In addition to generating brand buzz and creating campaign collateral, your marketing teams are working hard at contact management—actively securing leads, routing prospects to appropriate personnel, and ensuring timely follow-up and customer support. These activities are not simply add-on job functions—they’re just as essential, if not more so, as traditional advertising in securing brand loyalty, customer satisfaction, and ultimately, repeat business.

To successfully perform such tasks requires deep insight into customer behavior, including real-time updates as prospects turn to leads, leads turn to customers, and customers turn to support cases and repeat business. Marketers must be able to precisely and accurately distribute and track opportunities across every step of the customer lifecycle, then use these insights to create tailored messages aimed at specific touchpoints in the customer journey. In short, they need the level of functionality and visibility only afforded by Customer Relationship Management (CRM) software.

Traditionally, marketing automation systems and CRM solutions have acted as disparate units, and moving information between the two is a manual and time-consuming effort that often requires IT involvement. Connecting these two entities and allowing seamless, automated data transfer reduces the potential for user error, frees up valuable IT resources, and lets your marketers spend their time actively promoting your brand, not waiting on files to migrate. With stores of information about each opportunity at their fingertips, your marketing teams can radically transform the effectiveness of their campaigns—and the reputation of your business.

The Tokara Solutions Marketo-to-Pivotal Connector Solution: How it Works

Introduced in April 2014, our Marketo-to-Pivotal Connector solution is designed to allow users to seamlessly navigate between their Marketo marketing automation system and Pivotal CRM system with the click of a button, allowing them to quickly and easily utilize the features of both solutions without abandoning their work on each side. Available through a direct connection to each instance of Marketo through the user’s Application Programming Interface (API), the connector is deployed as a custom code owned by each user, which means it’s modifiable to fit existing business needs, offering instant integration—and unlimited potential.
With the Marketo-to-Pivotal Connector, you’re not just connecting data. You’re merging two of the most powerful systems in their industries for a comprehensive solution that provides game-changing benefits across the board, including:

**AUGMENTED, UNPARALLELED SUPPORT**
Ranked for years in the Gartner Magic Quadrant for Lead Management and recognized as an industry leader in marketing automation software, Marketo is a best-in-class powerhouse, and is the only platform capable of unifying all digital marketing channels. Industry award-winning Pivotal CRM is likewise leading the way for innovation, built on a flexible platform that puts the power in the hands of the user and strategically aligns business processes with technology. What do you get when you connect these two dynamic solutions? One incredibly agile, robust tool for customer contact and long-term management.

**TRANSFORMATIVE ANALYTICS**
Pivotal’s business intelligence (BI) tools help users analyze data to find patterns and trends in customer behavior. The Marketo-to-Pivotal Connector brings this capability into marketing campaigns, so teams can track the success of current projects and plan smarter for future outreach.

**BI-DIRECTIONAL SYNCHRONIZATION**
As soon as a file is updated or modified, it’s changed in real-time in both Pivotal and Marketo. This is especially beneficial when tracking leads, as it affords instant insight into customer activity and the steps leading to buyer conversion, helping marketers see what works, what doesn’t, and what needs to be tweaked to maximize reach.

**FASTER RESPONSE TIMES**
With greater insight into customer activity, marketers can more quickly distribute and track leads with sales teams, jumpstarting the sales process and reducing lag time. Additionally, automation boosts data quality and helps ensure against lost or forgotten leads, so you’re always up-to-date on the latest progress.

**HIGHER USER ADOPTION**
Now, users don’t have to abandon their trusted and proven Pivotal CRM software when they want to utilize the features of Marketo—by allowing them to effortlessly connect their efforts across both systems, then save and adjust their work as needed, the Marketo-to-Pivotal Connector provides the usability required to ensure your teams don’t just install the solutions—they integrate them into their daily routines.

**IMPROVED LEAD TRACKING**
With access to client contact information and the ability to monitor their activity across each project, marketers can now track and analyze leads from a variety of sources including cold calls, website clicks, email marketing, inbound marketing, social media, and events, for a 360-degree view of branding success.

**Solution Benefits:**
The Combined Power of Two Market-Leading Solutions
Solution Features: What You Can Expect from the Marketo-to-Pivotal Connector

**TWO-WAY SYNC** | This isn't a one-way street. Communication between Marketo and Pivotal works both ways, so whether you want to create a new record or make updates to an existing one, you're supported. Automatic synchronization means that elements like lists will be updated to incorporate new records as they're added in each system. Leads can even be set up to generate automatically in Marketo as they're created in Pivotal, taking the guesswork out of new opportunities.

**NEW MARKETO LEAD**
New lead created manually or through automation

**AUTOMATICALLY SYNCHRONIZED**
List creation in Marketo will incorporate newly created Pivotal records through automatic synchronization

**MARKETO LEAD AUTOMATICALLY SYNCHRONIZED TO PIVOTAL**
Near real-time synchronization or can be configured for any time duration/interval

**POLL-BASED SYNC** | The solution features a configurable setting that enables time-based synchronization based on custom intervals. Regardless of the time interval or duration set, the feedback and synchronization is nearly instant.
MARKETO POST SYNCHRONIZATION UPDATES | After every update, the Marketo dashboard provides a visual overview of all changes, quickly showing users what's new on the application.

