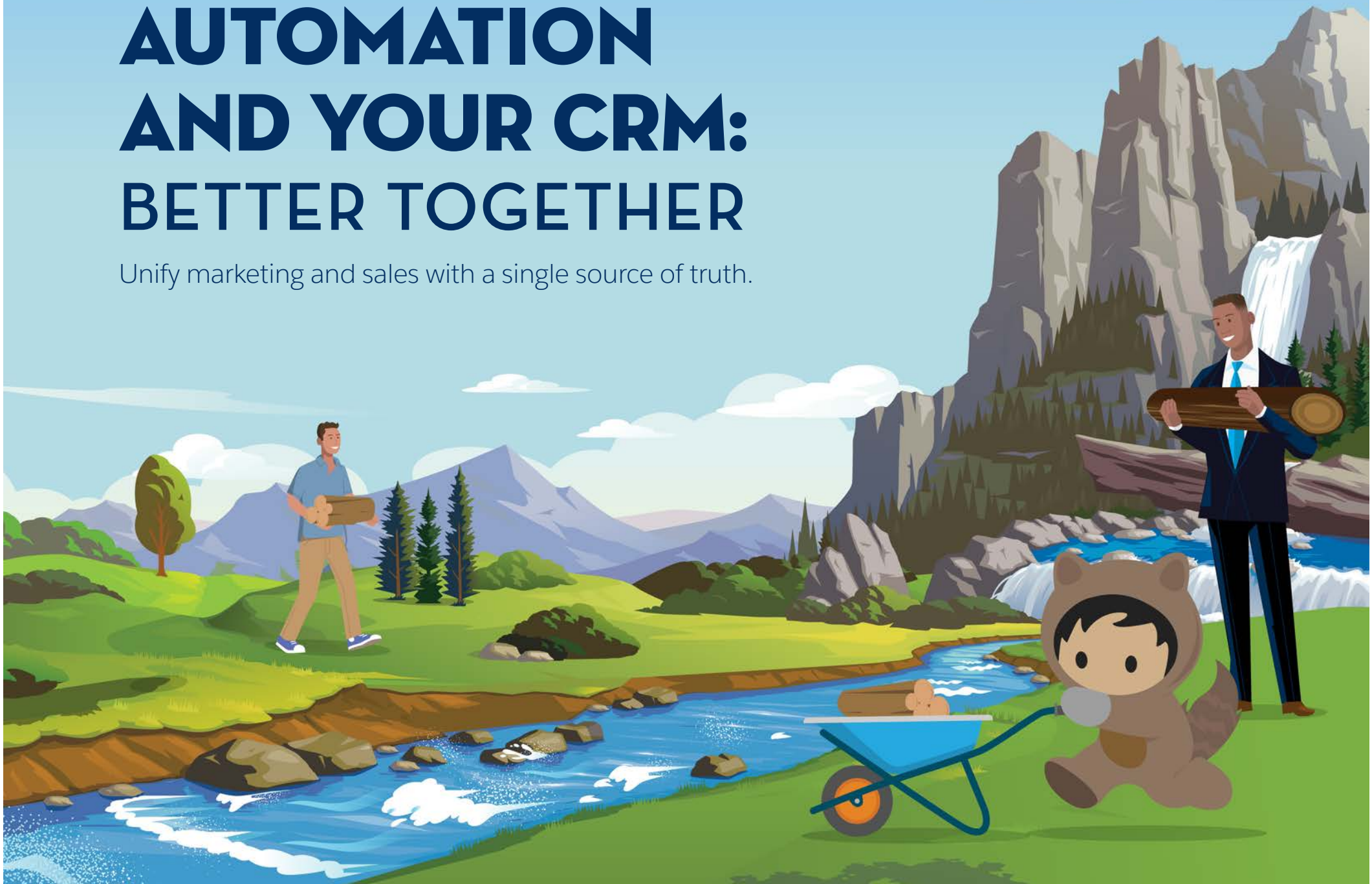# MARKETING AUTOMATION AND YOUR CRM:
BETTER TOGETHER

Unify marketing and sales with a single source of truth.

Contents

INTRODUCTION

Align marketing and sales with integrated marketing automation.

It's no secret that marketing and sales work better as friends than they do as foes in any organization. Still, many B2B companies have siloed teams competing for revenue generation and attribution, disagreeing at every turn of the sales process. But with marketing automation powered by your CRM, marketing and sales can work from the same playbook and pursue the same goal – revenue generation. For effective sales-marketing alignment, marketing automation and your CRM are better together.

Integrated marketing automation unlocks the data in your CRM to personalize every marketing communication, increase efficiency, and keep teams in perfect alignment. Customer interaction will be better than ever with marketing and sales working from the same actionable information.

This e-book will walk you through the basics and benefits of having your marketing automation and CRM on an integrated platform. We'll take an in-depth look at what makes CRM-based marketing automation so valuable, and why a single source of truth is essential to marketing success. We'll also offer a brief rundown of the implementation process so you can better understand what it takes to get a fully-integrated system up and running.

