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Marketing Automation & Your CRM: The Dynamic Duo

Bridge the gap between marketing and sales by creating a single source of truth for your organization.

INTRODUCTION

Align marketing and sales with marketing automation.

In 2012, SiriusDecisions predicted that the adoption of marketing automation would increase 50% by 2015 — it's now 2015, and the marketing automation industry continues to grow at a rapid pace. Why? Because more and more B2B marketers are realizing the benefits of creating a complete marketing and sales ecosystem using marketing automation and their CRM.

In today's B2B organizations, marketing and sales alignment is critical to success, but these two teams will only work well together when they're pursuing the same goals and have access to the same actionable information. Marketing automation is designed to bridge the gap between marketing and sales by working with your CRM to create a single source of truth for your organization.

This e-book will walk you through the basics of marketing automation and the benefits of building a marketing and sales ecosystem. You'll also get a brief rundown of the implementation process so that 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 two teams, gain greater insight into your campaign performance, jumpstart lead generation, and positively impact your ROI — all by pairing marketing automation and your CRM together to create the ultimate dynamic duo.

79% of top-performing companies have been using marketing automation for more than 2 years. -Gleanster

Marketing automation: What's all the fuss about?

Perhaps you've seen the phrase "marketing automation" floating around on the marketing blogs you read. You've almost certainly heard about it at B2B marketing conferences you've attended. Maybe it's even popped up while you're hanging out by the office watercooler, or come up in a casual conversation with a friend who just implemented automation at his new company (hey, it could happen!). After hearing it over and over again, you may be left wondering what all the fuss is about. What is it about marketing automation that has captured the attention of today's marketing professionals?

Let's start from the beginning. Marketing automation platforms are designed to increase sales and maximize efficiency for companies with complex sales cycles, allowing marketing and sales departments to manage their prospect interactions and online marketing campaigns in one central platform.

A marketing automation system typically offers:

- Micro-level analytics that track all touch points with a prospect — including forms, pageviews, 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 predefined rules or time intervals
- 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, branded, personalized online marketing campaigns and emails

When marketing automation is integrated with a CRM like Salesforce, a new level of functionality is unlocked that allows marketers to track and analyze all touchpoints with prospects from the moment of lead generation to the close of a sale (more on this in the next two chapters!).

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

B2B marketers who implement marketing automation increase their sales-pipeline contribution by 10%.

-Forrester Research

Build a sales and marketing ecosystem.

Many of the tensions between marketing and sales teams stem from breakdowns in the lead management process. All too often the marketing team is passing over leads that aren't sales ready, and the (understandably frustrated) sales team is choosing to pursue their own leads instead. This leaves customers lost in the mix — and when left to fend for themselves, your buyers will likely find a friend in a competitor that is doing a better job of catering to their needs. Revenue is left on the table.

When these alignment issues exist at the top of the funnel, the company is losing out on new customers, and marketing is losing a chance to show their value as a revenue generator. To shore up these holes and perfect a lead management process that works for both teams, it's essential to build an all-in-one marketing and selling tool that everyone can rely on. This is where marketing automation and your CRM come in.

"Creating a lead-to-revenue model is an integrated sales and marketing effort," comments Tyler Lessard, CMO at Vidyard. "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."

Once sales and marketing 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 likely used to working primarily in a CRM, but imagine a system that displays all of the relevant prospect and campaign information needed by both teams, all in one place. That's exactly the kind of ecosystem you can create by integrating a marketing automation system with your CRM.

Think of it this way: if a CRM is primarily a sales tool, marketing automation is its marketing counterpart. Integrating the two systems allows you to sync information bidirectionally, meaning that an update to a record in your CRM will automatically be made in your marketing automation system (and vice versa). This keeps sales and marketing on the same page by giving them valuable insight into prospect activities, increasing the efficiency of the lead management process, and smoothing out kinks in the sales funnel that might cause leads to drop out of the sales process entirely.

With marketing automation working in tandem with your CRM, you're creating a sales and marketing tool capable of streamlining troublesome sales and marketing tasks, such as:

- objectively qualifying leads so that only high-quality leads get passed from marketing to sales
- automating lead assignment so that leads are always sent to sales at the right time
- tracking marketing and sales touchpoints throughout the length of the sales cycle — in real time
- improving the relevancy of sales and marketing messages
- preventing non sales-ready leads from slipping through the cracks
- gaining insight into campaign performance to help prove marketing accountability

The chart on page 7 takes a closer look at how marketing automation and your CRM can cover the full spectrum of day-to-day sales and marketing tasks.

	CRM	MARKETING AUTOMATION
Business Goals (What are you trying to achieve with each of these tools?)	• 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	• 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	• Opportunity management • Sales forecasting • Account management • Task creation • Sales process reporting	• Email marketing • Lead nurturing • ROI and campaign reporting • Scoring and grading • Forms and landing pages • Social posting

> "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

Why Have a Single Source of Truth?