PIVOTAL POST SYNCHRONIZATION UPDATES | Similar to Marketo Post Synchronization Updates, the Pivotal dashboard will clearly identify changes made since the user's last visit. Marketers aren't the only ones who will benefit from this streamlined data flow—sales teams will appreciate the instant lead assignments generated from the most recently synchronized address information.

MARKETO UPDATES AUTOMATICALLY REFLECTED IN PIVOTAL

1. Newly synchronized Marketo record updates
2. Any existing Territory Management rules will assign the lead based on the newly synchronized address information

Solution Features:
Continued

POST SYNCHRONIZATION UPDATES
Lead record augmented in Marketo after synchronization

PIVOTAL POST SYNC UPDATES
Address, Job Title information added in Pivotal

MARKETO UPDATES AUTOMATICALLY REFLECTED IN PIVOTAL

1. Newly synchronized Marketo record updates
2. Any existing Territory Management rules will assign the lead based on the newly synchronized address information
AUTOMATIC LEAD SCORING AND NURTURING | As leads are integrated from Marketo into Pivotal, they're automatically assigned a “lead score” from Marketo based on how their interests intersect with those of the company, and their likelihood of conversion. This feature is critical to helping sales teams prioritize activities and outreach efforts and also helps marketers determine distribution strategies to maximize campaign response. As leads progress, the Marketo-to-Pivotal Connector allows users to enter and synchronize customer details across the systems, so they can be nurtured into successful relationships.

DUPLICATE CHECK | Though you're working within two systems, keeping data organized and manageable has never been easier. Built-in duplicate check tools make sure the same lead isn't entered twice in either Pivotal or Marketo to avoid confusion and overlap. If for any reason you need both records—that's OK too. Using each contact's e-mail address as the matching criterion, the solution alerts users when duplication occurs and, with authorization, will continue operation.

FIELD MAPPING | Used to working independently in your Marketo or Pivotal fields? The Marketo-to-Pivotal Connector features a flexible field mapping mechanism that allows Marketo fields to be mapped to Pivotal fields as required, and vice versa, even supporting custom fields as required.

DATA LOGGING | As information and insights are shared between Marketo and Pivotal, automatic data logging tools keep track of all changes, helping to show exactly what transferred, and enabling users to pinpoint and help solve any synchronization issues.
Streamlined in nature and designed to keep data clean and actionable, the solution’s components are simple, working and fitting together seamlessly as identified in the diagram below:

**Components:**

The Gears that Keep the Marketo-to-Pivotal Connector Turning

**MARKETO CONNECTOR** | This component reads and writes data from Marketo.

**PIVOTAL CONNECTOR** | This component reads and writes data from Pivotal.

**DATAMODEL CONNECTORS** | To reconcile the different datamodels between Pivotal and Marketo, this component establishes a new, custom model that represents a generic lead, allowing easy comparison and data exchange between the two systems. Adjustable fields include lead attributes such as name, e-mail address, and phone number, as well as established IDs including Pivotal Lead ID, Marketo Lead ID, and Pivotal RN Update.

**MARKETO DATAMODEL CONNECTOR** | This component converts a Marketo lead into the custom datamodel lead described above and vice versa as required. When Marketo data is read, it is converted to the custom datamodel before being passed on to the Sync Engine. On the other hand, when the Sync Engine writes data to Marketo, that data is converted to the Marketo datamodel by this component.
**Components:**

PIVOTAL DATAMODEL CONNECTOR | This component acts as the counterpart to the Marketo Datamodel Connector.

SYNC ENGINE | The Sync Engine component is the “heart” of the Marketo-to-Pivotal Connector and stores the logic that synchronizes data between the Marketo and Pivotal systems.

**Installation and Integration:** Getting Started with Your Marketo-to-Pivotal Connector

We know your time is valuable. That’s why we designed our solution to get your teams up and running as quickly as possible, with simple setup and zero downtime:

1. From inside Pivotal, import the Relationship Transporter File from the Toolkit.

2. From inside Marketo, configure Marketo Synchronization Administration through Smart Client without using Toolkit:
Though designed to work specifically with Pivotal 6.0, the Tokara Solutions team is proud of our technology partnership and industry expertise and will work with your teams to create a custom solution designed to fit your needs, including configurations to work with older versions of Pivotal CRM.

LEARN MORE
To learn more about how partnering with our seasoned CRM and marketing automation consultants can deliver this functionality to your business, please contact us at info@tokarasolutions.com.

For more information and details on this solution, we encourage you to download our Marketo-to-Pivotal Connector White Paper.

DOWNLOAD THE WHITEPAPER