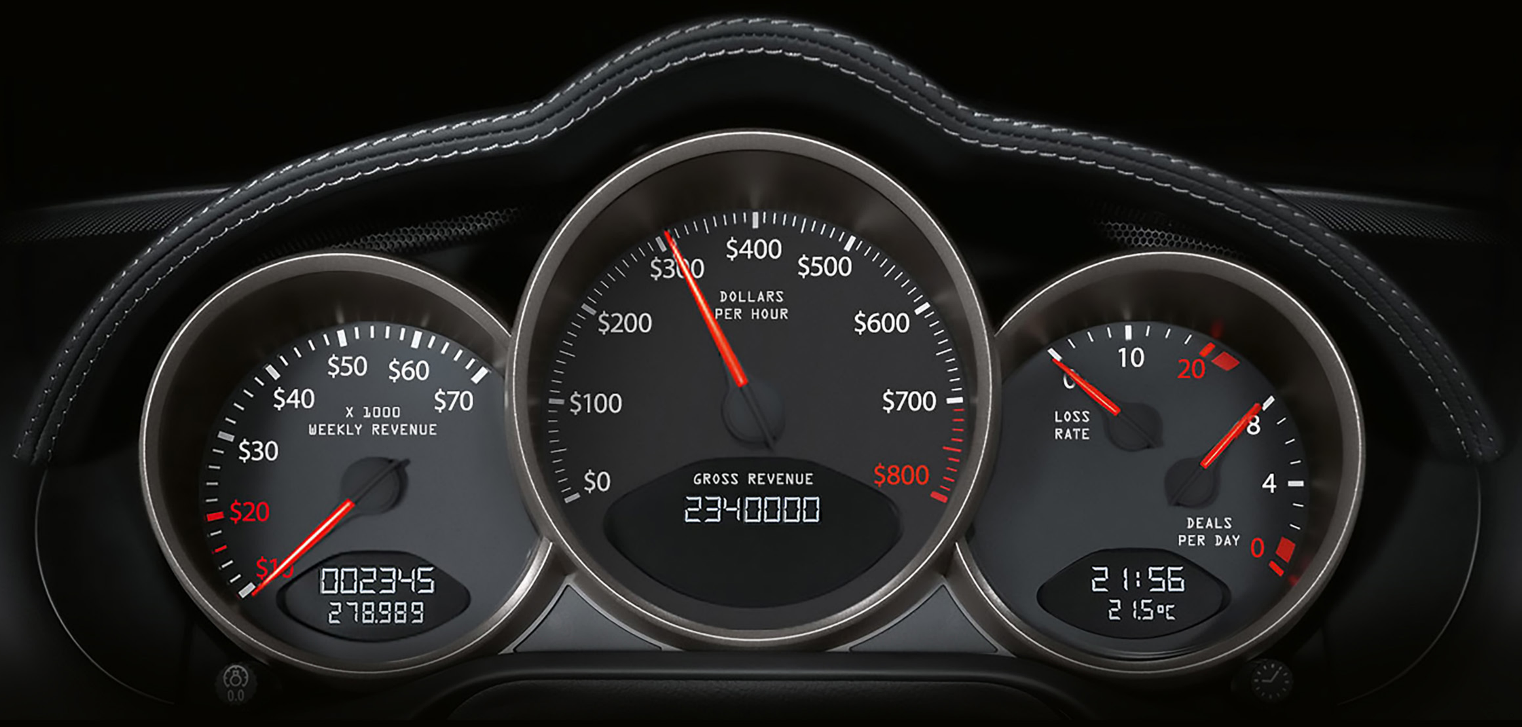
THE ESSENTIAL

pipedrive™

INTEGRATION & CUSTOMIZATION GUIDE



by:

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ABOUT

This guide is meant to help businesses who are using or are considering purchasing Pipedrive as a CRM.

The guide covers integrating Pipedrive with your other business systems, as well as customizing the system to suit your team's needs.

The Guide is brought to you by Bedrock Data, Inc.

EASILY INTEGRATE YOUR BUSINESS DATA

You can use Bedrock to sync between your cloud business systems and keep a running backup of your critical business data.

IN THIS GUIDE

Here is a rundown of the topics that we'll be covering in the guide:

Using Pipedrive: How easy is Pipedrive to use for your company's users? What are the best features of this system, how do they work and what can they do for your team?

