How can Ruler Enrich your Salesforce CRM?

Track customer journeys and see which marketing activities drive leads and close opportunities in Salesforce.

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Who are we?

Ruler Analytics is a multi-touch attribution and marketing mix modelling product for forms, phone calls and live chat, evidencing every step a visitor makes in their journey and matching revenue back to the source.

Ruler 'closes the loop' between leads and revenue by linking your CRM, analytics tools and other sales and marketing products. It enables organisations to attribute revenue to their marketing activity and understand the steps customers make in the decision making process.

Our platform provides a single point of truth to identify which campaigns are driving revenue, allowing organisations to make meaningful decisions to optimise marketing spend. With 1,000+ integrations with the world's leading applications, Ruler Analytics can sync data back to Google Analytics, your CRM or paid media solutions to give insight where you need it most.
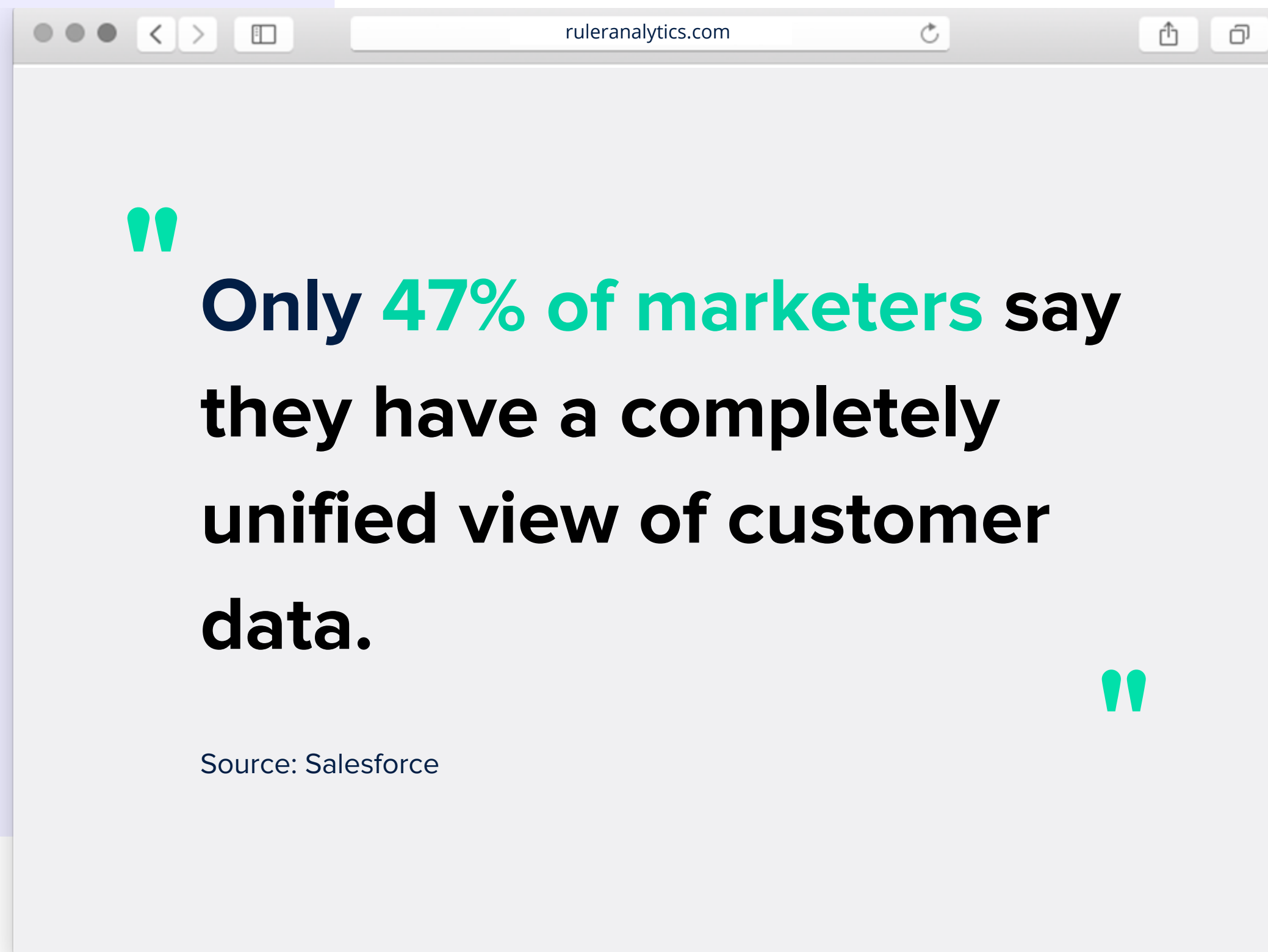
Salesforce marketing measurement challenges

You're probably wondering why you should even bother integrating a multi-touch attribution tool with Salesforce. After all, Salesforce comes with built-in tools that can help you track the effectiveness of your marketing campaigns.

