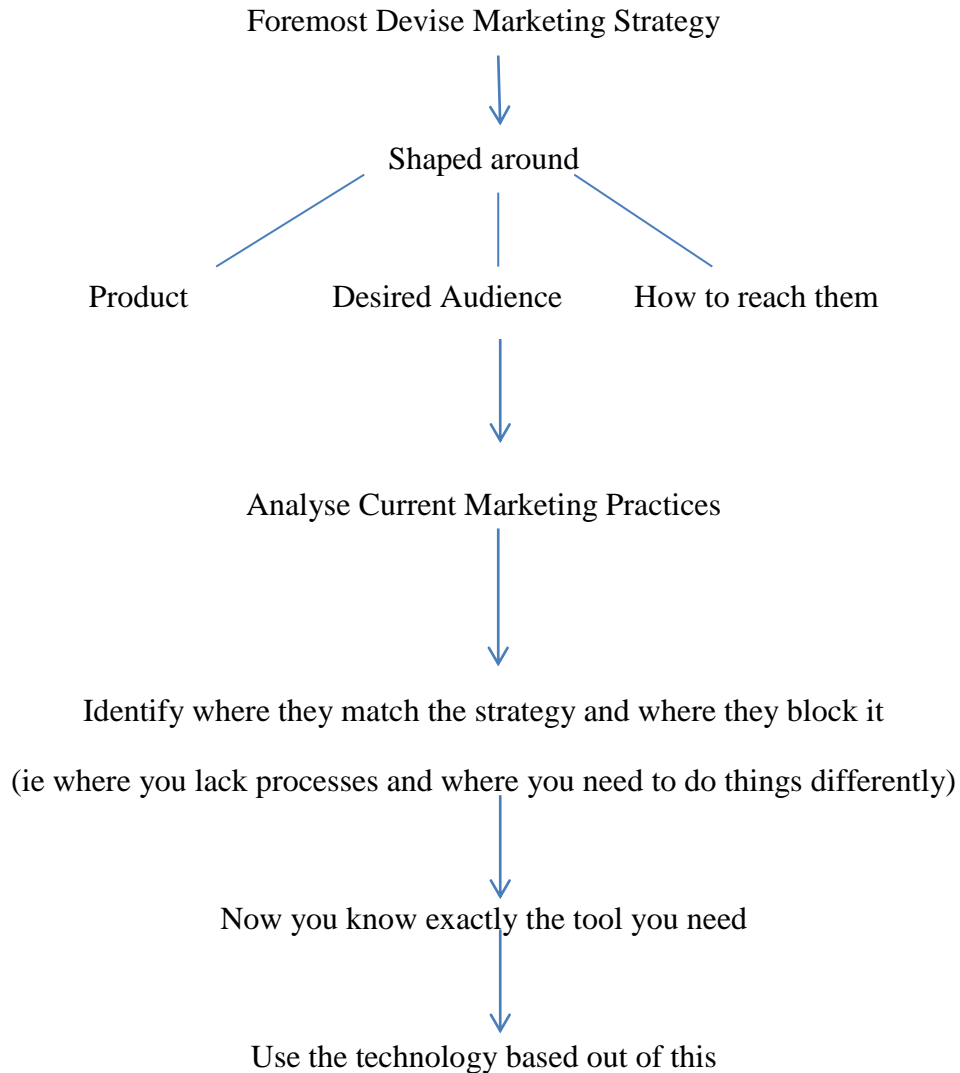
Proper Order of MarTech Stack Deployment

Figure 2 Marking Stack Deployment

Source: https://www.shiftcomm.com/blog/choose-marketing-technology-stack-part-1-7-introduction/

Framework

Foremost Devise Marketing Strategy

↓

Shaped around

Product   Desired Audience   How to reach them

↓

Analyse Current Marketing Practices

↓

Identify where they match the strategy and where they block it

(ie where you lack processes and where you need to do things differently)

↓

Now you know exactly the tool you need

↓

Use the technology based out of this

Example, a business that sells their goods and services to business (B2B) / customer (B2C) will use different modes of channel and techniques to acquire clients/customers and will have varying technology needs.
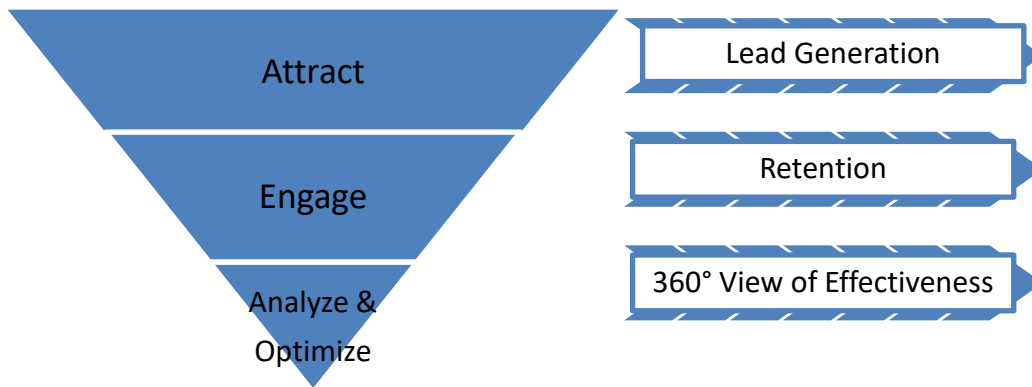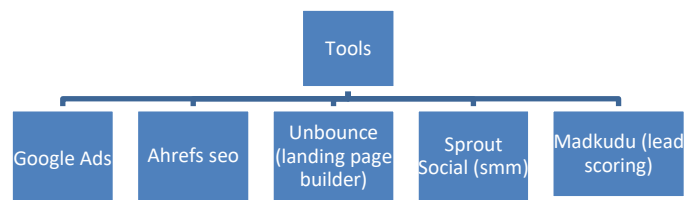
Fig 4 Workflow
Source: Own source

> **Attract**: Lead generation → starts with traffic
> Fact - 63% of marketers said that lead generation is their the biggest challenge.
> Tool – This is where the 1st collection of tools will be taking care of like:-

> **Engage**: Retention
> Fact – Last year it was estimated that marketers have spent over $6 billion attracting business to their websites.
>
> Isn't it mind blowing, how much attention we pay to campaigns (cash) which drive traffic to our sites. But happens once a prospect lands there?!
> Here comes the role of "customer engagement". Few tools:

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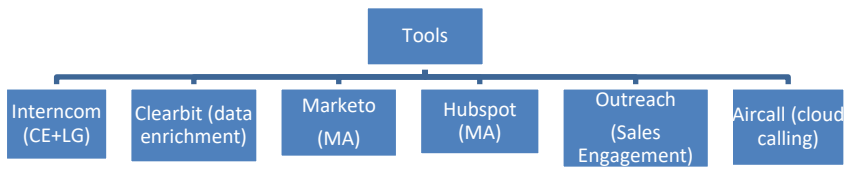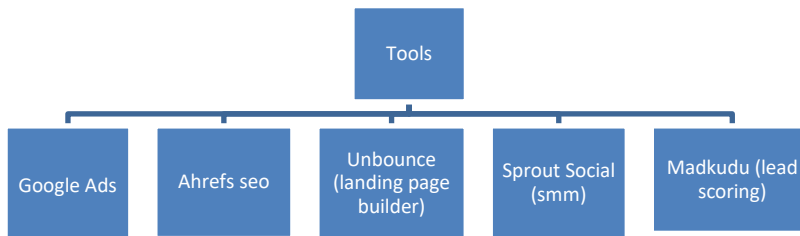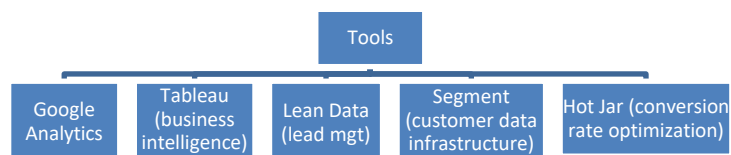
> **Analyse & Optimize:**
> Lead generation → starts with traffic
> Fact - 63% of marketers rated lead generation as the biggest challenge.
> Tool – This is where the 1st collection of tools will be taking care of like:-

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> 360° view of marketing effectiveness of each layer. Tools: few of them are-

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Customer relationship management tool (CRM)

Managing relationships is key to every organisation in running a successful business. A lot can happen when someone hears about a brand for the first time and when they turn up as a customer/client. CRM enters into the picture in this scene to make it happen. Every business use it with different purpose. Keeping this in mind the ten tools features were considered that would be helpful for most businesses.
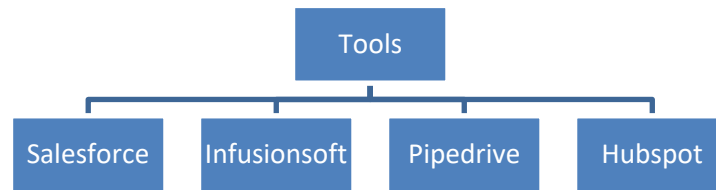

Figure 3 Customer Reation Elements

Sourcehttps://in.pinterest.com/pin/821062575788376697/

Track all customer relationships and can provide insights on how marketing campaigns influence sales pipeline and customer growth.

