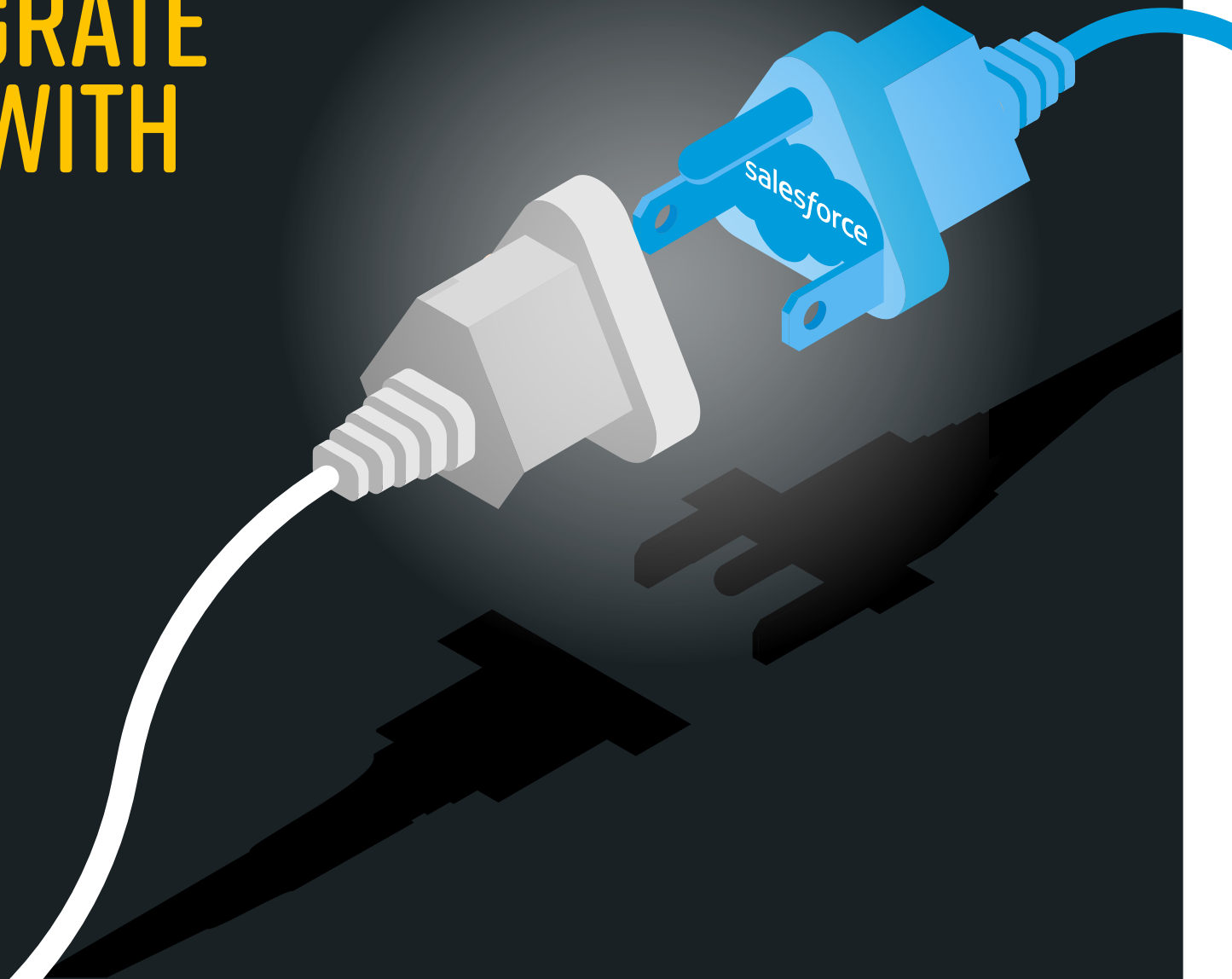


# HOW TO INTEGRATE SALESFORCE WITH MARKETING AUTOMATION



# THE FOUR THINGS YOU NEED TO THINK ABOUT WHEN YOU'RE INTEGRATING SALESFORCE WITH MARKETING AUTOMATION

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**Time was marketing and sales** were two really distinct teams. On the one side there'd be the creatives, coming up with innovative, visually arresting and super clever content. On the other, the people actually trying to sell stuff, occasionally wondering what all those words and pictures were actually doing.

Not so anymore. As the saying doesn't quite go, without the business, there ain't no show. And marketing and sales are interlinked to the extent that they're inseparable, with one informing and adding purpose to the other.

