



1 hour to connect your data between Dynamics and Adobe Analytics

# **Adobe + Dynamics Integration is . . .**

- 1. A data stitching application that integrates your Dynamics data into Adobe Analytics. (Primarily for B2B form-fill lead-gen approaches.)**
- 2. An immediate access to key data points including down-funnel conversions from MQL to pipeline to closed deals and revenue.**
- 3. An easy integration of customer attributes from Dynamics into AA.**
- 4. A vital import into your existing AA Workspace for powerful insights— from viewing content influence on revenue to full-funnel analysis to true journey analytics.**
- 5. Automated to run daily (seriously).**

# Dynamics Data . . . Now Available in AA Workspace

Stoke Dynamics + Adobe Analytics Integration is stitching data at the visitor ID level enabling analysis capabilities such as

- Attribution IQ
- Segment IQ
- Journey IQ (Cohort 2.0)

**AA+Dynamics Integration provides insight into previously unanswered business questions:**

- *Which marketing channels are most influential in driving sales revenue?*
- *What marketing efforts are most influential in driving a qualified lead, a sales conversion or an upsell?*
- *What's the ROI of our account based marketing (ABM) investment?*
- *How does our content and digital experience influence the sales cycle?*
- *What marketing tactics are most effective in accelerating a deal or conversion cycle?*

# Why AA+Dynamics Integration is a game changer . . .

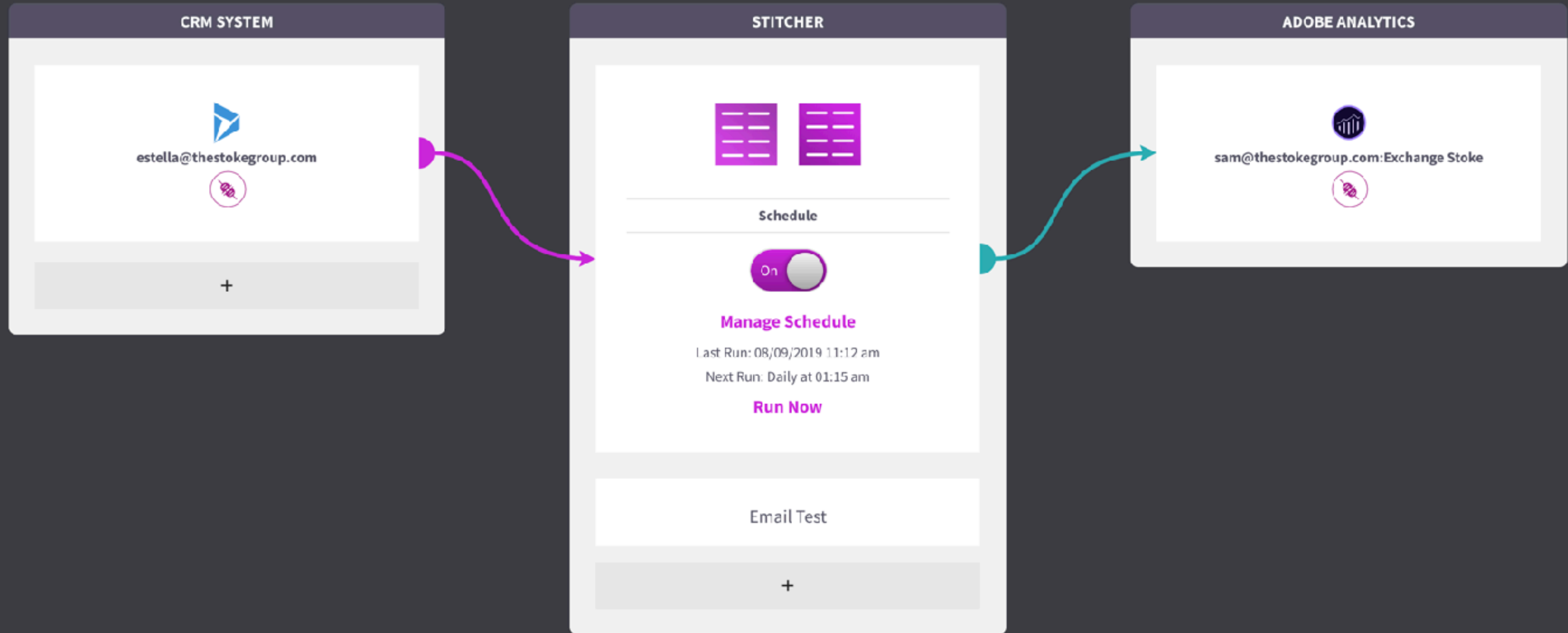
1. Easy set-up in one hour
2. Unlimited conversions
3. *More* Customer Attributes—and *More Powerful* CustomerAttributes
4. Connect Multiple CRMs
5. Automatically updates each day

# Reason to believe #1

*Our solution gets AA+Dynamics connected in one hour*

**+** Easy set up in 60 minutes. Automatically runs each day.

**X** GA takes multiple, manual steps and configurations. This integration will drag out for months with multiple frustrations.



