White Paper

Sitecore Salesforce Integration

A look at the S4S connector from FuseIT

31 July 2020

Contents

FuseIT Contact Details

Fuse Information Technologies Ltd
7 Forests Road
Stoke, Nelson
New Zealand 7011

☎ +64 3 547 8200
🖷 +64 3 547 8209
info@fuseit.com

Declaration

1. Introduction

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

CMS websites promote credibility and increase brand awareness but the main goal is engaging visitors to create revenue. Websites must capture new leads and retain existing customers. This duality of purpose makes creating an effective website challenging and makes personalization very important.

The standard approach to capturing leads is to show targeted web content to inspire visitor actions such as submitting a lead form or starting a chat conversation. New leads are captured in the CRM where they can be efficiently processed (qualified, nurtured, converted). Using the CRM with an email automation platform like Salesforce Marketing Cloud or Pardot, existing customers can be kept engaged and excited by personalized interactions and offerings.

Capturing leads and retaining customers requires the CMS and CRM to be integrated so the information collected by each system can be shared. Success depends on choosing the right systems and connecting them with an intelligent integration.

This paper focuses on two powerhouse solutions, Sitecore and Salesforce and how these can be intelligently integrated with the S4S integration.

2. Sitecore - S4S - Salesforce

S4S is an enterprise integration 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 is using pushing Sitecore web form field values to Salesforce lead or contact records. In the reverse, S4S can pull Salesforce data back into Sitecore such as populating product information, surfacing Salesforce documents, or showing communication preferences on the website.

3. The Challenge of Engaging the Visitor

There are at least six different types of visitor that arrive on a website. Each requires specialized management to ensure their needs are met:

- ***Raw prospects*** arrive from unknown sources and land on unpredictable pages. Sitecore must track their behavior, assign a profile, and show personalized content as soon as possible.
- ***Warm prospects*** are visitors that arrive on a landing page after clicking a link e.g. a pay-to-click-link. They expect to see a web page that delivers on the promises made by the originating link and page content.
- ***Leads responding to campaign emails*** are known visitors that arrive on a landing page. Some information is known about them so the personalized content must reflect this.
- ***Customers responding to campaign emails*** who are existing clients. The goal is to expose content that encourages them to make additional purchases (cross-sell and upsell).
- ***Customers that log in to portal pages*** are often established clients or partners. They are often well informed and expect to quickly find the information they need.

- ***Staff members that log in to portal pages*** to access secure information often 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 meet such a diverse range of visitor needs? The solution is to personalize based on what is known about the visitor. If little is known, then personalize based on the browsing behavior of past and present visits.

It is obvious that knowing your prospects and customers better will increase sales. What is learnt from phone, email and social interactions should be aggregated and used to improve future conversations. Collecting intelligence is a key feature of Salesforce and collecting web behavior is core to Sitecore. It therefore makes sense to integrate the two systems so this accumulated intelligence is available to both the sales/marketing team.

The integrated system can:

- Pass contextual insights to Salesforce when new leads or contacts are created from a web form. Sales reps need to see what the prospect did on the website before they submitted the web form.
- Enable the Sitecore content to be personalized from Salesforce so visitors get a better browsing experience when they on, or return to, the website
- Provide tools so the website can be used to augment sales calls, for example, populating website links from Salesforce in real time.
- 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 Salesforce so customers can log in and update their contact record.
- Personalize campaign emails based on web behavior, for example, if Sitecore has identified the visitor's profile, use that to personalize outbound emails.
- Permit the real time exchange of data between objects in both systems, for example, create a Salesforce contact from a Sitecore web form.

4. Keeping Visitors on your Website

Marketing strategies like SEO, Internet advertising, social media, blog posts, eBooks, white papers, webcasts (webinars) and email marketing draw visitors to your website but they are usually unknown when they land on the website. The key is to motivate them to fill in a lead form or buy a product or service.

It is important that visitors' expectations are met! Each will have an expectation created by the context of the link they clicked or their search phrase. For example, if linking from Google AdWords they should land on a 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 segmented content with clear and understandable headlines so visitors can quickly scan and understand the information.
- Present facts that let visitors evaluate the offering and differentiate your company. Use contextually appropriate language and content familiar to the visitor.