Read on to learn how you can align your teams, get insight into campaign performance, jumpstart lead generation, and positively impact your ROI – all by pairing marketing automation and your CRM to create the ultimate dynamic duo.

57%
of high-performing marketing organizations currently use a marketing automation platform.

- Salesforce State of Marketing

CHAPTER 1

Marketing automation: What's all the hype about?

You've probably heard about marketing automation a time or two… or a hundred. It's now the standard across many B2B and B2C companies. Marketing automation has been rapidly growing in popularity, with 44% of marketers using a marketing automation platform in 2018, compared to just 22% of marketers in 2014, according to the Salesforce State of Marketing Report.

But what's behind all the hype?

In short, marketing automation helps marketers and sales reps do their jobs more efficiently and effectively. Marketing automation can wear a lot of hats for your organization – lead generation, lead nurturing, automated engagement, ROI calculation, detailed analysis, and more. At its core, it aligns marketing and sales teams and takes some of the more tedious marketing tasks off your shoulders.

It's all made possible by customer data. And that data comes from your CRM, the single source of truth. If you're already using a CRM, you know that it's full of valuable information about your customers and all of sales' interactions with them. Using that information to power your marketing automation ensures that you get a full 360-degree view of your customers, made available to everyone responsible for interacting with them.

A marketing automation system typically offers:

- Micro-level analytics that track all touchpoints with a prospect – including forms, page views, content downloads, emails, social interactions, and more

- Lead scoring and grading to help qualify and prioritize your leads

- Automated lead nurturing to send emails to prospects based on predetermined rules

- Customizable real-time notifications that let your reps know when a prospect is active and showing buying signals

- Closed-loop reporting for easy calculation of marketing ROI

- Wizards and tools that allow non-technical users to easily create dynamic, personalized online marketing campaigns and emails

Starting to envision how a solution like this could transform the way you work as a marketer? Take a look at the next chapter to learn more about building a single marketing and sales ecosystem using marketing automation and your CRM.

In short, marketing automation helps marketers and sales reps do their jobs more efficiently and effectively.
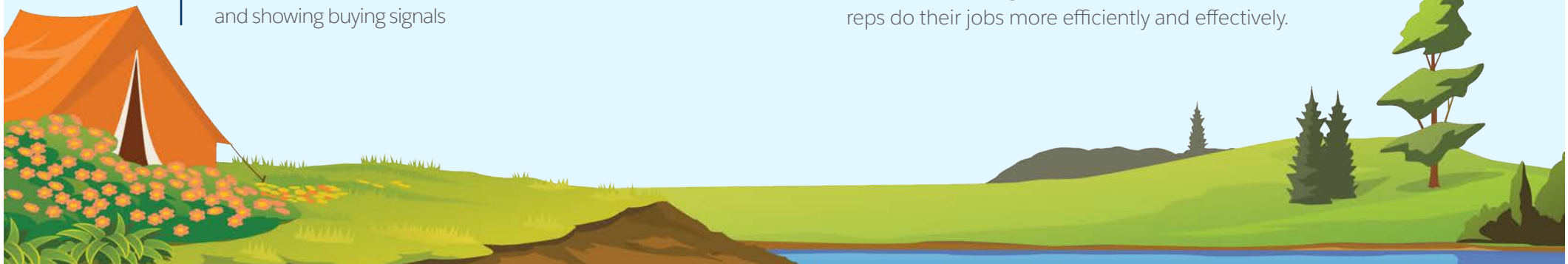
Build a marketing and sales ecosystem.

Due to misalignment, marketing and sales teams in many organizations aren't exactly the best of friends. Breakdowns in the lead management process can stem from conflicting strategies and goals. But if revenue generation is everyone's end game, what's with the conflict?

Marketing campaigns may generate buzz, but ROI can remain ambiguous, leaving marketers struggling to prove their worth. On the flip side, sales teams get frustrated when marketing campaigns bring them unqualified leads who aren't ready to buy. Marketing wants to show that campaigns are getting big results, and sales wants marketing to deliver highly qualified leads so they can close more deals.