Take Salesforce Campaign Influence, for example. Campaign Influence is a built-in Salesforce feature that uses CRM data to connect the dots between opportunity revenue and campaign data. Once enabled, you can use it to optimise your reports to show how marketing contributes to the sales pipeline and closed revenue.

While Campaign Influence can give you some insights into your marketing impact, it's not a complete solution. Let's look at a few reasons why.

ruleranalytics.com

" Only **47% of marketers** say they have a completely unified view of customer data.

Source: Salesforce

Campaign influence in Salesforce begins when a lead has been created

Campaign Influence is a built-in Salesforce feature that tracks the impact of marketing campaigns on leads and opportunities. However, it only considers touchpoints that happen after a lead is created.

For example, let's say you send out an email campaign with a link to download your eBook. If someone clicks the link and converts into a lead, Campaign Influence will consider that as the first touchpoint.

But how did that lead end up on your mailing list in the first place? Did they previously visit your website via a Google Paid ad and subscribe to your newsletter? Or maybe they found you via organic search? Campaign Influence can't tell you that.

Influence can only assign one Primary Campaign to each opportunity

Salesforce Campaign Influence allows you to associate an opportunity with multiple campaigns. Yet, only one campaign can be assigned as the primary campaign for a rollup summary.

Essentially, Campaign Influence can show you how an opportunity is related to multiple campaigns, but it can only attribute the opportunity to a single campaign for ROI reporting.

The limitation of Campaign Influence may not be a problem for businesses with a limited number of campaigns or short customer journeys. However, it can be frustrating for businesses with longer sales cycles and more complex campaigns that rely on multi-channel marketing.

Default lead source fields in Salesforce are too broad and vague

Salesforce allows you to track the source of each lead and opportunity using a built-in "Source" field. This field can be used to track a wide range of lead sources, including web, phone inquiry, partner referral, and many others.

Though handy, the default options available in Salesforce don't tell you much about the effectiveness of your marketing. For example, Salesforce typically attributes the lead source "Web" to your digital marketing leads. However, this does not provide any information about which website pages the lead visited, what keywords they searched for, which ads they clicked on, or which social media platform they came from.

This can be limiting, especially for marketing and sales teams that want to identify the campaigns that have the biggest impact on pipeline.

Limitations of using UTM parameters and hidden fields to track leads

UTM parameters can be captured in hidden form fields to track the source, medium, campaign, and other details of how leads arrive at your website. However, there are some limitations to this approach.

First, UTM parameters can only track leads who have clicked on a UTM link. They can't track leads who have arrived at your website through organic channels like search, social, or referrals. Additionally, UTMs can be lost when a visitor clicks on a link and then navigates to another page without making a conversion.

