

Sitecore Salesforce Integration - Why wouldn't you?

A look at the S4S connector from FuseIT

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Declaration

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1. Introduction

This paper demonstrates why intelligently integrating a CMS and a CRM makes sense.

Websites are great for gaining credibility and increasing brand awareness however the main goal is to 'engage people' to ultimately drive revenue for an organization or business. At its core, a website needs to both capture new leads and to retain existing customers. This duality of purpose makes creating and maintaining an effective website challenging.

The answer to the duality issue is to use two fundamental tools to form the foundation of your sales, marketing and customer management platform. To make this successful, it is important that each tool is the right tool for the right job and both are unified through intelligent integration.

Effective marketing requires an enterprise Web Content Management System (CMS) to create dynamically targeted content that engages visitors and inspires action (such as submitting a lead form, connecting via live chat, purchasing a product/service). Integrating this with a Customer Relationship Management System (CRM) ensures that leads are efficiently processed (captured, converted, and product or service delivered) and existing customers remain engaged and excited by personalized interactions and offerings.

This paper focuses on two powerhouse solutions, Sitecore (as the CMS) and Salesforce (as the CRM) and how these can be intelligently integrated with the S4S connector from FuseIT.

2. Sitecore - S4S - Salesforce

Sitecore and Salesforce are individually recognized as "best of breed" systems in their own spaces. Both systems contain a large number of objects, multiple databases, and many transaction interfaces so the connection permutations are numerous. The challenge is not to just integrate, but to integrate intelligently ensuring the integration adds the maximum value possible.

The FuseIT S4S connector is a complete integration solution for Sitecore and Salesforce. Businesses invariably have different individual requirements so S4S has been developed to allow any object in Sitecore or Salesforce to be bi-directionally updated. A powerful example of this is that a Sitecore custom form (or Web Form for Marketers form) can be used to create or update any Salesforce object such as a lead, contact, case or opportunity record. In the reverse, the connector can pull Salesforce data back into Sitecore such as populating product information, surfacing Salesforce documents, or showing communication preferences for logged in customers.

A popular use of the connector is controlling the Sitecore website experience of each visitor directly from Salesforce. This is possible after a visitor submits a web form and ensures the website delivers content that matches the current interest of the prospect.

Where the Sitecore Email Experience Manager (EXM) module is being used in Sitecore, S4S can optionally include the S4S EXM add-on. This allows emails to be sent to the individual members of a Salesforce campaign via Sitecore EXM which also synchronizes the email recipient behavior (stored in the Sitecore analytics database) back to the Salesforce campaign member record, for use in reporting and campaign tracking/detail. Marketers use this closed-loop marketing to measure and demonstrate the effect of digital marketing strategies in terms of customer acquisition, retention, and company revenue growth.

Using the S4S connector to integrate Sitecore and Salesforce creates many new opportunities to interact with leads and customers adding real strength to the sales, marketing and customer management platform. S4S has out of the box support for the common business use cases that add the maximum value.

3. The Challenge of Engaging the Visitor

There are at least five different visitor types arriving on a website each requiring specialized management to engage the visitor and to ensure their needs are met:

- *Raw prospects* arrive from unknown sources and land on unpredictable pages. Their objectives are yet to be discovered. To maintain interest, the entire website must entice and quickly profile the visitor while dynamically showing personalized content based on what has been learned about the visitor so far.
- *Warm prospects* are anonymous visitors that arrive on a targeted landing page after clicking a link from consumed content (like a pay-to-click-link). They expect to see a page that delivers on the promises made by the originating page.
- *Leads responding to campaign emails* are known visitors that land on a targeted page but more information is already known about them. Careful treatment with personalized content is required to convert them into customers.
- *Customers responding to campaign emails* are existing clients that need to be engaged in a relevant way. The goal is to expose new content or products to encourage them to make new purchases.
- *Customers or staff members that log in* are often established customers or partners looking for specific data on products or services already purchased. They are typically well informed and knowledgeable therefore the site needs to quickly direct them to the information they seek. They could also be internal staff who securely log in to Sitecore portal pages to access company information.

How can a single website be flexible enough to meet such a diverse range of visitor needs? It is obvious that knowing your prospect better will greatly improve your selling chances. The same applies when trying to keep a customer. The solution is to leverage the power in both your CMS and your CRM through an intelligent integration. Many of the integration benefits are about providing intelligence information to the sales/marketing teams, for example by surfacing the Sitecore analytics data in Salesforce we can let Salesforce operators drive and further personalize the prospect's web experience – leading to a higher rate of conversion.