Why Need CRM Tool?

- Maintaining relationships with customers is key to the success
- Will help keep organised and connected to customers
- 79% leads will fail to connect without CRM (according to IBM)

Few Tools are-

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Important aspect of any business relationship between customer and organization is

Good and Services

Right Content and Resources (that motivates prospects to interact with your brand)

Customer relationship management is how you go about managing customer relationships.

Customer relationship management software (also called CRM) is a tool for managing customer relationships.

Figure 4 CRM software functions

Source: https://www.business2community.com/customer-experience/the-ultimate-guide-to-customer-relationship-management-02240507

Pipelines
Opportunities
Sales automation
Hot/cold leads
Lead nurturing
....

CRM

COMPLETE CRM

CUSTOMER SERVICE

OPERATIONS

CRM or customer relationship management is at the core of any business technology stack. Integrated marketing automation helps tie your efforts together, resulting in seamlessly aligned sales & marketing. Not to mention, with built in customer service tools, you can effectively manage the customer experience no matter where you are.

Ticketing
Live chat
Surveys

Event management
Project management
Learning management
Quoting & invoicing
Team management

MARKETING AUTOMATION

....

Customer journeys
Workflows
Email marketing
Drip campaigns
Landing pages & signup
forms

Figure 5 CRM Core Areas

Source: https://www.greenrope.com/what-is-complete-crm

Crm framework

Foremost → know your customers (ATTRACT)

→ Decide what materials they engage with your brand and how (ENGAGE),

 [this is where sales and marketing department must work together closely to get it right and stand out of the competition]

→More and better communication between them will help in consolidation and interpret the relevant data to drive more personalized experience

(ANALYSE & OPTIMIZE)

[As you began to understand how your segment tend to interact with the services and offerings, one can analyse and optimize larger data sets to continue improve optimizing customer journey in the future]
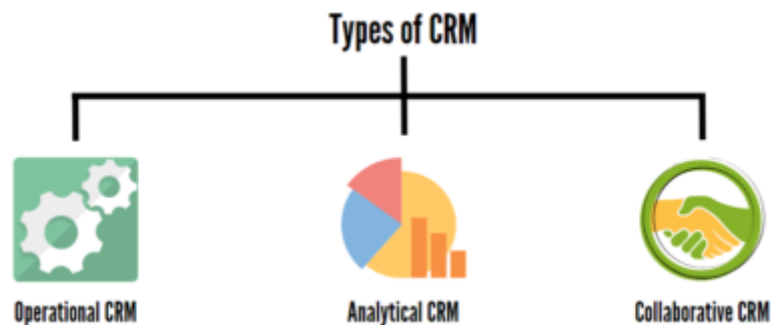
Figure 6 Types of CRM

Source: https://techonestop.com/what-does-crm-stand-for-what-is-crm
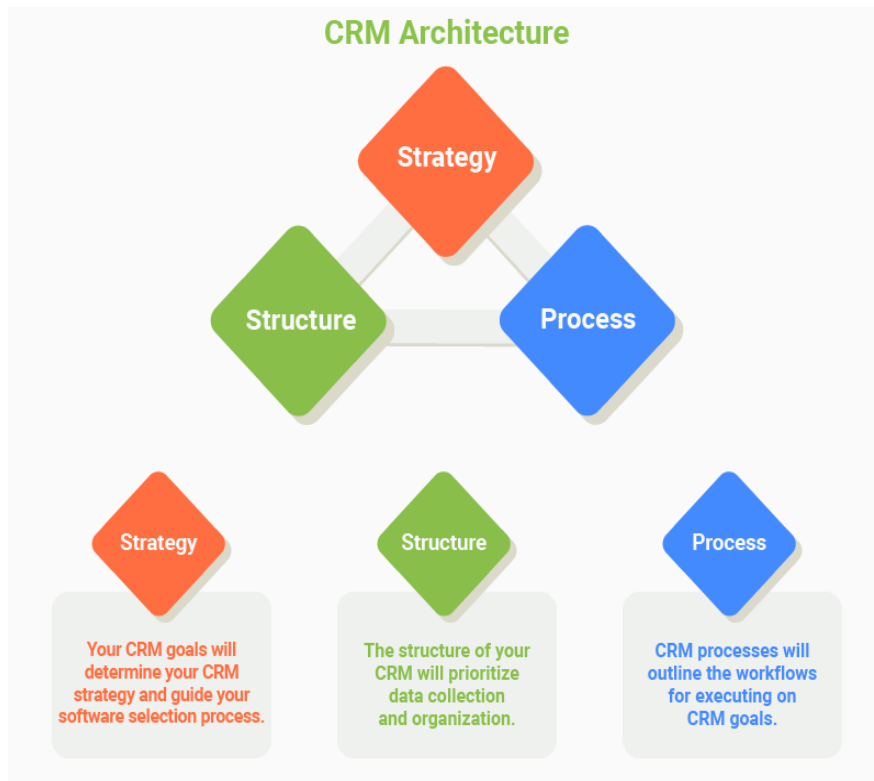
Figure 7 CRM architecture

Source: https://lab.getapp.com/crm-architecture/

3 Key Functions of CRM:

1. Marketing automation
2. Customer Service automation
3. Salesforce automation

Why marketing tools be synced with CRM?

Marketing and sales department run on dozens of software. While some of the leading software tools share integrations, many industry specific tools do not have the API and Integration needed to share the data across on entire marketing stack.

Example, a company's marketing automation tool might believe a lead is at the top of sales funnel where in reality they have already purchased. However, the customer is still receiving prospecting emails because the CRM didn't share this information with the email marketing software.

Here enters the Syncing tools – it ensures accurate and up to date data is shared across marketing stack like in healthcare or in credit card numbers these are essential.
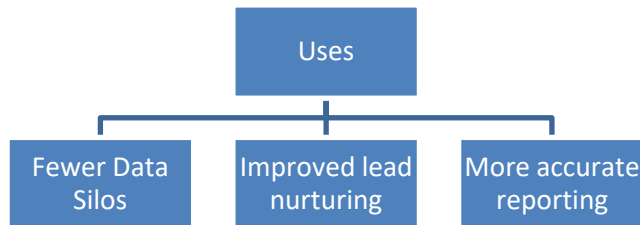
CRM basically provides organizations with a pool which assures security, simplicity, accuracy and scaling of customer interaction. CRM increases the business profits and customer list and interaction.
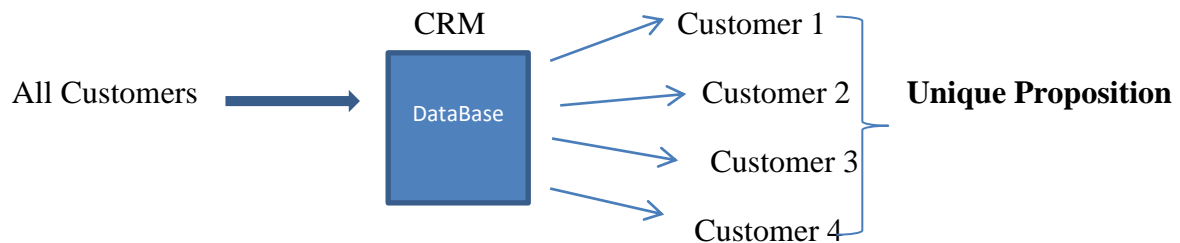
Benefits:

- Provides better and improved client/customer relationship
- Reduces cost and manual efforts
- Offers high efficiency and satisfaction
- Supports improved cross-functionality
- Increases team collaboration.

