

## WHITEPAPER

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# 6 Benefits of Data Integration with Salesforce

In the age of digital transformation and resulting business transformations, organizations need to reconsider the vision they have of their customers.

The implementation of a CRM platform, such as Salesforce, is a logical step to developing a 360° vision of customers.

However, setting up Salesforce is not an end in itself.

Key success points of this Client 360° strategy are the complete integration of Salesforce into the information systems, organizational processes, and the design of effective integration architecture.

# \$12.9 million

« Every year, poor data quality costs organizations an average \$12.9 million. Apart from the immediate impact on revenue, over the long term, poor quality data increases the complexity of data ecosystems and leads to poor decision making » <sup>1</sup>

<sup>1</sup> Gartner, July 2021, [12 Actions to Improve Your Data Quality \(gartner.com\)](https://www.gartner.com/doc/4688888)

## Introduction

**In the age of digital and business transformation, organizations need to prioritize KYC – or the knowledge they have of their customers.**

The implementation of a CRM platform such as Salesforce is often an integral part of developing a 360° view of customers.

However, simply setting up Salesforce is not going to help you. In order for Salesforce to be truly effective for a «Client 360» strategy, it requires integration with relevant Information Systems, business processes and most importantly - data. Customer data is at the heart of an organization's key processes. Capturing, cleaning and distributing this data efficiently is the key for gaining the greatest benefit.

The same holds true for CRM systems like Salesforce. In order to work effectively, data and workflows from your business should integrate seamlessly and automatically with your CRM.

This requires logical and controlled integration and orchestration of the data flows between Salesforce and applications such as your ERP, the website, e-commerce, data repositories (articles, products, regulatory, etc.), accounting, analytics applications (BI, Big Data), and many others.

The design of an effective Salesforce integration architecture is one of many important steps to a successful outcome - ensuring your organization has access to information in real-time for more accurate revenue projection, a clearer view of your current and potential customers, and a high return on investment.

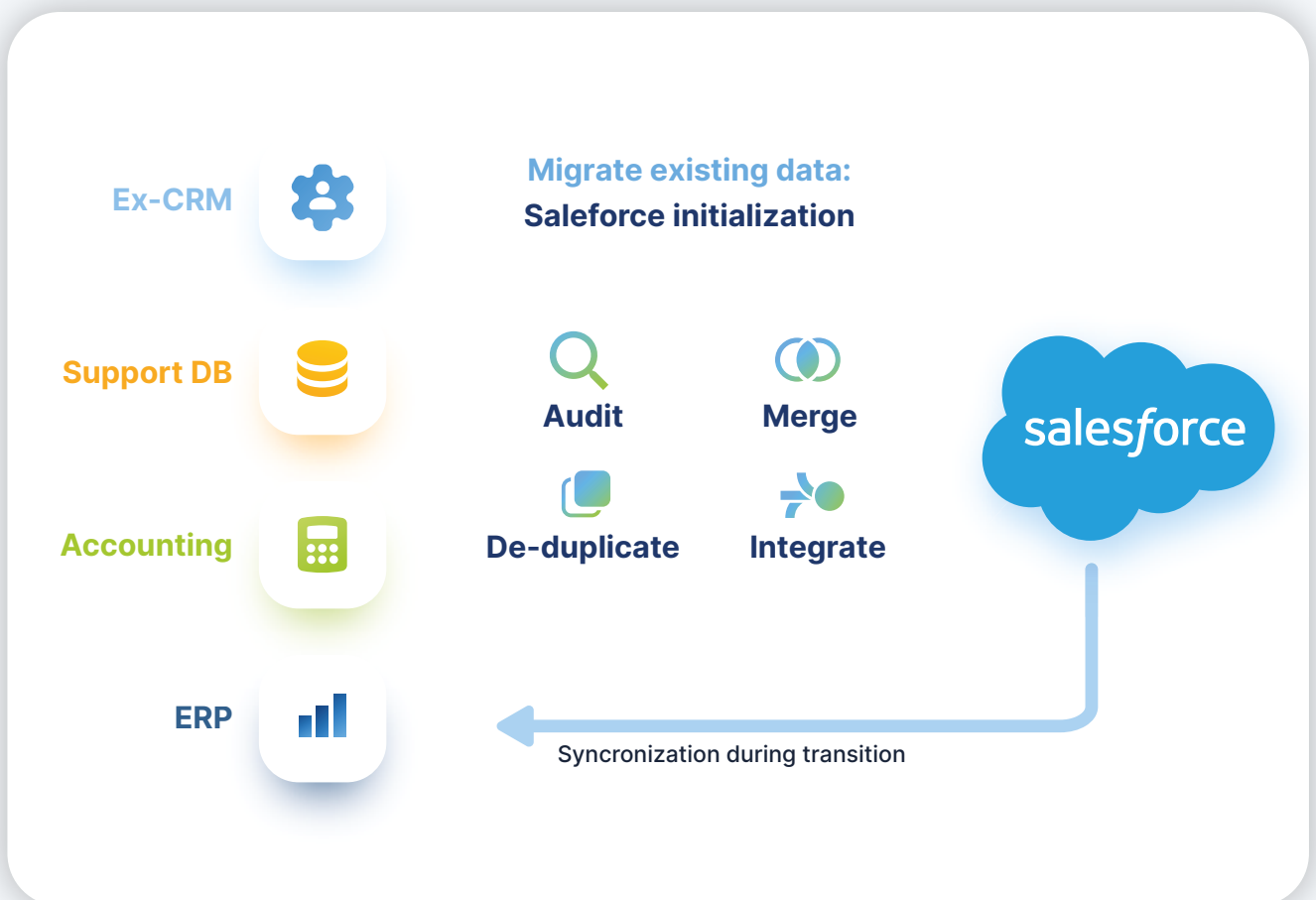
# 1. Simplify Your Migration to Salesforce to the Business Team