# Here's why GA is not OOTB:

1. Requires several manual configurations
2. Requires involvement from multiple teams and expertise
3. <https://support.google.com/analytics/answer/7584446?hl=ens>

### Create new custom fields in Salesforce Sales Cloud

Following these instructions [ID](#) , create 3 custom fields in Salesforce to store the Analytics ID

You can name your fields as you like. The ones below are just examples.

Field Name	API Name	Field Length
GACLIENTID	CACLIENTID__c	255
GAUSERID	GATSRRTD__c	255
GATRACKID	CATRACKID__c	255

You MUST create all 3 fields, no matter which tracking method you decided on in step 1.

Field names MUST be uppercase. Field labels can be whatever you want.

Make these fields read only to prevent unwanted changes.

These fields MUST be created in both the Lead and Opportunity objects.

#### Configure the Lead and Opportunity objects

For the Lead object, enable Field History Tracking for the Lead status field. For the Opportunity Field History Tracking for the Stage field. This will ensure that any update to these fields will

Map the fields in each object to their counterpart in the other object.

### Track Field History for Standard Objects

You can enable field history tracking for standard objects in the object's management settings.

REQUIRED EDITIONS AND USER PERMISSIONS

Available in: Salesforce Classic [\(not available in all orgs\)](#), Lightning Experience, and the Salesforce app and Database.com Editions

Standard Objects are not available in Database.com

USER PERMISSIONS NEEDED

To set up which fields are tracked. [Customize Application](#)

If you use both business accounts and person accounts, keep in mind that:

- Field history tracking for accounts applies to both business and person accounts, so the 20-field maximum includes both types of accounts.
- Changes made directly to a person contact record aren't tracked by field history.

To set up field history tracking:

1. From the management settings for the object whose field history you want to track, go to the [Fields](#) area.
2. Click [Set History Tracking](#).

### See Real-Time data

Real-Time is available in all Analytics accounts. No changes to the tracking code are necessary.

To see Real-Time:

1. Sign in to [Google Analytics](#).
2. [Navigate to your view](#).
3. Open [Reports](#).
4. Click [Real-Time](#).

### Ways to use Real-Time

With Real-Time, you can immediately and continuously have on your traffic. Here are a few of the ways:

- monitor whether new and changed content
- understand usage of your mobile app through
- see whether a one-day promotion is driving
- monitor the immediate effects on traffic from
- verify that the tracking code is working on your
- monitor goal completions as you test changes

Paste the following snippet right after the `<head>` tag on each page of your site. Replace `GA_TRACKING_ID` with your own Google Analytics tracking ID:

```
<!-- Global Site Tag (gtag.js) - Google Analytics -->  
<script async src="https://www.googletagmanager.com/gtag/js?id=GA_TRACKING_ID">  
</script>  
<script>  
  window.dataLayer = window.dataLayer || [];  
  function gtag(){dataLayer.push(arguments)};  
  gtag('js', new Date());  
  
  gtag('config', 'GA_TRACKING_ID');  
</script>
```

## Limits and caveats

### User ID enabled views

Real-Time reports are not compatible with User ID enabled views.

### Filtered views

If your data looks incorrect in Real-Time, check which filters are being applied to the view. It's best to use an unfiltered view when debugging tracking code implementations. Changes made to views may take up to two hours to reflect in Real-Time.

### Mobile App Tracking

Mobile hits are batched to conserve battery life, so you may notice delays. Batching typically occurs on the order of minutes.

### No data in Real-Time

## Session unification

Session unification is a User-ID setting that allows hits collected before a user ID is assigned to be attributed with the ID.

[Learn more](#)

## Next steps

To set up User-ID, you must first enable the feature in your Analytics account (Edit permission required) and modify your tracking code. [Learn more](#)

You can verify your setup by checking the data in the User-ID Coverage report.

### Find your tracking ID

To find the tracking ID:

1. Sign in to [your Analytics account](#).
2. Click [Admin](#).
3. Select an account from the menu in the [ACCOUNT](#) column.
4. Select a property from the menu in the [PROPERTY](#) column.
5. Under [PROPERTY](#), click [Tracking Info](#) > [Tracking Code](#). Your [tracking ID](#) is displayed at the top of the page.

### Tracking code snippet

Paste the following snippet right after the `<head>` tag on each page of your site. Replace `GA_TRACKING_ID` with your own Google Analytics tracking ID:

```
<!-- Global Site Tag (gtag.js) - Google Analytics -->  
<script async src="https://www.googletagmanager.com/gtag/js?id=GA_TRACKING_ID">
```



# 2018 case study: US manufacturing company

## **Headache after headache with GA Dynamics:**

- Overall implementation took 5 months
  - Setting up GA ID with Dynamics took 10 weeks, 6 meetings with multiple teams and outsourced consultants.
  - Client spent 8 weeks just to get Pardot forms and form handlers connected
- Thousands of dollars wasted on meetings, email disconnects, and reconnects.