Drawbacks of NOT using CRM tool:

- Increased manual efforts
- Loosing of tracks of business deals due to small scale.
- Lesser accessibility of data and lesser customer satisfaction
- Difficulty in managing customer contacts

Figure 8 CRM the game changer

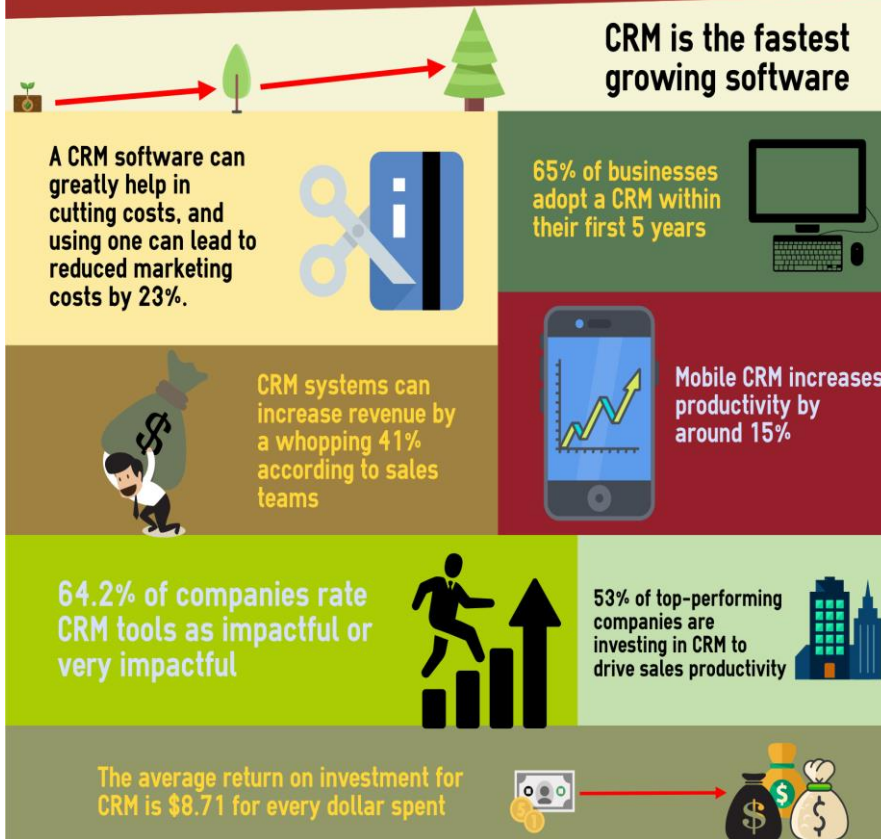Source: https://spotio.com/blog/why-your-sales-team-hates-your-crm/

CUSTOMER LIFECYCLE

Figure 9 customer lifecycle

Source: https://financesonline.com/list-10-best-crm-software-tools/

CRM tools can be used to permeate, influence and affect all the phases in customer lifecycle from establish initial awareness to conversion as buying customers. There are loads of CRM products and vendors out in the market and it's hard to pick the right one.

Multiple research reports say that 30-60% CRM implementation fails to serve as desired.

Reason?

Lack of product insight   Undefined goals   Lack of User

Adoption & Training

(Lack of knowledge of CRM features)

CRM Process

Evaluate your growth stack

If you already have a stack in place – but are looking for a new way of doing things – then you'll need to evaluate the current state of things which will depend on the complexity of your existing stack.

Start by looking at how your current stack is contributing to your marketing goals:

- The budget are you currently investing into your stack?
- Does it make the activities that move the needle easier? Perhaps various tools are missing features that would make your workflows more efficient?
- Does it make the best use of your team's abilities? Is usage of the tool high?
- How much of your team's resources are being used by managing and operating your current stack?

Answering these questions will help you figure out which tools and platforms you should keep, and those that should be replaced with a better fit. For example, an affordable tool that doesn't make a dent in the budget, while making a big impact on marketing results, is usually worth keeping in the mix.

Again, the ease of replacing or adding new MarTech solutions will depend on how complex your team structure is. For example, a tool that allows you to simply schedule social media content will be attractive for smaller teams or startups. But for enterprise-level organizations, something more end-to-end may be required.

You should also look for feature overlap. For example, why use a tool that automatically emails subscribers about a new blog post when your email marketing platform can do the same?

As you go through the process, make sure all stakeholders are involved. Hence, you should ask above questions when you identify a tool that connects processes between teams.

Key Features of CRM

Make sure the software has the following features to fulfil the primary purpose: nurture customer relationships.

1. Analytics- The software must be more than a platform that saves your customer data. The complexity of your business processes should be considered in how advanced your CRM tool should be. It must effectively gather, consolidate and analyze data so you can uncover crucial insights to use in making data-driven decisions.

2. Customization- Flexible and configurable according to the unique workflows of your business.

3. Scalability- It should support your business as it grows, so you won't have to transfer to another software and start from scratch..

4. Integration- You should check if it integrates with systems you are currently using, specifically customer facing apps at help desk.

5. Ease of use- Quick and easy to deploy. A short learning curve lets employees understand and navigate around the software with ease.

6. Mobile support- When a team member is out, mobile apps help you stay connected and updated.

7. Contact Management- It helps business to collect and organize customer data efficiently. Tracks leads as it progresses through the sales pipeline and make first purchase. It manages customer profiles, relationships and communication history.

8. Sales Process Automation- Automates and smoothes various sales functionalities to standardize business processesIt reduces human error, makes sales cycle shorter and improves lead to customer conversion ratio.

9. Service Automation- It automates and standardizes various service processes to reduce response time and human error. It improves customer loyalty and builds trust.

10. Marketing Automation- Allows companies to streamline, automate, and measure marketing tasks and workflows.

11. Sales Force Automation- Providing actionable goals and targets for each sales team member. Managing pipelines, opportunities and workflows.

12. Lead Management- To score and categories leads, define rules to automatically assign new leads to sales, manage sales pipeline and personalize the communication so that's sales team can churn less and close the deals more.

13. <u>Workflow Automation</u>- Handles time consuming tasks, schedules calendar, performance tracking and task scheduling and tracking thereby eliminating wasteful practices and helps focus on important business activiites.

14. <u>Business Intelligence</u>- keeps a track of how well your brand manages customer service. Helps gain insights into its customers and user. Accurately measures and monitors data like feedbacks and satisfaction of customers to help user improve sales processes. This enables 360 degree visibility into every KPI.

Case Discussion:

Following are the Top 10 CRM tools in the market:

1. **Hubspot**

   Shines in empowering businesses to build engaging, enduring relationships with their customers and promote productive conversations with them. This ability also helps businesses to improve their revenues using crucial information provided by customer data flowing in from such communication channels as phone calls, website visits and social media interactions. It also gives companies the means to process and analyze customer information, extract relations from disparate data items to reveal insights and depict opportunities.
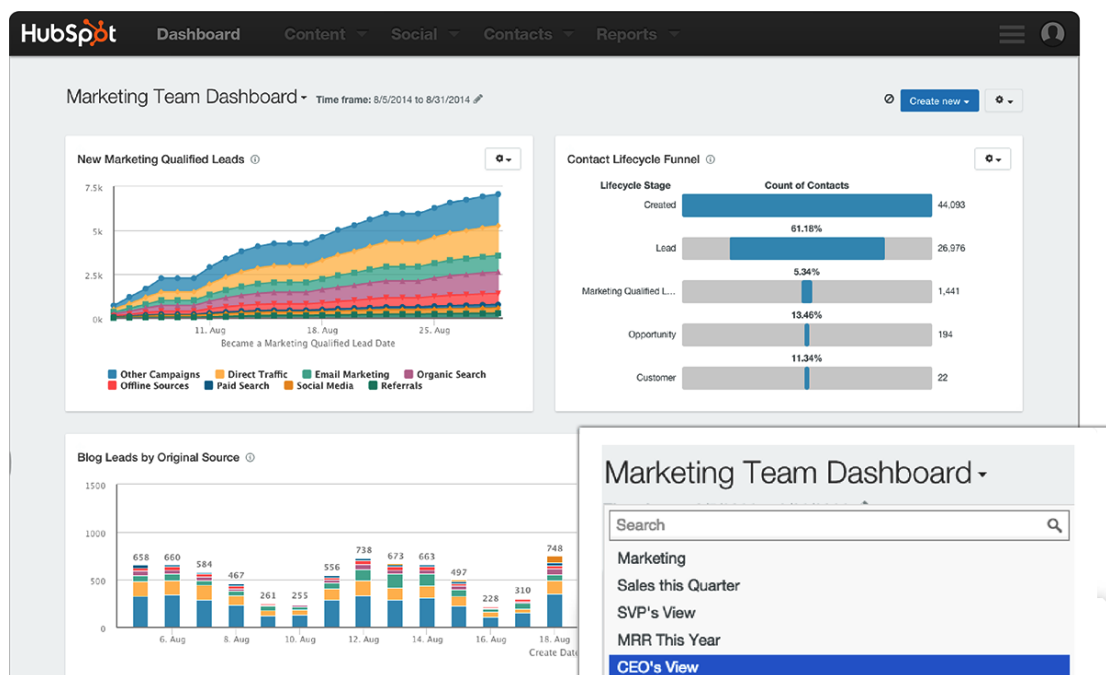
Figure 10hubspot dashboard

Source: hubspot.com-crm-do-features-and-benefits/

   Long time HubSpot CRM users prize the software for the way it allows them to categorize customers according to their expectations and commit time to prospective buyers—capabilities that convert to more tangible values especially in tandem with their sales and marketing systems.

   In more real terms, companies that recognize that the customer is at the heart of their business naturally see that the most potent window to customers is a very good software for CRM . And that's what HubSpot effectively see and essentially do in their tightly integrated CRM, marketing, sales, and customer support platforms.