Second, hidden fields only work with forms. They don't consider phone calls or live chat enquries, so you aren't able to track leads who come to your website through these channels.
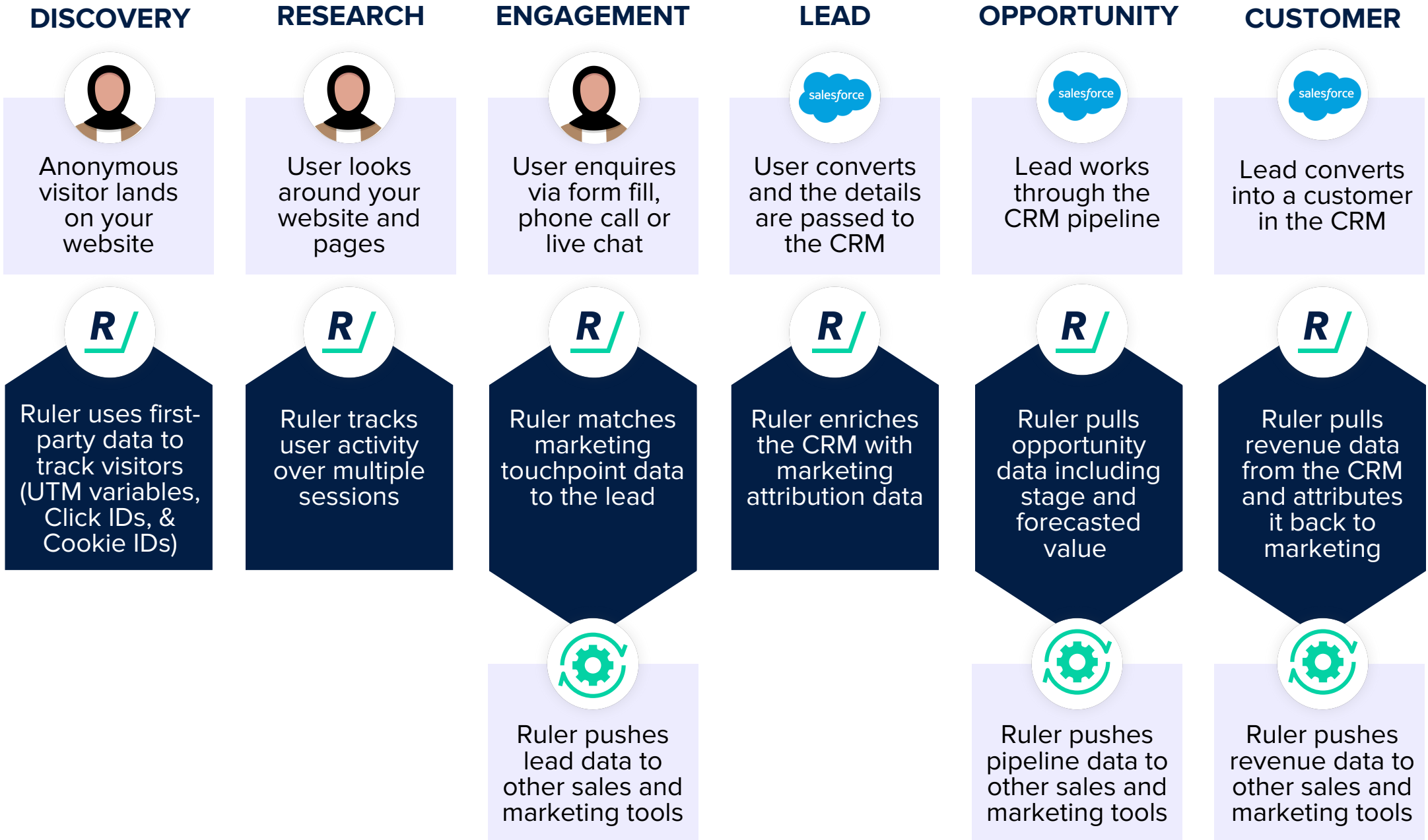
How Ruler can help with these challenges?

