E-book

Successfully integrating marketing automation and CRM

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Introduction: the importance of integration

Today's marketing and sales teams are lucky. It used to be that the tools these teams needed were prohibitively costly and required cumbersome, long-term contract negotiation way up the chain of command. Now, these teams have access to platforms that make their lives easier while helping their organization land more deals. These platforms help companies get out of the business of data center management, cloud integration, and security and compliance, and allow businesses to focus on the things they do that delight their customers.

Most marketing and sales tools fall into one of two main categories: marketing automation systems and customer relationship management (CRM) systems. Marketing automation systems allow your marketing team to run large campaigns and collect lead information, while CRM systems enable your sales team to efficiently manage its pipelines.[1] It only makes sense to integrate these systems — after all, marketing and sales both interact with potential leads and rely on the same data to improve their efforts.[2] Yet integrating your platforms requires careful consideration.

Marketing automation and CRM software are two very robust technologies. If you don't approach integration strategically, things can get messy quickly. For instance, does all data need to be shared and synced between platforms, or just some data? What if pieces of data don't match in the two platforms? Which system should be seen as your organization's source of truth?

In this guide, we'll tackle these questions so your sales and marketing teams can get the most out of your organization's integration efforts.

1 https://www.cio.com/article/3243324/customer-relationship-management/crm-vs-marketing-automation-whats-the-difference-and-which-do-you-need.html

2 http://relationedge.com/marketing-automation-bridge-marketing-sales/

Aligning strategy and goals

Your marketing automation and CRM systems are tools, and as with any tool, they're only helpful if you know:

- Your goals
- Your strategy to achieve those goals

Before jumping into integration, your sales and marketing teams need to be in alignment on these points, otherwise you won't be able to achieve your goals for both platforms. Rackspace experts can provide their expertise and experience to help you decide what you'll need. They'll meet you wherever you are and help take you to where you need to be.

Create service level agreements

What does your sales team expect when they see a lead passed over from marketing? Does marketing know what the ideal customer looks like from the sales team's perspective?

Service level agreements (SLAs) are a great way for each team to lay out everything the other should know. Marketing can list the channels they use, such as email, social media and AdWords, while sales can provide marketing with the characteristics of an ideal lead.

Your SLAs should include the following:

- **A defined hand off process:** When should a lead officially pass from marketing to sales? Is it when a certain value is met? What is that value? How is the hand off initiated? Is it via email, an update in your CRM or maybe both?
- **Clear expectations:** You'll want to outline which activities are the marketing team's responsibility and which are the sales team's. What information does sales expect to communicate to marketing, and vice versa?
- **Standardized lead qualification:** What are the differences between prospects and qualified leads?

This last point of lead qualification is especially important for sales and marketing alignment. Without it, your marketing automation and CRM integration will never reach its full potential.

Work together on lead qualification

Your sales team likely has a detailed lead qualification process. Does your marketing team know what this process looks like? If it doesn't, you could be misusing marketing's time by:

- Passing over leads that don't meet your sales qualification criteria
- Nurturing leads that have a lower chance of converting

Your sales team should clearly communicate to marketing how they qualify leads. What scoring system is in place? What does a qualified lead look like? What are clear buying signals?

Better yet, get marketing involved in the process. Marketing can provide insight into the tactics that generate the most traction. Let's say, for example, you have a particular e-book available online that has been assigned a high point value by marketing. Sales may have found that those who download the e-book aren't really interested in your company's solution.

With this insight, marketing can adjust its lead scoring system by lowering the e-book's point value. This type of collaboration enables marketing to pass along stronger leads.

Consider your lead remarketing

It's inevitable in any sales process that some leads just aren't ready to buy. Perhaps they don't have the budget for your product. Perhaps there was a sudden change on their side that put purchasing your product on hold.

Whatever the case, it's no longer worthwhile for your sales team to go after them — although they might still be great candidates for nurturing by your marketing team.[3] To get the most out of these potential future leads, sales should have a clear process for sending leads back to marketing. Marketing may determine that webinar invites and newsletters might continue to be valuable to this audience. Which other materials should these leads continue to receive?

1 http://relationedge.com/4-key-processes-need-capitalize-marketing-automation/

What marketing activities should be available to sales?

With lead qualification and remarketing goals aligned, your marketing and sales teams can easily identify the information that they do and don't need to share.

As a rule of thumb, sales should be able to see marketing activities that contribute to qualifying leads and inform their conversations with those leads. For instance, sales would want to know which content asset the lead downloaded, or if the lead responded to a particular email campaign. On the other hand, your sales team doesn't really need to know every tweet marketing sends out.

Getting the technical details right

With sales and marketing aligned on strategy and goals, your company can better approach the integration of your marketing automation and CRM platforms. This is where the technical aspects of the integration come into play. You need to know exactly what your platforms should communicate to each other, and the caveats that your employees should be aware of.