The B2B sales cycle has changed. It's no longer a traditional funnel, but a complex process with branching and overlapping paths that represent B2B buyers' tendencies to conduct their own research to the point of purchase, and then constantly re-evaluate those choices over time. Buyers are no longer telling companies exactly what they need to complete this research process, but they do expect companies to anticipate their needs and have the relevant, personalized content they're looking for – right when they need it.

This personalization falls on both marketing and sales' shoulders. Fortunately, using data collected by a marketing automation tool, sales reps and marketers have access to complete, 360-degree profiles of each of their buyers, giving them the exact information they need to personalize every conversation. This data becomes the "single source of truth" for companies, helping 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."

With the ability to provide so much added insight into buyer activities and sales and marketing performance, it's no wonder that marketing automation and CRMs are often penned as the "dynamic duo."

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, multi-purpose tool 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. It also cuts down on the tedium of manual lead qualification and assignment, helps marketers track their ROI, and makes it easier to target and segment marketing communications. Let's take a closer look at each of these.

Improving Lead Generation

Before we can get to lead qualification and assignment, first things first: you need to generate leads. While sales reps previously relied mostly on leads generated via their own cold-calling methods, marketing automation makes it possible for marketers to step in and take some of the burden off of sales' shoulders. With automation, you can run sophisticated lead generation campaigns, collect buyer information using forms and landing pages, and automatically route this information into your marketing automation and CRM tools so that the most recent, actionable data is easily viewable for both parties.

Automating Lead Qualification and Assignment

A common sore spot between marketing and sales teams is poor lead quality. With no system in place to score and grade leads, many marketers are left relying on their gut when the time comes to pass a lead to sales — or they pass over every lead that comes along. This can lead to frustration on both sides, and often ends with marketing-generated leads being dismissed altogether.

However, with the data gathered via a marketing automation system, marketers can automatically score and grade leads so that only the most qualified get passed to sales. Lead score measures interest in your product or service, while lead grade reflects how well a lead fits your ideal prospect profile. When leads reach a qualification threshold that's been agreed upon by both the marketing and sales teams, they can be assigned to sales reps automatically. This cuts down on manual processes and ensures that lead assignment is fair, efficient, and effective.

Among B2B marketers, the number one benefit of marketing automation is generating more and better leads.

-Pepper Global

Sending 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. Having a complete view of your buyers' activities and interests gives marketers the ability to send targeted messages and lead nurturing emails that are personalized to buyer pain points or stage of the buying cycle. Creating one-to-one email communications or segmenting based on criteria like industry or product interest adds a degree of relevancy to your emails, helping to increase engagement levels with once-generic marketing content. Dynamic content lets marketers scale the process by allowing you to create a single template that uses smart rules behind the scenes to plug in the offers most relevant to each prospect segment.

68% of successful marketers cite lead scoring based on content and engagement as most responsible for improving revenue contribution.

-The Lenskold and Pedowitz Groups

Tying Revenue to Campaigns

Which sounds easier: reporting on campaigns when the performance data is spread across multiple tools, or reporting on campaigns when the data has been aggregated in one system? The answer is pretty obvious. With campaign and tracking metrics constantly updating in your marketing automation and CRM tools, reporting on campaign ROI is a much more straightforward process.

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

Boosting Sales Performance

A marketing automation tool 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 is always privy to 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 tool.

Tracking Prospect Behavior

Integrating marketing automation and your CRM gives you the opportunity to go beyond basic demographic information and delve into detailed behavioral tracking, so that sales reps can view which pages their prospects are visiting, what types of content they're interested in, and where their prospects are in the buying cycle. Prospect tracking and analytics make it possible for sales reps to see a log of all touchpoints with their prospects, from files downloaded to email correspondences and more. This prospect activity history provides unparalleled insight into 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.

Utilizing Real-Time Activity Alerts

With marketing automation, your sales reps will receive real-time alerts whenever a prospect takes a specific action on your website, like visiting your pricing page or downloading a white paper — or if they click on a tracked link in an email. By having this detailed information delivered in real time via email or CRM, sales can stay up-to-date on their prospects' activities and interests, giving them the ability to "strike while the iron is hot" instead of wasting time chasing down dead ends.

Nurturing Leads to Sales-Readiness

Recent research indicates that buyers are more than two-thirds of the way through their research process before they even reach out to sales. This growing trend has brought lead nurturing to the forefront of marketing and sales strategies because of its ability to ensure that buyers are getting the information they need, when they need it. Using lead nurturing, marketers can automatically "drip" valuable content to leads over time, nurturing them to a sales-ready state. These sophisticated campaigns can adapt and branch 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.

Personalized emails generate up to 6 times higher revenue per email.