Yes – you can have it all. That's where marketing automation paired with your CRM comes in. To reach these goals and perfect the lead management process, it's essential to build an all-in-one marketing and selling solution that everyone can rely on.
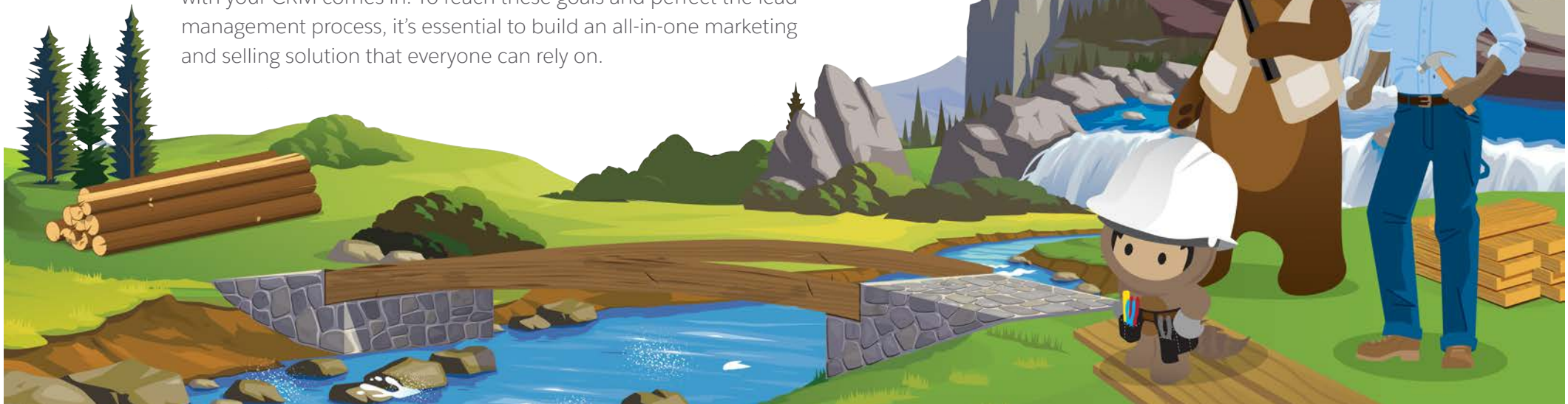
Once marketing and sales leadership agree to tackle this issue together, you'll want to start building this integrated revenue model by examining the technologies needed to help align objectives across party lines. Your sales reps are probably used to working primarily in a CRM, but a system integrated with marketing automation displays all of the relevant prospect and campaign information needed by both teams, all in one place.

Integrating CRM and marketing automation allows you to sync information bidirectionally. This means that every record update in your CRM will automatically be made in your marketing automation system as well, and vice versa. This keeps marketing and sales on the same page by giving them valuable insight into prospect activities, increasing the efficiency of the lead management process and filling gaps in the sales funnel where leads may have been dropping off.

"You have to break down the barriers between marketing and sales and start thinking about your revenue engine as an integrated model, from lead generation to lead scoring and all the way through the funnel."

Tyler Lessard, CMO at Vidyard

With marketing automation working in tandem with your CRM, you're creating a marketing and sales solution capable of accomplishing the most difficult marketing and sales tasks, such as:

• Identifying high-quality leads and gathering valuable customer data

• Objectively qualifying leads so only high-quality leads get passed to sales

• Nurturing cooler leads with personalized customer journeys

• Automating lead assignment so leads are always sent to sales at the right time

• Tracking marketing and sales touchpoints in real time throughout the sales cycle

• Improving the relevance of marketing and sales messages through automated personalization

• Proving marketing accountability through campaign performance and analytics.
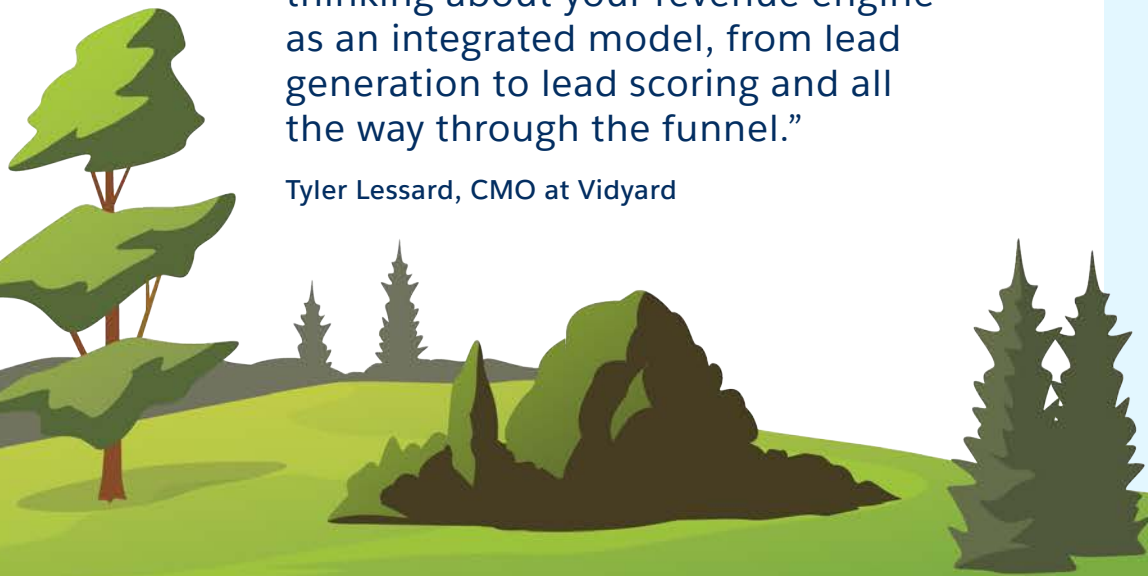
CRM

Business Goals

Track sales opportunities as
they move through the pipeline

Manage and track sales team activity

Better understand the pipeline
of prospective sales

Forecast with accuracy

Manage potential, new, and
existing customer relationships

Primary Features Offered

Opportunity management

Sales forecasting

Account management

Task creation

Sales process reporting

MARKETING AUTOMATION

Business Goals

Manage and automate
prospect interactions

Measure marketing ROI and
improve marketing accountability

Improve lead generation and
report on campaign success

Streamline campaign creation

Automate communications
and marketing programs

Better align marketing and sales

Primary Features Offered

Email marketing

Lead nurturing

ROI and campaign reporting

Scoring and grading

Forms and landing pages

Social posting

The single source of truth.

