

WORKATO FOR MARKETING **DATA INTEGRATION**



In this advanced information age, companies rely on applications and software to perform their daily job functions. Today, over 75% of marketers now utilize some form of automation, and 77% of those who have switched to automated solutions have seen an increase in conversions. This switch not only helps marketers automate repetitive tasks but also allows for a more customized experience for their customers.

According to new research by Accenture, nearly 87% percent of organizations feel that traditional experiences no longer satisfy the customer. A recent survey by Ascend2 found that 44% of marketers consider delivering personalized content to be the biggest barrier to success.

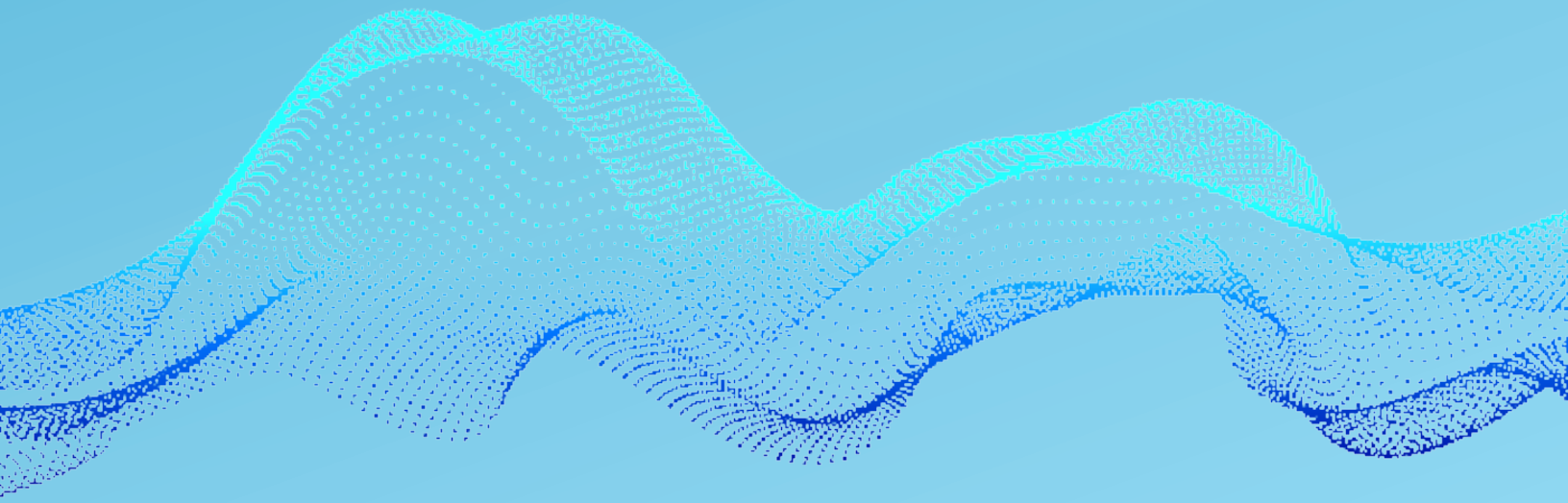
Marketing integration and automation is the only way to reach the intended customer in a personalized manner. Without an integrated stack and automated work, companies suffer from a Frankenstein-like system with disconnected core systems, causing data inaccuracy, challenges, and inefficiencies that impact the customer experience and ultimately revenue potential.

There is a better way to harness customer data—one of the greatest assets your company owns. Let's review how a successful data integration strategy and the right technology can turn your data into a competitive advantage.

In this playbook we will cover four key ways integrating customer data sources can drive value so you can better lead your company to the top.

These include:

- 1. DATA INTEGRATION FOR IMPROVING THE CUSTOMER EXPERIENCE**
- 2. DATA INTEGRATION FOR SALES AND MARKETING ALIGNMENT**
- 3. DATA INTEGRATION FOR COMPLIANCE**
- 4. DATA INTEGRATION FOR ANALYTICS**



DATA INTEGRATION FOR AN IMPROVED CUSTOMER EXPERIENCE

If you are like most companies, there isn't one tool or even a suite of tools that can handle all of your marketing needs.