-Experian Marketing Services

Lead nurturing also gives marketers and sales reps the ability to automate communications with prospects who are actively engaging in the buying process — by making it appear as though emails are personalized, one-to-one messages from each sales rep. This increases the relevancy of sales emails and reduces a lot of the heavy lifting for sales reps when it comes to follow-ups.

Accessing Lead Information in One Central Interface

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.

Salesforce for B2B Marketers: The Complete Guide

Looking for more details on the marketing automation features that matter to you? Check out our Complete Guide for a full rundown of Pardot features like lead nurturing, lead qualification, and ROI reporting — and learn how they'll integrate with Salesforce CRM.

GET FREE E-BOOK

Creating One Unstoppable Tool

So you're sold on the benefits of building a single marketing and sales ecosystem, but you're not quite sure where to start when it comes to adding marketing automation. Let's take a look at each stage of integration — from preparation to implementation and beyond — so that you can get a better idea of what it takes to transform marketing automation and your CRM into the dynamic duo.

Preparing to Integrate

When implementing a new technology, it's important to think about the new processes you'll need to create and the business goals you are trying to achieve. Preparation is often broken into two stages: defining your goals for implementation and mapping out a plan of attack for the integration itself.

Triggered email messages average 70.5% higher open rates and 152% higher click-through rates than "business as usual" marketing messages.

-Epsilon Email Institute

Communicate with Your Sales Team

Integrating a marketing automation system with your CRM is all about sales and marketing alignment, so your sales team should have input from the very start. Your sales reps may be very comfortable with your CRM and may not see a need to introduce a new system, so make sure they understand the benefits of marketing automation and how it can help them close 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, then let that sales rep sell the rest of the team on marketing automation.

Your reps are the ones who are on the front lines when it comes to selling your product, so they should have a good idea of what works and what doesn't. Hopefully you are already speaking with your sales counterparts frequently.

Here are some questions you may want to use to help establish realistic goals and processes after implementation:

- What constitutes a qualified lead?
- How often would sales reps like to get alerts of prospect activity? What would be their preferred method of delivery?
- Dive deep into the current sales cycle and what it takes to close a deal. Who are the different stakeholders you are selling to, and what obstacles do you encounter at each stage of the sales process? How could lead nurturing supplement their processes with targeted messaging?
- Which content and lead generation campaigns are producing the most qualified leads today? Which aren't working?
- How will lead follow up 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 should be able to help you decide the best configuration to meet your needs. Talk to your vendor about your goals for the integration. There are lots of questions you can ask to determine which marketing automation system is right for you, but here we'll focus on questions specifically about the CRM integration:

- What is the timeframe for integration?
- What am I responsible for during the integration? What is the vendor and/or implementation specialist responsible for?
- Which system will be the master (the CRM or marketing automation platform)?
- How does de-duplication work?
- What fields and modules will be synced?
- 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 time for implementation, your marketing automation vendor or implementation specialist will help 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've completed implementation, don't wait to start exploring the new features at your fingertips. Training your sales team, optimizing your new system, and evaluating your progress are all 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 tool to reach its full potential, it's essential that your sales team knows and understands the system's capabilities and how they will benefit from using 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 (note: you may need to revisit this step as you get more comfortable with your new system).

Optimizing Your System

One of the most important steps after implementation is to secure buy-in from sales (even if they've been involved from the beginning), so you'll need to be able to demonstrate value right off the bat. Start by using your marketing automation system to build simple lead nurturing programs, qualify leads using the default scoring and grading models, and automate the lead assignment process. Once your sales team starts to see the value in these capabilities, move on to a few of the following:

- More advanced lead scoring
- Deeper segmentation
- More targeted drip programs
- More granular ROI reporting

Building a sales and marketing 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 the reporting features in your marketing automation system to see the impact on 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.

Evaluation

It's important to seek out feedback from marketing, sales, and management every three to six months to see how the integration is being received. 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:

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

Keep your data clean.

As you begin to explore the more advanced capabilities of your system, be sure to stay vigilant when it comes to data quality. 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. (For a list of recommended tools, visit our blog post on the topic).

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.

Conclusion

Businesses that have integrated a marketing automation system with their existing CRM to create one sales and marketing ecosystem have seen proven results when it comes to ROI, sales performance, marketing and sales alignment, and more. That's why it's no surprise that the automation industry is growing (and is predicted to grow even more over the next few years).

In fact, according to Forrester Research, 58% of top-performing companies (companies in which marketing contributes more than half of the sales pipeline) have already adopted marketing automation. With this growth will come an even greater investment in marketing automation and CRM systems, helping your marketing and sales teams close more deals, track their impact on ROI, and adjust their strategies based on past performance.

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WANT MORE INFORMATION?

Pardot is B2B marketing automation by Salesforce.

Your customers are smarter, more capable, and better-informed than ever before. This new breed of consumer demands a better breed of marketing, and the Pardot platform has the capabilities to get you there.

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