The B2B sales cycle has changed – it's no longer the traditional, linear funnel you learned about in business school. Leads may wander up and down the funnel themselves, gathering their own information up to the point of purchase, and then reevaluating their choices over time. With the wide variety of information readily available online, it's no wonder buyers have taken parts of the sales process into their own hands.

Though buyers are no longer telling companies exactly what they need to complete the buying process, they do expect to have their needs anticipated and met with relevant, personalized content. To meet this expectation, it's vital that marketing and sales teams have comprehensive, 360-degree buyer profiles, giving them the exact information they need to personalize every conversation. This data helps to create a single sales, marketing, and engagement plan for the entire lifecycle of the customer.

"It makes very little sense to spend time and energy trying to orchestrate a bunch of different, independent systems,"

explains Billy Cripe, CMO at Field Nation.

"Synchronization is a productivity drain unless it's done behind the scenes."

Buyer profiles fueled by data in your CRM create the most accurate representation of your customers across all teams who interact with them. When marketing and sales both operate from the single source of truth, their interactions are informed by the same 360-degree view of the customer. Your CRM doesn't just make your marketing automation better – it's essential for consistent and effective communication and interaction.

Any strategy without your CRM at the center is going to cause misalignment between marketing and sales teams and make it more difficult to take advantage of the tools marketers and sales teams rely on to be successful in the future of B2B marketing – analytics, artificial intelligence, and account-based marketing. Each of these strategies rely on unified data, which is only possible when you have a single source of truth.

The following pages detail some of the reasons why a single source of truth is essential for both your marketing and sales teams. Take a look to learn more about the benefits of creating a powerful, multipurpose solution that's capable of supporting both marketing and sales initiatives.
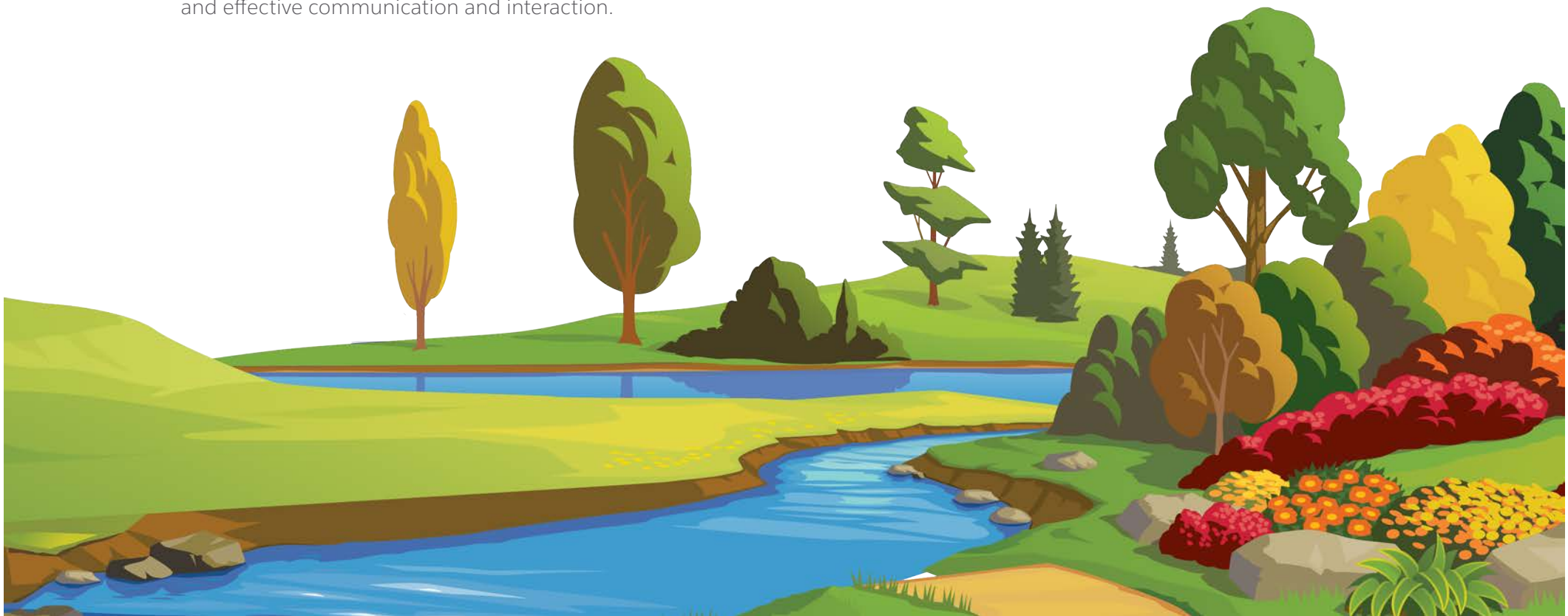
ACHIEVING MARKETING SUCCESS

For the marketing team, the benefits of integrating marketing automation with your CRM extend far beyond easing tensions with sales. Marketing automation also transforms lead generation, saves you the tedious task of manual lead qualification and assignment, accurately tracks ROI, and makes it easier to target and segment marketing communications. Let's take a closer look at each of these.