Implementing Salesforce in the organization requires combining existing data from multiple sources, like an existing CRM, ERP, or other databases.

In addition, this migration usually needs to be operational during a certain transition or parallel processing period with the old systems.

The integration rules ensure the audit, merge and deduplication of data from multiple sources into one.

With data integration in place, you can implement a partial or complete synchronization or parallel process of old and new systems during the data migration period - reducing double data entry and simplifying the process.



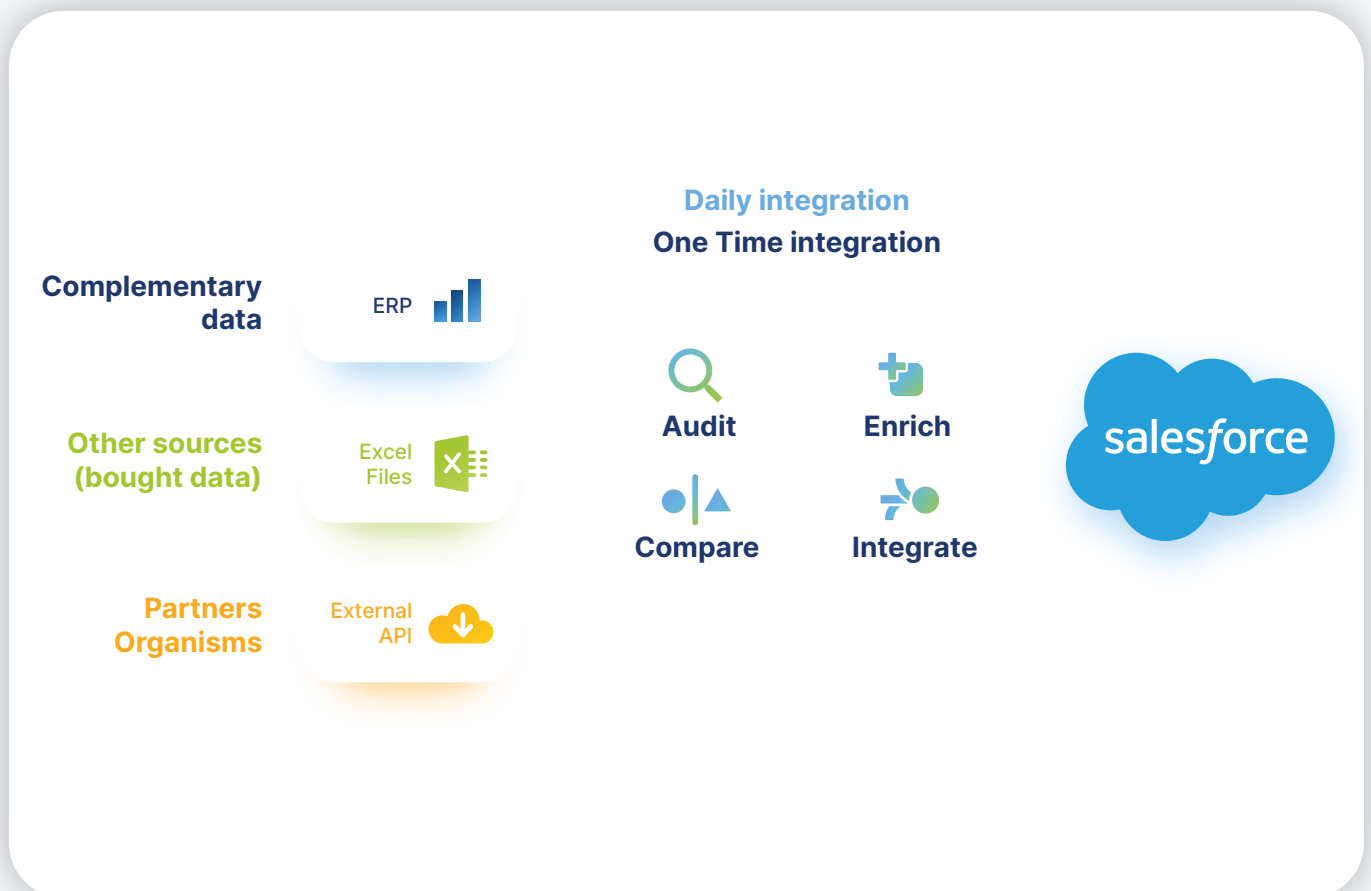
## 2. Save Time by Automating Data Import and Merging