Tools like Ruler can help you bypass these challenges by providing a more comprehensive view of how leads arrive at your website and convert into revenue.
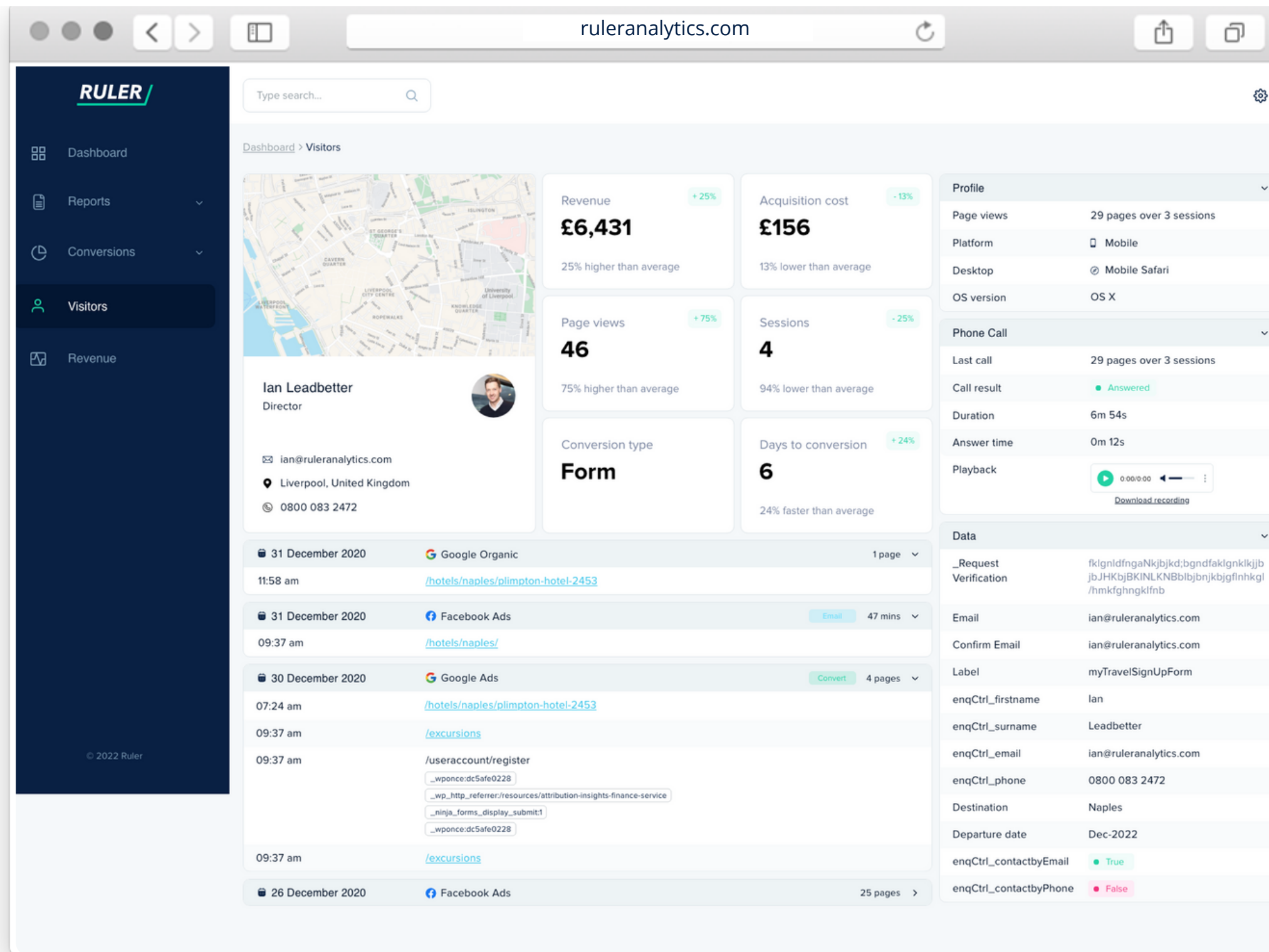
Ruler is a marketing measurement tool that tracks the entire customer journey at visitor level on a first-party basis, including the marketing source from each session, page views, UTM variables, Click IDs, and Cookie IDs.

When a user converts into a lead, Ruler will send all of the data held on that individual over to Salesforce, including their contact information and marketing touchpoints. A conversion could include a form fill, phone call, live chat enquiry, or offline event.

Ruler will continue to monitor and refresh the data on that lead, allowing you to track the impact of your marketing campaigns at every stage of the pipeline. When a lead converts into a deal, Ruler fires the conversion and revenue data to its dashboard and other web tools, enablng you to track the ROI of your marketing.

Let's dive into how Ruler works and what features it offers.

DISCOVERY

Anonymous visitor lands on your website

Ruler uses first-party data to track visitors (UTM variables, Click IDs, & Cookie IDs)

RESEARCH

User looks around your website and pages

Ruler tracks user activity over multiple sessions

ENGAGEMENT

User enquires via form fill, phone call or live chat

Ruler matches marketing touchpoint data to the lead

Ruler pushes lead data to other sales and marketing tools

LEAD

User converts and the details are passed to the CRM

Ruler enriches the CRM with marketing attribution data

OPPORTUNITY

Lead works through the CRM pipeline

Ruler pulls opportunity data including stage and forecasted value

Ruler pushes pipeline data to other sales and marketing tools

CUSTOMER

Lead converts into a customer in the CRM

Ruler pulls revenue data from the CRM and attributes it back to marketing

Ruler pushes revenue data to other sales and marketing tools

First-party user journey tracking

→ Track every website visit and view the full user journey in Ruler's dashboard.

→ See the source of every visit, including the pages viewed, the length of visit and referring websites.

→ Match leads who have converted through form fills, phone calls, and live chats to their marketing touchpoints.

Salesforce CRM data integration

Connect with Salesforce and other sales systems to enrich leads and opportunities with marketing source data.

Populate CRM records with campaign, keyword and landing page data for enhanced reporting.

Send lead and opportunity status back to Ruler to identify the sources that are worth investing more in.

Lead
Sara Smith

COMPANY | **TITLE** | **PHONE** | **EMAIL**
Business Inc. | CMO | 555-1234 | sara@business.com

First click source Google Paid

First click keyword attribution tools

First click campaign attribution software

First click GCLID EAlaQobChMirr...