Improve lead generation.

First things first: you need to generate leads. Before automation, sales reps relied on leads generated via cold-calling. With marketing automation, marketers can step in and take some responsibility for effective lead generation.

Automation empowers marketers to run sophisticated lead generation campaigns, collect buyer information, and automatically route this information into your marketing automation platform and CRM so that the most recent, actionable data is easily viewable and usable for all parties. This is the most vital starting point for true marketing and sales alignment.

Automatically qualify and assign leads.

The most difficult part of any relay race is the handoff – and the same rings true for the marketing to sales handoff as well. As a marketing professional, it can be hard to know when a lead is warm enough to pass off to sales. Without consistent, automated lead qualification, marketers are often left to depend on their gut instinct to decide when to pass off a lead – or they end up handing off every lead, no matter how cold.

This leads to a lot of frustration between teams, and often ends with all marketing-generated leads being dismissed altogether. But not anymore – now, automatic lead qualification and assignment is here to ensure a smooth handoff every time. Marketing and sales can finally agree on what makes a good lead through automatic and intelligent lead scoring.

When leads reach the designated qualification threshold agreed upon by both the marketing and sales teams, they can be assigned to sales reps instantly and automatically. This cuts down on manual processes and ensures that lead assignment is fair, efficient, and effective.

The key to accurate and effective lead scoring? Yet again, it's the single source of truth – your CRM. Lead scoring with misaligned data leads to inaccurate qualification, letting hot leads slip through the cracks. CRM-informed lead scoring ensures lead qualification is based on an accurate, holistic view of every customer.

Send targeted messages.

Modern B2B marketers recognize that buyers want different, targeted content at each stage of their research – but many have difficulty providing the personalized content that their buyers demand at scale. Marketing automation addresses this pain point by collecting detailed behavioral data about each buyer, integrating the data with your CRM, and delivering personalized content accordingly.

With a complete view of buyers' activities and interests, marketers can send targeted messages and lead nurturing campaigns that are personalized to buyer pain points, degree of sales-readiness, or other individual characteristics. Creating one-to-one email communications or segmenting based on criteria like industry or product interest ensures your content is relevant and tailored, which increases engagement levels compared to that of generic marketing content.

Dynamic content lets marketers scale the process by creating a single template that uses smart rules behind-the-scenes to plug in the offers most relevant to each prospect segment. Less work for you and more personalized content for the customer creates a win-win for both parties.

Tie your revenue to individual campaigns.

Find what works – and what doesn't – with detailed and streamlined campaign reporting. With campaign and tracking metrics constantly updating in your marketing automation and CRM, ROI analysis becomes much more straightforward.

Marketing automation's closed-loop reporting functionality gives marketers the ability to tie closed deals back to the campaigns that created them, so you can attribute revenue to campaigns, track marketing spend, accurately measure ROI and project revenue, and make data-driven marketing decisions.

72% **of business buyers expect vendors to personalize engagement to their needs.**

- Salesforce State of the Connected Consumer Report

Level up with artificial intelligence.

Meet Einstein – artificial intelligence on the world's #1 CRM. Paired with your marketing automation platform and CRM, AI will help you scale up and dial in your marketing strategy.

Make decisions faster, increase productivity, and make customers happier with smart predictions and recommendations.

Einstein analyzes your data to identify conversion patterns, interpret customer behavior, and evaluate your campaigns performance. With Einstein in your corner, you'll know more and guess less.

LEARN MORE

BOOSTING SALES PERFORMANCE

A marketing automation solution opens up a world of new data for marketers to explore, both demographic and behavioral. But this data doesn't only help marketing – it's also essential to sales success. Real-time insights into prospect activities and sales funnel trends supplement the data already available in your CRM, ensuring that your sales team always has the most relevant and actionable information.

Let's take a look at a few of the benefits that sales reps will see when their CRM is working in tandem with a marketing automation solution.

Accurately track prospect behavior.

Basic demographic information can only go so far. Integrating marketing automation and your CRM lets you dive deep into detailed behavioral tracking, so sales reps can see which pages their prospects are visiting, what types of content they're interested in, and where they are in the buying cycle.

Prospect tracking and analytics let sales reps see a log of all customer touchpoints, from files downloaded to email correspondence and more. This unparalleled insight ensures that everyone who interacts with the customer will have a complete, unified view of all of a customer's interactions with the brand. You'll know exactly what leads are interested in, allowing your sales reps to tailor their phone calls and sales pitches accordingly. It also helps sales pick up right where marketing left off, creating a seamless journey for your customer.