Summary:
One of the most famous crm tool that attracts most of the clients as it is free to a huge extent.
Features:
- Track performance against quota set in one simple view
- Tracks customer interactions automatically
- Records client details at one place and can read clients feedback as well.
- Connects to all the places where you conduct your sales process such as phone, websites, social media, email, etc

Cons:
- Can't send emails across multiple companies at the same time
- Free version doesn't have all features

2. Salesforce

It has become the standard in CRMs. And although the company now offers over a dozen different products, its many-featured and highly customizable sales CRM remains the backbone of its offerings. While there is an entry-level Essentials plan, its minimal features make it more of a gateway product to get users hooked on the Salesforce ecosystem as they grow. The more impressive capabilities start with Professional and go up from there. Along with an array of customization options, some of the standout features include its workflow builder, automated activity capture, and collaborative forecasting.
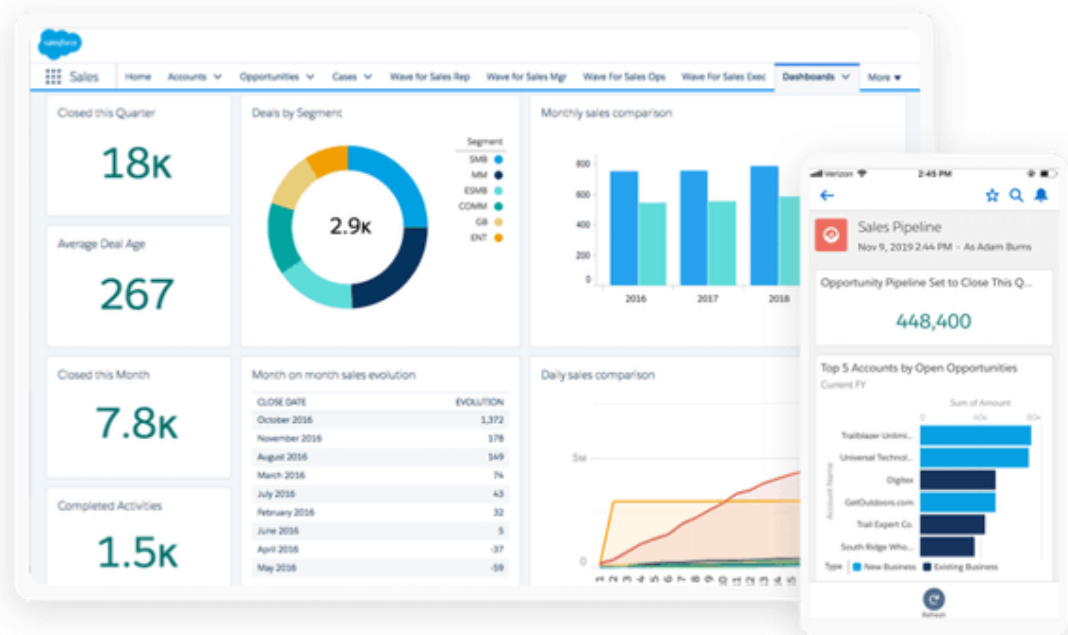

Figure 11 Salesforce profile dashboard

Source: https://www.softwareadvice.com/crm/salesforce-profile/

To help automate business processes, Flow Builder is a visual drag-and-drop tool that lets you create workflows to ensure compliance or to just put repetitive actions on auto-pilot. Alternatively, you can create the same workflow with a button in the contact record that lets the rep start the flow.

With Salesforce's artificial intelligence, Einstein, you can sync your email and calendar to automate data entry. Emails sent from Gmail will be automatically linked to their records.

Summary:
One of the world's leading cloud based crm tool which provides creative solutions that can be used effectively for all business requirement companies from high scale to small startups.
Features:
- Cloud, scalable and ease of use
- Customization and provides platform for growth and upgrades
- Supports mobile integration
- A single platform wherein one can sell, serve and market any time.
- Free and simple and easy navigation
- Cloud based so effective business automation

Cons:
- Costly customization
- Poor technical staff
- Complex process of generating reports

3. **Oracle**

Oracle entered the CRM marketplace in 1998 and since then has supplied customer relations solutions to 420,000 customers across 145 countries. Providing a comprehensive range of fully integrated cloud applications, platform services, and engineered systems, Oracle aims to deliver all the tools to make businesses of all sizes operate smoothly. With customers in a range of public and private sectors, from aerospace and defense through to retail and insurance, Oracle has a robust and customizable platform able to be adapted for different purposes. Oracle is headquartered in Redwood Shores, California, USA and serves companies worldwide.

Oracle markets its Experience Cloud of sales and marketing solutions (Oracle CX) as an all-in-one experience that combines social media, call center, mobile and in-store contact points. Its focus on customer satisfaction and social relationship management features emphasize improving customers' relationships with your organization through a variety of channels.

With a slightly lower price tag than Salesforce, Oracle could be a perfect fit for your business (and your budget!) but it is less comprehensive than the industry giant. Oracle CX Cloud Suite provides an exceptional contact management database. It comes with pre-built cross-referencing functionality that helps maintain unique data records, reducing the chances of human error or multiple profiles for the same client.
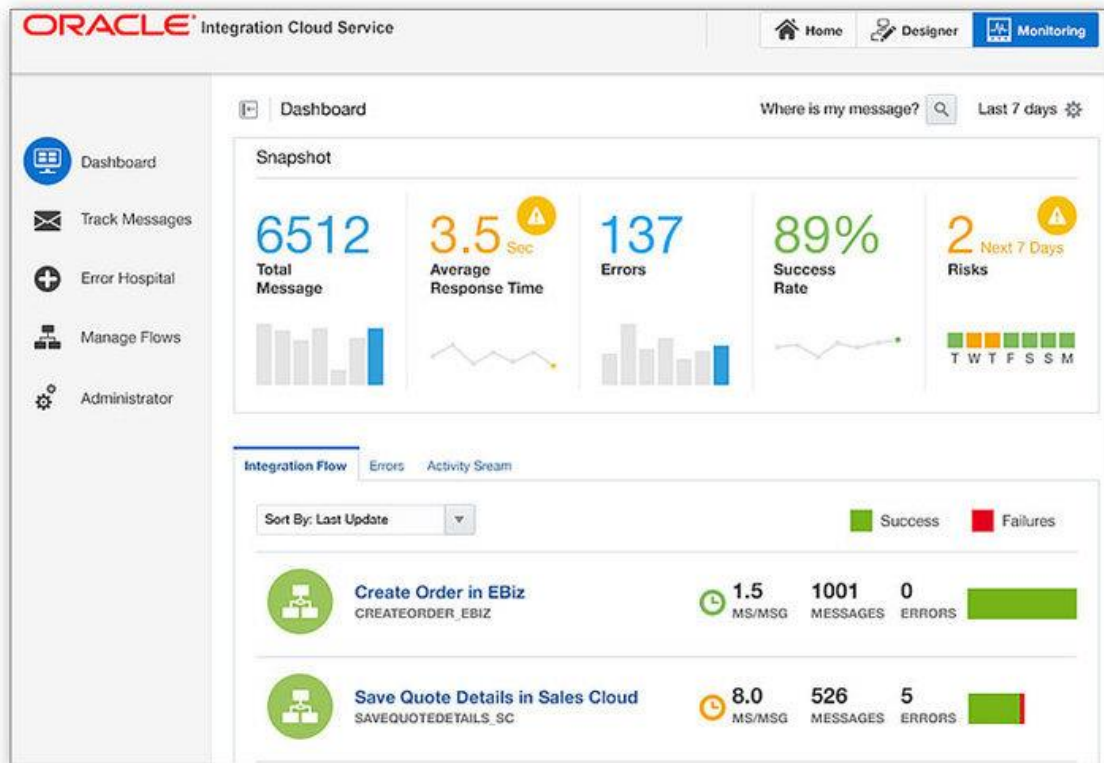

Figure 12 Oracle CRM dashboard

Source: https://www.discovercrm.com/oracle-crm-vendor-profile.html

The case management function provides guided resolution to customer concerns and tracks activity so it can be easily escalated if necessary. The solution uses customer data from multiple channels to supply an overview of the contact's engagement such as requests, orders, payments, etc. Oracle CX Cloud also allows users to access customer related information and share relevant customer data internally between sales and marketing teams.

Summary:
Renowed and trusted crm tool among all the customers. Provides reliable solutions for marketing, sales, commerce, social platforms and service.
Features:
- Provides social interaction with good client data integration.
- Supports business intelligence applications

- Partner relationship management
- Integration to Siebel crm

Cons:
- Application becomes slow and has complex learning curve

4. **Microsoft Dynamics**

Out of the box, the product focuses mainly on Sales, Marketing, and Customer Service sectors, though Microsoft has been marketing Dynamics CRM as an XRM platform and has been encouraging partners to use its proprietary (.NET based) framework to customize it. In recent years, it has also grown as an Analytics platform driven by CRM.

More than three years after the launch of Dynamics 365, Microsoft's combined customer relationship management (CRM) and enterprise resource planning (ERP) suite has finally come of age, according to Gartner senior director analyst Julian Poulter. When Dynamics 365 was launched in 2016, it was branded by some as a challenger to the likes of Salesforce, while Microsoft corporate vice president, cloud and enterprise, Takeshi Numoto, suggested the release saw the company "taking the first step to bring our customers new, modern, enterprise-ready intelligent business apps".

