B2Best Practice

Marketing Automation and CRM Integration

A guide to the benefits of integration, including how to choose the best platform and unite teams with platform processes.



It's an age-old problem: **Sales and marketing don't work well together**. Marketing thinks sales isn't following up with the leads they're driving. Sales thinks marketing isn't driving enough quality leads. What can alleviate the misalignment between marketing and sales? **A well-integrated marketing automation platform.**

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Marketing automation is a technology platform for marketers to create, nurture, and pass leads to sales. Most marketing automation platforms (MAPs) have **functions for email marketing, social media, contact list management, forms, landing pages, website tracking, and reporting.** Marketers use this technology to execute marketing campaigns in a scale that provide a customized experience to their audiences.

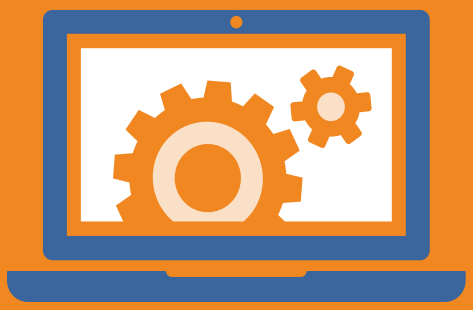
Why should I integrate these two systems?

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. The benefits to integrating your CRM and marketing automation platform are primarily three-fold:

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, 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 can then provide feedback on content, web pages, or email campaigns that they think qualified leads will engage with. From there, marketing is able to build a lead scoring profile which will only pass leads to sales that meet the minimum scoring threshold. Unqualified leads will continue to be nurtured through the system.

3. **ROI on marketing spend:** 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. 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. MAPs also implement lead source reporting and ROI dashboards in order for the user to understand 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 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 an MAP that is able to do a delta sync, meaning they only bringing down changes from the CRM.

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

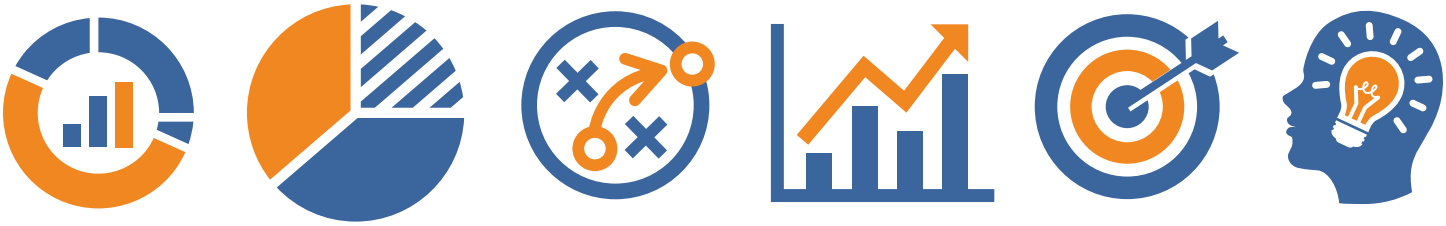
Your CRM likely has some custom fields in it. Making sure that you can map that information to your marketing automation is crucial for being able to create customized campaigns. The best scenario is to fully replicate the database structure of your CRM inside of the MAP to provide seamless matching 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 with the potential for 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 processes 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 for productive follow up conversations.





Now that I've integrated platforms, how do I integrate teams?

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:

1. **Review lead score profile together 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, 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.

2. **Remarketing. Why are people getting remarketed?**
A well-integrated MAP and CRM 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.

3. **Where do you want to build sales steps into the marketing nurture?**
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 things nurture steps you can build into MAPs that allow you to create open and assigned CRM tasks automatically.

4 What fields do you want 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.

5 What MAP information do sales people 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 firmographic from the MAP. This conversation is simply about what information a sales person should see in the CRM from the MAP. A natively integration 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.

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