Once Salesforce is operational, a steady flow of data is needed to implement an efficient and effective sales and marketing strategy.

With data integration, you can automate the creation of leads from external applications, partners or data files without having to manually manage “data dumps” or data entry from multiple external systems or spreadsheets.

With a reliable and efficient integration solution, data is automatically validated, enriched, compared to existing data and then reliably integrated

into the Salesforce application, saving valuable sales and marketing time that can be utilized for revenue-generating activities.

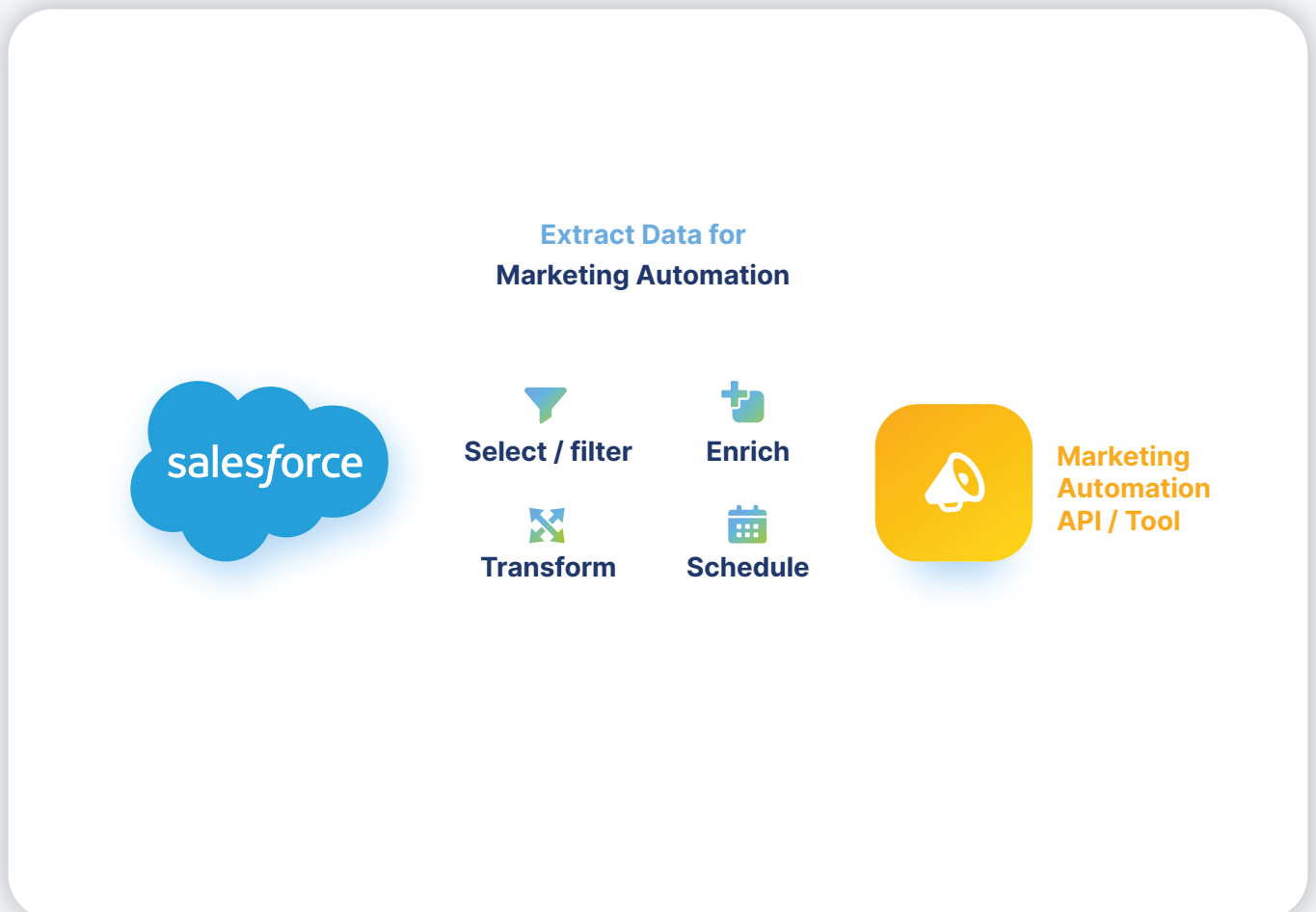


# 3. Streamline Marketing Automation

Salesforce is often coupled with Marketing Automation solutions such as Pardot, Marketo, Eloqua, Adobe or Hubspot - with data integration tools.

Salesforce can seamlessly connect to these external partners and systems to streamline marketing automation - minimizing manual tasks, emails, data entry and other time consuming activities.

Integration not only enables an efficient and fast data selection, it ensures data is compatible with the target application data to reduce errors.



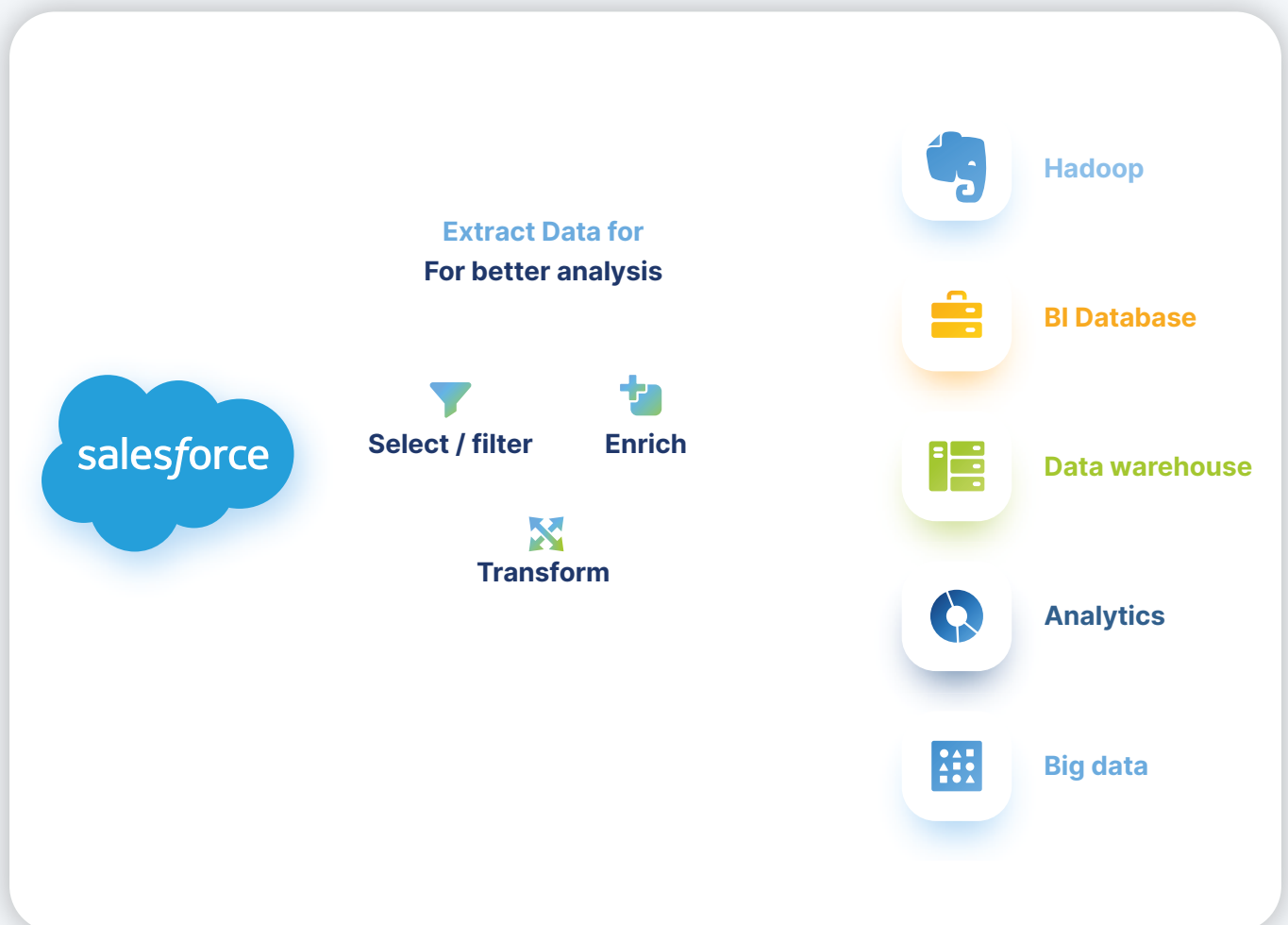
# 4. Gain Business Intelligence from Advanced Analytics

