

A Marketer's Guide to CRM Integration

Find the Right System without Losing Your Mind

Raab

associates, inc.

345 Millwood Road

Chappaqua, NY 10514

www.raabassociatesinc.com

Greetings.

Welcome to *A Marketer's Guide to CRM Integration*. We know that CRM integration probably wasn't the first thing on your mind when you started thinking about a new Marketing Automation system. But that slick new system won't do you much good without it. More to the point, some Marketing Automation systems are better at integration than others: so you have be sure the system you pick will match your integration needs. This Guide is here to help.

How you use this Guide depends on what you know now:

- If you're already an expert, go straight to Hog Heaven, otherwise known as Section 4, for a detailed checklist of items to consider. (Experts love checklists, if only to see what's missing).
- If you're not an expert, start with the sections below, which explain things in Three Easy-As-We-Can Make-Them Lessons.

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1 What is CRM Integration and Why Do I Need It?

Let's be honest: you don't truly need CRM integration. You could just write the details of each new lead on a piece of paper, wrap it around a brick, and throw it through the door of the Sales department. That's pretty much the way things were done before Marketing Automation. It worked, but it was inefficient. And you eventually ran out of bricks.

CRM integration saves all that fuss by automatically copying the new lead from the marketing system directly into the CRM system. (If you're really new to this stuff, CRM stands for Customer Relationship Management and it's a general term for systems used by sales people and service agents to deal with individuals. Your Sales department probably has one already, most likely Salesforce.com, Microsoft Dynamics CRM, SugarCRM, or Oracle/Siebel CRM.)

But the virtual brick toss is just one of the fascinating reasons to do CRM integration. Be sure to memorize the list below and drop it freely into social conversation, maybe during an awkward silence on your next blind date. (Let us know how that works out for you.)

- **Lead nurturing:** sending the right message depends on knowing what you've already said and how the subject responded (we're back to that blind date). Since Sales and Marketing are probably both interacting with your leads at the same time, exchanging information gives them both a complete picture of what's happened so they know what to do next. This means a two-way data exchange, not just sending information from Marketing to Sales. The fancy term for that is "bi-directional synchronization".
- **Sales access:** all the cool Marketing Automation systems have special modules that let sales people access some Marketing Automation features directly. This goes beyond just seeing the data to taking actions like adding leads to campaigns, removing them, and sending them messages through the Marketing Automation email system. This is so awesome that no one seems to have invented a special word to describe it. Is "fabulicious" taken?
- **Process integration:** It's not enough to let sales people poke around inside the Marketing Automation system. Process integration is about letting the CRM system itself send orders to Marketing Automation, and letting Marketing Automation return the favor. It's like psychic remote control by robots, or something. This moves beyond sharing data to sharing processes like moving leads through campaign sequences and assigning tasks to sales people. The technical term is "super-fabulicious".
- **Analyze results:** This sounds really boring compared with psychic remote control by robots, doesn't it? But measuring the value of marketing programs is needed to do things like, say, justify your paycheck. The only way to do that is to import information about results, like closed sales opportunities, which happens to reside in CRM and other systems outside of marketing. So unless you're doing marketing purely as for art's sake, integration to support analysis is also important.

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2 The Joy of Integration

The only way to get good at CRM integration is to practice with a willing partner. Still, it helps to know what you might want to try. Section 4 of this workbook offers enough ideas to keep you busy for weeks if you have the time and inclination. This section will tease you with an overview.