Figure 13 Microsoft dynamics dashboard

Source: https://www.arnnet.com.au/article/669451/has-microsoft-dynamics-finally-come-age/

The CRM Solution can be used to drive the sales productivity and marketing effectiveness for an organization, handle the complete customer support chain, and provide social insights, business intelligence, and a lot of other out-of-the-box functionalities and features. As a product, Microsoft Dynamics CRM also offers full mobile support for using CRM apps on mobiles and tablets.

Summary:
Popular and strong crm tool. Helps to streamline the process increases profit in sales, marketing and service divisions. It is a server – client software.
Creates a strong bond with the customer, thereby satisfying their requirements and expectations.
Features:
- Helps centralize data of customer, sales and marketing
- Creates a new database for the already available data
- Creates customer data in excel format
- Simple and easy client interface
- Supports both Saas and on-premise
- Provides automated workflows that reduces manual efforts
- Offers high customization

Cons:
- Good compatibility with Microsoft products but slows down
- Global searching is left out in one version

5. **Zoho**

The original Zoho Office Suite launched in 2005 with an open-source-programmed word processor. Today, the SaaS company offers individuals and businesses affordable tools for custom app creation, accounting, document management and, of course, customer relationship management. While larger players in the CRM industry have just started offering small business versions of their enterprise software, Zoho has always been focused on the small business set, which means its tools were built with SMB users in mind first, not as an afterthought. Zoho's tools carry the reputation of being easy to implement and equally easy to use; they're not just for companies with massive budgets or extensive in-house tech support.

It puts tools in the hands of sales reps that make selling both smart and fun. With the help of features like real-time visitor alerts, lead prediction, and gamification, a sales team will spend more time having conversations with qualified leads than wasting time chasing the wrong ones. SalesSignals is the backbone for understanding how and when contacts, leads, and customers interact with your company. It provides real-time notifications for email opens, website visits, campaign activity, social mentions, and other actions. For example, if you're running an email campaign with your contacts, you'll be notified when that person opens or clicks a link in the email.

Zoho CRM software offers lots of functionality at a competitive price point. While the customization options aren't as extensive as those of some other CRMs we reviewed,

there are still a lot of ways to tailor Zoho to meet your needs. Plus, everything within the Zoho ecosystem is built to work together, so if you require tech tools beyond the scope of CRM, you can build out a comprehensive business solution with relative ease.
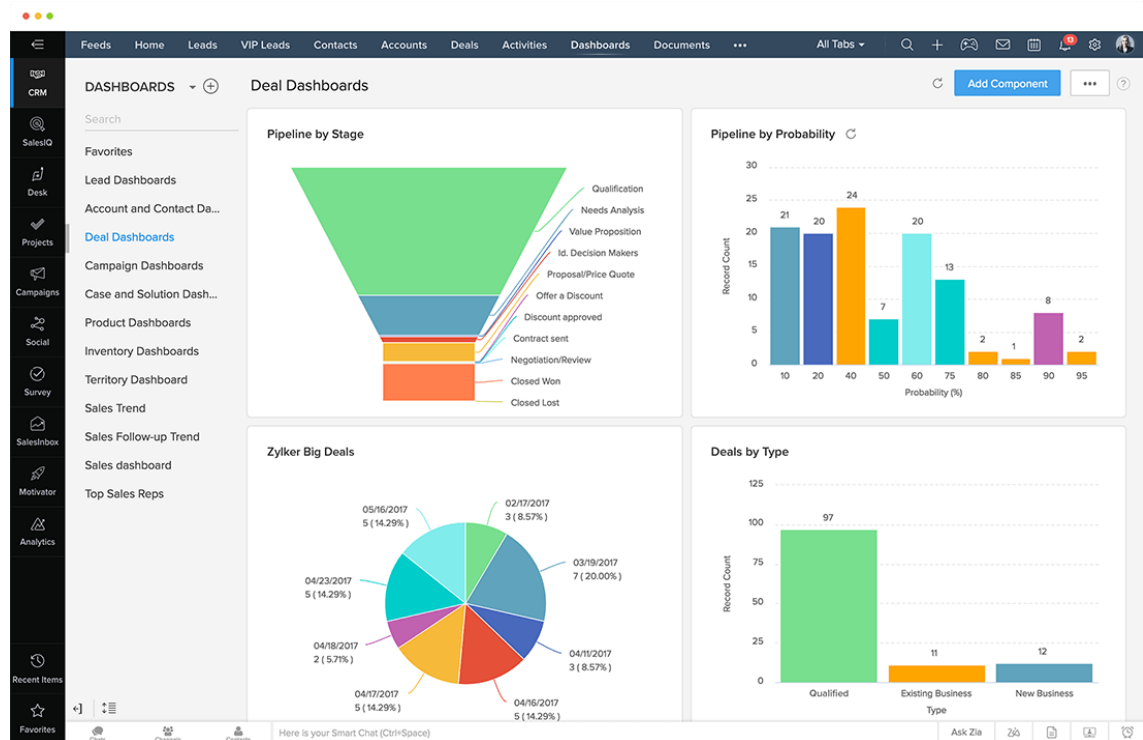

Figure 14 Zoho crm dashboard

Source: https://www.getapp.com/customer-management-software/a/zoho-crm-plus/compare/business-plus-accounting-touch-screen-point-of-sale/

Zia is the built-in AI that collects and analyzes data entered in the CRM each day. One of its core features is lead and deal prediction. This uses past record data to analyze the likeliness that a lead will convert to a deal, and a deal will convert to a sale. Because it's based on data, you need to create and close a minimum of 1,000 deals in the last 15 months for it to work, among other criteria. Once the requirements are met, Zia will assign a prediction from 0-100, showing you which deals need attention, and which you're more likely to win or lose. Ultimately, it helps you prioritize your team's efforts and sell a little smarter.

Gamescope sounds like a cross between a fantasy league and a video game, but it's not. With it, one can create time-based challenges between team members such as most leads converted, tasks completed, and deals won. Everyone who reaches the target gets a Badge.

Summary:
Cloud based crm and has been in business more than a decade.it is an operational business platform that goes beyond being sales pipeline or lead management tool.
Features:
- Supports 26 languages
- Omnichannel platform to connect with customers across different channels
- Sales automation tools to manage leads, contacts, deals and accounts

- Customize dashboard and reports with multiple options to compare and analyse data
- AI powered sales assistant (Zia) to help you predict sales outcome, enrich data and identify email sentiments and the best time to contact someone
- Quick and easy onboarding. Migration system (Zwitch) helps bring all existing sales data to Zoho in few clicks
- Advance security features
- 24-hr support to premium users
- Flexible contracts and pricing

Cons:
- Free edition is limited to 3 users
- Does not offer on-premise solutions

6. Sugar

SugarCRM is the world's largest open source CRM (customer relationship management) software. Founded in 2004, over 7,000 customers and more than half a million users rely on SugarCRM to execute marketing programs, grow sales, retain customers, and create custom business applications. These custom business applications can be used in a multitude of ways, such as to power sales teams, run customer support organizations, and manage customer information databases.

One of the unique things about SugarCRM in the CRM space is that it's fundamentally an open source application, meaning that the source code of the application is available to any user, developer, or customer of the product. Whether one opts for the AGPLv3 licensed or the commercially licensed version, the application comes with all of the source code, enabling developers to customize and build upon the product with ease.
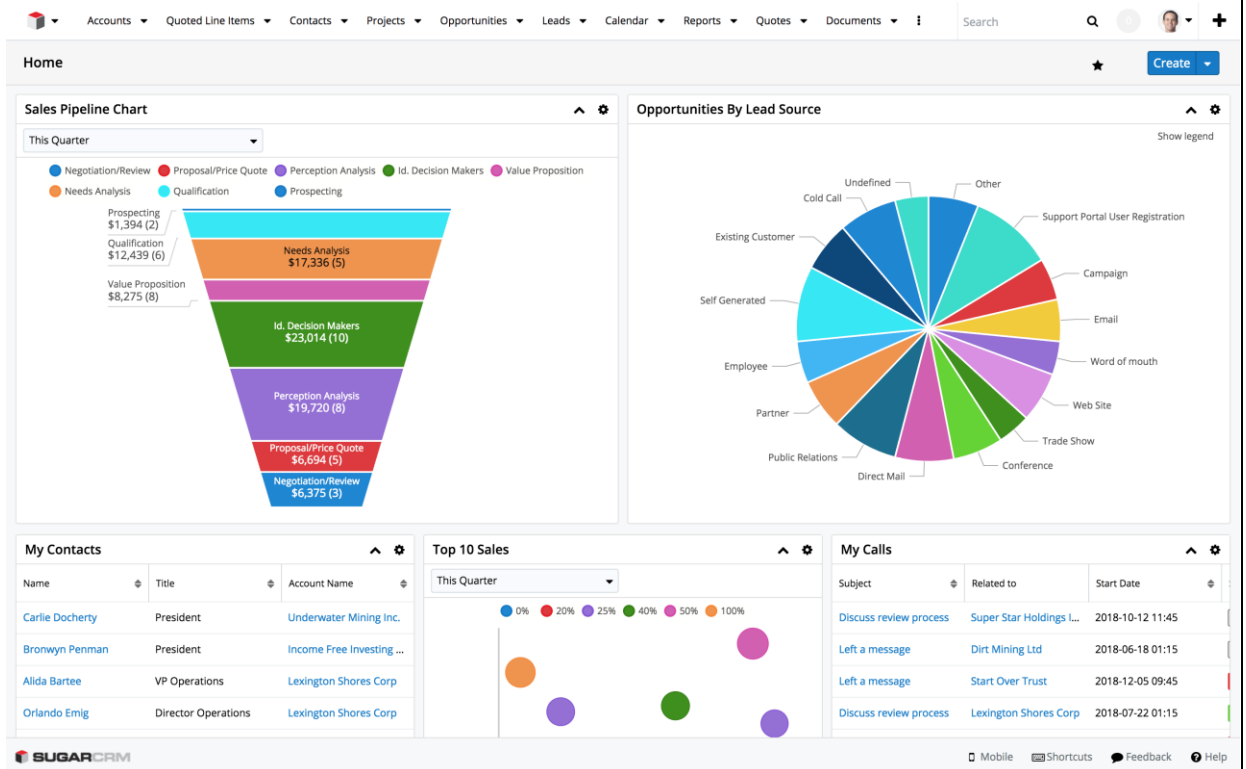
Figure 15 Sugarcrm dashboarcd