Pipedrive Data Model: What are the object types and how do they relate to each other? This should also give you an idea of the learning curve for the system.

Setup, Integrations and APIs: How do you integrate the system from a big picture with other systems that you're already using? Does the system have an API and how easy is it to use?

Marketing System(s) Integrations: Some awesome things you can accomplish with a Pipeline Deals Integration with your email marketing or marketing automation platform.

Finance System Integrations: Some awesome things you can accomplish with a Pipeline Deals Integration with your finance system.

Customization: Mainly we will look at customization that you can do with fields and objects in Pipedrive. Everyone uses the almighty contact object, but how else can you represent your business data with the system?

Pricing and Scalability:

Overall, Bottom line: how good of a system is this for your business and should you go through with the purchase of this CRM system?

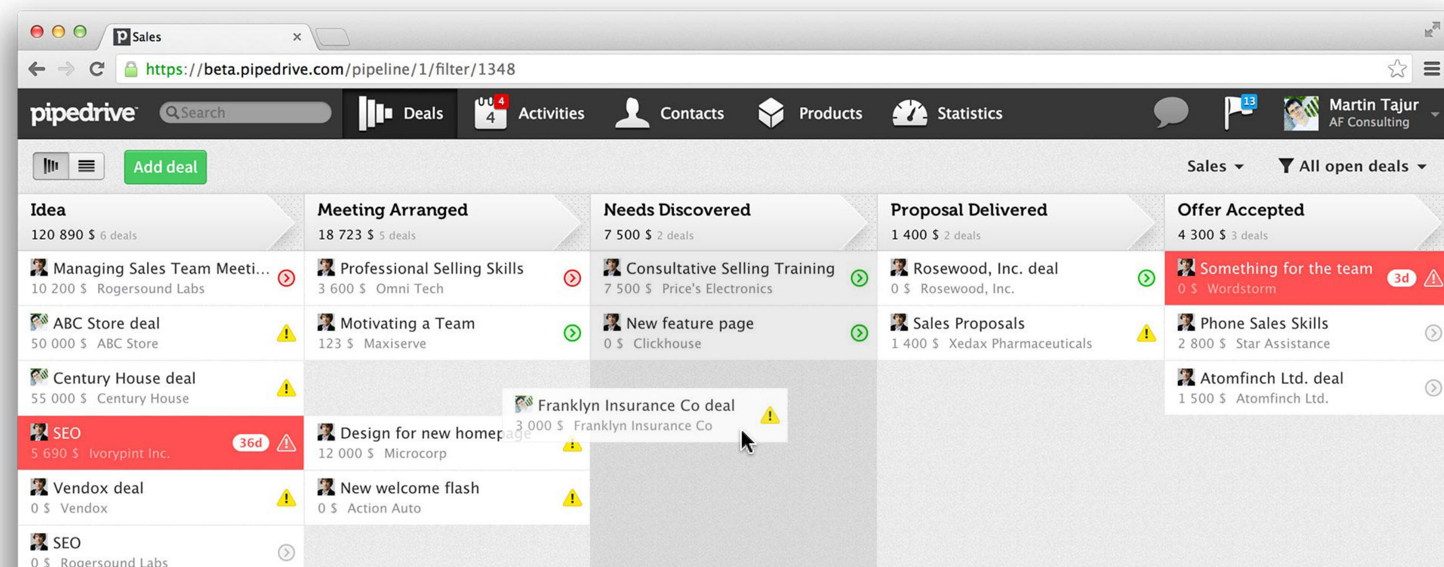
INTRODUCTION

Pipedrive started out as many startups do these days: out of an incubator – opting to join Angelpad back in 2010. Much of Pipedrive's team is based in Estonia, where the product and company appears to have gotten got its start.

We love the Pipedrive product, especially for it's "deal-first" user interface, which aligns your deals by the different stages that they are in, in a side-by-side, drag and drop interface. This makes it really easy and nice for a sales rep to work their deals and stay organized.

