

Marketing Automation and CRM Integration

How and Why Marketing Automation and CRM Integration is Necessary for Success



The single most important criteria for sales and marketing success is the alignment of the two teams. In fact, SiriusDecisions recently shared that **companies can drive 5-36% growth simply through alignment**. Working towards common goals in a coordinated way sounds easy enough – determine joint processes, define service level agreements and communicate regularly. The reality is that the need to create a consistent experience across all prospect and customer interactions and the amount of data involved makes it much harder than it looks.

To facilitate the alignment, it is essential for marketing automation platforms to be integrated with the sales CRM. Without this integration, it is difficult to create a consistent experience for prospects and too much time and too many resources will be drained trying to coordinate activities to ensure leads don't fall through the cracks.

And, **a 2016 report** indicates that simply having a MAP is not enough. To improve communications with sales, it is necessary to integrate with the customer relationship management (CRM) solution and establish service level agreements (SLAs) to define marketing qualified and sales accepted leads. For those who do, **60% report strong or exceptional communications with sales** compared to only 30% who do not have an integrated solution.

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What is Marketing Automation?

Marketing automation is a technology platform that streamlines the creation, management and analysis of marketing campaigns and leads in one place. It automates processes for emails, website interactions, events and other activities as well as prioritizes the management of leads as they move over to sales. It makes a marketer's job easier by taking previously manual and tedious tasks and automating them so prospects can have a personalized and consistent experience.

By helping to generate more qualified leads, better engage with prospects and customers, track campaign performance and analyze results, marketing automation platforms allow marketers to make more informed decisions to improve future campaigns. Marketing automation platforms can also help engage with prospects earlier on in the buying cycle, which is critical given that SiriusDecisions reports as much as **70% of the buying cycle is completed online before engagement with a salesperson**. Finally, these platforms can help close the gap between marketing and sales by creating a single funnel and workflows that unite both teams around a common goal and improve visibility.



Why should I integrate these two systems?

There are a number of marketing automation platforms that provide all the features mentioned above, but the key is having a system that fully integrates with your CRM to make use of all the data inside it. It is proven that you will benefit from integrating your CRM and marketing automation platform in the following areas:



1

MORE LEADS

A marketing automation platform will help you drive more leads for sales. Period. A well integrated CRM/MAP pair will seamlessly transition leads from marketing to sales. Natively integrated MAPs will also arm a sales representative with a view of all the activity a lead has taken to get to sales, such as engaging with email campaigns, attending an event, filling out forms or simply visiting your website.



2

BETTER LEADS

Most marketing automation platforms offer lead scoring, which allows marketers to work hand-in-hand with sales to define what is truly sales ready. Sales representatives and marketers define the criteria of a lead. By creating scoring profiles, marketing is able to prioritize and process leads through the funnel at the right time to help sales improve the efficiency of their outreach. As your leads interact with your digital content or events, they accumulate a score based on the values assigned to each action. Once a lead's score reaches the threshold you determine for being sales-ready, the lead is automatically pushed to the CRM and assigned to a salesperson. A lead scoring model can dramatically improve your overall lead management strategy, create efficiencies within the sales process and improve conversion rates.



3

CONSISTENT AND CLOSED-LOOP EXPERIENCE

Typically prospects have already engaged with your company before a sales person ever speaks with them. How do you make sure that sales picks up the conversation where the prospect left off? Give them visibility to the journey the lead has gone on with your brand including events they attended, whitepapers they downloaded and emails they responded to. All of this information ensures sales has the information to engage in the right conversation.

Marketers spend a lot of time filling the top of the sales funnel with leads, but what happens to those that aren't ready to buy? A well integrated marketing automation platform allows a salesperson to indicate that marketing needs to nurture a lead more before they're ready to talk to a sales person again. And, what about creating nurture campaigns that include a personal phone call from sales? With an integrated solution, marketing can add tasks to the CRM for sales to call into an account at the right time in a campaign.

Essentially, the two-way communication between marketing and sales ensures you're doing everything that you can to produce a qualified lead and get the most out of the leads you've driven by creating a consistent and closed-loop experience.



4

ROI ON MARKETING SPEND

It is important to understand which marketing activities are driving positive results. By having an integrated solution, marketers can easily track the complete lifecycle from lead to closed/won business. Lead source reporting and ROI dashboards track how much revenue is being produced from marketing-generated leads and which marketing activities are the most fruitful.

What should I look for when choosing a MAP?

Integrating your marketing automation platform with your CRM isn't hard, but the real challenge is choosing a marketing automation provider that will be able to maximize the data in your CRM the right way. It's crucial to choose a provider that can accurately leverage your CRM data to execute customized marketing campaigns. Here are a couple of questions that you should be asking when considering a marketing automation solution that will provide the best integration.

Does your solution provide native integration?

