Product Sheet

Advanced CRM Mapping

More Custom Data = More Personalized Engagement

As each company is unique, so is the data they collect, how it's organized and stored, and how they want to use it.

With Act-On's Advanced CRM Mapping (for Salesforce, SugarCRM, and Microsoft Dynamics), data from nearly any object or entity can be integrated and leveraged for better measurement, segmentation, and more personalized, relevant engagement.

Common challenges advanced integrations can help solve:

- Traditional sedmentation is impersonal, authentic personalization is hard
- Impacting customer churn is difficult without the right data/insights
- Identifying upsell or cross-sell opprotunities is often guesswork or very manual

How Advanced CRM Mapping Can Make An Impact:

Segmentation & Personalization

Create more relevant, personalized messages to boost engagement at any stage of the customer journey

Enhance CRM Data

Create new records or enrich your existing database with new attributes, lead score, behavior activity, etc.

Advanced Automation

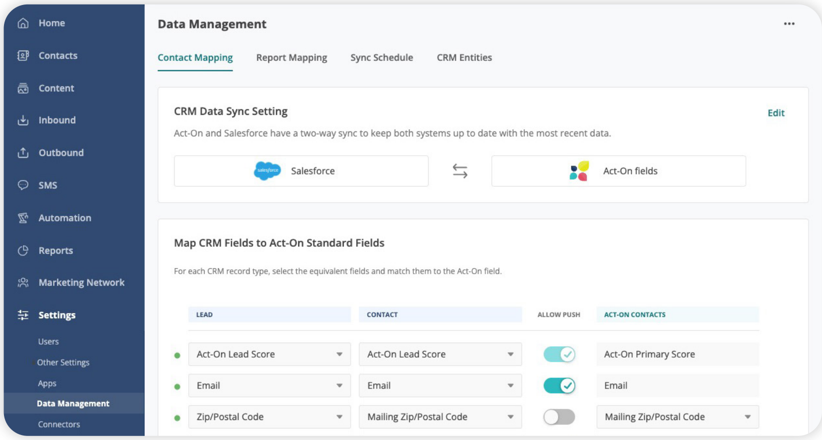
Ensure contacts always receive the best messages by routing them to the most optimal programs or create more advanced if/then scenarios

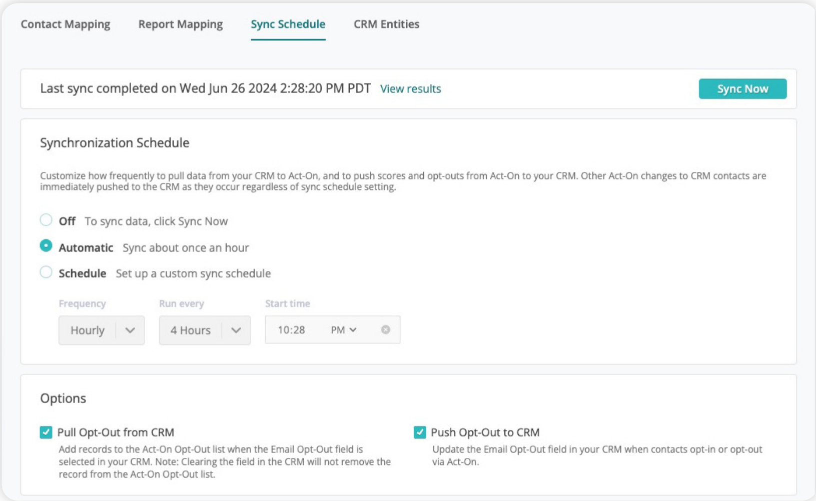
Behavior Tracking

Build a more holistic view of customers to prevent customer churn, identify upsell opprotunities, or score and target more effectively

Example Use Cases

A company is leveraging a 3rd party platform to track usage data in their product and has integrated it with Salesforce as a custom object. Leveraging this usage data in Act-On via Advanced CRM Mapping allows the company to:





- **Create new segments** that target power users, primary users vs business contacts, and/or users that haven't utilized certain areas of the product or test accounts
- **Personalize campaigns** such as tips and tricks for new/infrequent users, detailed release notes for primary users, and best practices and strategies for business users
- **Drive internal email campaigns** that equip account managers with the data needed to follow up on customers that may be at risk or near the end of a contract

More questions?
Call us at +1 (877) 530-1555 for help,
or contact your success representative directly

Contact Us

www.act-on.com