White Paper

Sitecore Salesforce Integration

A look at the S4S connector from FuseIT

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Declaration

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1. Introduction

This paper discusses why integrating your CMS (Content Management System) and CRM (Customer Relationship Management system) makes sense.

CMS websites are great for gaining credibility and increasing brand awareness however the main goal is to 'engage visitors' and create revenue. At its core, a website needs to both capture new leads and retain existing customers. This duality of purpose makes creating an effective website challenging.

Most enterprises use a CMS to capture new leads by showing dynamically targeted content that engages visitors and inspires actions such as submitting lead forms, connecting via live chat, or purchasing products and services. New leads are then created in a CRM where they can be efficiently processed (captured, qualified, nurtured, converted, etc.). Using the CRM, existing customers are kept engaged and excited by personalized interactions and offerings.

Capturing leads and retaining customers requires the CMS and CRM to be unified to form a complete sales, marketing and customer management platform. Success depends on choosing the right systems and connecting them with an intelligent integration.

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 integration from FuseIT.

2. Sitecore - S4S - Salesforce

Sitecore and Salesforce are individually recognized as "best of breed" systems in their own spaces. Both systems contain many data objects so the connection permutations are numerous. The challenge is not to just integrate but to integrate intelligently to maximize business value.

S4S is a complete integration solution for Sitecore and Salesforce. Businesses invariably have different individual requirements so S4S allows objects in both systems to be updated from the other in real time. A powerful example of this is using a Sitecore form (or Experience Form) to create or update a Salesforce record such as a lead, contact, case or opportunity. S4S can also 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 S4S is pushing Sitecore visitor behavior to Salesforce when web forms are submitted. This information gives the sales team an insight into the prospect's needs so the team can prepare for the sales call with greater confidence. If they learn more about the prospect during the call, they can control the prospects future website experiences directly from Salesforce. This will deliver web content that better matches the prospects interests and engagement status on any future visits.

For customers who use the Sitecore Email Experience Manager (EXM) module, S4S has an optional S4S EXM add-on. This allows emails to be sent to the individual members of a Salesforce campaign using Sitecore EXM. The module synchronizes the recipient behavior back to their Salesforce record which can be used for reporting and campaign tracking. This closed-loop approach lets companies measure and demonstrate the effectiveness of digital strategies in terms of customer acquisition, retention, and company revenue growth.

Using S4S to integrate Sitecore and Salesforce creates new opportunities to interact with leads and customers adding strength to the sales, marketing and customer management platform. S4S supports the most common business use cases that add business value.

3. The Challenge of Engaging the Visitor

There are at least six different visitor types arriving on a website, each requiring specialized management to ensure their needs are met:

- *Raw prospects* arrive from unknown sources and land on unpredictable pages. Their objectives are yet to be discovered so to create interest, the entire website must entice and quickly profile them 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 (like a pay-to-click-link). They expect to see a page that delivers on the promises made by the originating link and page content.
- *Leads responding to campaign emails* are known visitors that land on a targeted page. Some information is already known about them so careful personalized content is required to convert them into customers.
- *Customers responding to campaign emails* who 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 additional purchases (cross-sell and upsell).
- *Customers that log in to portal pages* are often established customers or partners looking for specific data on products or services they have already purchased. They are typically well informed and knowledgeable and expect the site to quickly direct them to the information they need.
- *Staff members that log in to portal pages* to access privileged information usually pulled directly out of the CRM. A portal page can be constructed to let staff members create, update or delete CRM data as required.

How can a single website be flexible enough to meet such a diverse range of visitor needs? The solution is to personalize your website based on the recent history of the visitor. If the history is unknown, then personalize the site content based on the browsing behavior during the current visit.

It is obvious that you will increase sales when you know your prospects and customers better. What you learn from web, phone, email and social interactions should be aggregated and used to improve future conversations. Since this is a key feature of CRM systems, it makes sense to integrate your CMS and CRM so this accumulated intelligence is available to the sales/marketing team.

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 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.
- Enable the CMS content can be personalized from the CRM so visitors get a better browsing experience when they return to the site.
- 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 CRM contact record with the likes of address changes and subscription information.

- Add email personalization to CRM campaign emails to enable recipients to receive targeted emails sent out under a flexible automation (unattended) process.