Native integration ensures your data is surfaced natively inside the user interface of your CRM fields versus inside of an iFrame window. iFrame integration may require additional training for salespeople since they will be exposed to the MAP application itself, versus seeing the marketing data living natively inside of the familiar out-of-the-box and custom CRM fields. Another benefit of native integration is that you can be sure if the CRM vendor has a mobile application, the MAP data will render seamlessly in the mobile application as well.

What is your sync time between systems?

Real-time or near real-time updates are ideal. They ensure behavioral-based nurture campaigns are timely and most importantly, sales can quickly act on leads. Some MAPs write over all lead, contact and account information when they sync. It is ideal to work with a MAP that is able to do a delta sync, meaning they only bring down changes from the CRM.

Can custom fields in the CRM be mapped in the marketing automation platform?

Your CRM likely has some custom fields in it. Making sure that you can map that information to your marketing automation is crucial for being able to create customized campaigns. The best scenario is to fully replicate the database structure of your CRM inside of the MAP to provide seamless matching of all out-of-the-box and custom fields. Essentially, it's ideal to exactly mirror the CRM rather than using a third party middleware tool to connect the two systems or have limited functionality with a MAP that only integrates with the out-of-the-box CRM fields.

Is your solution an out-of-the-box solution or do you need middleware to integrate?

Middleware is a third party that enables the two systems to communicate and pass data between each other. However, middleware introduces another variable for the potential misalignment when syncing and can become out of date when there are changes made to either system.

There is more to sales and marketing alignment than platform integration, but well integrated platforms make sales and marketing processes work in unison. Sales is able to work in a system they're familiar with, but they're armed with a higher volume of leads, better quality leads, and more information about each lead to make productive follow up conversations.

I have platforms that integrate but what's next?

When you have the right MAP to go with your CRM, you will need to sit down with sales and decide on the process. Now that your teams are equipped with the technology to integrate, how will everyone work together? Here are some topics your teams, once technically able to integrate, should discuss to build the new process:



Create Service Level Agreements

Marketing and sales leaders should each go through the exercise of documenting processes. Write down everything – no detail is too small. Create a Service Level Agreement (SLA) to define the ideal customer profile, standardize lead definitions and determine the lead handoff and protocols such as how long does a rep have to follow up with a lead. This is your chance to ensure that everyone is on the same page and agrees with what a lead looks like and how it will be handled. These are living documents and will require continuous updating and review.



Review lead score profiles and identify threshold for passing

This can be a difficult conversation if marketing doesn't provide context to sales. For example, how many points are you assigning to an email open, attending an event, a website hit or an email click? If you assign one point or ten points for those actions, that gives sales a baseline for understanding that you want to assign twenty-five points for a case study download and one hundred points for a demo request.



Define criteria for remarketing leads

A well-integrated MAP and CRM solution offers your sales people the option to put a lead back into nurture rather than just letting it collect dust in the CRM. Defining why the leads are being remarketed (going back into the nurture process) allows marketing to build nurture campaigns that make sense to leads at every stage in the buying cycle.



Identify when to build sales steps into a marketing nurture campaign

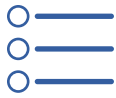
Well integrated systems blur the lines between marketing-owned leads and sales-owned leads. Plus, nurturing isn't just a marketing function. Do you want to sprinkle phone calls within a series of email campaigns? Do you want to add a task in the CRM for a sales rep to perform a specific follow-up based on a lead's recent activity? These are nurture steps you can build into MAPs that allow you to create open and assigned CRM tasks automatically -creating a seamless experience for prospects.



Determine the fields to sync from the CRM to the MAP

Out-of-the-box and custom fields in a CRM are used to house valuable information to make a lead actionable by sales. They are also the fields that sales is updating on a regular basis. The information in those fields provides marketing the ability to create highly customized nurture campaigns. Understanding what CRM fields hold the data that need to lie in the MAP is vital to the accuracy of the segmented list and success of the nurture.

Outline the MAP information sales reps want to see in the CRM



This question is broader than fields - though that is important here, too. Just like a MAP will pull data down from the CRM, a CRM will pull information from the MAP. This conversation is simply about what information a salesperson should see in the CRM from the MAP. A natively integrated MAP will be able to push the information into the user interface of the CRM rather than simply iFraming a certain view.

Conclusion

Integrating your marketing automation and CRM tools is no longer a nice bonus - it's a necessity. How can you expect to align your sales and marketing departments if you can't even align your technology platforms? Make sure you're choosing a MAP that will cooperate and communicate with your CRM from day one. From there, integrated lead scoring and nurturing will become second nature.

Want more information?
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Salesfusion makes the promise of marketing automation accessible to all levels of marketers. Shining a light on the handoff between sales and marketing with native integration to CRMs, Salesfusion creates a unified funnel to ensure no lead is left behind. More than 400 small and mid-sized businesses rely on this comprehensive yet easy-to-use platform to engage in long-term relationships that drive more qualified leads, improve conversion rates and increase revenue. For more information visit www.salesfusion.com or on Twitter @salesfusion.

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