This leads to siloed marketing data within the organization. But as competition heats up, it is now more important than ever that all applications work together so you can be successful.

After its employees, the most valuable tool of any company is its customer data. There are a few ways to aggregate this data: native connectors, integration as a service platform, customer data platforms, data lakes, and/or custom development using ETL (extract, transform and load) processes. If native connectors aren't an option we recommend using an Integration as a Service (IaaS) tool, like Workato, which transforms basic sales and marketing systems into smart data flows you can control without writing code or needing your IT team to support.

These integrations allow marketers to build out segments that can be activated dynamically in campaigns as well as provide the business unit with dashboards that include key information about prospect activities. When looking for the right platform or approach, make sure that the solution can meet all aspects of the customer data lifecycle. These include the ability to:

- 1** Build connections with many data sources to collect customer activities.
- 2** Standardize data from multiple applications into a consistent format.
- 3** Transform and enrich activities into a master customer record.
- 4** Integrate with customer-facing platforms.
- 5** Activate campaigns dynamically in all marketing channels.

DATA INTEGRATION FOR SALES AND MARKETING ALIGNMENT

Poor communication means lost opportunities. And, between sales and marketing, this becomes a real problem. The results: decreased revenue, poor customer experiences, and higher marketing costs. A recent Gartner study found that half of the sales time is spent on unproductive prospecting, with 70% of marketing leads unleveraged or ignored. Wasted opportunities, wasted time, and wasted dollars.

Fortunately, there are several proven plays to optimize sales funnel tactics to maximize efficiency, reduce costs, increase pipeline and supercharge growth:

- 1 Formally align leads between sales and marketing.
- 2 Employ effective lead scoring.

Formally Align on the Lead Process

According to research less than half of companies have an agreed-upon definition of a lead. Given this confusion about what qualifies a lead as sales-ready, it's not surprising to find frustration around the topic of lead quality.

Sales and marketing leadership must collaboratively identify the criteria that constitute a sales-qualified lead. Marketing should continue to nurture prospects that don't meet these criteria and keep moving them through the funnel until they become sales-ready.



Go through each product or service, considering demographic (title, company revenue, number of employees, etc.) and engagement (attending events or webinars, visiting the website, downloading whitepapers, clicking on emails, etc.) metrics to determine what types of prospects your sales team wants to see. You should also employ data analytics to see how the perceptions of your sales team match actual lead and opportunity data.



Success metrics need to be aligned between sales and marketing. This means sharing key financial targets — like the number of marketing qualified leads, the percentage of leads that qualify for an opportunity, the amount of pipeline generated, the closed-won rate, and ultimately the top-line revenue number.



The two units must agree on a customer hand-off process and a service level agreement for outreach based on interactions with the other unit.

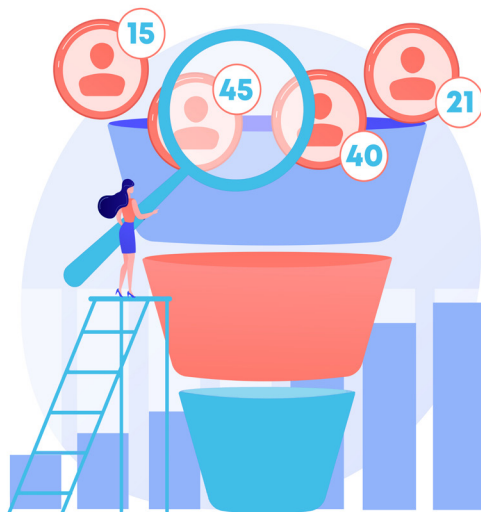
Employ Effective Lead Scoring

Lead scoring has been around for a while and nearly every sales rep or marketer agrees that effective lead scoring pays dividends. Companies with lead scoring mechanisms see 77% higher lead generation ROI than their counterparts. However, there is generally a large gap between what companies hope to accomplish with lead scoring and what lead scoring achieves.