4. Keeping Visitors on your Website

Marketing strategies like SEO, Internet advertising, social media, blog posts, eBooks, white papers, webcasts (webinars) and email marketing all draw visitors to your website but typically they are unknown (anonymous) when they land on the site. After investing time, effort, and money into driving visitors to your site you must immediately get their attention and motivate them to fill in a lead form or buy a product/service.

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

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 and 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 so the experience can be automatically resumed 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 you with an 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/or immediately after form submission) to engage the visitor further and immediately answer questions the visitor may have.

When a visitor submits a web form, it is vital the data is automatically added to the CRM and they receive an immediate response as part of the sales process -this is due to user conditioning. The response 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. Ideally an integrated system would enable an automated email to be sent directly from the CRM.

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 mass communicate with these leads in future, the CRM should automatically add each new lead to a designated campaign.

Once a lead is in the CRM, an entire suite of tools is available to 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, when S4S pushes the web browsing history of the new lead to Salesforce, this raft of information is available to the sales team at a time when it is most needed - before making the first sales call. CRM reports can be created using this information to identify high priority prospects. The information exposed in the lead by S4S 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).
- Level of technical expertise based on articles read.
- Country of origin (and, in many cases, company).
- Topics of interest such as:
    - specific products and services.
    - your company’s team and management structure.

Together with the data gathered on the registration form, the sales team will be confident they are well prepared when initiating the first sales call.

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 complete, relevant, accurate, timely and accessible (CRATA). Customers updating their personal information on the website have the changes automatically saved to their CRM record where it can be more intelligently utilized.

During early sales calls and emails, as the team learn more about the prospect, particularly their preferences and idiosyncrasies, this info can be entered directly into the CRM against their lead record. Leads are often converted to contact records where the individual will join the pool of clients. In many cases, businesses will want to enable contacts to log in to a portal on the main website to access special offers. The full benefits of a portal:

- Retaining customers by offering them their own space. Logging in is like using a key to open the door to a friendly and familiar place – humans like to have their own space.
- 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.

To easily implement a portal, S4S stores the login credentials, including the Sitecore role and preferences, in their Salesforce contact record. This optional feature, called the Security Connector, checks for a matching username and password in Salesforce when customers log in to the portal.

The 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 instruct what content to show the customer next time they log in. This might be a simple greeting message, targeted advertising or a directive to open a particular landing page.

The Security Connector also helps excite hot leads. For example, if your sales team attends a conference and returns with a collection of new prospects, the information can be entered into the CRM and an email invitation send to each prospect inviting them to visit the corporate website. A link in the email will take them to the corporate website where they are automatically logged in and presented the page relevant to their interest.

7. Leveraging Integration for Email Campaigning

Before an email campaign can be dispatched, the recipient list must be carefully compiled in the CRM. This process requires careful thought to identify target segments using the available data. The surfacing of website browsing data in the lead or contact record adds additional attributes and makes this task easier.

After segmentation has been completed the emails can be dispatched directly from the CRM or via an email automation platform like Salesforce Marketing Cloud. Alternatively, marketers can use S4S to pull the marketing list, typically a Salesforce report or campaign, into Sitecore for dispatch via Sitecore EXM. Marketers use an 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 option, called Split AB Testing, sends out batches of emails targeting the same market and is used to determine the most effective message.

After the emails have been sent, Sitecore starts to collect and store analytics, like email open and click-through rates. The S4S EXM module pushes this information back to the Salesforce lead or contact record to complete the round trip.

8. Closed Loop Marketing

Measuring and determining 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 how your prospects and customers responded to campaigns launched from your CRM.

Using S4S, the sales and marketing teams can identify the level of engagement – if emails have been misdirected or ignored, which have been opened, and if links within the email body have been clicked (click-throughs). In the latter case, if an email link points to your companies 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 at a granular level.

The intelligent integration lets both your Sales and marketing teams track your prospects across email and website interactions. This enables the effectiveness of campaigns at both campaign and individual levels to be determined.

9. Summary

We have looked at how leveraging the S4S integration 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 developed or customized over the years but they are rarely connected. Your CMS and CRM are large investments that deal with your prospects and customers, the same people! Intelligently integrating them has obvious advantages.

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

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