sugarcrm

CRM and Marketing Automation Integration Simplified

What it is, Why it Matters and What to Expect.

Introduction

Who will find this helpful?

You may have a CRM and no marketing automation platform or you have an integrated solution but are unhappy with it. In order to make informed decisions on your tech stack, such as if you should adopt or switch platforms or not, it's essential to understand your requirements and needs out of a solution. That extends to understanding how important it is for a native integration between your marketing automation platform and CRM.

Why do solutions on the market boast seamless integration?

Because a seamless integration between your CRM and your marketing automation platform is crucial to 1) Sales and Marketing alignment, 2) more efficient connection with leads and prospects throughout the buyer's journey, 3) the success of your technology adoptions and 4) getting the most out of your investment—including ROI.

This simplified guide will help you understand:

- The difference between a CRM and marketing automation
- Why a seamless integration is important
- What to expect from a seamless integration
- The value you gain from integration

If you've heard the words "seamless integration" regarding a Customer Relationship Management (CRM) platform and marketing automation platform and you don't immediately understand the value behind those words, then CRM and Marketing Automation Integration Simplified is for you.

What's the Difference Between a CRM and Marketing Automation?

Marketing Automation:

A marketing automation platform, a marketers most valuable tool, streamlines the creation, management and analyses of lead generation programs and activity to manage the buyer's journey and enables Sales with contextual information and actionable data for more successful engagement. Additionally, it automates tasks, assists in the creation of emails, nurtures, events, landing pages and forms, scores prospects engagement, manages the lead flow and analyzes the sales opportunity value to prioritize leads throughout the buyer's journey and assist in driving conversions.

Customer Relationship Management (CRM):

A CRM platform is a solution fundamentally designed to manage the selling process and is the tool that your Sales team lives, breaths and eats within. It stores data on your leads and contacts and manages your company's interactions and relationships with them over time, allowing for efficient contact management, customer retention and conversions. It's a solution that manages your sales activities and tasks throughout the buyer's journey and customer lifecycle.

Why is Native Integration so Important?

70% of the buyer's journey is completed prior to Sales engagement and the majority of that engagement involves self-researching via digital information consumption. Nowadays, the buyer's journey is a much more complicated cycle that puts the power into the hands of the buyer. A CRM and a marketing automation platform—and their the two respective teams—that operate separately of one another lead to a disconnected approach toward the same sales cycle. In order for Sales to assist buyers in the primarily independent portion of the journey, Sales must rely on marketing activities and insight, which are housed within a marketing automation platform. By integrating your CRM with your marketing automation tool, the platform can create resources for the buyer's digital consumption, track their activity and give better context and visibility to the Sales team, enabling them to engage at the pivotal purchase-decision moment with an understanding of the prospect's mindset and needs. Rather than Marketing and Sales and their respective technologies operating in a disconnected manner, they can work together for high-quality lead hand-off and conversions.

What Should You Expect From Seamless Integration?

An integration between marketing automation and CRM is a means to a quicker, more efficient handoff of qualified leads to Sales. By utilizing the two tools together, Marketing can more effectively track leads to revenue and Sales can understand a prospect's prior engagement to tailor conversations and more effectively convert. The functionality of the integration itself helps Marketing and Sales gain visibility into leads throughout their buyer's journey and provides an automated bi-directional sync between the two platforms, meaning a complete data-share without any manual imports or exports or digging for information between the two systems. With marketing automations lead scoring and tracking capabilities, a prospect's data is automatically captured, tracked and updated in the CRM according to their engagement with marketing's assets. This ensures your data on contacts is consistently updated according to their preferences, interests and mindsets.

"Communication between Sales and Marketing is key for us and with so much manual entry being done on our part, it was hard to consistently ensure nothing was falling through the cracks. When we saw the tight integration Sugar Market and Sugar Sell have, transitioning to Sugar Market was a no brainer for us."