Get real-time activity alerts.

With always-on marketing automation, your sales reps will receive real-time alerts whenever a prospect takes an action on your website, fills out a form, opens an email, or attends an event. This allows sales reps to reach out at the perfect time and start the selling process while leads are hot, instead of wasting time chasing down dead ends.

Nurture leads to sales-readiness.

Some leads need a little extra TLC before they're ready to have a sales conversation – and with the wealth of information available online today, many leads are well on their way through their research process before they even reach out to sales. Lead nurturing guides buyers along their independent customer journey, ensuring that they get the information they need without feeling the pressure of the bottom-of-funnel sales process.

Using lead nurturing, marketers can automatically deliver valuable content to leads over time, nurturing them to a sales-ready state. These sophisticated campaigns can adapt and branch out based on how a prospect interacts with your messages.

With nurturing running behind the scenes, sales reps don't have to waste time pursuing leads who aren't yet ready to buy, and marketers increase the value of their database by engaging with these early-stage leads that might have otherwise slipped through the cracks.

Lead nurturing also gives marketers and sales reps the ability to automate communications with prospects who are actively engaging in the buying process – sending personalized, one-to-one messages from each sales rep. This increases the relevance of sales emails and reduces a lot of the heavy lifting for sales reps when it comes to followups.

59%

of customers say tailored engagement based on past interactions is very important to winning their business.

- Salesforce State of the Connected Consumer Report

Access lead information in one unified platform.

With lead and prospect information available in both your CRM and marketing automation systems, your sales reps can see everything they need to know without leaving their CRM. This includes all data collected through your marketing automation system, from social profile information to the emails your prospects have received, what they've been clicking on, what they've signed up for on your website, and more. Sales reps can use this information to tailor their conversations to the needs of each individual prospect. If they find a lead isn't ready to buy yet, they can quickly "recycle" that prospect by adding them to a marketing-approved nurturing track right from the CRM.

Smarter Marketing Automation on the World's #1 CRM

Align your marketing and sales teams with the power of Pardot – marketing automation built on the Salesforce platform to find & nurture leads, close more deals, and maximize ROI.