The reporting and dashboard mechanisms in Salesforce enable quick access and enhancement of certain data.

Yet it is often necessary to integrate external data into these reports for additional insight on lead tracking, campaigns and opportunities.

Using a data integration solution for Salesforce enables you to easily export Salesforce data

into different analytics systems like traditional business intelligence, hadoop or Spark analytics platforms, or any other internal or external data analytics solution - for more thorough, accurate business intelligence.



# 5. Improve Customer 360° View (KYC)

Building an API / Micro services layer around Salesforce will help leverage the customer data for a 360° view of your customers, including integration of data from partner web portals, external customer ERP, or e-Commerce shop, etc.

This allows organizations to quickly plug and unplug microservices to Salesforce as business needs require, without endless amounts of custom code, allowing for greater fluidity of customer data.

In addition, adding a Data Hub architecture for Master Data Management to support this initiative ensures trustworthy insights are always

available to business decision-makers, with best-in-class data governance.

With an intuitive interface to help users understand data terms and policies in context, you can forget ungoverned spreadsheets and incomplete or low-quality data and evolve sales and customer data to be agile, intuitive, and collaborative.



# 6. Improve business efficiency with real-time, end-to-end data exchange

Starting a data integration with the Salesforce application can be the first step to improving business intelligence with a global data management solution.

The essential symbiosis of Salesforce with the rest of your Information Systems can be easily accomplished with data integration.

But it can also allow the use of Salesforce data in all of your business workflows, facilitating the decompartmentalization of applications and a greater synergy between teams, data and knowledge bases.

Developing an effective Salesforce integration architecture is just one of many important steps to a successful CRM project.

Yet Salesforce is only one of many applications that require data integration workflows.

At Semarchy, we offer data integration solutions for your entire enterprise. Ready to turn your decision-makers into data champions?

[Contact us today](#) to see how we can help you leverage your business platforms for greater business intelligence.







# About Semarchy

Semarchy, a leader in the data integration and master data management markets, delivering data freedom and empowering organizations to rapidly generate business value from their data.

It's unified data platform enables organizations of any size, to quickly discover, govern, manage, integrate and visualize critical information scattered across applications.

Semarchy is available as an on-premises platform, is natively available on most popular cloud marketplaces, such as Microsoft Azure, Amazon Web Services (AWS), and Google Cloud Platform (GCP), and managed as a service.

Semarchy is based in Phoenix, USA with offices in London, UK, Lyon, France, and Mexico City, Mexico.

**Free your data.**  
Start fast. Scale infinitely.  
Intelligently secure &  
govern.

**Semarchy**

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