COMPANIES WITH LEAD SCORING MECHANISMS SEE **77% HIGHER LEAD GENERATION** ROI THAN THEIR COUNTERPARTS.

The first step to setting up lead scoring — after defining criteria for marketing qualified leads — is to determine which data points should be scored and how to weigh them. The data points that offer value might be different for each business depending on sales strategy, various buying channels, and growth strategy.

Well-integrated systems move prospects down the funnel, adding value at every step. The company that best articulates how it meets a need generally wins the sale.



DATA INTEGRATION FOR COMPLIANCE

Most marketers have heard of acronyms like GDPR, CAN-SPAM, CASL, and even CCPA to describe customer data regulations. While many have enacted rules for sending emails and for gathering consent on their website to comply with these regulations, most struggle with how to scale these rules in systematic ways across all digital channels.

It's no secret that a marketer's chief goal is to drive revenue for their organization. On top of legal considerations, marketers are caught between the mandate to generate revenue growth and a changing strategic landscape — with more distribution channels, significant technological transformation, greater customer expectations, and increased advertising costs — successful companies must reimagine the role of marketing within an organization.

We believe that starts and ends with how a company manages its customer data pipeline. Gone are the days of traditional marketing that focused solely on marketing-specific objectives like brand awareness, content creation, and generating impressions. While fully robust solutions can take time to implement these five common-sense actions will set you up for success:



Consent: At every touchpoint, you should try to gain consent. This doesn't just include the ubiquitous cookie policy that allows users to opt-in or opt-out of behavioral tracking. It also includes attempting to get consent when users fill out forms, register for an account, or purchase products. This consent must be managed in real-time and integrated with other connection points to avoid conflict between data in different systems.



Choice: It is important to give users the ability to consent to certain messages while restricting others. A good example of this is a preference center or a subscription center.



Combine: Bringing data together from different systems is paramount to your master data management strategy. Most systems have some data on a customer, but only when it is all combined do you see the complete 360-degree picture of the customer so that you can better target.



Centralize: A master record that combines the most up-to-date user information and activities offers a level of insight that is second to none. This central record will allow you to execute information in real-time (For example: web personalization, targeted emails, etc.)



Conservation: Keeping data fresh not only means your messages hit the right people, but it also leads to a reduction in costs through more cost-effective campaigns and decreased data storage costs.

DATA INTEGRATION FOR ANALYTICS

According to the latest CMO Survey Report, chief marketing officers use marketing analytics less than 40% of the time in the decision-making process. How are these results possible when there is more customer data science available than ever before? Especially when studies have shown the benefits of insights at scale.

FIRMS THAT USE INSIGHTS SYSTEMICALLY ARE
2.8 TIMES MORE LIKELY TO REPORT
DOUBLE-DIGIT YEAR-OVER-YEAR GROWTH.

This results from the inability of most companies to collect, aggregate, standardize and attribute their customer data pipelines. This disconnect leads to lost revenue due to stock-outs, failing to solve a customer's need, or increased costs due to operational inefficiency. We believe this shouldn't be accepted as a cost of doing business and that your data holds the key to unlocking this trapped revenue.

There are two critical ways that companies can use data to deliver better analytics for decision making -- data visualization and data attribution.

Data Visualization

The realization that data can help make better decisions has never been higher. However, due to numerous factors (including the sheer amount of data, data silos within organizations, poorly designed business processes, talent shortages, and even the lack of real-time dashboards) organizations haven't been leveraging the value of their data. This means opinion-driven decisions over data-driven decisions.

1. The first step for any organization is to set up a strong data foundation, connect systems, map data elements, and standardize data.
2. The second step involves a change in mindset for most organizations. Companies must be willing to embrace the democratization of data, meaning that data is freely shared between different platforms and business units so the right people have access to the data.
3. Finally, shift from a centralized reporting model to a more decentralized self-service strategy. There should be a centralized team that connects, manages, and validates data from different systems, creating a single source.