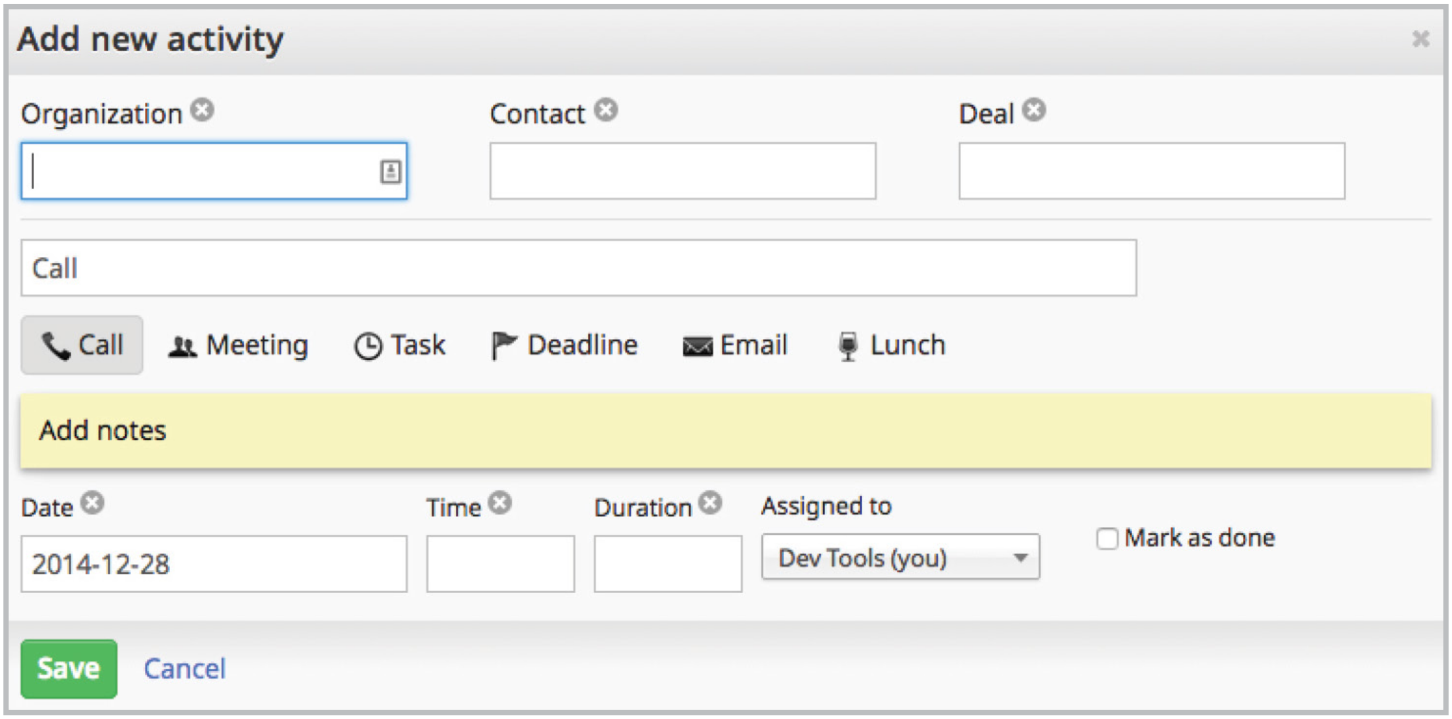
Pipedrive clearly fits into the "smaller" end of the larger CRM picture – it isn't Salesforce or Dynamics CRM in terms of its automation, customization and complexity. The system is easy to integrate, as the APIs are nicely designed and easy to work with.

The product is excellent for small and medium teams, though the system lacks some automation that you might need for a large sales team of more than 10 reps or so.



USING PIPEDRIVE

Pipedrive is broken up into Contacts, which can be people and companies; Deals which are the primary data object and feature the nice "Pipeline" interface where our reps spent much of their time.