This means that integrating Salesforce with your marketing automation system is a natural step to take for better management of the nurturing and lead generation process. But integration isn't always easy as plugging one thing into another and thinking you can get going. If it's going to work then it has to be strategic and mapped against some clear, business-specific objectives.

These are the four things we think you should consider when integrating Salesforce with your chosen solution.

1

# CHOOSE YOUR WEAPON



Unless you already have one, then you're going to need a marketing automation system. And there are a few to choose from, as well as a few pitfalls to avoid when finding the one that's best for your business.

Knowing your business goals through and through is essential to making the right call when investing in a piece of software. Likewise, clearly defining *why* you need it.

You might find that HubSpot is the favourite for your business. Maybe it's Eloqua. Or Marketo. Either way, before you integrate with Salesforce it pays to understand what you want from it.

Follow these steps when choosing your system:

- Talk to sales – make sure their thoughts are taken into account, both in terms of the data they need and their strategy
- Consider compatibility – sounds obvious, but there have been instances of marketers investing in solutions that literally don't work in their business
- Don't get sold – there'll be features you absolutely need, and features you don't. Understanding the difference between out of the box functionality and the add-ons that will make the difference is crucial

2

## MARKETING TO SALES HAND OFF

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Once you've got your systems and solutions in place and connected, it's time to start thinking about how it clicks together – and how it'll enable better working practices between sales and marketing.

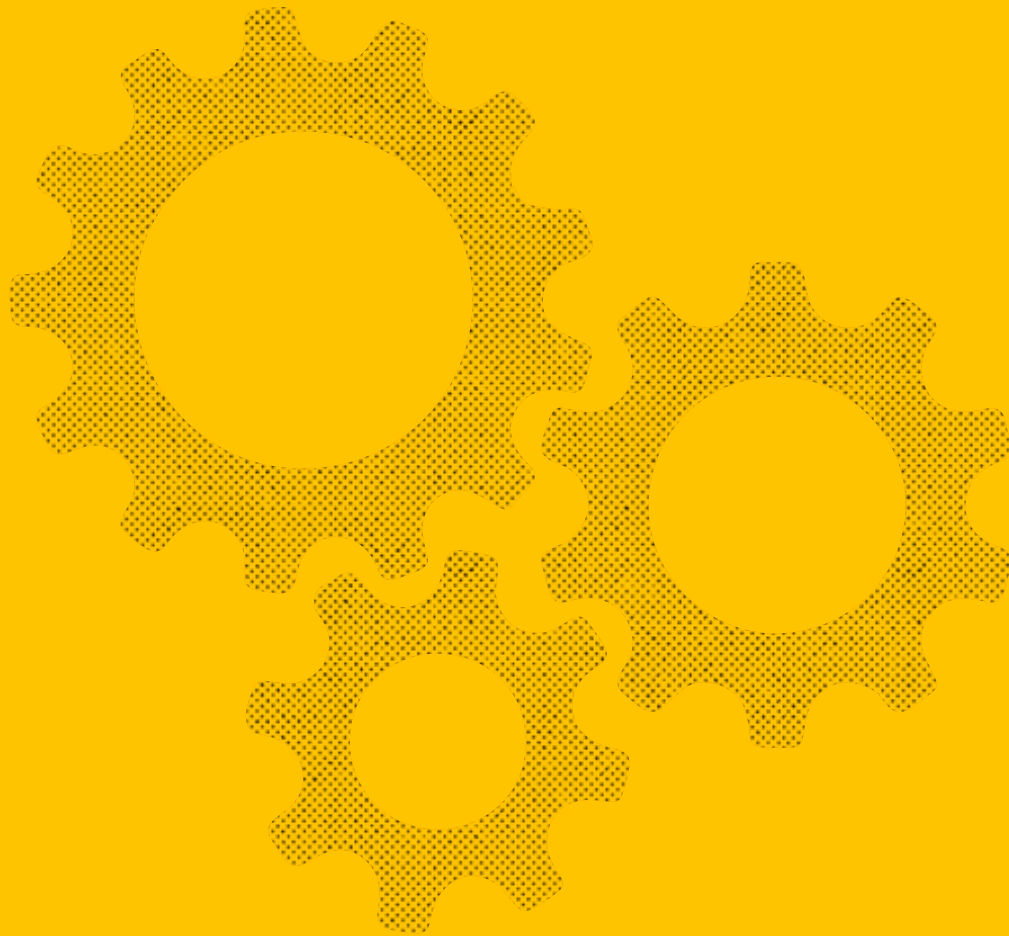
In the most basic terms, this is the process of transferring leads. Turning MQLs (Marketing Qualified Leads) into SQLs (Sales Qualified Leads), and turning more prospects into customers. However, be warned that this is not as simple as handing a lead over. And neither is it linear. Sometimes leads passed onto sales will go back to marketing if they're not considered to be 'warm' enough. These may require more nurturing, scoring and what-have-you before sales are really interested in talking to the prospect.