First click landing page ruleranalytics.com /products/marketing-attribution

Last click source Organic Search

Last click landing page /

Page Views 11

Sessions 2
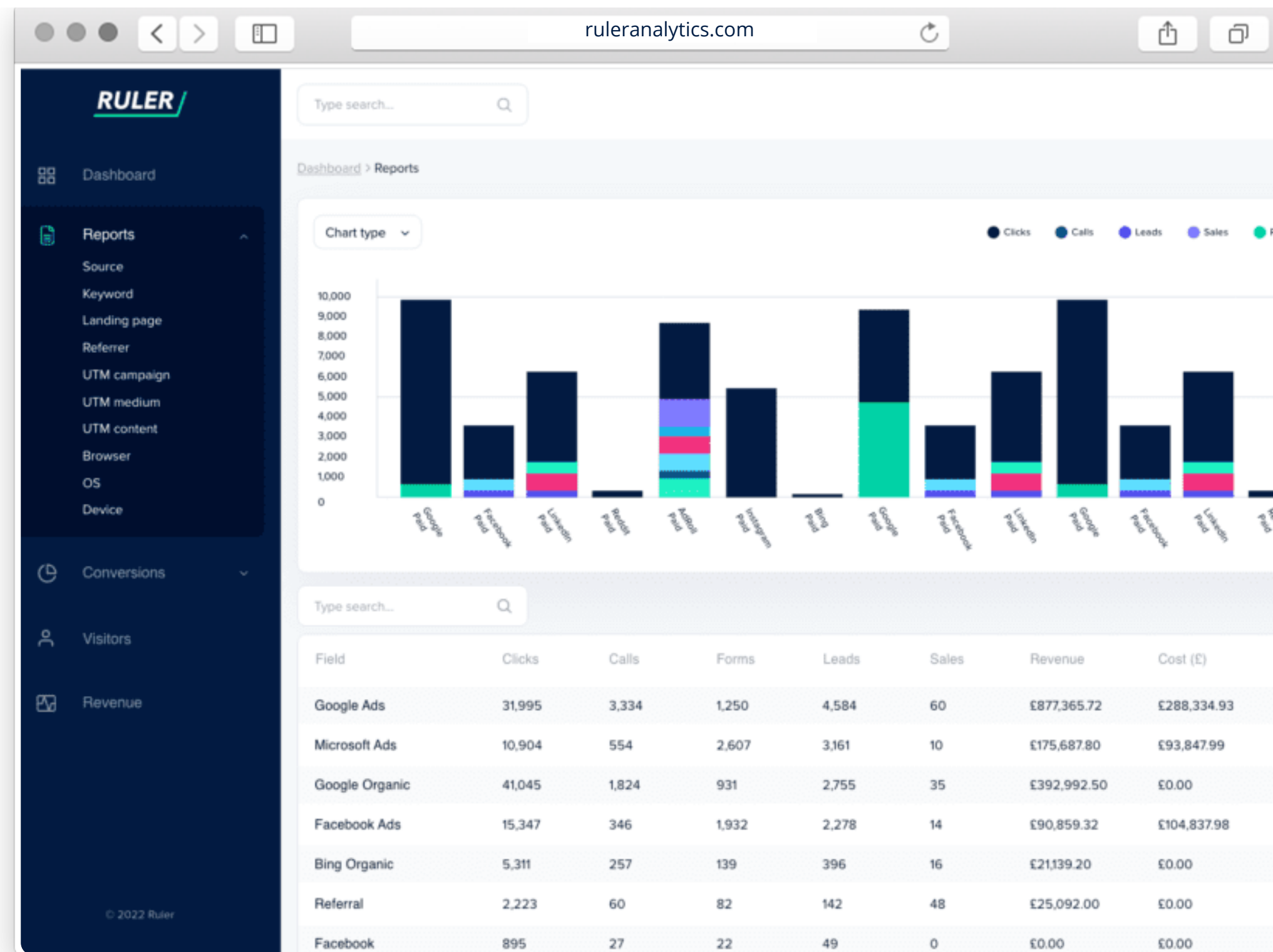
Multi-touch attribution tracking

