

# sweet for Marketing

## PRODUCT SHEET

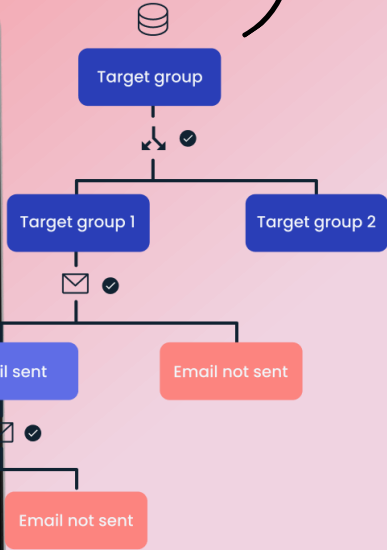


Hi Sweet! Tuesday 2025-02-11 10:16

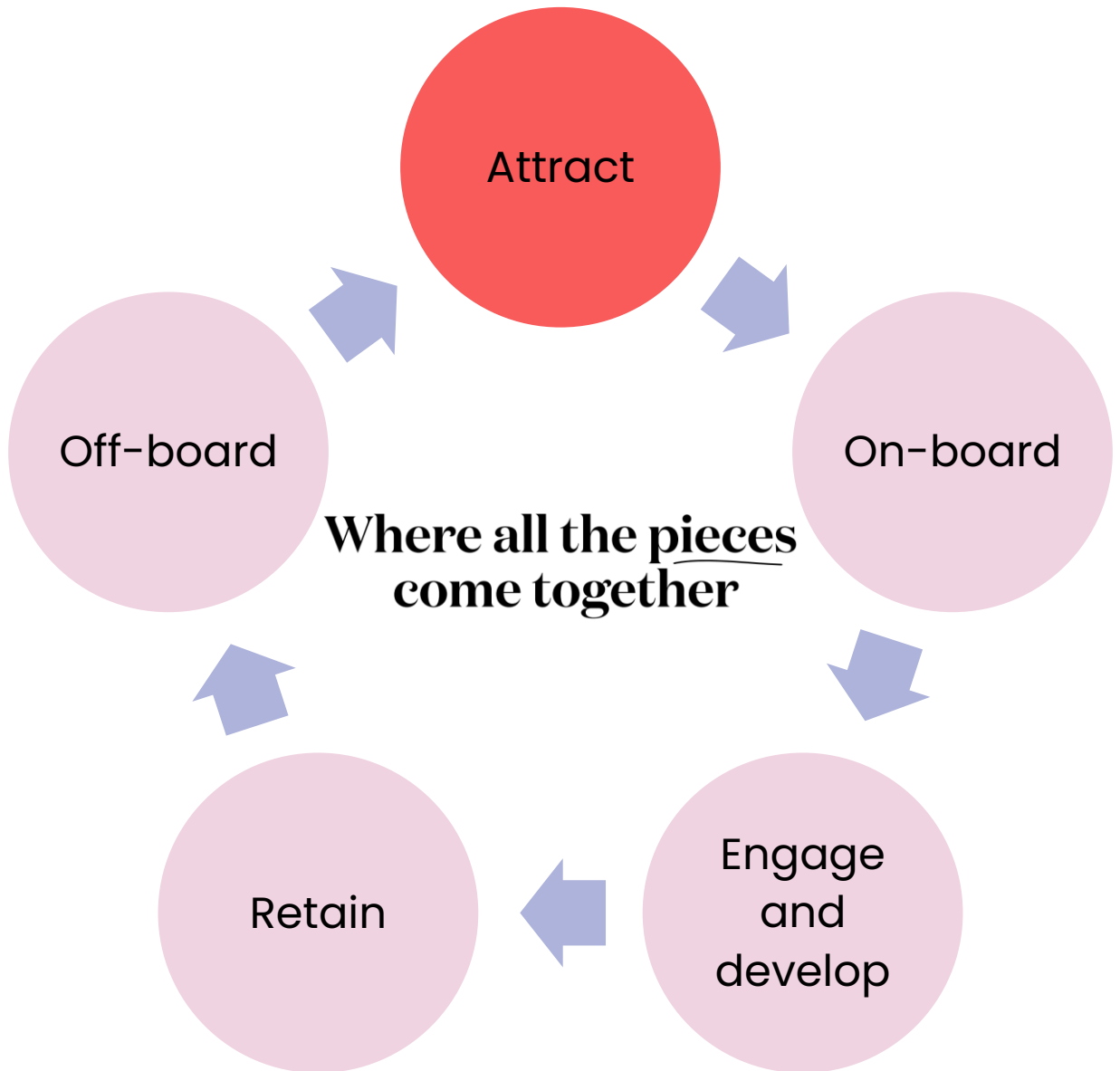
Start Visit planning 1-Marketing (10) Deal pipe