An intelligent integrated system should be able to:

- Enable the interaction between objects in the CMS and CRM, for example, create a Salesforce contact from a Sitecore Web Forms for Marketers form.
- Pass contextual insight to the CRM when new leads or contacts are created using a web form. CRM operators need to see what the prospect did on the website before they submitted the web form.
- Effectively allow a single source of data to be created to ensure data is not scattered and inaccessible.
- Enable website login using credentials stored in the CRM so customers can log in and update their Salesforce contact record with the likes of subscription information.
- Add email automation and personalization to CRM campaign emails to enable recipients to receive targeted emails.

4. Keeping Visitors on your Website

After investing substantial time, effort, and money into driving visitors to your website, you must immediately (milliseconds not seconds) get the visitors attention and motivate them to fill in the lead form or buy a product/service.

Marketing strategies like SEO, Internet advertising, social media, blog posts, eBooks, white papers, webcasts (webinars) and email marketing draw visitors to your website but typically these are unknown, or anonymous when they land on the site.

It is important visitors see what they expect to see, this applies to new and returning visitors. Each will have an expectation created by the context of the link or their search phrase. For example, if linking from a Google AdWords™ advertisement, they should land on a custom page with content directly referencing the wording in the AdWord™ advertisement.

Keeping visitors on a website is challenging and requires a focus on relevance, speed and simplicity:

- Meet their expectations.
- Create discrete content segments with clear and understandable headlines so visitors can quickly scan and understand the content.
- Present facts that let visitors evaluate your offering and differentiate your company. Use language and contextually appropriate content that is familiar to the visitor to encourage visitors to explore the site further.
- Provide a personalized experience. Use implicit personalization to build up a profile based on the visitor's previous page and item selections, and then use rules-based personalization to deliver targeted content and resources. Save the personalization information to enable it to be automatically used when the visitor returns.
- Make getting more information simple. Visitors must instantly recognize how to navigate the website to find information and forms. Forms should be simple and seek a minimum of information.

A significant part of Sitecore's success is the ability to create personas that can be used to render targeted content to different market segments. Sitecore can track the behavior of anonymous visitors as they move about the site. By cleverly building a dynamic profile based on of their navigational history the site can show tailored content to create an increasingly personalized browsing experience. This advanced personalization gives you an advantage over your competitors. It also provides the opportunity to segment the website to meet the needs of different visitor types.

5. Processing Leads Intelligently

Enthusiastic visitors will submit a lead form - a critical moment because at no other time will they have such a high level of interest in your product or service. A very effective technique is to offer a live chat channel (before and immediately after form submission) to engage the visitor further and immediately answer questions the visitor may have.

When the visitor has been engaged (filled out a form, and connected via chat) it is vital the visitor is automatically added to the CRM to ensure they receive an immediate response as part of the sales process. Typically, due to user conditioning, visitors expect an immediate response following the submission of a form. This can be a simple thank you or something more complex like a special offer that immediately rewards the prospect and begins to

establish the essential trust required to progress a sale. To achieve this simply, an integrated system would enable an automated email to be sent directly from Salesforce or via Sitecore using the Email Experience Manager (EXM) if implemented.

Like the website, the response email needs to be completely focused on meeting the expectations of the recipient. Websites with multiple lead forms need multiple email responses each with contextually relevant content. To communicate with these leads in future, the CRM should also automatically add each new lead to a matching campaign.

Once a lead is in the CRM, an entire suite of marketer's tools is available to progress the sale, convert the lead and ensure the customer is retained. In handling leads, a unified integrated system is extremely powerful in a number of innovative ways. For example, the Sitecore to Salesforce integration pushes the browsing history of the new lead to Salesforce. This presents a raft of information to the marketer at a time when it is most needed - before making the first follow-up call. CRM reports can be created using this information to identify high priority prospects. The information exposed in the lead by the S4S integration includes the page count, pages visited (including dwell durations and date of visit), a list of Sitecore goals attained and the total goal score.

If a visitor was particularly active on the website they may have undertaken polls, surveys, chats, or even posted comments on a blog. Clearly, the website activity provides a useful insight into the persona of the lead visitor such as:

- Level of enthusiasm (time on site)
- Topics of interest such as
- Specific products and services
- Your company's team and management structure
- Level of technical expertise based on articles read
- Country of origin (and, in many cases, company)

Together with the data gathered on the registration form marketers will be confident they are well prepared when initiating the follow-up call or email.