LEARN MORE   **WATCH DEMO**
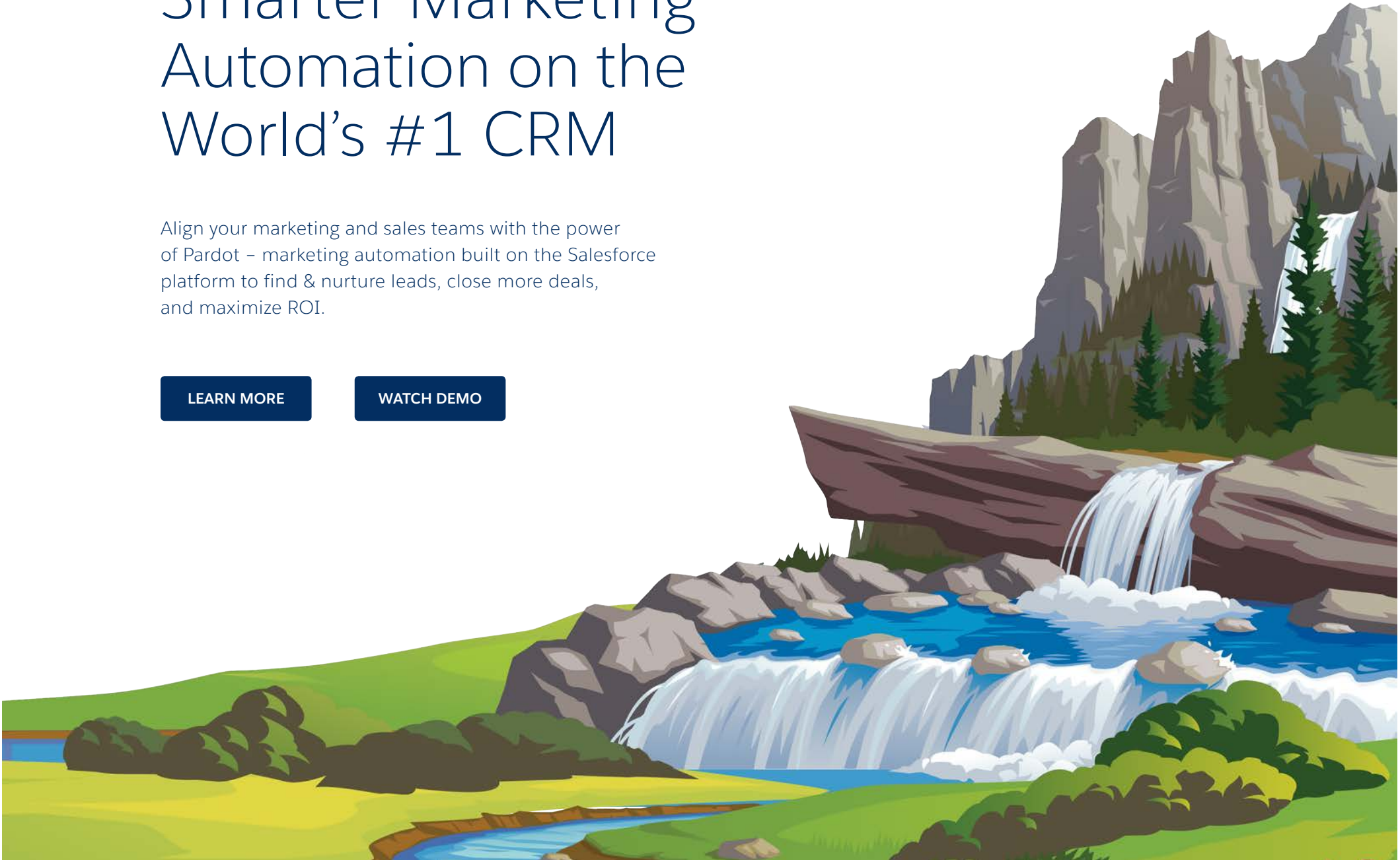
CHAPTER 4

Creating one unstoppable platform.

So you understand the benefits of building a single marketing and sales ecosystem, but you may not be quite sure where to start when it comes to implementing marketing automation. Let's take a look at each stage of integration – from preparation to implementation and beyond – so you can get a better idea of what it takes to get going with marketing automation powered by your CRM.

PREPARE FOR INTEGRATION

When implementing any new technology, it's important to think about the new processes you'll need to create and the business goals you're trying to achieve. To make it easy, we've broken down the implementation process into a few simple to-dos.

Communicate with your sales team.

Integrating a marketing automation system with your CRM is all about marketing and sales alignment, so naturally you should involve your sales team right off the bat. Your sales reps may not understand the need for a new system at first, as they're likely very comfortable with your CRM already.

To ensure buy-in, help them understand the benefits of marketing automation and emphasize how it can help them close more deals – faster. It often helps to pull a small group of sales reps in during the implementation process, thoroughly train them and allow them to see results, and then let those reps share their successes with the rest of the sales team. It's all about communicating value.

Set goals.

Use strategic questions to help establish realistic goals and processes after implementation. Some good questions to ask are:

- What constitutes a qualified lead?

- How often would sales reps like to get alerts of prospect activity? What is their preferred method of delivery?

- What does your current sales cycle look like? What does it take to close a deal?

- How could lead nurturing supplement sales processes with targeted messaging?

- Which content and lead generation campaigns are producing the most qualified leads today? Which campaigns aren't working?

- How will followup be handled? When a lead is assigned, will a task be created in the CRM?

Working through each of these questions will help ensure that your processes run as smoothly as possible after implementation.
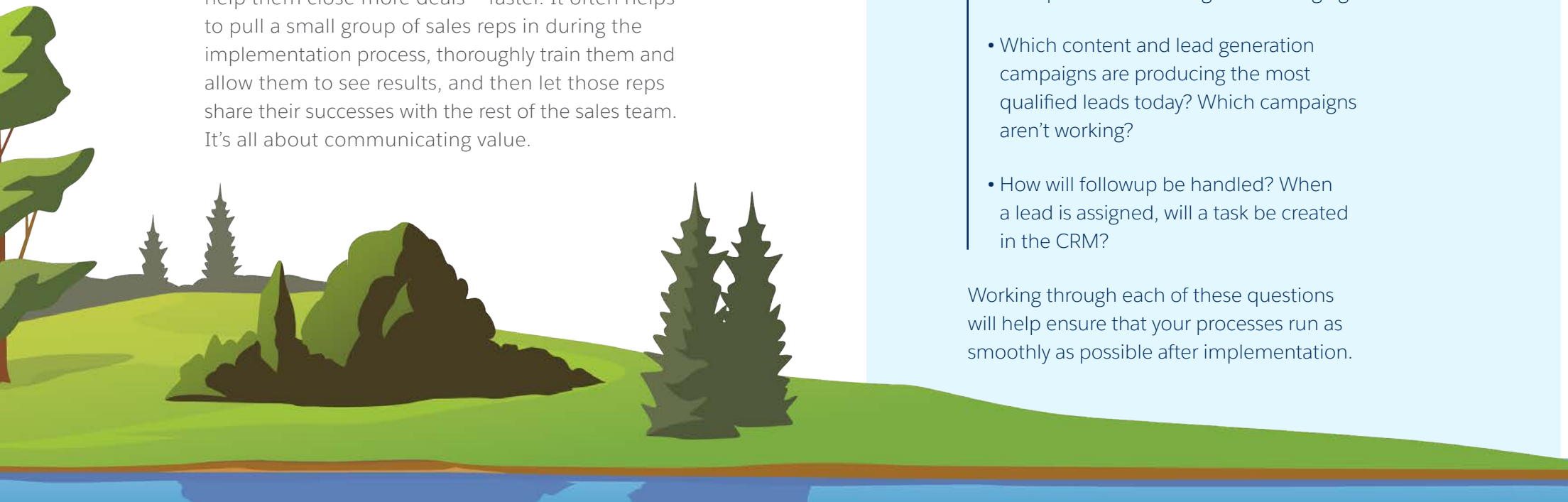
Communicate with your vendor.