Source: https://www.sugarcrm.com/blog/good-news-for-sugar-on-premise-customers/

This ability has given SugarCRM partners and developers worldwide the ability to customize the out-of-the-box application to fit in many different organizations, vertical markets, and locales.

Summary:
Is an open source, meaning that any developer can access the source code. Developers can create their own integration in php.
Features:
- Variety of communication options
- Flexibility to choose deployment method
- Good sales, support automation and online support
- Centralized storage with expanding workflows and role based views
- Affordable price

Cons:
- Difficult learning curve
- Lot of manual programming is required for customization
- Development is quite complex for developers

7. Nimble

When prospecting, a large part of sales rep's time is spent first finding accurate contact info and then connecting with those contacts effectively. One will be able to manage these accounts from the Messages screen, making it easier to follow feeds and interact directly with contacts. G2 Crowd, the world's leading business software review platform, crowned Nimble as the CRM market leader for small business teams based on its high customer satisfaction score:

- 95% of Nimble users have rated it 4 or 5 stars.
- 91% of Nimble users are most likely to recommend it to others.
- 94% of Nimble users believe it's headed in the right direction.

Nimble is a great, simple, and intelligent stand-alone CRM. However, its outlook add-in lets users live inside of Office instead of having to navigate to other external applications. All Office users can make the best use of all features of a good CRM application—lead management, contact management, and pipeline management—while using the information from both Microsot 365 and its own database.

Perfect for quickly growing SMBs and lean start-ups that already use G Suite and Office 365, Nimble allows you to organize your contacts in a single place, attract prospects more intelligently and quickly, build lasting relationships with customers, and close an increased number of sales with minimal effort. It's a multi-user, collaborative system that allows Microsoft 365 teams to share contact data and emails from any device, providing in-depth insights about a contact simply through their social handle.
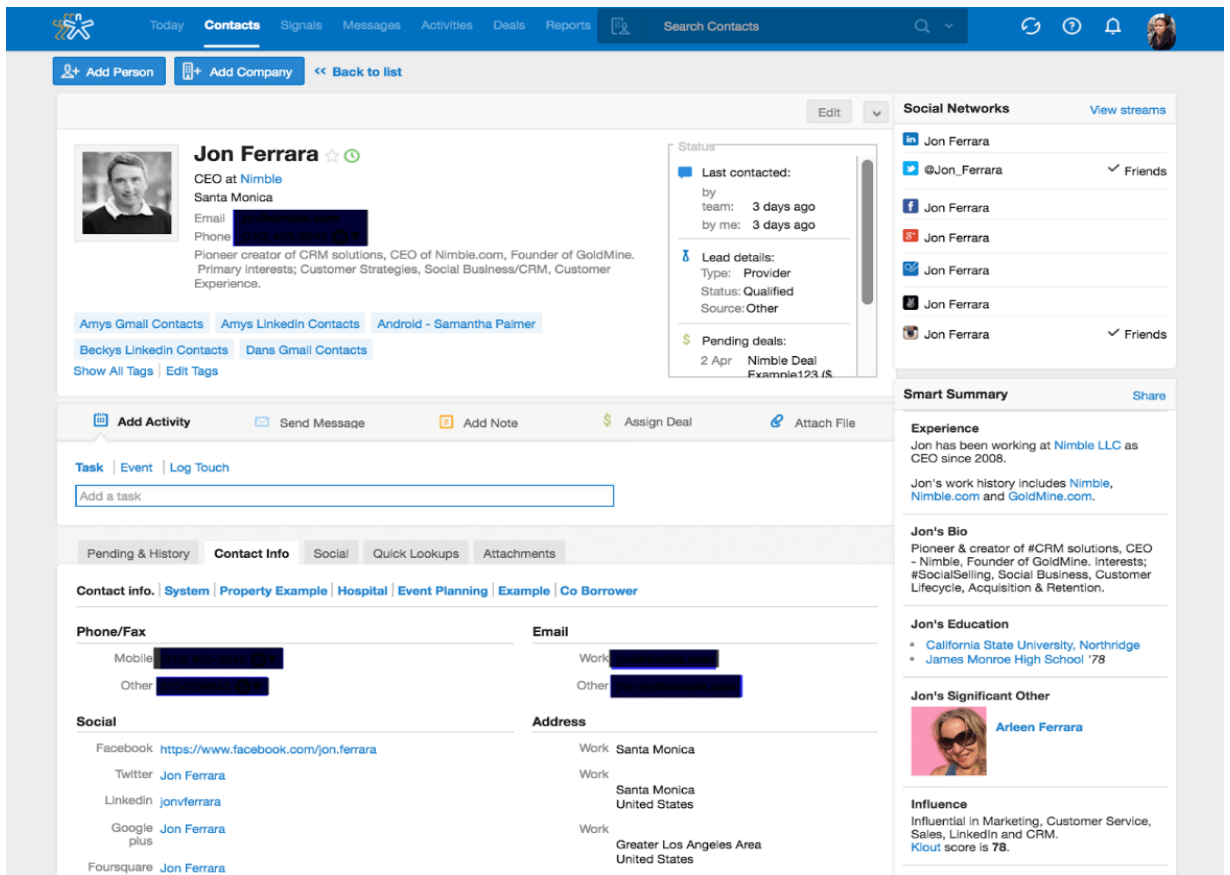
Figure 16 Nimble crm profile dashboard

Source: nimble.com/blog/5-signs-you-just-may-be-ready-for-a-crm/

Summary:

Famous crm tool developed for professionals and organizations to establish better client-customer relationship. Provides fast and quick approach for monitoring, engaging and increasing business relationships. Helps combining communication and customers in single platform for simple understanding.

Features:

- Good customer contact management
- Simple client friendly thereby increasing satisfaction
- API, custom fields, email signature capture, group messages and so on.
- Can assign work to anyone with improved sales pipeline tracking and reporting
- Can extend nimble with more tools

Cons:

- Poor deal management system
- Lacks integration
- Comes with only one pipeline

8. SAP CRM

Known as integrated customer relationship management module by SAP that helps any organization to achieve their business goals and allows them to perform all Customer Relationship tasks efficiently. CRM is one of the key components for making business strategy for medium and large scale organizations and it also helps in understanding the customers, their needs and customer service effectively. It can help an organization to stay connected to customers. This way organization can achieve customer expectations with the types of services and products that he or she actually needs.