Clickgrade

SENT DATE	MESSAGE	CHANNEL	LIFETIME	SENT	INTERACTIONS
2025-01-09 06:45:34	Sy	EMAIL		1	0
2025-01-13 14:23:33	Sy	EMAIL	0	1	1
2025-01-13 13:23:37	Spotler	EMAIL	0.04	1	2
2025-01-13 14:23:48	Sy	EMAIL	0	1	1
2025-01-09 17:02:45	S	EMAIL		1	0
2025-01-09 14:58:13	Spotler	EMAIL	0.38	1	4
2025-01-13 14:23:30	Sy	EMAIL	0	1	1
2025-01-25 17:30:05	Förnyelsemail	EMAIL	1.67	20	9
2025-01-27 09:05:24	Förnyelsemail	EMAIL	0.04	2	1
2025-01-28 17:30:10	Förnyelsemail	EMAIL	0.83	6	2
2025-01-25 17:30:05	Förnyelsemail	EMAIL		6	5
2025-01-27 17:30:05	Förnyelsemail	EMAIL		4	3
2025-01-28 17:30:04	Förnyelsemail	EMAIL		7	3
2024-09-21 12:41:47	Nytthetsbrev	EMAIL	10.88	10	5

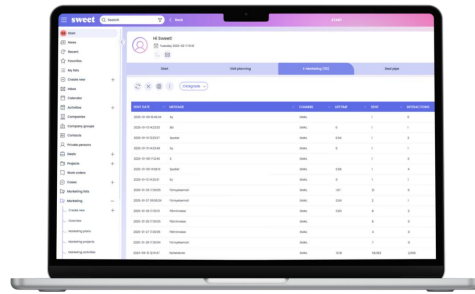


# Marketing through the customer lifecycle



# Marketing with Sweet

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We developed Sweet for Marketing to address the evolving needs of businesses in a rapidly changing marketing landscape. We recognized that our customers were dealing with various challenges, including inefficient marketing processes and a lack of automation. Many of them struggled with managing their email marketing campaigns, marketing automation, and leveraging marketing planning effectively. We saw an opportunity to make a difference.

With Sweet for Marketing, we set out to streamline and revolutionize marketing operations for our customers. Our goal was and still is to provide a comprehensive solution that encompasses email marketing, segmentation, integrated marketing automation and SMS marketing, all within a single, user-friendly platform.

By integrating with powerful e-mail marketing providers, customers could design and send targeted emails to specific audience segments. Automation became a game-changer as it allowed for personalized and timely e-mail sequences triggered by user actions or time-based triggers. This ensured that the right message reached the right people at the right moment, boosting engagement and conversions.

The success of our platform lies in its automations and integration capabilities. By integrating with various systems, including e-mail marketing solutions, CRM platforms like Sweet CRM, and leveraging our rules engine and business process automation tool, Sweet Automation, our customers achieved marketing magic. They could effortlessly send out campaigns, measure responses, handle data seamlessly, and create automated processes from start to end. This not only saved valuable manpower but also provided more time for colleagues to focus on value-creating tasks.

If this sounds Sweet to you, **continue reading!**

**Lead generation | Campaign Management | E-mail marketing | Automation | Target group and segmentation  
Customer lifecycle | Integrations | Analytics | Storage**

# About the E-marketing Module

## Create, send, track and analyze – all in one solution

The Sweet E-marketing Module is a powerful addition to Sweet CRM for Marketing, designed to give marketers complete control and deep insights into their email campaigns. By connecting your email platform to Sweet, all data is automatically collected and transformed into clear performance KPIs. The module offers both high-level campaign overviews and the ability to drill down into the details – from identifying your top-performing campaigns to seeing exactly which recipients opened, clicked, and converted. You get the data you need to make smarter decisions and continuously optimize your campaigns.