Below we'll cover how to get the technical details of your integration right.

Syncing marketing automation and CRM

Your marketing automation and CRM platforms will send information to each other. To avoid confusion and speculation on the part of your marketing and sales teams, you need to thoroughly understand how this syncing will work.

The three most important things to understand are:

- **Sync time:** In an ideal world, your platforms would sync instantly. If they don't, what's the exact timeframe? Knowing sync time is necessary for marketing and sales to ensure they're viewing the correct information. Sync time can also affect processes, such as handing off leads to sales.
- **Type of data override:** When your platforms sync, they're essentially overwriting old data with new data. Some systems overwrite all data during a sync. Other systems use a delta sync, where only some information is updated.[4] Understanding which data will change helps your company establish a single source of truth.
- **Single source of truth (SSOT):** Even though an integration will sync information between your platforms, it's still necessary to establish one system as your SSOT. An SSOT is agreed by everyone to be the definitive source of accurate information.[5] Organizations typically choose their CRM. Once you've identified your SSOT, you need to prioritize information to push to the other platform. This might be to update your marketing automation platform with CRM/ SSOT data, for example.

4 https://www.getfilecloud.com/blog/2017/03/myths and-facts-about-delta-sync-why-delta-sync-doesnt matter/#.W04jwNPwa7N

5 https://blog.buckets.co/the-single-source-of-truth-430b61d10e19

Aligning fields

After understanding how data syncing works with your integration, you then need to align the data itself. This may seem fairly straightforward at first — shouldn't first and last name fields be available on both platforms? Ultimately, careful field mapping is necessary to ensure marketing and sales can create customized campaigns and materials.

Some other items your organization needs to consider:

- **Mapping fields:** While every platform will have the essential account name and contact field, there may be minor differences. For example, your marketing automation platform may have one field named "Company Website" while the same field in your CRM just says "Website." Defining these fields is key to avoiding incorrect data syncing.
- **Custom field support:** Flexible platforms give organizations the ability to create custom fields to support specialized sales and marketing efforts. You must ensure that your platforms can support each other's custom fields. Although third-party tools can map custom data, this only adds extra costs and hassle to your process, while undermining the very point of integration.

Avoiding duplicate leads

Nobody wants to deal with duplicate leads, but they are a reality in most every database. Someone may download an e-book more than once because they deleted it, or a prospect may have called one of your sales reps then clicked on an ad later that day.

Duplicate leads do more than just return duplicate search results.[6] They can affect reporting accuracy if two records for a single lead are marked as qualified. Multiple records can also confuse your marketing and sales staff. If your employees are working in two different versions of a lead's record, not only will they be viewing inaccurate information, but they'll waste time troubleshooting and updating records once the issue is identified.

To avoid these issues, you need to discuss with your integration team and platform admins how to handle potential duplicate records. Salesforce, for example, allows admins to set up duplicate and matching rules, which run before records are updated.

Using closed-loop reporting

Once a new deal has been closed, there's still a bit more for sales to do. Your team needs to determine how marketing will find out about the new client, as well as the path the client took through the marketing and sales funnels to your organization.

Closed-loop reporting addresses these items by sending new client data back to your marketing team. This is necessary for marketing to understand the true return on their efforts. If blog posts around a certain topic are generating more customers than, say, a downloadable guide, marketing can focus its time on what's working.

Conclusion

Moving forward with marketing automation and CRM

Your marketing automation and CRM systems should work together. Integrating the two is meant to allow users to tap into the advantages of each system easily.

When it comes to integrating your marketing automation and CRM systems, you don't have to go it alone. Reach out to your platforms' support and account management teams for help with integrating your systems correctly.

You can also turn to outside experts like those at Rackspace, who know marketing automation and CRM integrations inside and out. Our team of technology and marketing experts can help you engage with your customers from lead to loyalty through an integrated marketing automation and CRM system. We do this by improving business processes, leveraging technology, and integrating creative digital marketing to make your unique integration a success.

Visit www.rackspace.com/application-management to see how we can help you.

This e-book is brought to you by Rackspace. Rackspace Application Services combines a **Process First. Technology Second.®** approach with creativity to provide transformative business value.

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At Rackspace, we accelerate the value of the cloud during every phase of digital transformation. By managing apps, data, security and multiple clouds, we are the best choice to help customers get to the cloud, innovate with new technologies and maximize their IT investments. As a recognized Gartner Magic Quadrant leader, we are uniquely positioned to close the gap between the complex reality of today and the promise of tomorrow. Passionate about customer success, we provide unbiased expertise, based on proven results, across all the leading technologies. And across every interaction worldwide, we deliver Fanatical Experience™. Rackspace has been honored by Fortune, Forbes, Glassdoor and others as one of the best places to work.

Learn more at www.rackspace.com or call 1-800-961-2888.

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