- **Data shared.** What information should you exchange with CRM? If you're just sending leads, then all you need to share are leads, contacts, accounts, and the sales people who manage them. Nurturing and sales access must also share activities (that is, emails sent and received, Web forms completed, Web pages visited, etc.), campaign details, and maybe marketing assets. Process integration and rules analysis need all the above plus sales opportunities, purchases, and other customer interactions.
- **Actions synchronized.** What can one system do to another (with its permission, of course)? Again, lead sharing doesn't demand much: just update lead and contact information and notify salespeople about new leads and tasks. Nurturing, sales access and process integration also want to control how leads enter, exit and move within campaigns. Result analysis isn't about taking action: it just likes to watch.
- **Sales user functions.** Sales users have their own quirky needs, and who are we to judge? Mostly they want to control exactly how their accounts are managed, which means making it easy to find information like lead scores and activities, to send messages, and to change campaign assignments. And they want to do this any time and place imaginable: within the CRM system, through desktop applications outside of CRM, and on their mobile devices.
- **Complexity.** "T'aint what you do, it's the way that you do it" also applies to CRM integration, where every function can be simple or complex. The right level depends on your business: if your CRM system hasn't been customized, you don't need to worry about connecting to custom objects ("objects" is geek-speak for what used to be called database tables or, if you're really old, data files). Other dimensions include automation of the set-up process, control over which data changes are accepted, rules for identifying duplicate records, and how often data is synchronized. This is seriously technical stuff, so dust off that pocket protector (or cozy up to somebody who wears one).
- **API capabilities.** API stands for Application Program Interface (your third technical term of the day, along with "bi-directional" and "super-fabulicious". Use each twice in a sentence today.) This is an even geekier subject than complexity, but it boils down to letting systems communicate directly instead of through file transfers. (We've been talking about file-based integration until now, even though we didn't mention it. Surprise!) APIs face the same general issues of which data can be shared and what actions can be taken, plus special considerations about speed, capacity, and whether you'll have to pay extra for the really fun stuff.

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3 How to Assess a System

Believe it or not, you now know enough to start judging the integration capabilities of different Marketing Automation systems. (I'm assuming you didn't skip any of the previous sections. If you did, go back and read them now. You know we're watching.) To complete the process, follow these three steps:

- **Define your needs.** Ok, we didn't say this would be easy. Knowing what integration you need pretty much means knowing how you're going to use your entire Marketing Automation system, and most people don't figure that out until they're deep into the selection process. (Some never figure it out at all, but that's another problem.) To get started, review the list of reasons to integrate (Section 1) and how those relate to integration techniques (Section 2). Ponder those a bit, try to understand your Marketing Automation future as clearly as possible, and then jump into the detailed lists in Section 4 and choose which specific items apply. Don't be shy about asking for help – your Marketing Automation salesperson, IT staff, and outside consultants can all provide expert advice. Friends at other companies may also have useful opinions, but just be sure their situations were similar enough to yours to be relevant. This is yet another area where one size definitely does not fit all.
- **Analyze the vendors.** Compared with figuring out what you really need, understanding the vendors is a piece of cake. Sadly, it's a big, dry cake that's hard to chew and tastes like cardboard. But you can still plow your way through it given enough patience and an occasional glass of milk. Less metaphorically, take the relevant requirements from Section 4 and have the vendors explain how they would handle each one. Some things they'll be able to answer simply or demonstrate easily; others may require setting up a sample process or talking to really specialized engineers. This won't be fun (if you're a marketer who does find it fun, you made the wrong career choice). Still, you'll end up with a clear idea of what the different systems can do and how hard it is to make them do it. Reward yourself with another drink (not milk this time).
- **Make some trade-offs.** If you've ever wondered how unfair life can be, here's one measure: after all that work to understand your needs and the available systems, you probably won't find a perfect match. Bummer. But you'll know who comes close and what you're giving up with each alternative. That's actually great because it lets you avoid picking a system that won't do something critical. In any event, perfection wouldn't really matter because CRM integration is just one of many considerations you'll weigh in making your final selection. In fact, it's probably not even the most important. So obsessing about the perfect integration is like trying to find a car with a perfect set of cup holders: nice to know, but ultimately not the deciding factor. Just be sure it meets your basic needs and go on to other issues.

So here we are. You're now ready to turn the page to Section 4 and start working on your detailed CRM integration requirements. Or you can ignore the whole problem and hope you get lucky. The choice is yours.