SAP CRM is part of SAP ERP (Enterprise Resource Planning) business suite and is used to implement customize business processes related to Customer Relationship management CRM and to integrate with SAP and non–SAP systems. SAP CRM allows an organization to achieve customer satisfaction by meeting the service expectation and providing products required by customers.
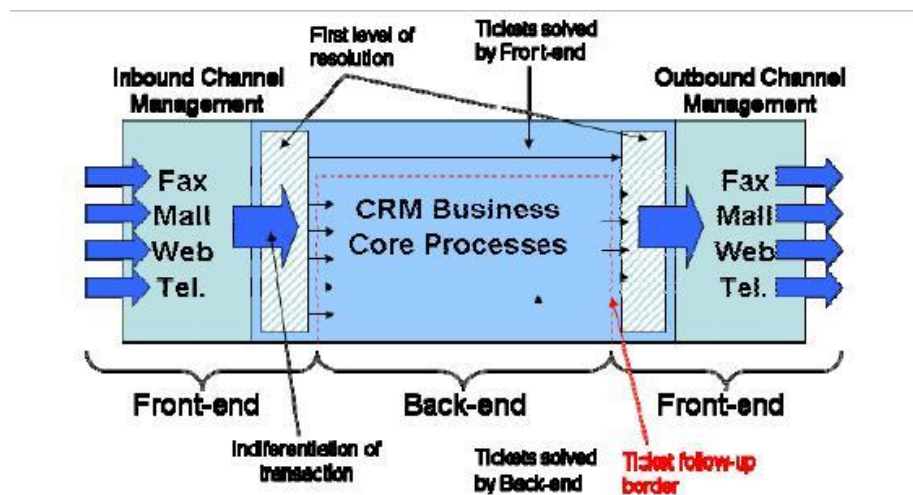
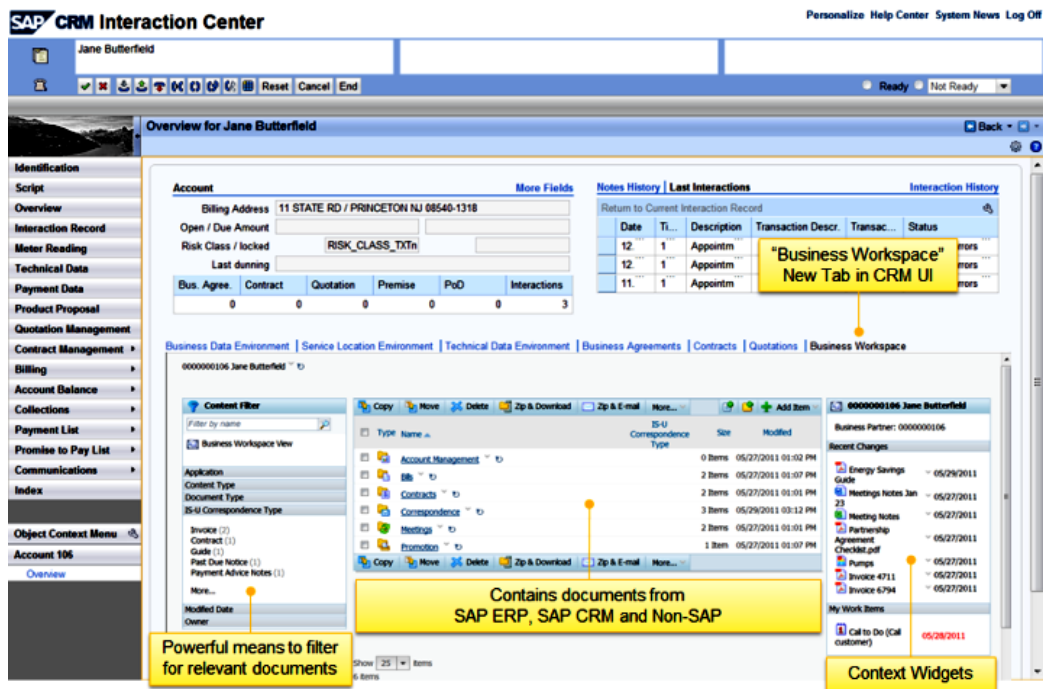

Figure 17 Typical SAP CRM WORK FLOW

Figure 18 crm interaction centre

Source: https://sapbrainsonline.com/crm-tutorial/what-is-interaction-center.html

Summary:

Famous customer relation platform developed to support improved working capabilities.

Also provide very good customer interaction experience for growth.

Features:

- Boosts customer engagement, sales and marketing
- Automates and integrates all the customer facing activities
- Many varieties of reports, tools and views for analysing and forecasting
- Provides 360 degree view of all customers

Cons:

- Expensive
- More manual efforts are required to configure things
- Not good social capability

9. Netsuite

NetSuite CRM+ is a cloud-based customer relationship management (CRM) solution for small and midsize organizations. NetSuite caters to thousands of customers across a wide range of industries including wholesale distribution, manufacturing, media/publishing and retail.

It offers sales force automation, e-commerce, customer data management, partner relationship management, marketing analytics and more. The NetSuite for iPhone application extends the functionality of the software to the mobile device. The analytics functionality is able to integrate back-office metrics and data with front-office operations to provide upper management with a complete view of their organization.

The solution operates on a multi-tenant architecture and all information is stored in a secure data center. NetSuite also offers an application development platform known as the NetSuite Business Operating Platform (NS-BOS) that provides tools and resources for developers to plan, build and deploy industry-specific customizations and applications.
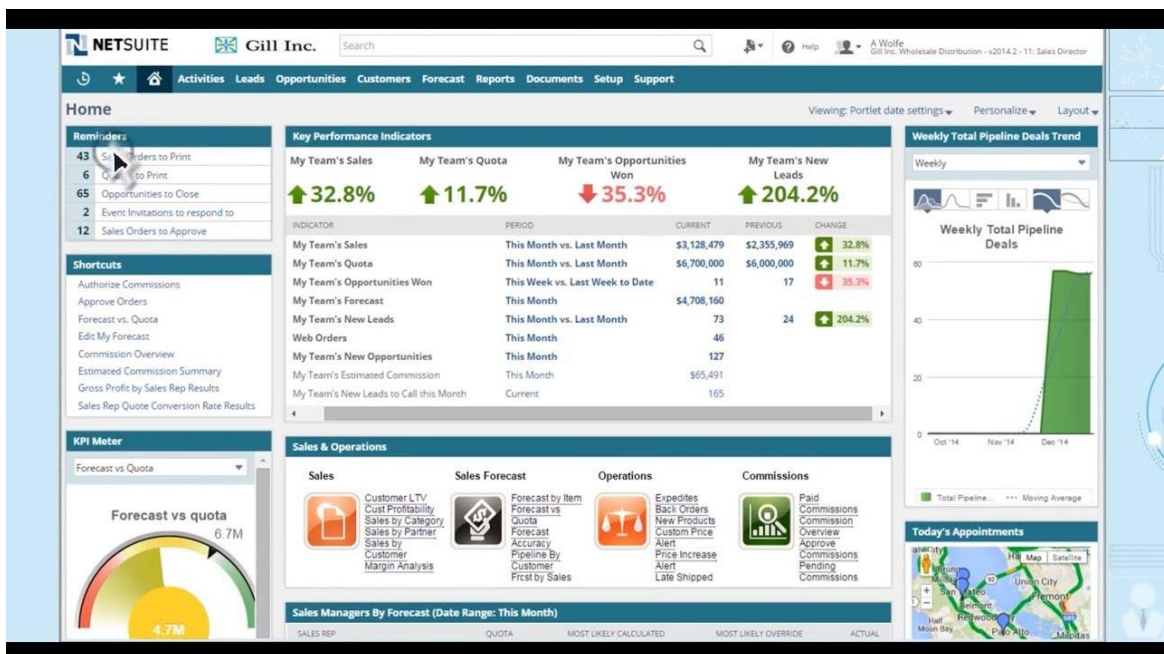

Figure 19 Netsuite dashboard

Source: https://www.getapp.com/customer-management-software/a/netsuite-crm/

Summary:
Cloud based ERP tool. Integrates departmental and processes like planning, purchasing, finance sales, invoicing, marketing and so on to form as a central service system for your business operations.
Features:
- Fully integrated
- Engaging workforce that guides you through
- Inventory and production management
- Financial info is easy to read

- Cloud application so accessible
- Custom reporting and audit tracking

Cons:
- Low speed and expensive for small business
- Training for multiple user level

10. Infusionsoft

Infusionsoft is the industry's longest-running and most powerful product, offering an all-in-one solution that provides advanced marketing and sales automation, fully customizable campaigns, and powerful app integration. Keep track of contacts, appointments, tasks and everything else about your business all in one place. Access Infusionsoft from any computer with an Internet connection and work from anywhere.
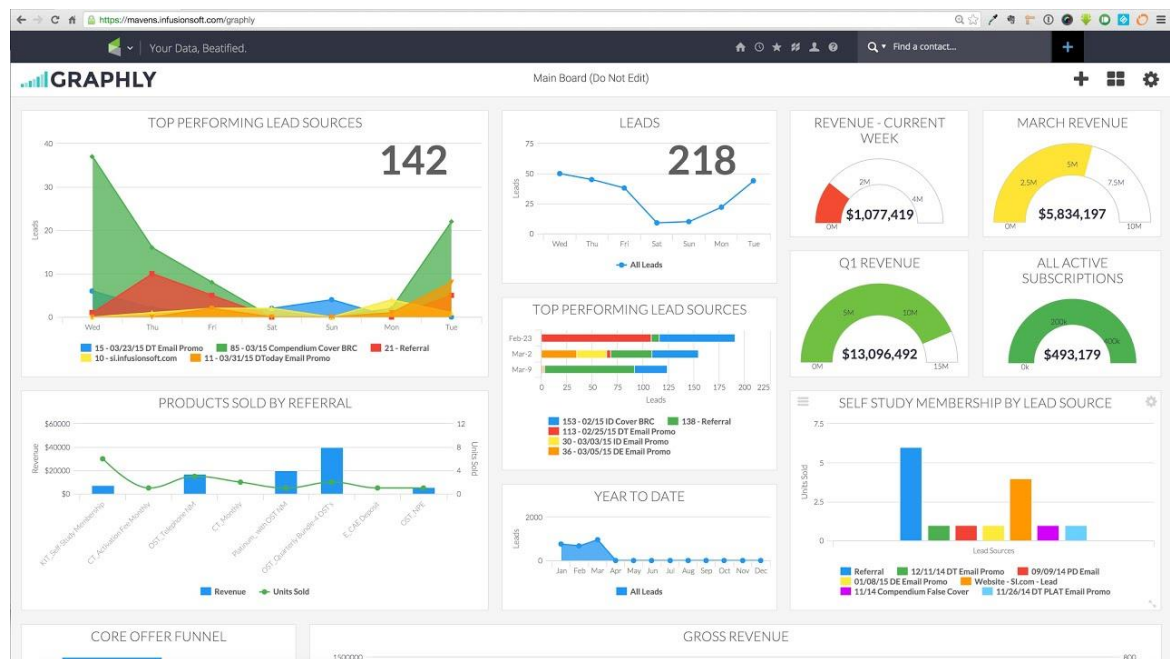
Figure 20 Infusion soft dashboard