### Key features:

- Create your own target groups from all connected data sources.
- Build campaigns or customer journeys with trigger activated, scheduled or manual activation.
- Email/SMS performance summary directly on Sweet's start page
- Statistics for each individual send out and batch
- Full campaign overview including content, recipients and results In-depth recipient behavior analysis: clicks and conversions

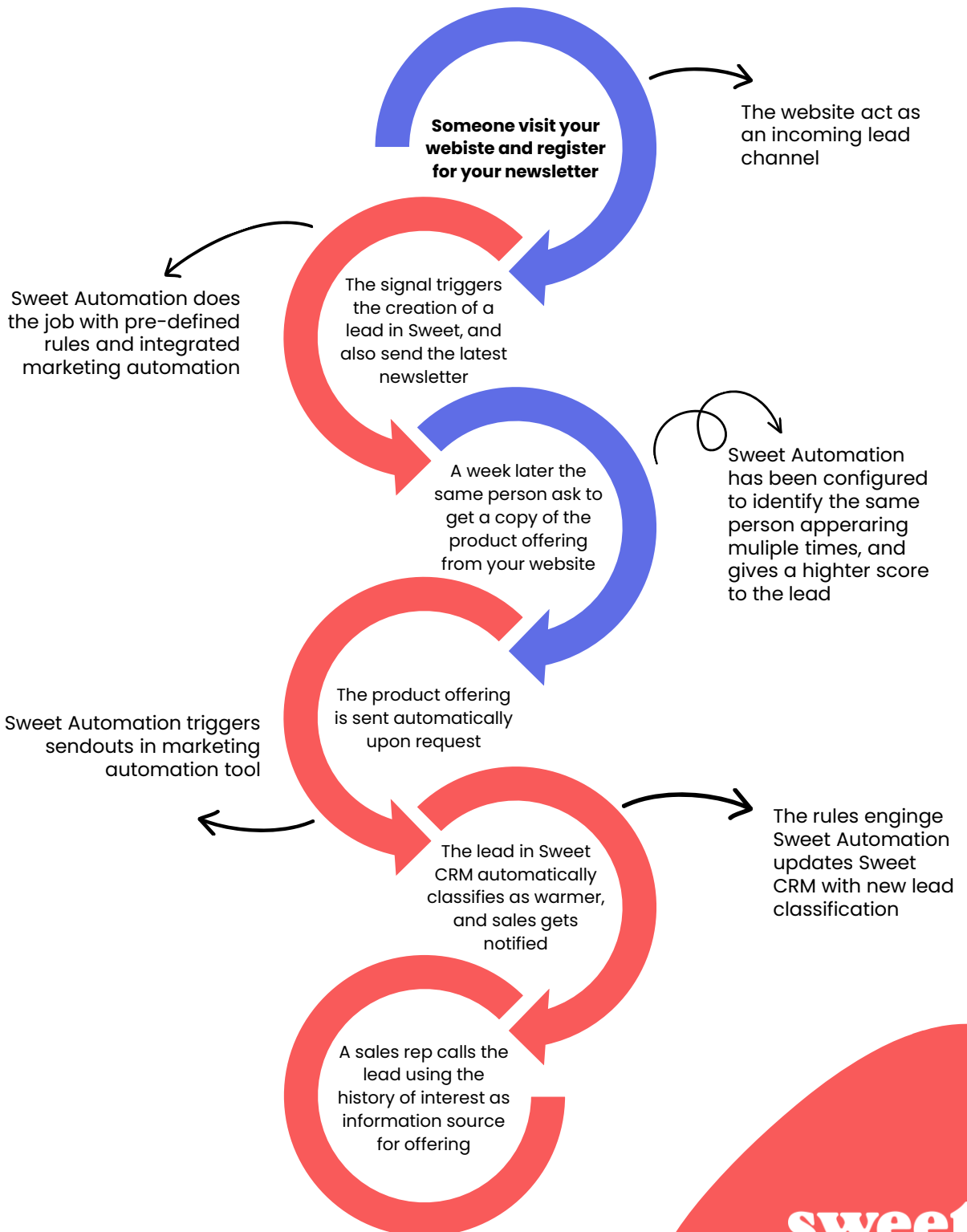
### Supported e-marketing platforms:

- Spotler Mailpro
- Symplify
- Lime Newsletter



sweet

# Example of use

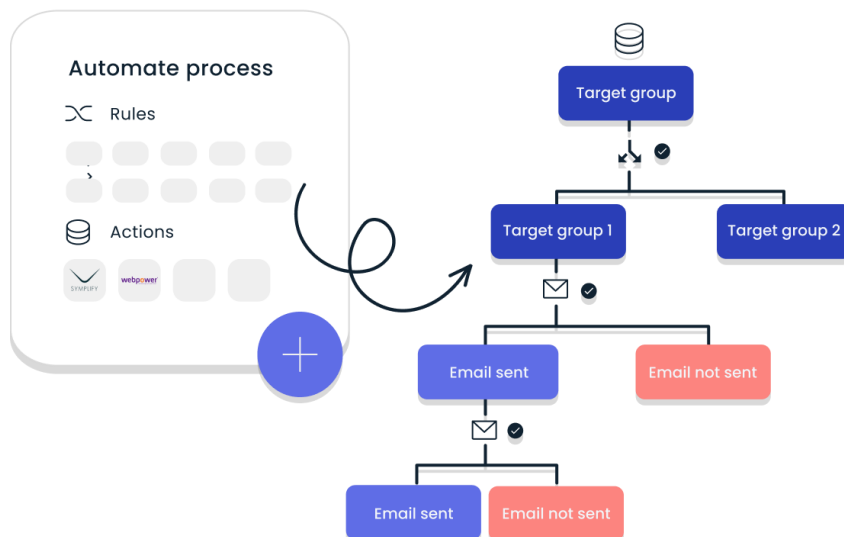


# Attracting new customers

## Attract

### Lead generation and nurturing

Capture leads effortlessly from various sources and nurture them through personalized, automated e-mail or SMS campaigns tailored to their interests and actions. For instance, you can connect your digital forms from your website or select those who have downloaded your white paper to get in touch. This process helps convert leads into customers more effectively.



### Get to know your new customer

The first step is to collect accurate information about your customer so that you can interact with them about offerings they might find attractive. We can help you integrate with the sources you need, such as digital forms on your website and your CRM.

### On-board

You might want to give your new customer a warm welcome, just say hi, and tell them what's next through an email, an SMS, or something else? We know that a nice welcome means a lot and can be the key to future success.

By automating the onboarding process, you can create a chain of actions given a predefined timeline, purchase behavior, or any parameter of yours.

## On-board

# Develop the customer

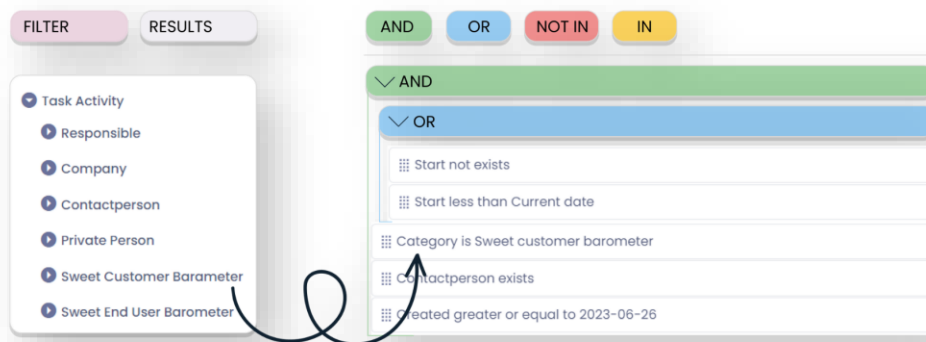
Engage  
and  
develop

## Engage your customers and make them grow by using workflow automation

Automate repetitive tasks and streamline complex marketing workflows, saving time, reducing errors, and maintaining consistency across your marketing efforts. By using an e-mail marketing platform in combination with your marketing automation you can communicate through e-mail, SMS or create landing pages. You set the rules, we make it roll.

## Intelligent customer segmentation

Segment your audience based on demographics, behavior, purchase history, or engagement level, ensuring your marketing messages reach the right people at the right time with a personalized message. Sweet for Marketing helps you slice the cake into pieces and leave you with the cherry on top.