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4 Assessment Criteria

Data Available

Leads, contacts and accounts are the minimum data that a Marketing Automation system must pass to CRM. (Quick definition: contacts are linked to an account; leads are not.) Knowing which CRM users are assigned to which leads and accounts lets Marketing Automation to send notices and tasks to those users. Other data objects are less essential but still useful: activity information gives everyone a more complete picture of the company's interactions with leads, while campaign steps and memberships help both systems coordinate treatments. Making marketing assets available to sales people saves them work and creates more consistent communications. Opportunities, service cases and similar CRM data are created late in the purchase cycle or after a prospect becomes a customer. They are used to help with upsell and retention marketing and to measure the results of earlier marketing efforts.

Synchronized data is not always available for all purposes. The availability may actually vary for different data types: for example, standard data objects might be more accessible than custom data objects. These limits should be explored with each vendor in detail.

Example: you want to send Marketing Automation emails that are signed by the salesperson assigned to each lead. To do this, the system must import the salesperson's name from the CRM system along with each contact.

Data included	Needed?	Rating
leads, contacts, accounts		
CRM users, tasks, account ownership		
activities (email, web visit, calls)		
campaigns, campaign steps		
campaign members, member status within campaign		
marketing assets (email templates, web forms, etc.)		
opportunities, opportunity contact roles		
CRM service cases, contracts		
Data use	Needed?	Rating
personalization		
segmentation		
campaign rules		
lead scoring		

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Lead / Contact Functions

The fundamental reason for integration is to send leads from Marketing Automation to CRM. In theory, Marketing Automation could also convert leads into contacts, delete records, merge duplicates, change the account owner, and update opportunities. But most companies want the CRM system alone to make these decisions. These items are marked with an asterisk in the list below.

One other change controlled by Marketing Automation is converting an anonymous leads to a known lead. This usually happens within Marketing Automation when someone fills out a Marketing Automation Web form. But the change may not apply if anonymous leads are not passed to CRM in the first place.

Example: the company wants to remove leads from the Marketing Automation nurture campaign when they become part of an active opportunity. To do this, campaign rules in Marketing Automation must be able to read changes in opportunity records.

CRM changes based on events in Marketing Automation	Needed?	Rating
add new lead, contact, or account in CRM to match MA change		
delete lead, contact, or account in CRM to match MA change*		
convert anonymous to identified leads in CRM to match MA change		
convert lead to contact in CRM to match MA change*		
merge leads , contacts or accounts in CRM to match MA change*		
change lead/contact owner in CRM to match MA change*		
Marketing Automation changes based on events in CRM	Needed?	Rating
add new lead, contact, or account in MA to match CRM change		
delete lead, contact, or account in MA to match CRM change		
convert lead to contact in MA to match CRM change		
merge leads , contacts or accounts in MA to match CRM change		
change lead/contact owner in MA to match CRM change		
add new opportunity in MA to match CRM change		
change opportunity status in MA to match CRM change		

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Campaign Functions

Marketing Automation and CRM systems have separate campaign engines. Some users want to make each system aware of campaign memberships in the other system so they can use the information in making treatment decisions. This is usually done by creating separate campaigns in each system and then tagging them as related. Users can then add or remove a lead from a campaign in their own system and have this change echoed in the other system. Within this general approach, there are distinctions for whether the synchronized campaigns are created manually or automatically, whether corresponding campaigns are created in all cases, and whether the systems track movement through stages within the campaigns.

Example: your company decides that leads should only be assigned to one campaign at a time, including campaigns in both Marketing Automation and CRM. To enforce this, campaigns and memberships set up in each system must be copied into the other.

CRM changes based on events in Marketing Automation	Needed?	Rating
automatically create new CRM campaign to match new MA campaign		
manually create and map CRM campaign to match new MA campaign		
automatically delete CRM campaign when delete corresponding MA campaign		
automatically map CRM campaign member status to MA campaign stages during campaign set-up		
manually map CRM campaign member status to MA campaign stages during campaign set-up		
add lead/contact to CRM campaign when added to corresponding MA campaign		
remove lead/contact from CRM campaign when removed from corresponding MA campaign		
update lead/contact member status in CRM campaign to match changes lead/contact stage in MA campaign		
Marketing Automation changes based on events in CRM	Needed?	Rating
automatically create new MA campaign to match new CRM campaign		
manually map MA campaign to CRM campaign		
automatically delete MA campaign when delete corresponding CRM campaign		
manually map MA campaign stages to CRM campaign member status during set-up		
add lead/contact to MA campaign when added to corresponding CRM campaign		
remove lead/contact from MA campaign when removed from corresponding CRM campaign		
update lead/contact member stage in MA campaign to match changes lead/contact status in CRM campaign		

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Activity Functions

Activities include interactions with a lead and messages to a sales person. Lead interactions include emails, Web site visits, and downloads. Sales messages include notifications and tasks.

