

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



ADVANCED AUTOMATION

Ensure contacts always receive the best message 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



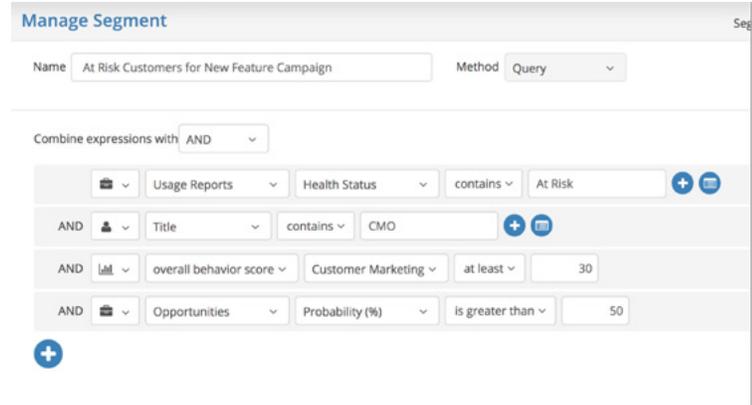
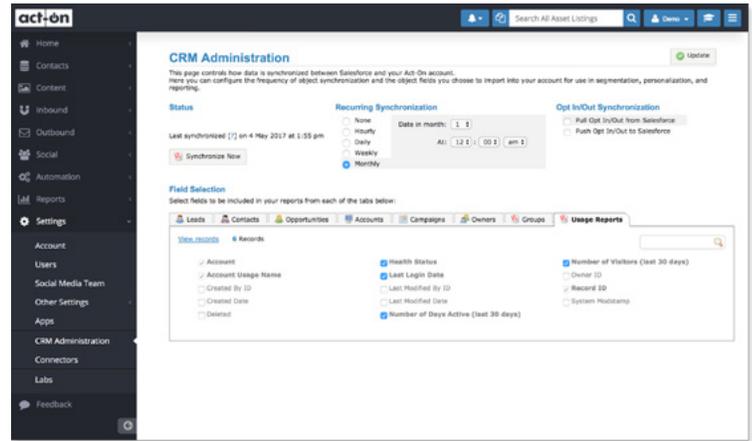
ENHANCE CRM DATA

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

Example Use Case

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, advanced strategies for power 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



Getting Started

Contact your account representative to learn more about how to get Advanced CRM Mapping and start leveraging the full breadth of your CRM data.

About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.

Connect with us to learn more