Marketing automation vendors deal with implementations on a daily basis, and will be able to help you decide the best configuration to meet your needs. Talk to your vendor about your goals for the integration, and they'll help you find the best path to success. We've laid out some key questions you can ask to determine which marketing automation system is right for you.

- What is the timeframe for integration?

- What am I responsible for during the integration? What is the vendor and/or implementation specialist responsible for?

- How does deduplication work?

- What fields and modules need to be added?

- What happens during the initial sync?

- How will it work after that? How often will it sync? Will it be manual or automatic?

- Are there limits to record syncing and how much will this cost me?

- What information will be available to me via my CRM's mobile app?

Understanding the answers to each of these questions will give you a solid foundation as you move into the implementation phase.

IMPLEMENTATION

When it's officially go time, your marketing automation vendor or implementation specialist will guide you through the technical setup. This process will vary depending on your vendor, but normally doesn't take too long. Before you know it, you'll be ready to start optimizing your new system. Let's move on to the fun part!

POST-IMPLEMENTATION

Once you and your vendor have completed implementation, it's time to dive in! Don't wait to start exploring the new features at your fingertips – getting your hands dirty is the best way to learn. While you're learning the ropes, be sure to start training your sales team, optimizing your new system, and evaluating your progress. All are equally important steps when it comes to ensuring that you're getting the greatest return on your marketing investment.

Train your sales team.

In order for your marketing automation system to reach its full potential, it's essential that your sales team learns the system's capabilities and how they will benefit from it. Spend one to two hours teaching your sales reps how to use the system, and make sure they understand how their processes might change moving forward.

Optimize your system.

Securing buy-in from your sales team is an essential step to ensure successful implementation. Even if they've been involved from the beginning, you'll need to be able to demonstrate value early on to get keep everyone on board and supportive of your program's early stages.

Start by using your marketing automation system to build simple lead nurturing programs, qualify leads using scoring and grading models, and automate the lead assignment process. Once your sales team starts to see the value in these capabilities, you can move on to a few of the following:

- Advanced lead scoring
- Deeper segmentation
- Targeted drip programs
- Granular ROI reporting

Building a marketing and sales power-tool using marketing automation and your CRM is all about finding the processes that work best for you and your team, so don't be afraid to experiment until you start seeing results.

Once you've had your new system in place for a few months, start using reporting features to measure your ROI. Lifecycle reports can give you a glimpse into the health of your sales funnel, opportunities created, and the average amount of time that prospects spend in each stage of the buying cycle, helping you gauge the efficiency of your marketing efforts while simultaneously pointing out areas of improvement.

Evaluate Continuously.

It's important to keep a close pulse on how integration is going by continuously checking in with marketing, sales, and management. Request feedback from all groups every three to six months to see how the integration is being received, so you can fine-tune your strategy as you go. Consider placing marketing and sales on a nurturing track to regularly poll them for feedback, and be sure to revisit the following areas on a regular basis:

- How has lead quality improved?

- What deals are closing and why?

- Which lead generation campaigns are performing the best? Why?

- What content are prospects looking at? Are there any gaps in content?

- How successful have the lead nurturing campaigns been?

- Which features/content/campaigns are being used? Which are not being used? Why?

Soliciting feedback is one of the best ways to make sure that you're always getting the most out of your system. The only way to consistently improve your efforts is to constantly evaluate your past campaigns, adjust based on results, and move forward with an optimized strategy.

Clean data is good data.

Keep your newly-integrated system in tip-top shape by supplying it with high-quality data.

Take a look at the list below for a few quick data cleanup tips that can help you optimize the efficiency of your system.

- Make sure forms adhere to best practices

- Use import validation

- Implement internal data guidelines

- Use required fields and dropdowns

- Consider data cleanup tools

Conclusion

It's clear that marketing automation and your CRM are better together. Through unified data, increased efficiency, and automated processes, marketing and sales are poised to team up like never before to meet and excel in revenue generation. Businesses that have integrated a marketing automation system with their existing CRM have seen proven results when it comes to ROI, sales performance, marketing and sales alignment, and more.

After integrating marketing automation with your CRM, your teams will work better than ever – together to find & nurture leads, close more deals, and maximize ROI.

Let's get started.

Pardot is B2B marketing automation built on the world's #1 CRM.

Your customers are smarter, more capable, and better-informed than ever before. This new kind of consumer demands a better kind of marketing, and Pardot has what it takes to help you get there.

WATCH DEMO

Get up and running with Trailhead.

Onboarding your team to a new system may seem like a daunting task, but Salesforce Trailhead makes it easy.

Trailhead is the fun way to learn Salesforce and pick up new skills. As the world's leading learning experience platform, Trailhead helps your team get going and encourages continuous improvement.The best part? It's free and easy to set up.

Join the community of Trailblazers and supercharge your marketing automation adoption.

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