"Header" records contain summary information about activities, such as an email date and subject line. These are typically copied between systems. Details such as message text and page view logs are sometimes copied from CRM to Marketing Automation but are not usually copied from Marketing Automation to CRM because the volume is too high. Instead, the CRM system may be given direct access to the Marketing Automation system's internal files.

Example: the Marketing Automation system notifies the assigned sales person the first time each lead in an active opportunity visits the pricing page. To do this, it must import activity information and the sales person assignments from CRM.

CRM changes based on events in Marketing Automation	Needed?	Rating
copy MA activity headers to CRM activity table		
copy MA email sent, delivered, opened, clicked to CRM activity detail		
copy MA Web form viewed, completed to CRM activity detail		
copy MA download requested, completed to CRM activity detail		
Read MA activity details directly from MA database		
notify lead/contact owner		
create lead/contact owner task		
Marketing Automation changes based on events in CRM	Needed?	Rating
copy CRM activity headers to MA activity table (contact, email, web forms, downloads)		
copy CRM contact notes to MA activity detail		
copy CRM email sent, delivered, opened, clicked to MA activity detail		
copy CRM Web form viewed, completed to MA activity detail		
copy CRM download requested, completed to MA activity detail		

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Sales Access Functions

Many Marketing Automation systems give sales people access to information about their leads and let them take specific actions such as adding them to a campaign. These functions may be integrated with the CRM interface, exist in a stand-alone desktop application, or be available through a mobile device.

Example: sales people are given a list of leads, ranked by current activity levels and expected value.

Contact/lead treatments	Needed?	Rating
assign to MA campaign		
remove from MA campaign		
add to MA list		
remove from MA list		
send email via MA system		
send email using MA email templates		
log email sent via CRM system in MA activity table		
synch with MA data		
Data access	Needed?	Rating
MA data viewed in separate tab in CRM interface		
MA data viewed within standard tabs in CRM interface		
MA data viewed outside of CRM on desktop app		
MA data viewed outside of CRM on mobile app		
show anonymous lead activity		
use CRM owner hierarchies to control record access		
Activity data	Needed?	Rating
view headers with MA activities		
view details of MA activities		
view actual messages of MA activities (email text, Web forms, downloaded documents, etc.)		

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Data Complexity

The core data structure of most B2B marketing automation systems is largely fixed since it must correspond to the CRM data structure. (B2C marketing automation systems are usually more flexible.) Most Marketing Automation systems do combine lead and contact records in a single table, even though they are nearly always stored separately in CRM. This has few practical implications. There's more variety in whether the Marketing Automation system keeps a separate account table or copies the account data onto the Marketing Automation lead/contact records. This has a little more impact, since it may mean that changes the Marketing Automation system makes to account data are not reliably copied to all related records.

Custom objects are data tables beyond the standard CRM data structure. How Marketing Automation handles these are more important, since limitations may prevent the Marketing Automation system from accessing important information. There are substantial variations among Marketing Automation systems in custom object functions, ranging from full flexibility to not allowing them at all.

Data structure	Needed?	Rating
separate account table in MA		
separate lead and contact objects in MA		
multiple leads/contacts with same email in MA		
Custom objects	Needed?	Rating
linked directly to lead, contact or account		
linked indirectly to lead, contact or account (via intermediate objects)		
linked to objects other than lead, contact, or account		
independent of other objects		

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Administration Complexity

These features relate to the effort involved in setting up and maintaining the CRM integration. A pre-built connector saves time and money; of course, you only care about whether there's a connector for the CRM system you need to work with. Automated mapping is also a time-saver, even though most companies end up making manual adjustments to the automated set-up. ("Mapping" means defining which CRM fields relate to which Marketing Automation fields, since the names are rarely the same.) After the initial set-up, it's helpful for the Marketing Automation to alert its administrator if it sees a change in the CRM system data structure. A really clever Marketing Automation system might try to assess the impact of a change and even make some adjustments such as adding a new Marketing Automation field to match it.