Select your target audience using powerful filter options

Retain

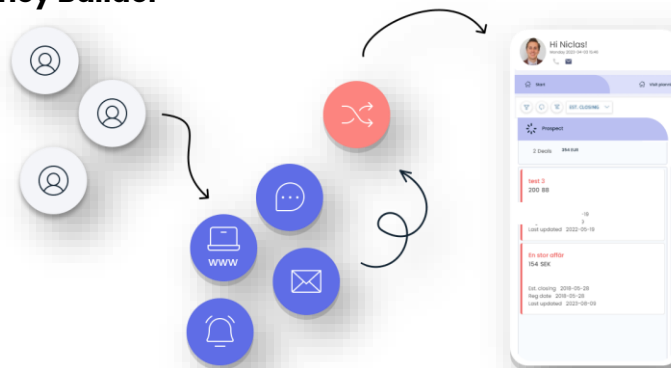
## Retain

A passive customer could be happy - or have one foot out the door. Make sure you keep track of the customers that you have not interacted with by defining the conditions of a "passive customer" and define the process of how to handle them. By being one step ahead you can retain your customers by keeping them happy and make sure they will continue being customers.

# How to build customer journeys

## Customer Journey Builder

### Customer Journey Builder



When you've got your integrations in place and your segmentation criteria all set, you are ready to start on the journey of creating automated customer experiences. Here's a strategic approach:

- 1. Define objectives:** Begin by defining your goals for automating customer interactions. Determine what you aim to achieve, whether it's improving engagement, streamlining communication, or enhancing customer satisfaction.
- 2. Segmentation strategy:** Segment your audience based on relevant criteria to personalize interactions effectively.
- 3. Automate or not:** Decide which aspects of the customer journey you want to automate first, and which tasks should remain under human control. Striking the right balance between automation and human touch is key to success. We recommend to start small but think large.
- 4. Start the journey:** Initiate your customer journey by choosing the optimal starting point. Consider where your customers enter the journey and how you can engage them effectively along the way.
- 5. Map the journey:** Define what should happen along your new customer journey. Map out a sequence of interactions, messages, and actions to create a seamless and engaging experience.
- 6. Flexible refinement:** If necessary, divide the journey further based on specific criteria. Refine your journey or segmentation to cater to diverse customer needs and preferences. It's easy breezy.

Sweet Automation's customer journey builder puts you in control, allowing you to create tailored, proactive interactions that drive results and customer satisfaction while lowering costs.



# Saying goodbye

Off-board

## Off-board

Have your customer decided to leave? Well, that's sad news. But a good off-boarding can either give you a new opportunity to attract the customer or leave on good terms so that they might be willing to come back in the future. Be prepared by having a goodbye-letter with the last words or offerings to your customer, and hope for the best. Why don't you give them a call after a few months to see how they're doing? Sweet can help you create these activates regularly and reminds you automatically.

Skistar Vacation Club

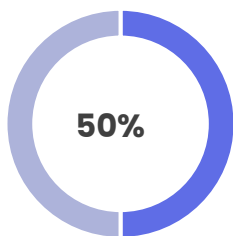
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**What feels good about Sweet is that we can be involved in shaping the tool - our desires become a reality. That hasn't been the case with previous systems.**

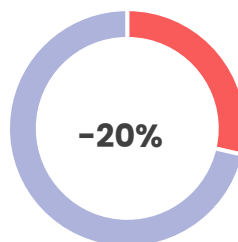
**Hafez Tadayon**

Former Business Area Manager at Skistar Vacation Club

[Read Skistar's success story here](#)



■ Increased productivity



■ Manual work

**sweet**

# Marketing

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## CRM

### **One platform for all your business processes**

Sweet CRM plays a central role in the Sweet marketing offer by serving as the central hub for all your business processes. Acting as your daily guide and collaboration platform, it consolidates essential information and facilitates the definition and management of processes such as sales, service, aftermarket sales, work orders, and marketing. With Sweet CRM, all these critical processes are seamlessly integrated into one unified space, streamlining collaboration within the organization.