→ Attribute conversions & CRM revenue by switching between multiple attribution models, including data-driven.
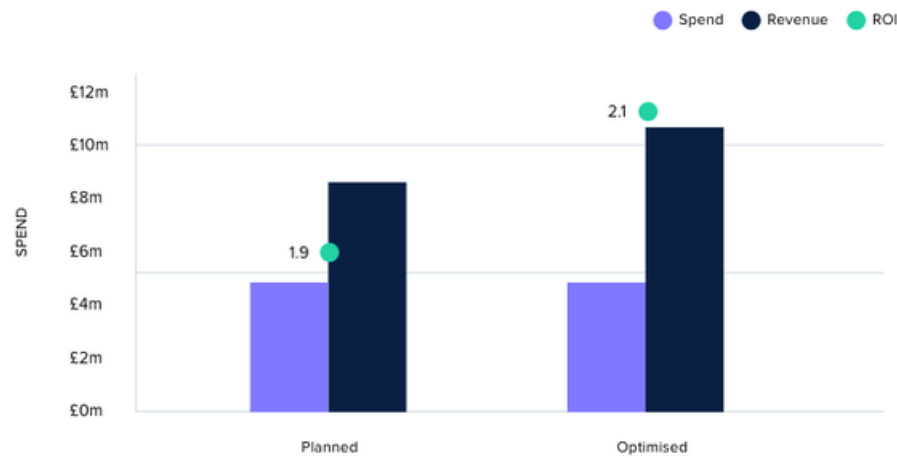
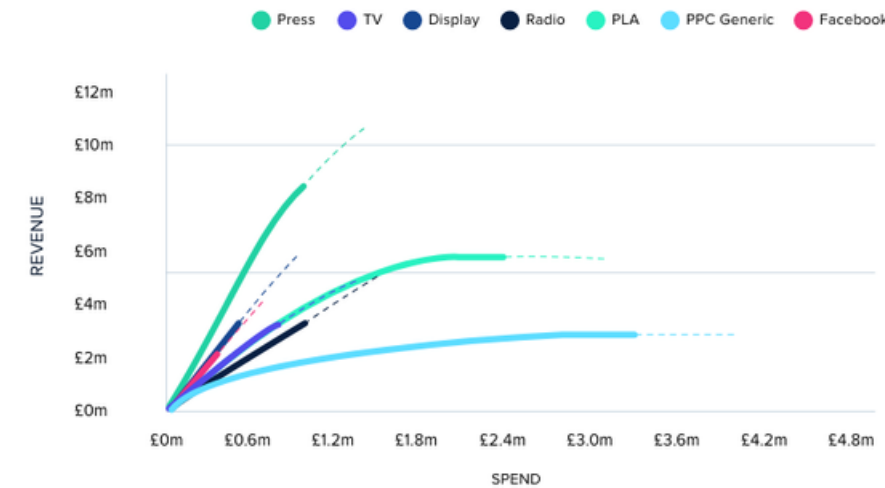→ Measure revenue against your cost data and identify which sources are driving the most profitable results.

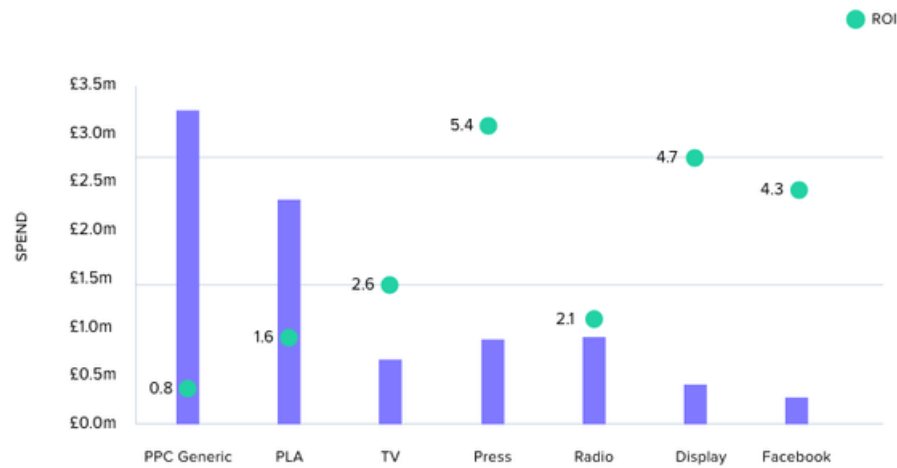→ Report on any UTM level including; source, campaign, landing page and keyword.