Both Salesforce and your chosen marketing automation system will have lead scoring capabilities –all based on actions people take and the value attributed to that action. If you can do this well your automation technology will work in perfect harmony with Salesforce. And it'll make all the difference when handing off between marketing and sales.

Remember! Leads can go back and forth between marketing and sales. Make sure your system accounts for that otherwise you risk leads dying on one side of the divide or the other.

3

## TRIGGERS AND EVENTS



With the right rules and scoring metrics in place, and Salesforce and your marketing automation solution working nicely together (we hope), it's time to think about lead management and who owns what. This is where things get a little more complex, because every trigger or event in your lead management system will effectively change the status of that lead, and where it sits.

This part of the process requires a lot of set up. You're defining who's in charge of a lead and your company's relationship with a potential customer.

Moving someone from marketing to sales at the wrong stage could have a really detrimental impact on all departments. It also increases the chance of the lead going back the other way because it's not nurtured. You also need to think about who's being notified about what. So that salesperson A doesn't change the detail of salesperson B's client (there are a few Salesforce forums rife with complaints about this sort of thing).

The only way to nail this is with effective data management and data flow design. As well as a solid working relationship between marketing and sales. This is where the two departments really come together.

### 4

## CLOSE THE LOOP AND LEARN

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There's no end point with automation and Salesforce integration. Instead it's a constant process of development and fine tuning to improve both marketing and sales. What you will be able to do is close the loop between sales and marketing, and learn from the data in the system.

Closing the loop includes doing things like sending personalised emails to prospects from specific salespeople, because you have the relationship and insight to do so. As well as segmenting your databases of contacts and creating more bespoke content, tailored to certain groups of leads (or even certain people, if you're getting into ABM). This also feeds into the above steps about handing back leads if they're not considered qualified – the more insight you have, the more you can do.

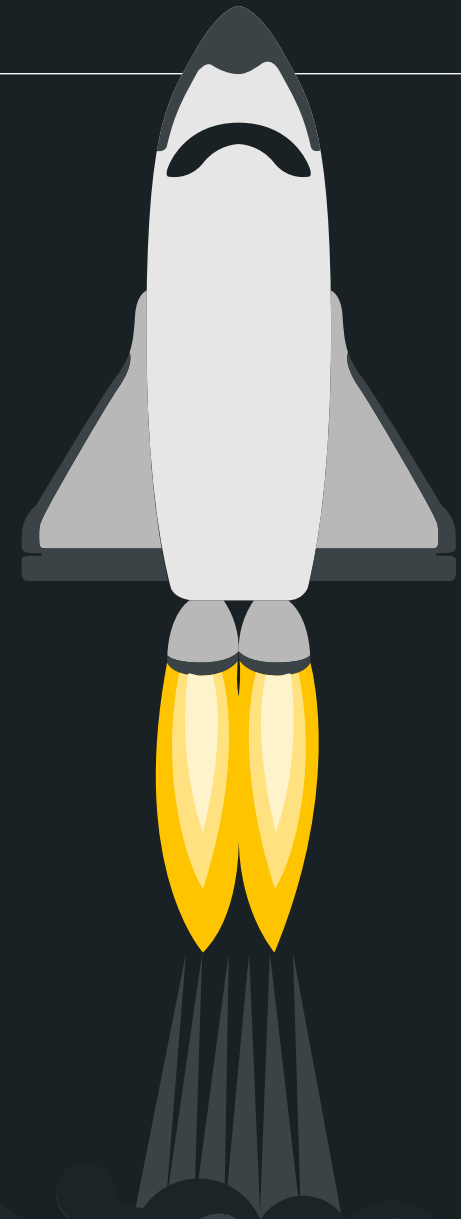
Then comes the learning. All the data you collate from managing a nurture programme through an automation system, then passing onto sales can be used to make things better next time. You'll be able to understand the ROI of certain activities, learn what you should repeat, as well as what you should never do again.

Good right?

# FROM MARKETING TO SALES AND BACK AGAIN

If you're a marketer who is looking to deliver great campaigns and great results then Salesforce and marketing automation integration is an essential step. It'll add insight to what you're doing on the creative side; and proof of value to those sales people who still cock a snook at the suggestion that something that looks good and reads well can transform a prospect into a lead.

We at Octopus Group work with clients who do this every day – using our Brand to Sales methodology to make sure marketing and comms deliver on clear objectives. So if you want some help on Salesforce integration (or, like, anything else to do with marketing), get in touch.





Thank you for reading

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