— JULIE FELLER, DIRECT MARKETING MANAGER
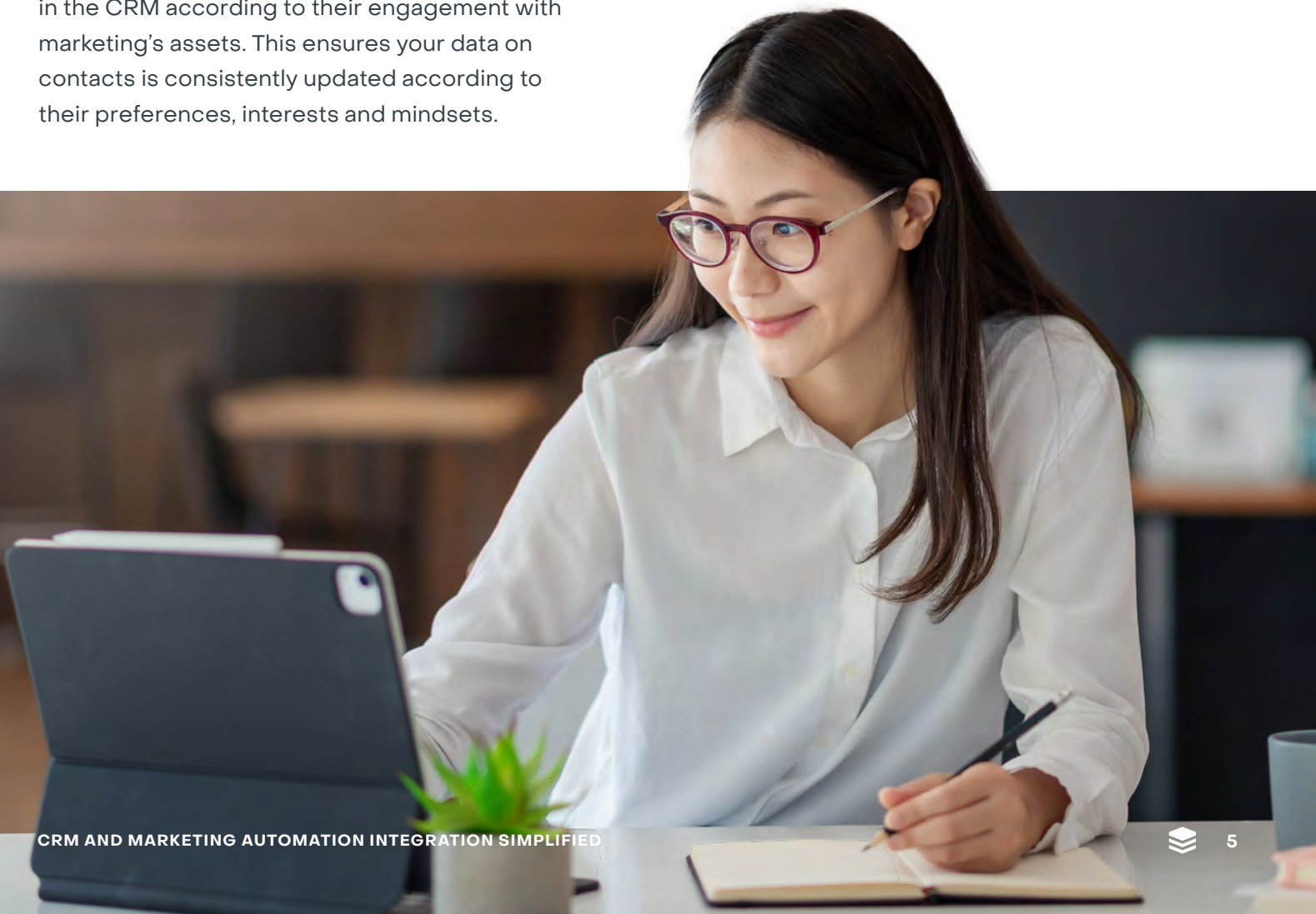
What's the Value of Integration?

Sales Enablement

An integrated solution delivers leads and information in an easily digestible way to increase Sales productivity and drive conversions. Marketing automation drives a 14.5% increase in sales productivity and a 12.2% reduction in marketing overhead.

Sales and Marketing Alignment

Sales and Marketing are sharing information on prospect's actions and engagement throughout the buyer's journey. The teams are more efficiently able to identify where Sales should step in. With the time that automation saves, the teams can work together to identify key measurements of success and align on messaging for particular buyer personas. The more the two teams align to work in a harmonious approach to the sales funnel, the more effective their performances and thus lead hand-off process.

Customer Retention

Customer retention is improved by leveraging a CRM system by as much as 27%. An integrated CRM and MAP allows you to nurture customers, manage relationships to retain their business and even sell to them more.

Save Time and Money

Sales spends less than 36% of their time selling, meaning the remainder of their time is spent on meticulous tasks. Not to mention that an average 50% of a sales rep's time daily is wasted on poor prospects, meaning your paying your sales reps for hours of work that have no ROI. An integrated solution streamlines tasks, increases sales productivity and saves money in the long-run. In fact, a total of 53% of companies who use marketing automation see a higher conversion rate of quality leads into customers.