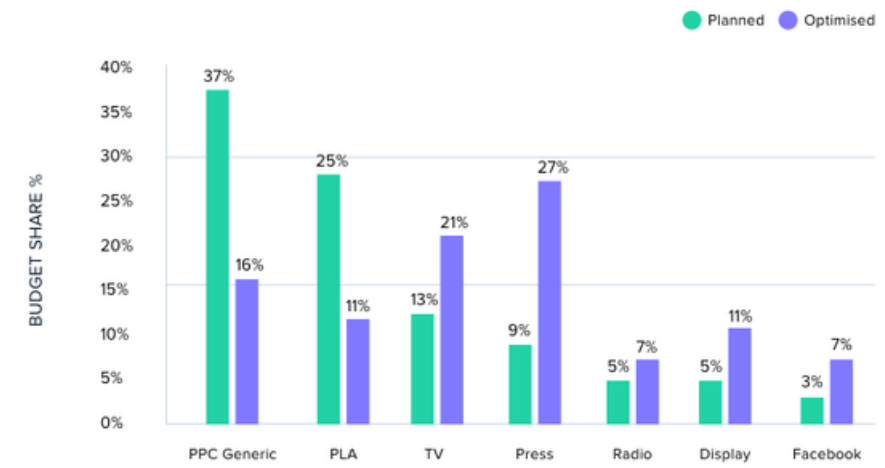# Ruler's marketing mix modelling

Attribution is a great way to break down the data silos and bring together your teams. But what happens when someone sees your ad, doesn't click, but later converts? It's difficult to connect these kinds of interactions to revenue using traditional attribution methods.

Also, with the launch of Apple's iOS 14.5 update and Google's "cookie phaseout", marketers are finding it increasingly challenging to track user journeys across different platforms and touchpoints.

This is why we built marketing mix modelling into our attribution solution. By combining multi-touch attribution and MMM, you can get a more accurate picture of the impact of individual marketing efforts on conversions and ROI.

Let's take a closer look at Ruler's MMM features.

Ruler's MMM features

Impression attribution
Gives you more insight into your invisible touchpoints e.g. ad views, tv and radio impressions, allowing you to make evidence-based decisions for your company.

Diminishing returns
Models your ROI and helps you optimise your marketing spend by identifying the point where ROI starts to diminish.
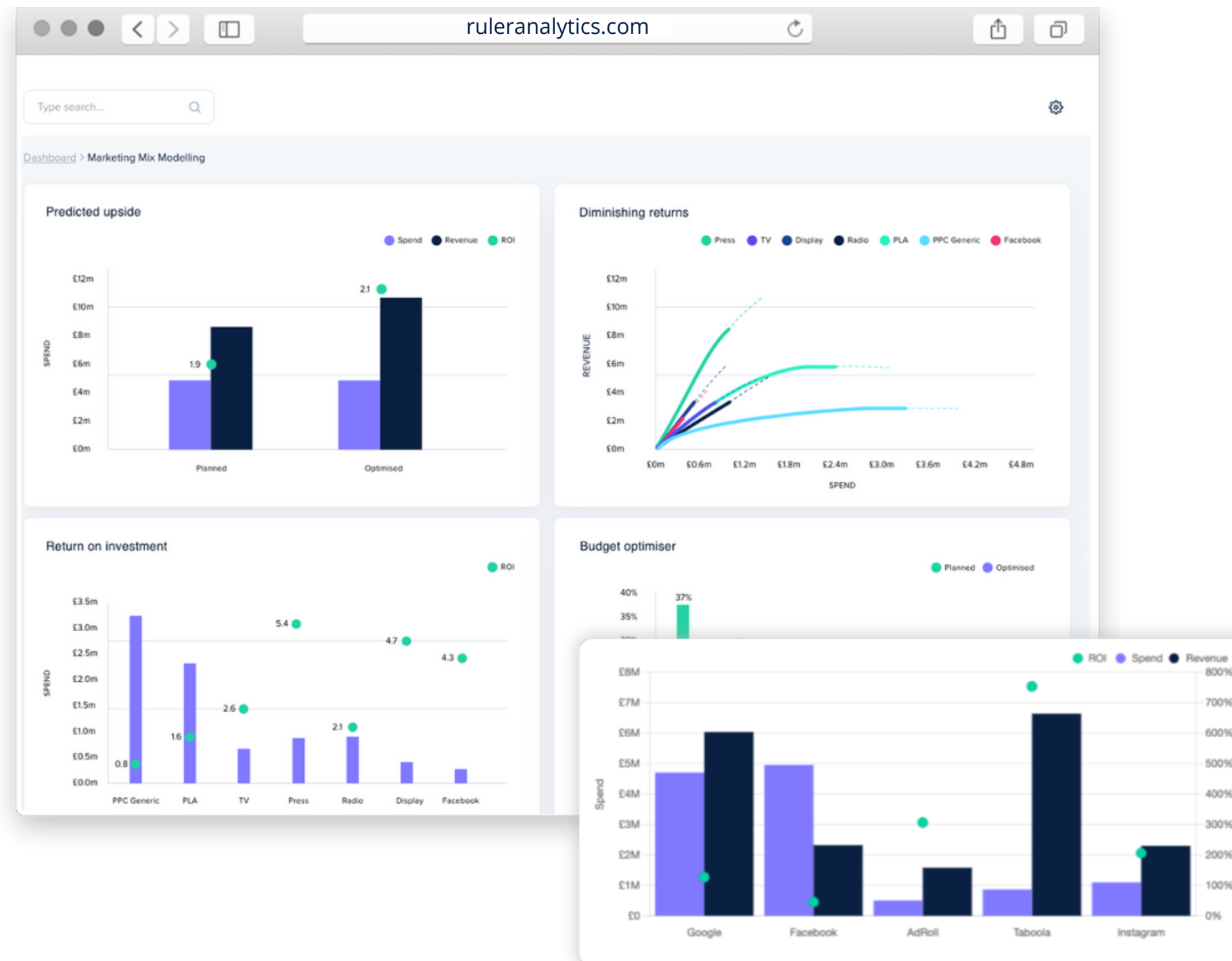
Budget optimiser
Helps optimise your marketing spend by shifting recommended budget from channels with diminishing returns to channels with higher ROI potential.

