

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 segmentation is impersonal, authentic personalization is hard
- ✓ Impacting customer churn is difficult without the right data/insights
- ✓ Identifying upsell or cross-sell opportunities 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 opportunities, 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:

The screenshot shows the 'Data Management' section of the Act-On interface. The left sidebar contains navigation links: Home, Contacts, Content, Inbound, Outbound, SMS, Automation, Reports, Marketing Network, Settings, Users, Other Settings, Apps, Data Management, and Connectors. The main content area is titled 'Data Management' and has tabs for 'Contact Mapping', 'Report Mapping', 'Sync Schedule', and 'CRM Entities'. The 'Contact Mapping' tab is active, showing 'CRM Data Sync Setting' with a description: 'Act-On and Salesforce have a two-way sync to keep both systems up to date with the most recent data.' Below this is a visual representation of the sync between Salesforce and Act-On fields. The second section, 'Map CRM Fields to Act-On Standard Fields', provides instructions: 'For each CRM record type, select the equivalent fields and match them to the Act-On field.' It features a table with columns for 'LEAD', 'CONTACT', 'ALLOW PUSH', and 'ACT-ON CONTACTS'. The 'LEAD' and 'CONTACT' columns have dropdown menus for mapping fields like 'Act-On Lead Score', 'Email', and 'Zip/Postal Code'. The 'ALLOW PUSH' column has toggle switches, and the 'ACT-ON CONTACTS' column has dropdown menus for 'Act-On Primary Score', 'Email', and 'Mailing Zip/Postal Code'.

- **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

The screenshot shows the 'Sync Schedule' tab within the 'Data Management' section. It displays the 'Synchronization Schedule' settings. At the top, it shows 'Last sync completed on Wed Jun 26 2024 2:28:20 PM PDT' with a 'View results' link and a 'Sync Now' button. The 'Synchronization Schedule' section includes a description: 'Customize how frequently to pull data from your CRM to Act-On, and to push scores and opt-outs from Act-On to your CRM. Other Act-On changes to CRM contacts are immediately pushed to the CRM as they occur regardless of sync schedule setting.' There are three radio button options: 'Off' (To sync data, click Sync Now), 'Automatic' (Sync about once an hour, selected), and 'Schedule' (Set up a custom sync schedule). The 'Schedule' option is expanded, showing 'Frequency' set to 'Hourly', 'Run every' set to '4 Hours', and 'Start time' set to '10:28 PM'. Below this is an 'Options' section with two checkboxes: 'Pull Opt-Out from CRM' (checked) and 'Push Opt-Out to CRM' (checked). The 'Pull Opt-Out from CRM' option has a description: 'Add records to the Act-On Opt-Out list when the Email Opt-Out field is selected in your CRM. Note: Clearing the field in the CRM will not remove the record from the Act-On Opt-Out list.' The 'Push Opt-Out to CRM' option has a description: 'Update the Email Opt-Out field in your CRM when contacts opt-in or opt-out via Act-On.'

- **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