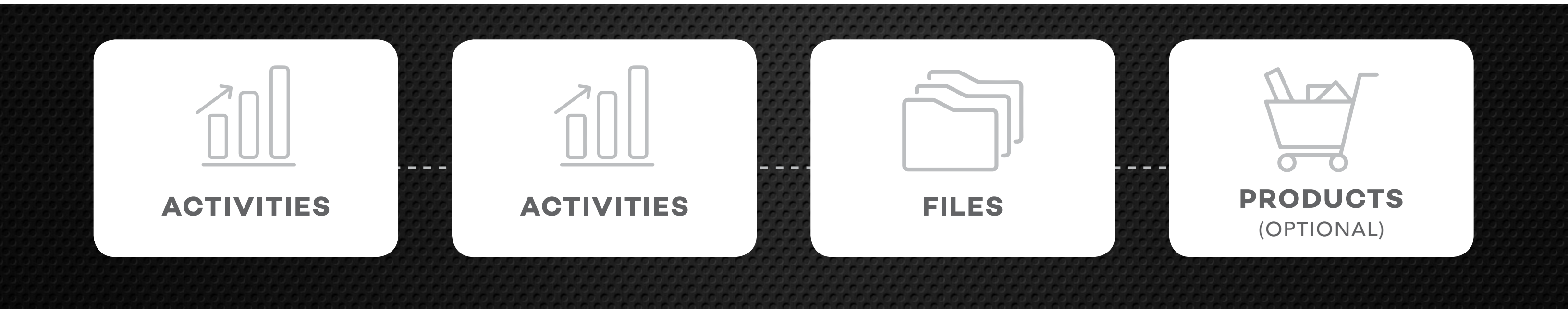


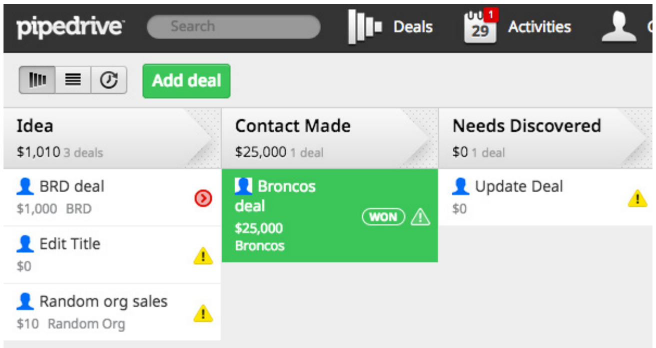
You then have Activities that your reps can associate with a person, company or deal. Activity types include all of the basics that you'd expect: calls, emails, Meetings, Tasks, etc...

The other main part of Pipedrive is "Statistics" area, which is a nice way to keep track of team progress on deals daily, weekly and monthly. You can also break your stats down by your own personal stats or get your company stats so that you can see where your team is at as a whole.

PIPEDRIVE'S DATA MODEL

Pipedrive's objects are essentially a simple CRM setup: you have people, organizations and deals that can be associated with either of those objects. This simple data model means that you can literally pick up Pipedrive and start using it without an issue, your sales reps will need very little training.





Other objects include Statistics, Activities and Files, the later of which can be attached to Deals, People and Organizations. You can also enable a feature which will turn on the "Products" object. You can create products and associate them with deals – very useful!

SETUP, INTEGRATIONS AND APIS

So you've setup the system and your reps are up and running on it, congrats! The first thing that you probably want to be able to do is to make Pipedrive your "business data hub," so that your sales reps have as much data as possible to help them sell. To accomplish this, you have to be robust about how much data you're syncing into Pipedrive.

HERE ARE YOUR OPTIONS:

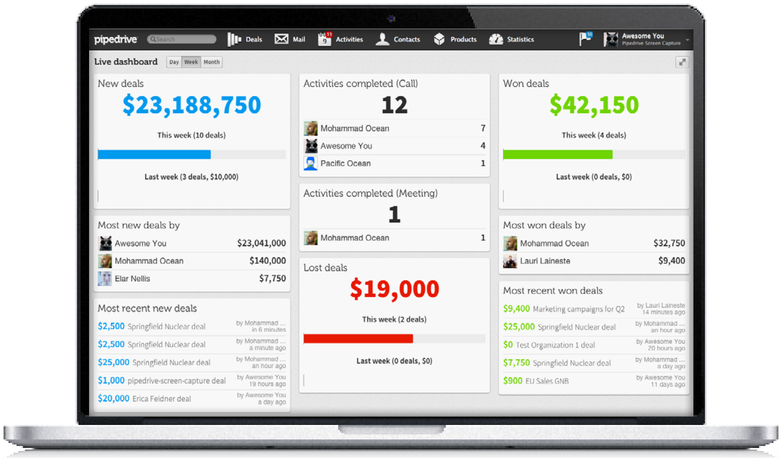
1. Manual import, which you'll have to do constantly from various lead/ contact sources to keep your data up to date (ugh). Pipedrive is somewhat unique in the sense that they have enabled "Import2" app to do manual imports from other apps.