Data Attribution

With multiple touchpoints over different lengths of time, marketers need to understand what assets or a mix of assets drive value. Individual statistics don't just impact performance, it impacts who gets a bonus or a promotion.

The same is true in your company. While the salesperson closes the lead and gets the commission for a B2B sale, there was nurturing that led to the close.

It might look like this:

An in-person event that generated that lead. There was an on-demand webinar that drove the prospect to sign up for the event. There was a newsletter that highlighted the webinar and led to the registration. There was a paid retargeting campaign that led to the prospect signing up for the newsletter. And there was the organic search ranking that first got the person to the site to learn about the brand and be entered into the retargeting campaign.]

It is doubtful that our example sale would have occurred without the combination of the other five touchpoints.

REAP THE REWARDS

Marketing integration tools are powerful, but unless you have extensive experience, you likely aren't maximizing your investment. But how do you connect, configure and optimize your newest tool and get everyone trained while following the principles discussed in this playbook?

You rely on knowledgeable teammates - Workato and Zirous. A modern enterprise leader recognized by Gartner and a partner with decades of experience. We'll work together to bring you an end-to-end solution you can trust that will quickly get you the most out of your investment and set up your new marketing automation tool to fit your precise needs so you can be a champion.

Contact us today to see how we can help your organization maximize its data.

Unify Data to Uncover a World of Possibilities

Overcome your toughest integration challenges.

Building a 360-degree view of relevant data poses a challenge to organizations. The average enterprise business uses more than 120 applications while small and medium sized businesses need at least 70 different tools to manage their operations. Creating an integrated, single source of truth ensures that each line of business has access to the data required to complete the job- and that it's accurate every time- is a huge competitive advantage in today's digital-driven environment.

Centralize data, prescribe your future.

Workato powers connected experiences to transform your digital business. Zirous brings a half-century of experience driving value for clients through data transformation and integration. Together we give your organization the roadmap and tools to dominate your industry.

Zirous



Workato certified architects and developers.



Customer-centric, holistic architecture approach.



Event-driven, process-oriented integrations.



Modernizes and streamlines integration timeline and development resources needed.

Workato



Build integrations easily and securely.



Collect customer data and build workflows and share info instantly.



Easily accommodate new systems with a future proof strategy.



Utilize data to its fullest extent to fuel better decision-making.

WHO IS ZIROUS?

For 35+ years, Zirous has been the solutions partner of choice for marketing technology, identity and access management, integration, cloud and development.

Our integration practice specializes in the seamless flow of information that powers businesses. Zirous' integration experts have created countless enterprise integrations for clients, bringing together information from multiple platforms and allowing them to get it to the right place when it's needed- supporting every business department with the necessary knowledge to achieve their goals.

WHY ZIROUS?

Our clients love us for three resounding reasons:

- We provide accessible experts that fit company culture.
- We're a partner who understands their business even better than they do.
- We are strategy-focused and not afraid to challenge the status quo.

We know these are true - because we asked! Our clients tell us that we're an essential part of their team and their success because we work **with** them to reach their goals.

All of these things align with our values, which makes this even better news. We're not an in-and-out, one-size-fits-all provider working through as many clients as possible as quickly as possible. We are truly custom solution providers, working through your specific business problems to provide the answers and resources you need to do your job best and boost your bottom line.

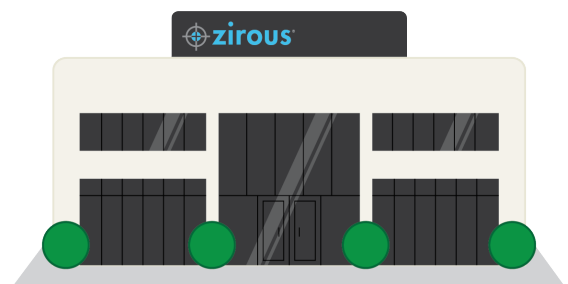
CONTACT

vice president of sales

Mike Spear
mike.spear@zirous.com
(515) 974-5522

headquarters

1503 42nd Street
West Des Moines, IA 50266



zirous.com



/company/zirous



@zirous



/zirousinc