

Best Practices for Salesforce Integration in support of Sales and Marketing Teams

Build a Connected Business

Go-To-Market (GTM) teams rely on accurate data to prioritize, target, and engage customers to support sales and marketing activities. Too often, unreliable data spread across siloed, disconnected systems impedes a team's ability to achieve its revenue goals. Integration connectors make it easy to connect revenue teams with high-quality data across systems. HG Insights Salesforce Connector automatically moves our data and technology intelligence directly into the Salesforce CRM system.

Build a connected business and further leverage the value from your IT investments through an enterprise-grade Salesforce integration. Effective integration is key to enable sales, marketing, and operations teams to enhance customer loyalty and grow market capabilities.

Here are some best practices to effectively support sales and marketing teams with HG Insights' Salesforce Connector solution.

01 ACCESS TO QUALITY DATA

Fuel your teams and grow your markets by importing active accounts into Salesforce after extending the data insights provided using HG Insights Opportunity Generator.



21% of sales reps time is spent researching incomplete data¹

700B

Poor data costs businesses \$700B a year, or 30% of the average company's revenue¹



78% of marketers say their customer engagement is data-driven and use up to 12 data sources to obtain customer data²

12M+
HG Insights market-leading data supports broad coverage of 12M+ Companies and 15,000+ installed technologies

HG Solution:

- Human verified, enriched data
- Opportunity Generator
- Company Scoring Model
- Technology installed insights
- IT Spend Insights
- Contextual Intent insights

02 EFFECTIVE TARGETING

Understand and select targets that align to your company's Ideal Customer Profile to accelerate sales and drive efficiencies.



30% of marketers stated the reaching the right audience is one of their biggest marketing challenges.³



39% of marketers are satisfied with their ability to identify target accounts.²



79% of sales executives say a leading driver of hitting new targets is improving the productivity of existing sales reps.⁴

HG Solution:

Combine our market-leading company, technology install, IT spend, cloud and buyer intent intelligence with targets aligned to your company's ICP before loading to your Salesforce CRM organization.

03 COMPANY MATCHING ACCURACY

Enrich information in your existing Salesforce organization with accurate firmographic and technographic data. Enable your teams with insights on which companies will be the best fit for your product or solution.



With HG Insights, you can expect a **95%** match rate which is higher than average.

HG Solution:

Unmatched, industry-leading company technology insights with company match results to improve your sales and campaign targeting experience.

04 BUILT WITH SECURITY COMPLIANCE

Achieving SOC 2 compliance is yet another affirmation of HG's operational excellence and assurance to keep customer data secure and confidential.



90% of IT leaders face significant data security and governance challenges in 2022.⁶



67% of security professionals report that the best way to improve their company's data security is by upgrading tools.⁶

HG Solution:

SOC 2 Type I certified technology system protects against both physical and digital unauthorized access.

05 STAY AHEAD OF THE COMPETITION

Equip sales, marketing, and strategy teams to provide more precise buyer targeting. Prioritize segments and score leads to improve sales acceleration and remain competitive.

23 x Data-driven organizations are 23 times more likely to acquire customers, six times more likely to retain them, and 19 times more likely to be profitable as a result.⁷



94% of businesses are planning to invest in competitive intelligence.⁸



89% believe that companies that will not adopt a data-driven strategy risk losing their market position.⁸

Know what your competitors are doing and gain more insight into where your market is going. Incorporating technology install and IT spend data into your decision-making process will give you an edge on the competition as you build your sales and marketing campaign targets.

HG Solution:

- Account scoring model
- Industry-leading innovation with 5 patents pending

HG Insights Salesforce Connector creates a bidirectional sync between the HG Insights Platform and Salesforce to support sales, marketing, and operations teams to accelerate your business.

To learn more, download the solution brief, or visit hginsights.com/salesforce_connector

Sources:

¹ Data Validation Practices, Salesforce Blog, November 2021
² Salesforce State of Marketing Reports, November 2021
³ 9 Marketing Challenges for 2022 [New Data] And How to Overcome Them, July 2021
⁴ 149 Eye-Opening Sales Statistics to Consider in 2022, Spotio, July 2022
⁵ "Data Enrichment", Marcom Robot, August 30, 2022
⁶ "Pivoting to a Risk-Driven and Proactive Society", Netenrich, August 30, 2022
⁷ "Data is current and future source of competitive advantage", ieUniversity, August 30, 2022
⁸ "94% of Businesses Investing in Competitive Intelligence, How About You?", Small Business Trends, August 30, 2022