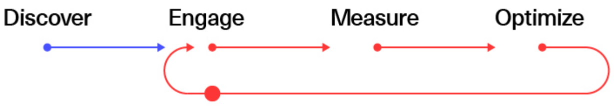
A & CRM Integration

It's the process of getting your CRM and MA (marketing automation) tools working in perfect harmony to ensure clear and complete data.

Why you should care

Your CRM and MA tools may be top-of-the-line but if they aren't integrated, you're most likely missing out on valuable leads and losing revenue. A properly integrated CRM will mobilize your sales team at the right moment and enrich them with insights on lead behaviour and preferences.

The Velocity Spin Cycle™ is our framework for the transformation to data-driven performance marketing.



Integration in Action

VWFS

Synchronized Salesforce and Pardot fields to ensure:

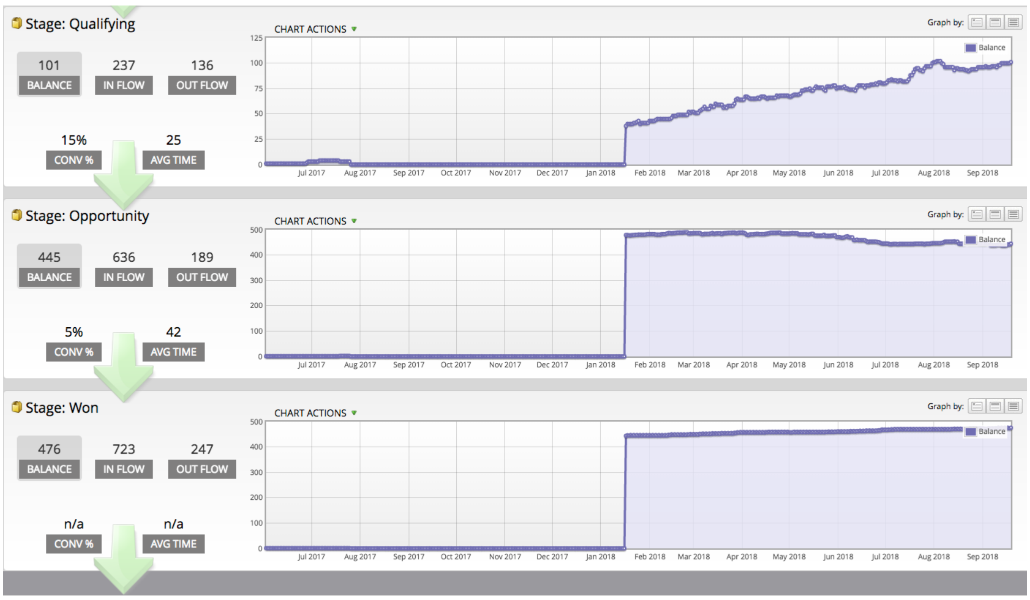
- Uniformity of reporting
- Alignment between sales and marketing data
- Simplified lead management

Learn more

How it works

Integration between a CRM like Salesforce and your MA (marketing automation) tool marries two disparate data sets and gives users of both systems to insight from combined data. Here are the steps we follow for a successful integration:

Pre-Implementation	Technical Implementation Process	Post-implementation
Audit existing CRM integration to capture your needs, goals, plans, and challenges. We then create a roadmap that charts the steps from current to desired marketing integration. Write a data management plan to identify what customer data passage and quality issues may arise.	Install the marketing automation application, add the Salesforce CRM connector, and then perform MA configuration to align funnels, fields before triggering prospect synch.	Onboard sales for alignment and formulate best practice criteria for constant alignment between campaign and sales process data.



Getting started

If your CRM and MA tools aren't playing nice with each other, get in touch. We'll sort them out.
Email info@velocitypartners.com or pick up the phone +44 (0)208 940 4099