6. Customers and Personal Space

An integrated platform means your organization can use a single source of data. This is hugely beneficial as your data is much more likely to be CRATA (complete, relevant, accurate, timely and accessible). Imagine the power in a customer updating their personal information on the website which is then saved automatically to one place – back in the CRM record where it can be more intelligently utilized.

During early follow-up calls and emails, marketers will learn more about the lead, particularly their preferences and idiosyncrasies, which can be entered directly into the CRM against their lead record. Leads are often converted to CRM contact records where the individual will join the pool of clients.

In many cases, businesses will want to enable contacts to log in to the main website. The benefits of allowing website logins are:

- You will retain customers by offering them their own space. Logging in is like using a key to open the door to a friendly and familiar place – it is human nature.

- Customers get better security, increased access to resources and functionality and know they are in a unique group with privileged membership.
- Your organization can track and target customers with focused content, personalized offers, feedback requests, invitations and more. Sometimes this is away from the eyes of your competitors.

The S4S integration stores the important login credentials including the Sitecore role and preferences of the web user in the contact record. This optional S4S feature is called the Security Connector. The information only exists in Salesforce so synchronization tasks are not required.

The S4S Security Connector feature opens up even more opportunities in a unified platform. For example, in the CRM we can use a customer's contact record to "tell" the website what content to show the customer next time they log in. This might be a simple greeting message, targeted advertising or an instruction telling the website to send the customer directly to a relevant landing page.

The Security Connector also helps attract new customers. For example, marketers attending conferences often return to the office with a collection of notes and business cards. Entering a new customer into the CRM lets the marketer choose to email an invitation to the new contact to visit the corporate website. The customer will click on a link in the email and be taken to the corporate website, automatically logged in and presented the page relevant to their interest, perhaps a product recently discussed.

7. Leveraging Integration for Email Campaigning

Before an email campaign can be dispatched the recipient list must be carefully compiled. This process requires considerable thought around identifying target segments and how to use the available data to accurately create recipient lists for each segment. The surfacing of website browsing data in the lead (or contact record) in a CRM adds additional attributes and makes this task easier.

After segmentation has been completed the emails can be dispatched directly from the CRM. With S4S, the EXM add-on could be used instead to send emails from Sitecore enabling marketers to use a Sitecore automation plan to define a flexible set of rules around how to process the emails and different actions to take based on the recipient responses. A number of options are also available for testing the responsiveness of emails. One such option is Split AB testing where marketers can send out batches of emails targeting the same market with a view to finding the most effective message.

The S4S integration provides a wizard in Salesforce for compiling a marketing list from one or more Salesforce reports or campaigns. The list can be sent to Sitecore EXM, along with an email template, for deferred, delayed or immediate dispatch. The integration enables the marketer to choose the most comfortable technology, working entirely in Salesforce, partially in Salesforce and partially in Sitecore EXM, or primarily in Sitecore EXM.

8. Closed Loop Marketing

The ability to measure and determine the effectiveness of marketing messages, emails and materials are often referred to as Closed Loop Marketing. A unified platform makes it very easy to identify customers and how they have responded to campaigns launched from your CRM.

Using S4S, marketers can see emails that have been misdirected or ignored or those which have been opened by a recipient and if they actively followed links within the email body. In the latter case, if an email link points to the company's Sitecore website, the visitor's (recipient's) actions on the website are also tracked. All this information is pushed back to Salesforce for visibility and reporting.

By intelligently integrating your CMS and CRM, if your CMS tracks the website visitor behavior, these results can be shown in the CRM so the marketer can determine the effectiveness of campaigns at both campaign and individual levels. Campaigns can then be refined and improved or reused.

9. Summary

In this paper we have looked at how leveraging the S4S connector from FuseIT to intelligently integrate Sitecore with Salesforce can increase engagement and ultimately drive revenue for your organization or business.

A unified platform approach has the potential to radically transform your organization. Most companies have expensive IT systems they have developed or customized over the years, but they are often disconnected. A CMS and CRM, in particular, are typically big investments for any business. Both systems deal with your prospects and customers therefore intelligently integrating your CMS and CRM - logically just makes sense.

This paper was written based on our experiences with Sitecore (CMS) and Salesforce (CRM). The aforementioned functionality is available using the FuseIT S4S connector.

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