The effectiveness of a CRM system relies on the accuracy of the data it contains – and this is where it gets interesting. By integrating the CRM with solutions for leads management, support cases or e-mail marketing *and* utilize Sweet's business process automation tool on top of it, we'll provide you with what you need to reach that sweet spot where your business just keeps going.

### **In Sweet CRM you can**

- Create and manage your marketing plan over the year with
- Plan, work on and manage marketing project
- Plan and execute activities like events, telemarketing activities, e-mail send outs or information posts in the external customer portal.
- Create and manage target groups/ customer segmentation

### **If you already have a CRM?**

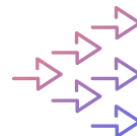
If you already have another CRM that's perfectly fine – we can integrate with that too, even though we know ours is a bit sweeter.

# Functions

Below are some of our most appreciated functions

## Marketing Automation

With the power of automation, marketers can automate manual work and make sure to deliver on marketing plans both long- and short term. This allows you to work proactively and stay one step ahead of competition. Continuity and proactivity will be your leading star.



## Leads management

In Sweet you can connect your lead sources and feed them into your CRM, manage and nurture them by a process you define and automate, or one by one in a personal but yet manual way.

## Segmentation

Sweet allows you to combine your leads, customers and other contacts and make your segmentation spot-on. By being able to dive into nitty gritty customer details, the possibilities are almost endless.



## E-mail marketing

Sweet is your trusted partner, seamlessly integrating with top e-mail marketing providers to offer you cutting-edge solutions for both e-mail and SMS marketing. Explore our [website](#) to find a comprehensive list of connections, which continues to expand.

## Integrations & API

Sweet can connect with third-party tools and services, including CRMs, analytics platforms, and other applications. Of course, we have an API that makes it all easier.



## Analytics and reporting

Gain valuable insights into the effectiveness of your campaigns with detailed analytics and reporting. Track metrics like open rates, click-through rates, conversion rates, and revenue attribution to optimize your marketing strategies.

## CRM

Sweet CRM is the place where you manage your marketing plans and activities, and is the place where your contacts and customer can be found. We offer you a powerful, yet easy to use CRM for all of that.



## GDPR and data privacy

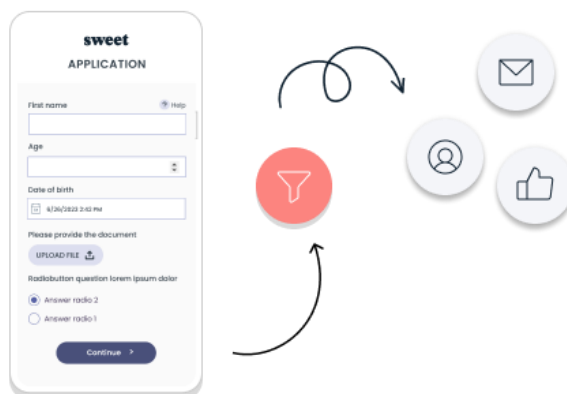
By keeping track of consent status, and making sure data is regularly accurate and relevant you can sleep well at night. Sweet supports planned and reactive data clean-ups such as anonymizations or full delete of customers.

# Marketing add-ons

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## Sweet Forms for data collection

To truly understand your customers and their needs, it's crucial to engage with them directly and gather valuable information. Sweet offers exceptional solutions for conducting digital forms or surveys and collecting customer insights through user-friendly online forms. With our powerful digital form capabilities, you can extract the information you need to make informed decisions and take meaningful actions.



### Key features

- **Seamless digital forms creation:** Easily create customized forms or surveys tailored to your specific needs using Sweet's intuitive Form Designer. Design engaging questionnaires that capture customer opinions effectively.
- **Use the data you have and pre-populate it,** so the customer can focus on answering the things you do not already know.
- **Multi-channel distribution:** Reach your customers through various channels, including email, customer portal or website.
- **Real-time responses:** Collect responses in real-time, allowing you to promptly analyze and act upon the feedback received. Stay agile and responsive to your customers' needs and preferences.
- **Actionable insights:** Empower your decision-making process with the valuable insights gathered from customer feedback. Identify areas for improvement, optimize your strategies, and enhance customer satisfaction.