2. [Use an Automated Integration](), which will seamlessly sync data into Pipedrive from your marketing database, and then back again as it changes. We're partial to this option. ☺

There doesn't appear to be a built-in "web-to-lead" functionality in Pipedrive, though there is an API that is easy to use and work with (if you're a developer).

These APIs will allow you to add new people, update person and organization data, create deals and activities and a ton of other useful operations.

Check out the [API documentation here]().



INTEGRATING PIPEDRIVE WITH MARKETING SYSTEMS

Marketing systems are build to generate and manage leads. Most of them will also allow you to do operations on those leads, like sending them email or hosting webinars with your leads in attendance.

We like to break down marketing systems into marketing automation or management systems like HubSpot and Marketo on one side, and then Marketing augmentation systems like Eventbrite and GoToWebinar on the other. Either way, you want to make sure that the leads and contact from these systems make it into Pipedrive.

Pipedrive integrations with marketing automation systems should be bi-directional, so that you can automate your marketing campaigns with your ever-changing Pipedrive data.

So if you're using a system like HubSpot, Infusionsoft or Marketo, you'll not only want to add records to Pipedrive, but also sync data from Pipedrive back to these systems, triggering campaigns right from the CRM.

HERE'S AN EXAMPLE:

- Contact converts on a website form to download a whitepaper.
- Integration system syncs this contact as a Person to Pipedrive.
- Deal is created in Pipedrive and worked by a sales rep on your team.
- Changes to the Organization, Person and/or Deal syncs back to the marketing system by the integration system, triggering pre-defined campaigns.
- Deal status (including Won deals) syncs back to the marketing system, informing marketing analytics.

INTEGRATING PIPEDRIVE WITH OTHER SYSTEMS

Pipedrive integrations with other system types like Financial and Support systems will help you to inform your sales reps who are using Pipedrive about their lead/contact/customer activity. You can inform them about customer status, as well as the actions your customers are taking in terms of payment. Then, if you've connected your marketing system as well, then this data will be available there as well.

Let's take a deeper look:

Financial integrations sync data from finance applications to Pipedrive. These integrations can help you to sync critical data about customers, contacts and payments (invoices) from your financial system into the CRM.

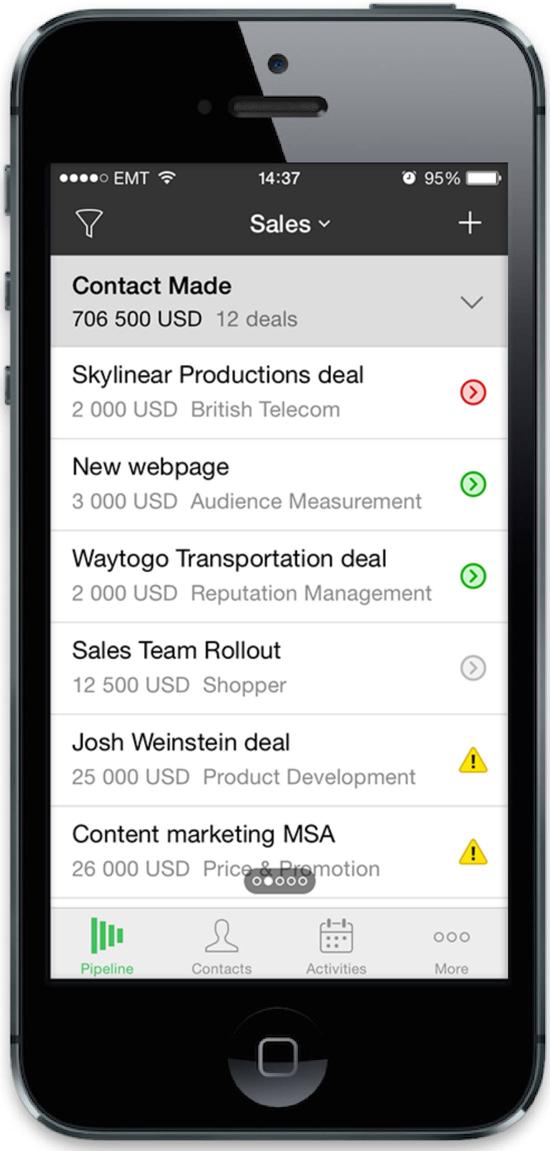
They can also automate the creation of invoices and updating of customer data in your financial system based on changes that happen in Pipedrive. Popular finance systems that you can integrate with Pipeline Deals include Quickbooks, Freshbooks, Xero and Recurly.