CRM connector	Needed?	Rating
Pre-built, direct connector to target CRM		
Connect using third party systems (Boomi, Castlron, etc.)		
Custom connector		
Set-up	Needed?	Rating
automated mapping of standard objects		
manual mapping of standard objects		
manual mapping of custom objects		
manual mapping of individual fields		
automated mapping of custom objects		
Maintenance	Needed?	Rating
notify of changes in CRM data schema		
identify impact of schema changes on existing MA objects (forms, campaign rules, list rules, personalized assets)		
copy field name, field type, picklist values for new field		

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Precision

Marketing Automation systems offer different degrees of control over how data is shared with CRM. Simple systems might take the most recent data from either system and copy it to the other. But users often want more sophisticated rules. These might decide changes on an object-by-object basis or even for individual fields. These rules are largely used to protect CRM data – such as a hard-won personal phone number – from being overwritten with less reliable Marketing Automation information. Other rules might try to assess which piece of information looks more accurate: for example, not replacing an actual value with a blank, or a full first name with a single initial.

Update rules	Needed?	Rating
same rules for all objects		
separate rules for each object, same for all fields in object		
separate rules for each field in each object		
copy entire record when any field changes		
copy only changed field (faster update)		
set source priority (which system's value to use in case of conflict)		
prevent blank value overwrite		
value priority (use rule to select surviving value, e.g. length of entry)		
transformations (use rule to convert CRM value to MA value; e.g. standardize via lookup table, change numeric format, convert currency)		
Dedupe rules	Needed?	Rating
merge records with exact match on email		
merge records with exact match on standard fields		
merge records with exact match on user-specified fields		
merge records with near/fuzzy match on user-specified fields		
identify near-matches and send to user for resolution		
Synch frequency	Needed?	Rating
nightly synch of MA changes to CRM		
near-real time synch of MA changes to CRM (5-60 minute interval)		
real-time synch of MA changes to CRM		
nightly synch of CRM changes to MA		
near-real time synch of CRM changes to MA (5-60 minute interval)		
real-time synch of CRM changes to MA (depends on CRM)		
real-time synch of individual record to CRM by campaign rule		
real-time synch of individual record to MA by campaign rule		

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API Capabilities

APIs create direct connections between computer systems. They're relevant mostly if you plan to integrate with an uncommon CRM system or other external systems. Marketing Automation products vary widely in their APIs. The features that matter depend on exactly what you're trying to accomplish.

Read access	Needed?	Rating
leads, contacts, accounts		
campaigns, campaign steps		
campaign members, member status within campaign		
activities (email, web visit, calls)		
opportunities, opportunity contact roles		
marketing assets (email templates, web forms, etc.)		
custom objects		
Schema		
Actions		
add/update lead, contact, account		
delete lead, contact, account		
merge lead, contact, account records		
add/update opportunity (usually done in CRM)		
delete opportunity (usually done in CRM)		
add/update campaign		
initiate/stop campaign		
delete campaign		
add contact to campaign		
remove contact from campaign		
add/edit marketing assets		
delete marketing assets		
add activity		
delete activity		
add/update custom object content		
delete custom object content		
call MA user interface functions		

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API Utilization

These items relate to deploying the API. They must be evaluated separately for the Marketing Automation API and CRM API. Depending on the configuration, a particular integration process may access the API of one system or both.

Marketing Automation utilization	Needed?	Rating
throughput capacity (API calls per hour) (must meet client needs)		
throughput speed (response time per API call) (must meet client needs)		
batch API calls		
single-record API calls		
query within API calls		
costs for API access		
CRM utilization		
throughput capacity (API calls per hour) (must meet client needs)		
throughput speed (response time per API call) (must meet client needs)		
batch API calls		
single-record API calls		
query within API calls		
costs for API access		

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