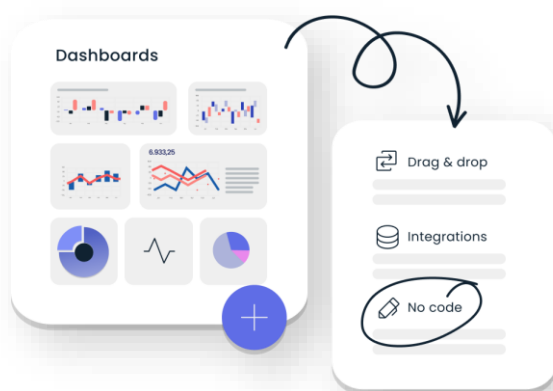
[Read more](#)

**sweet**

# Marketing add-ons

## Sweet Performance for analytics

Are you ready to elevate your marketing performance to new heights? Sweet offers real-time dashboards and monitoring: Stay up to date with our dynamic dashboards and real-time monitoring capabilities. Track key metrics, visualize data with customizable graphs, and gain invaluable insights into your operations.



### Key features

- **Do It Yourself:** Sweet's user-friendly interface empowers you to take control. Customize your dashboards and graphs according to your unique needs, putting you in the driver's seat of your performance analysis.
- **Sales Tracking:** Keep a close eye on your sales performance with our comprehensive sales tracking tools. Identify trends, spot opportunities, and make data-driven decisions that drive growth.
- **KPI Setup and Measurement:** Define and measure your Key Performance Indicators (KPIs) effortlessly. Sweet simplifies the process, ensuring you're always aligned with your business objectives.
- **Goals and Metrics:** Set clear goals and track your progress with precision. Sweet's goal-oriented approach makes it easier than ever to stay on the path to success.
- **Seamless Insights Sharing:** Collaboration is a breeze with Sweet. Share your insights easily with your team, fostering a data-driven culture that fuels innovation.
- **Multi-source Data Integration:** Sweet isn't limited to one data source. Integrate data from multiple sources to get a holistic view of your performance landscape, allowing for more informed decisions.

Experience the power of Sweet's performance optimization tools today. Elevate your business with real-time insights, customizable metrics, and the freedom to make data-driven decisions like never before.

[Read more](#)

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# Integrations



## E-mail marketing



**Spotler Mailpro** for email efficient and smooth e-mail and SMS marketing.



SYMPlify

**Symplify** will help your e-mail marketing and communication reach the next level.

## Website

Capture leads from the website, from digital forms or whenever someone downloads a white paper.

## Another CRM

Integrate with your CRM to get full access to all your leads, contacts or people you want to connect with. Sweet offers a seamless integration with Sweet CRM, yet it works with other CRM solutions too.

## API

Don't you find the integration you're looking for?  
With our API:s it's easy to build new integrations.

[Find our API documentation here](#)

# Security and Compliance

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## Authentication

We offer a diverse range of authentication options tailored to meet your specific needs for securing your data.

## User access controls

We provide various user levels, ranging from basic users to administrators, each with different access rights and privileges. Your assigned user level will determine the extent of access you have within the system.

## GDPR

Our solutions are fully compliant with the current regulations outlined in the General Data Protection Regulation (GDPR). We prioritize the security and privacy of your data, and our platform includes built-in features to support anonymization or deletion of data as well as the ability to tag sensitive information. With our GDPR-compliant solutions, you can trust that your data is handled in accordance with high privacy standards.

## Information security

At Sweet, we prioritize the security of your data and we are proud to be ISO 27001 "Information Security Management" certified. With our well-established processes, we ensure that your data is always handled and managed securely. Data and information security are of utmost importance to us, and we go above and beyond to safeguard your valuable information.