Let's take a look at what a financial system integration with Pipeline Deals might look like:

- Person record is created in Pipeline Deals, along with a Company.
- Company and person data is synced to Finance system as a new Account or Customer record (with no invoices or payments due yet).
- Deal is created in Pipedrive, then worked to a "Won" state.
- Closed/Won deal from Pipedrive syncs to your finance system and creates a new invoice waiting for fulfillment.
- Updates on that invoice or customers in your finance system, such as payments, or lack of payment can create Activities on Companies (and other objects) in Pipedrive.

CUSTOMIZATION

Aside from integrations and APIs, Pipedrive also will let you customize certain parts of the system. Pipedrive lets you do some important customizations so that you can configure the system to suit your needs (check it out in Pipedrive under "Settings -> Features."). **Let's take a deeper look:**



Pros:

Custom Fields: Are supported essentially across People, Deals and Organizations. All major field types are also supported, including multi-select, dates and even monetary fields.

Custom Deal Stages and Multiple Pipelines: Because of the really nice "Pipeline" Deals user interface that Pipedrive provides, the focus on deal customization comes to the forefront. Luckily, you can totally customize your deal stages, which will automatically change the deals "pipeline" UI. You can also create multiple pipelines, so if you want to have different deal stages, this feature will be useful.

Products and Other Customizations: As mentioned earlier in the guide, you can enable a new products object, which you can use to attach products to deals and track revenue numbers.

Cons:

Assignment and Workflow Rules. One slight downside to Pipedrive is that it does not have built in workflow rules and lead assignment. This makes it tough for sales teams that may organize themselves by region or persona. However, you can build custom automation into the system with development work on the Pipedrive open API.

PRICING AND SCALABILITY

PIPEDRIVE'S PRICING IS INCREDIBLY AFFORDABLE AND STRAIGHT-FORWARD:

$12

PER USER PER MONTH

TRY IT FREE

WHAT'S INCLUDED IN THIS PRICE? EVERYTHING.

- ✓ No contracts
- ✓ No account limits
- ✓ No hidden fees
- ✓ No charge for phone/email support
- ✓ No charge for API key
- ✓ No credit card required for 30-day trial

All versions of Pipedrive include API access, as well as access to their (new, excellent) mobile app, which is recently re-built and is getting some awesome reviews on the iOS App Store.

Pipedrive doesn't lock you in either: all subscriptions are month-to-month and include access to all parts of Pipedrive. There are also little to no limits on Pipedrive, so you don't need to worry about number of custom fields, records, etc... Quite simply, we love the simple pricing!

Scalability can be an issue though. Since automation doesn't come out of the box but requires development resources, it's not easy to apply rules for lead or task assignment. Pipedrive is better suited to small teams, or teams that can work out of a lead pool and assign leads to themselves (without fighting one another in the process).

OVERALL TAKEAWAYS

If you've read any of our other guides around the CRM space today, you've probably heard us talk about the breakdown of CRM systems into 2 separate and distinct groups: each targeting a different company size.

Pipedrive is targeted at smaller sales teams with a sales model that requires high attention on lead tracking and follow-ups. It currently does not feature built-in automation.

In terms of a system for small teams though, Pipedrive really shines. The focus on you're the sales pipeline (it's a "Deals" driven system), and it's multiple Deal user interfaces (there is a really neat timeline view as well) makes it really shine. It's the sort of system that gets out of your way and lets you close, and we really appreciate that.

So if you're a small team and want a simple CRM that will help you get organized and integrate your entire business, then you have to give Pipedrive a try. Just know that if you're planning to scale quickly, you may outgrow the system over time.

Thanks for reading, and happy selling!