Source: https://www.youtube.com/watch?v=B6cA-TEkWBw

Collect data about your leads' behaviors, score them based on marketing interactions and prioritize the leads that are hottest and ready to buy. CRM for small business has never been more powerful and easy to use. Best of all, with an integrated system, when someone becomes a client, it will automatically trigger personalized automated follow-up. All of your customer history will be in one system to create a seamless system.

Summary:
One of the famous marketing automation tool. Has one of the best user interface for building automation campaigns, making it easy and enjoyable to use.
Features:

- Best designed user interface
- Great intergration and API
- Great support and training
- Scalability as it uses universal tracking which keeps track of contact's behaviour across multiple marketing channels

Cons:

- Expensive
- No native integration
- Additional

CHAPTER 5

Table1: CRM TOOL COMPARISON

CRM Tools	Rating	Industry Sgment	Suitable for	Cost	Free Trial	Mobile Support	CM	SMM	MA	SA	LM	WA	BI	PM	DM	CI
Nimble	4.5/5	CS+M&A	SME	Low	Yes	Yes	Tick						Tick		Tick	
Hubspot	4.3/5	CS+M&A+IT	ALL	Moderate	Yes	Yes		Tick	Tick							
Salesforce	4.2/5	CS+IT	SME	High	Yes	Yes	Tick		Tick	Tick	Tick	Tick	Tick		Tick	Tick
Keap(Infusionsoft)	4.1/5	M&A+CS	Small	High	Yes	Yes	Tick		Tick		Tick		Tick		Tick	Tick
Zoho	3.9/5	CS+IT+Retail	SME	Medium	Yes	Yes	Tick		Tick	Tick	Tick	Tick		Tick		
Oracle	3.8/5	CS+IT	Large	High	Yes	Yes	Tick	Tick	Tick	Tick	Tick	Tick	Tick	Tick	Tick	
Microsoft Dynamics	3.7/5	CS+IT	Medium	High	Yes	Yes			Tick						Tick	
Sugar Sell (Sugar)	3.7/5	CS+IT	SME	Medium	Yes	Yes	Tick		Tick	Tick	Tick	Tick	Tick		Tick	
SAP	3.5/5	CS+IT	Large	High	Yes	Yes	Tick			Tick	Tick	Tick	Tick		Tick	Tick
Netsuite	3.4/5	CS+IT+CH	Medium	High	No	Yes	Tick			Tick			Tick		Tick	Tick

Note (in Industry):
CS-Computer Software
M&A- Marketing & Advertisement
CH- Computer Hardware
Note (other category of comparison):
CM-Contact Management
SMM-Social Media Management
MA-Market Automation
SA-Sales Automation
LM-Lead Management
WA-Workflow Automation
BI-Business Intelligence
PM-Performance Management
DM-Database Management
CI-Client Interaction

CAPABILITIES	FEATURES
Activity Mgt Apointment Mgt Shared Contacts Internal Collaborations File mgt	Contact Management
Contact Information Engagement Customer behavior and desire Demographics Social crm Track, engage potential customers	SMM
Campaign Analysis Segmentation and Targeting Competitor tracking Lead conversion opportunity Lead Nurturing	Marketing Automation
Opportunity Mgt Sales Collaboration Quoting Profit/Loss Analysis Sales activity mgt ExpenseMgt Sales Forecasting	Sales Automation
Lead Capture and Generation Retention Feedback Mgt Pipeline Tracking Lead follow-up	Lead Management
Calendar Integrations Task Scheduling Task Tracking Workflow Mgt Allocation	Workflow Automation
Activity dashboard Revenue cycle modelling Sales intelligence Management Decisions Data analysis and reporting	Business Intelligence
Performance tracking Expense reporting Attendance tracking Valuable insights Performance evaluation	Performance Management
Database linking Comprehensive records Opyimised storage Monitoring orders Actionable insights	Database Management
Filtered views Account mgt Payment mgt Interaction mgt Customer segmentation	Client Interaction

Concluding Remarks:

This chapter covers the main content about the marketing stack tools, the top 10 tools details or we can say the case so studies was analysed and the important facts and the information to reach the conclusion happens here. Also after extensive case studies of various respected authors papers and their view points were considered and finally came out with my interpretation after studying the various components, capabilities of these 10 tools and to whom they can be better suited for.

CHAPTER 6

Recommendation

Building the right marketing tech stack for any company is no picnic. It can be quite a gargantuan task. But it's all about integrating the right technologies together so they're working cooperatively instead of independently. Not only will you get a full, comprehensive view of your customer journey and marketing efforts, but you'll uncover how to optimize your hard earned marketing dollars. Whether you're looking at the 3rd or 30th tool for your marketing stack, there's a sheer incomprehensible number of providers out there who will happily take a slice of your budget cake. Making an investment and committing to a new tool is almost never an easy decision, especially when there's a lot of implementation and training attached to it. If you get your tech stack right, it'll make your workday infinitely better.

1. Before you jump into marketing stack process, ask yourself these questions or consider these points to get started in the right direction.

    ➢ Have I done enough research to begin with?
    ➢ Does the software integrate with the tolls I need it to?
    ➢ Do I have shiny syndrome?
    ➢ Should I include other departments' inputs in the final decision?
    ➢ Do I have the right amount and kind of manpower to operate it?

2. Make integration a chief priority in your marketing technology acquisition strategy.
    ➢ Raise the level of priority for integrated technology as part of your vendor strategy. Make sure that all of your teams are trained in this area and that technology vendors you evaluate understand that integration is an important point of differentiation.

3. Let the customer experience guide your requirements and priorities.
    ➢ Top-down approach to building data and technology requirements. Design the type of customer experience that your organization wants to deliver to customers, on your website, mobile apps, email, social media, digital ads and so on.

4. Technology is just one hurdle, organizational and execution challenges still need to be addressed.
    ➢ Mastering cross-channel requires a marketing organization that is designed to break down silos, create internal alignment and drive real value across the enterprise.
    ➢ Staffing is a critical factor. The right skills and technical expertise must be gathered in-house or through agency, vendor and other third-party partnerships.

Conclusion

From this case studies I have interpreted that one can design/ choose their tool(s), the best combination that addresses their organisation or marketing/sales needs for staying ahead of the competition and function smoothly.

Hereby, one will be able to achieve the following:

- ➢ Address unique needs and marketing objectives
- ➢ Optimize your social media marketing
- ➢ Reach maximum audience
- ➢ Collaborate with Sales to personalize customer needs/experience
- ➢ Gauge lead generation results using analytical tools
- ➢ Proper combination will improve the productivity and increase the effectiveness
- ➢ Align your marketing stack with building awareness, acquiring new customers and retaining existing customers.
- ➢ Handle many marketing tactics with platform integration.

 CRM is not a technology or even a group of technologies. It is a continually evolving process that requires a shift in attitude away from the traditional business model of focusing internally. CRM is an approach a company takes toward its customers backed up by thoughtful investment in people, technology and business processes. It is important to understand the concept with respect to information systems and marketing. As a marketing component, CRM is a relationship process which a company can cultivate with its customer groups/segments in such a way that it would benefit both the customer and the company. It can also be considered as a liaison process between a product and a consumer which is as old as marketing itself.

CHAPTER 7

Limitations And Further Research

Limitations of this study:

- The study is limited to ten tools.
- The time period over which this study was conducted was also less.
- The size is relatively small. To accurately evaluate and provide insights, organization approval and details so not openly shared are desired.
- Organizations don't share detailed information in confidentiality terms.
- Limited to marketing stack only.
- No other tools are considered in here except the CRM tools.

Further Research:

Research can be further taken forward by respective organizations on how they can bundle various marketing CRM tools /software for achieving specific objective or increasing overall efficiency. It differs to organization to organization so further research in terms of their budget allocation, workforce competency and skills vary. And accordingly research and analysis has to be done as recommended above.

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