Return on Investment

The average return on investment for a CRM is $5.60 for every $1.00. In other terms, a CRM system can increase revenue by 41%. Now just imagine what a CRM functioning in alignment with marketing automation can do. According to Demand Gen, four in five marketing automation users increased their leads and almost as many (77%) saw an increase in conversions. With the two systems working together to increase sales productivity and deliver more qualified leads to Sales, there is no doubt that the two teams are driving incremental revenue.
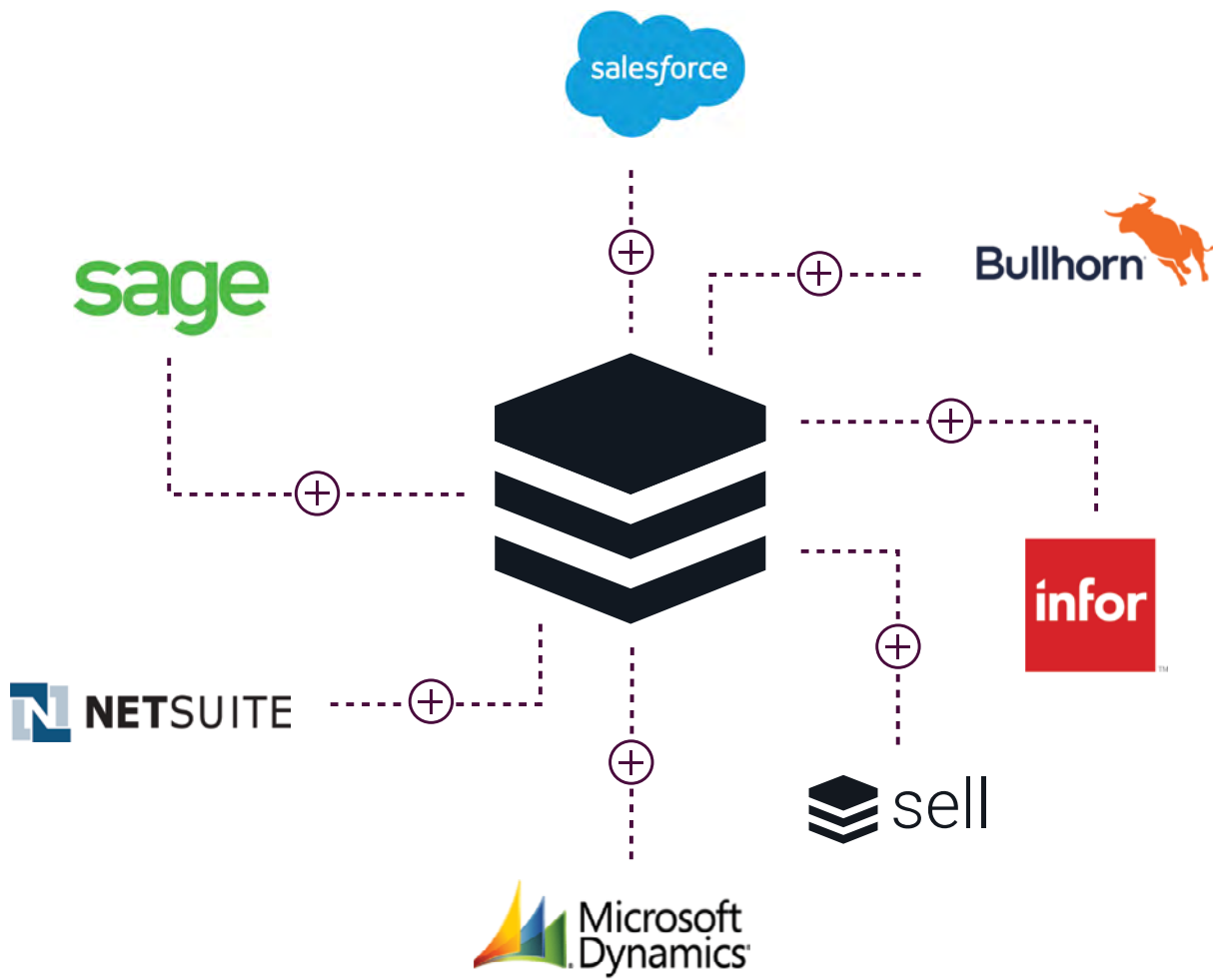
Sugar Market Native CRM Integrations

Sugar Market natively integrates with the 7 most popular CRMs: Sugar Sell, Salesforce, Bullhorn CRM, Infor CRM, Netsuite, Sage, and Microsoft Dynamics.

The integrations include:

- Better quality leads from Marketing to Sales
- Sales and Marketing alignment for an efficient approach that drives conversions
- Proven ROI due to a more unified approach to the buyer's journey and proven value in your technology
- Automatic, bi-directional sync of information between the two platforms for improved lead management

- Custom lead scoring and tracking to capture prospects data, track them throughout the buyer's journey and hand them off to the sales team at the purchase-decision moment with contextual, actionable data to help them close deals more effectively

From Attracting to Connecting, Let the Platform Do the Work

Learn what SugarCRM can unlock within your organization.
A better solution is just a click away.

GET DEMO

market

ABOUT SUGAR MARKET

Target accounts based on likeliness to convert, and personalize each outreach with Sugar Market. Highly intuitive campaign builders, AI-based predictions, and superior reporting enable you to understand engagement, improve conversion, and drive more revenue. With Market, you can let the platform do the work.

www.sugarcrm.com/solutions/sugar-market

About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit www.sugarcrm.com or follow **@SugarCRM**.

sugarcrm | **Let the platform do the work**

NORTH AMERICA | LATIN AMERICA | EUROPE | ASIA-PACIFIC