

Note: Salesforce.com (CRM) Connector is available through Acquisio Business Solutions. Contact your Acquisio Account Manager or Sales Executive for more information.

Are you tracking your online conversions? Good, that's a great first step. If your business model is similar to ours, then tracking a conversion is only half of the equation. If you're using conversion tracking to track leads, then you're likely assigning an arbitrary value for the conversion. You probably have a Customer Relationship Management (CRM) such as Salesforce.com that ultimately captures the sales opportunities these leads generated. To truly see the value of your marketing initiatives, you would need to connect the two disparate pieces.

Through Acquisio's automated Unique ID Encoding, we can link your offline qualified leads, sales opportunities and their associated revenue back to the originating keyword. With this data mapped back to our platform, not only can you astonish with highly-detailed reports, but you can also act on this valuable information in Campaign Automation.

## Unique ID

The driving force behind this integration is Acquisio's Unique ID. We can automatically append our own unique keyword tracking parameters to your destination URLs for use by 3<sup>rd</sup> party analytics services, call tracking providers and CRMs.

Think of our Unique ID as a baton that's passed in a relay race. The first step is to auto-encode your destination URLs with Acquisio's Unique ID. Then, when an ad is clicked, the race starts and the Unique ID parameter (trkid=) from the destination URL is captured by the landing page and carried through the user session. The trkid parameter is passed to your CRM on form completion. These offline conversions and their associated revenues are then mapped back to the keyword in Acquisio.



## CRM Conversion Mapping

Whether you're using a mainstream or proprietary CRM solution, the process to integrate your CRM data and map it back to Acquisio is essentially the same. With the trkid parameter passed to your CRM,

you will need to automate a CSV file to our FTP server. We will then automate the import of reported conversion and revenue metrics to Acquisio at the keyword level.

## Salesforce.com Integration

For our Salesforce.com integration, we connect to the Salesforce.com API to acquire actionable insights to help optimize PPC campaigns and to include offline revenue in your ROAS calculation in Acquisio. Our Salesforce.com link can map the following to the keyword that originated the marketing effort:

- Leads (online),
- Qualified leads (offline),
- Sales opportunities and associated revenues (offline), and
- Sales opportunities (closed won) and associated revenues (offline).



### Leads

The Unique ID parameter in the destination URL can be passed to a predefined field in Salesforce.com via a Salesforce.com Web-to-Lead Form. Alternatively, a 3<sup>rd</sup> party vendor such as Marketo can be set up to pass this information to Salesforce.com.

### Qualified Leads

Salesforce.com can be set up to pass the destination URL (or the trkid parameter) to the Contact when the lead converts, which can then be mapped as a “qualified lead”. Not all leads are created equal. You may want to use a lead scoring process to categorize your leads (e.g., Lead Score > 10 = Qualified Lead).

### Sales Opportunities and Associated Revenues

We can also fetch all opportunities or a specific set of predefined opportunity types to give a count of the sales opportunities as well as their associated revenue. We will map the count and revenue to the

originating click by referring to the associated Salesforce.com Contact record to identify the original URL. Optionally, we can do a secondary reference of all contacts in the Salesforce.com account for an original URL to map the sales opportunity and revenue to the originating click.

Note: We can only map conversions and revenues for offline events related to leads that originate from clicks on ads with URLs encoded with an Acquisio Unique ID.

### Setup Requirements

To integrate Salesforce.com, all of the following requirements must be met:

- The campaigns need to reside in Acquisio so you will need to import them into Acquisio if that is not the case.
- Through External Data Sources in Admin, you must set up and maintain the Acquisio Unique ID auto-encoding process. If new campaigns are created, you must associate the campaign so that the URLs are encoded with the trkid.
- Your website needs to be properly set up to pass destination URLs through each user session.
- A Salesforce.com Web-to-Lead Form or Marketo must be enabled to pass the required Unique ID parameter (trkid) from the destination URL into a specific field in Salesforce.com.
- Salesforce.com then needs to pass the trkid from the Lead to the Contact when the lead converts.

Note: In order to access your Salesforce.com account, you will need to give us read-only API access to an email address we'll provide to you.