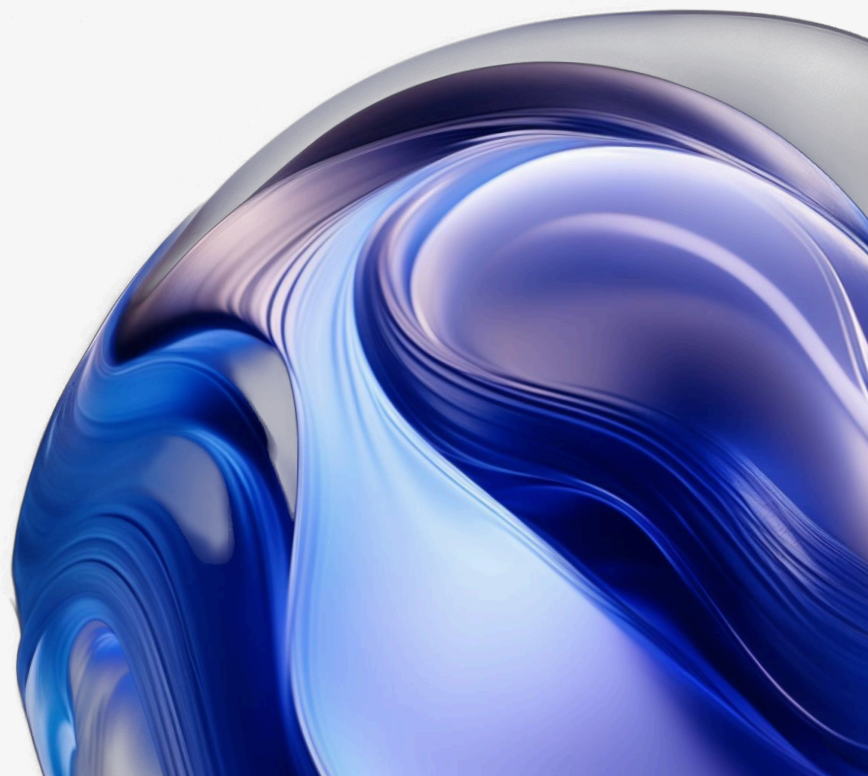


# How Optimizing Marketo-Salesforce Sync Resulted in **Faster Sales Cycles** for a B2B Company



A B2B company that had implemented Marketo for marketing automation and Salesforce as its CRM faced challenges with data inconsistency between the two platforms.

Sales teams were frequently missing out on real-time lead engagement data, while marketing teams struggled to nurture leads effectively due to incomplete or outdated CRM data.

This disconnect resulted in slower sales cycles, inefficient lead handling, and missed opportunities.

## Solution



To address the problem, Xgrid helped them implement a comprehensive integration between Marketo and Salesforce, ensuring that both platforms were seamlessly synced and up-to-date.

The integration was carefully configured with a focus on maximizing sales and marketing alignment. The process involved:

### **Defining Key Data Elements:**

The sync was set up to synchronize crucial data points such as leads, opportunities, activities (e.g., email opens, webinar sign-ups), and custom fields between Marketo and Salesforce.

## Sync Flow Setup:

- **Lead Sync:** A two-way data flow was established, ensuring that any lead created in either platform was automatically pushed to the other system, along with associated details like lead score, lifecycle stage, and engagement metrics.
- **Real-Time Updates:** The sync was configured to update lead statuses, scores, and activity data in real-time, allowing the sales team to access the latest marketing insights on leads.

## Conflict Resolution:

Data conflict rules were put in place to ensure that in case of discrepancies between the two platforms, the most authoritative data source (either Salesforce or Marketo) would be prioritized.

## Field Mapping and Data Quality:

Standard and custom fields were mapped between the two platforms, ensuring that data types matched, and that information flowed accurately from one system to the other.

## Testing and Monitoring:

Before going live, the integration was thoroughly tested by creating test leads and verifying that data was syncing correctly between both systems. After going live, the team set up a monitoring dashboard to track sync performance and resolve any issues promptly.

# Results



## **Improved Lead Qualification:**

By syncing Marketo's lead scoring with Salesforce, the sales team was able to focus on high-priority leads, resulting in a 30% increase in conversion rates.

## **Faster Sales Cycles:**

With real-time access to up-to-date lead and engagement data, sales reps were able to act on leads more quickly, reducing the average sales cycle by 20%.

## **Better Marketing-Sales Alignment:**

Marketing teams gained insights into sales progress and could optimize campaigns based on real-time feedback from the sales team, leading to a more cohesive strategy and a 15% improvement in ROI from joint campaigns.

## **Enhanced Data Accuracy:**

With the conflict resolution rules in place and regular monitoring, data discrepancies were minimized, ensuring that both marketing and sales teams were working with the same accurate, up-to-date information.

## Key Takeaways



- 1** Personalization in the "From Address" significantly boosted open rates and engagement.
- 2** A carefully configured sync process not only saved time but also reduced errors, resulting in more accurate lead handling and faster sales cycles.
- 3** Collaboration between marketing and sales teams became much smoother, as both teams had access to the most current data.

## Best Practices Derived



- 1** Ensure data quality by implementing validation processes on both platforms before setting up the sync.
- 2** Automate workflows between the two systems to maximize efficiency, such as automatically converting high-scoring leads to opportunities in Salesforce.

- 3 Regularly monitor the sync and perform tests to ensure everything is functioning smoothly and without errors.

By aligning marketing and sales systems through proper integration, the company was able to optimize its processes, resulting in enhanced productivity, better customer engagement, and increased revenue.