Predicted upside
Forecasts the impact of your reallocated ad budget on the customer journey and revenue, enabling you to improve your marketing ROI and pipeline generation.

Benefits of integrating Ruler with Salesforce

Ruler's integration with your Salesforce CRM and current tech stack gives you access to the following key benefits:

01

Eliminates team & data silos

Many businesses collect and store data in different systems, creating data silos. This makes it dificult to gain a comprehensive view of lead and customer journeys. Ruler can help consolidate data from various sources into a single platform, making it easier to act on.

02

Holistic view of marketing effectiveness

Ruler's attribution features let you see how different click interactions throughout the customer journey affect pipeline, and its marketing mix modelling gives you additional insights into the effectiveness of your offline media and invisible touchpoints.

03

Effective measurement in the era of data privacy

Governments and regulatory bodies are tightening their grip on data protection. Ruler's MMM can help marketers assess marketing effectiveness in the wake of privacy-related changes like Apple's ATT, GDPR, and the deprecation of third-party cookies because it uses aggregated data over user-level data.

04

Provides the evidence you need to prove ROI

Proving ROI isn't easy, especially when your peformance data is scattered across multiple sales and marketing platforms. But when your data is integrated with Ruler, it becomes a lot easier to prove marketing's impact on pipeline and revenue.

How Optionis use data from Ruler to prove ROI

Optionis Group provides accountancy, tax and umbrella employment solutions to contractors and small businesses across multiple brands.

We spoke to Chris Shepherd, Ecommerce Manager, who manages a wide range of digital channels to deliver campaigns, with leads pulling into his CRM.

Chris said, "A high proportion of our leads like to engage with us through telephone numbers. They prefer to speak to a human rather than communicate and transact digitally."

This posed a challenge as the team couldn't prove which campaigns were driving offline leads for the business. And even more so, they couldn't prove which of those leads went on to convert into to a sale.

With Ruler's marketing attribution solution in place, Chris was able to evidence how the team had exceeded targets including the number of leads generated, call volume, paid and direct traffic volume and brand awareness mentions via referral sites and social channels.

Chris continued, "Ruler's tracking allows us to monitor if campaigns are driving sufficient call volumes and help better understand which sources have the strongest conversion metrics for both conversion to lead and conversion to sale."

"We've also identified areas where we can focus our efforts. For example, Ruler's data highlighted inefficient spend in a campaign, resulting in our cost per lead coming in over budget. With access to this data we were quickly able to realign messaging and improve conversion rates across all channels."

Ready to integrate Ruler and Salesforce?

There's a lot to gain from integrating Salesforce with Ruler.

First, Ruler allows you to establish a direct connection between your marketing campaigns and revenue in Salesforce. This gives you a more tangible understanding of how your marketing efforts are impacting your bottom line.

Second, Ruler helps you better understand how your marketing campaigns are supporting your pipeline generation. By tracking how leads interact with your marketing materials, you can identify the channels and content that are most effective at generating qualified opportunities.

Once you implement Ruler, you'll see the value of attribution and wonder how you ever managed without it.

Want to see Ruler in action?

Book a demo with Ruler's attribution experts here:

Book a demo