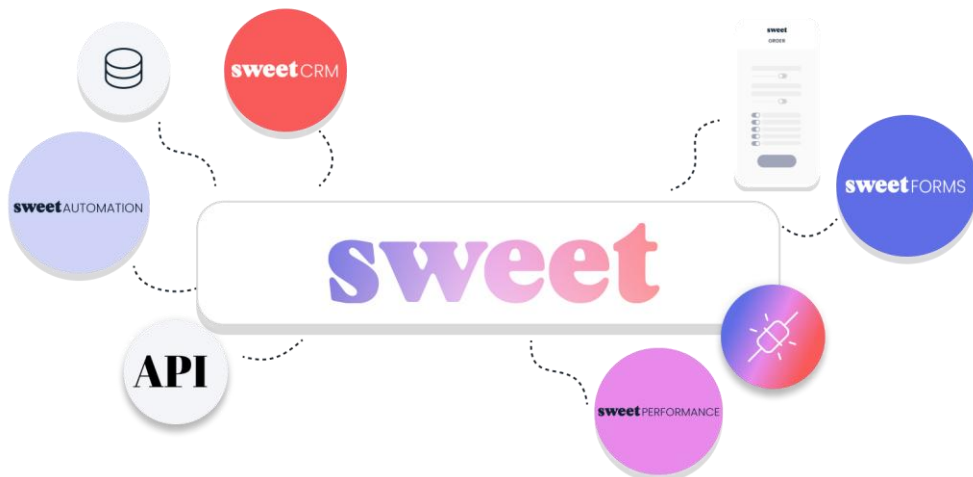


# Infrastructure & Storage

## Platform details

Sweet for Marketing is a bundle of Sweet CRM and Sweet Automation.

- **Sweet CRM** and its capabilities of holding marketing plans, projects and activities, together with contact details to your customers, suppliers, partners leads etc. Sweet CRM acting as your best interface for overviews and your everyday work.
- **Sweet Automation** and its automation capabilities together with the rules engine to automate your sales processes and interactions. This is also the place where the integrations to lead sources, e-marketing providers and other systems is managed.



## Setup

Our setup model is easy, it's a digital platform with a cloud first storage strategy (but we can help you set it up locally when required.)

- Azure Cloud, either shared or separate cloud
- On-premise

## Storage Sweet CRM

Just like the setup, storage is connected to the chosen setup model. We offer storage

- Microsoft Azure Cloud, either shared or separate cloud
- On-premise



# Infrastructure & Storage

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## **Storage Sweet Automation**

Sweet Automation is designed to automate business processes. It centers its capabilities on two core functionalities: Selections for lists, filtering and segmentation and Flows for building rules, chains of actions, integration and automation.

### **Selections**

Selections form the foundation of data extraction. The selections can be divided into two parts, metadata and the selection templates:

#### **Metadata of the selections**

The selection engine stores metadata about data sources within the platform. This metadata includes:

- Names and descriptions of tables and columns in a relational database.
- Paths, filenames and filetypes of files stored either on network shares or online
- API endpoints

Sensitive metadata, such as connection strings and authentication credentials, is encrypted for security. Only administrators with the necessary permissions can access the metadata of the selections.

#### **Selection templates**

Using the stored metadata, users can craft selection templates. Upon execution, these templates extract data from the data source, which might be sensitive or non-sensitive. Every extraction is logged, capturing details like:

- User access and potential data exposure
- Time of extraction
- Exact database query details
- Amount of data rows returned

Selections may be locked so that they cannot be changed by any other user (or admin). All selection templates and the data extraction logs can be accessed by all users of the system.

# Infrastructure & Storage

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## Storage continuing

### Flows

Users of the system can build flows that execute actions. These actions may perform a whole range of different tasks. For example, send or retrieve emails, export or read a file, update a database, do API calls, etc.

While doing this Sweet Automation needs to retain some data to keep state of ongoing processes. This data could be unique IDs like Caseld, AccountId, CustomerId or anything else that uniquely identifies "the object that is being processed in the flow" that we call the "flow participant".

Users may choose where to store the flow related data. Either

- Within the platform.
- In any relational database table, outside of the platform.

Depending on the nature of the data the user can decide which storage fits best per flow.

### Logging

Every run within a flow is logged, capturing details like:

- User that scheduled the run
- Start and end date of the run
- Affected rows of the run
- The exact configuration of the action at the point of the run
- If any selection templates were used within the run, that is logged according to the specification above.

Flows may be locked so that they cannot be changed by any other user (or admin).

Flow may be configured to run in "test mode" where selected action runs are skipped.

All flows and all run logs can be accessed by all users of the system.

### Files uploaded in the flows

Users have the possibility to upload files into Sweet Automation that might be needed for a specific Flow.

These files are stored within the platform and can be accessed by all users of the system.



Don't hesitate to [contact us](#)  
with your questions,  
we're happy to serve!

# Are you ready to get started with Sweet?



Contact us



# sweet

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