- Provide a personalized experience. Use implicit personalization to build up a profile based on the visitor's behavior so far, and then use rules-based personalization to deliver targeted content. Save the personalization information so the experience can be automatically resumed when the visitor returns.
- Make it easy to get more information. Visitors must instantly recognize how to navigate the website to find information and forms. Forms should be simple and seek a minimum of information.

5. Processing Leads Intelligently

Enthusiastic visitors will submit a lead form. This is a critical moment because at no other time will they have such a high level of interest in your product or service. An 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 they may have.

When a visitor submits a web form, the clock starts ticking! The form data needs to be in Salesforce quickly so the sales team can respond immediately. The response can be an automated thank you or something more complex like a special offer. Like the website, the response email needs to focus 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 the future, the CRM should automatically add each new lead to a designated campaign.

Once a lead is in Salesforce, an entire suite of tools is available to progress it through the sales funnel. This is extended in an integrated system. S4S, for example, pushes the web browsing history to Salesforce so the sales team have vital sales intelligence prior to making their first sales call. Salesforce reports can be created using this information to prioritize leads based on their web behavior (page count, pages visited, Sitecore goals attained, total goal score etc.).

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 state of mind of the visitor:

- Level of enthusiasm (time on site).
- Level of technical expertise based on articles viewed.
- Country of origin (and company).
- Topics of interest such as:
    - specific products and services.
    - "About Us", checking out the team and management structure.

Together with the field data gathered on the web form, the sales team are well prepared to initiate a sales call.

6. Giving Customers a 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 Salesforce where it is more accessible and can be used intelligently.

During early sales calls and emails, as the team learn more about the prospect, particularly their preferences and idiosyncrasies, this info can be added to their Salesforce lead record. Leads are converted to contact records when the individual becomes a client. In many cases, businesses will want to enable contacts to log in to a portal on the main website to access special offers. The benefits of a portal are:

- Retains 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 increased security, access to resources and functionality and know they are in a unique membership group.
- Your organization can track and target customers with focused content, personalized offers, feedback requests, invitations and more, all away from the eyes of 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 S4S Security Connector feature opens up opportunities. For example, values in the Salesforce contact record can instruct Sitecore to show specific content when they next 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 leads. For example, if your sales team attends a conference and returns with a collection of new prospects, the information can be entered into Salesforce 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 personalized content.

7. Leveraging Integration for Email Campaigning

Before an email campaign is dispatched, usually the recipient list is compiled in Salesforce. 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 to make this task easier.

After segmentation the emails can be dispatched directly Salesforce or via an email automation platform. Alternatively, marketers can use the S4S List Builder to pull 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. For example, 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, the automation platform collects and store analytics, like email opens and click-through rates.

8. Closed Loop Marketing

Closed loop marketing is when the prospect or customer ends at the starting point, in this case, the Sitecore website. To implement closed loop marketing requires an identifier in all three systems (Sitecore, Salesforce and the email automation system). The id could be a membership number or any id that is auto-generated in Salesforce when a new lead is created.

A typical example is as follows:

1. A website visitor submits a Sitecore form.
2. A new lead is created in Salesforce and given an id.
3. Salesforce leads have been mapped to the email automation system so the id now appears in the matching subscriber record in that system.
4. An email campaign is prepared. The email contains a link to the Sitecore website that includes the id as part of the link (parameter).
5. The campaign emails are dispatched.
6. A recipient opens the email and clicks on the link.
7. The Sitecore website opens in a browser and S4S reads the id from the link parameter
8. S4S saves the id in the Sitecore visitor record.
9. S4S updates the Salesforce lead record with the visitors browsing analytics.

Closing the loop in this way aggregates the information in each system giving all parties a better understanding of the prospect.

9. Summary

The S4S integration intelligently integrates Sitecore with Salesforce and has the potential to radically transform your organization. Capturing visitor website behavior then passing that to Salesforce provides the sales team with invaluable pre-sales information. Passing the same information to the email automation platform means email content can be personalized based on the recipient's website behavior. S4S allows sales and marketing teams to track prospects across email and website interactions.

Sitecore and Salesforce are significant investments that need to be used effectively and intelligently integrating them has obvious advantages.

10. Author Information

Terry Humphris
CEO and Director of Technology
FuseIT
thumphris@fuseit.com