# Reason to believe #2

## *Unlimited Conversions*

**+ You want to see lead statuses and opportunity stages in multiple dimensions to do your job properly—our integration delivers this**

**X GA is limited to lead statuses, opportunity stages and single custom fields.**

<u>Google-Dynamics</u>	<u>Our AA+Dynamics Integration</u>
MQL	MQL
SQL	MQL - Enterprise
Closed Won	SQL
-	SQL - Enterprise
-	Closed Won
-	Closed Won - Enterprise

# Analysis Workspace View . . .

Content Influence



Segment

Jan 1 2019 - Feb 28 2019

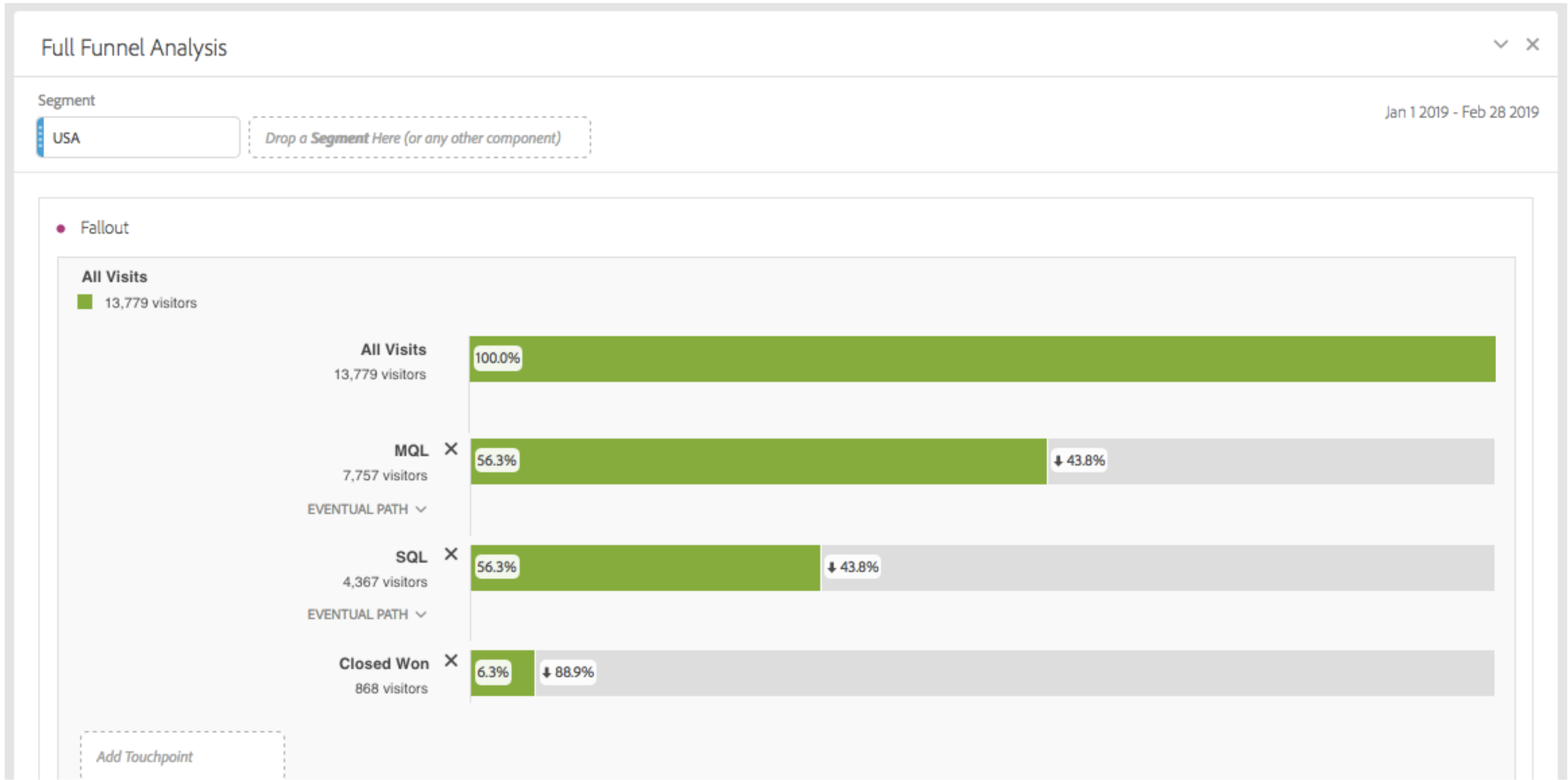
USA

Drop a **Segment** Here (or any other component)

Freeform Table

	Visits	MQL	SQL	Closed Won	Revenue
<b>Page Name</b> Page: 1 / 1 Rows: 50 1-7 of 7					
<b>You Don't Care About ROI</b>	5,003	3,252	2,114	676	\$3,380,000
<b>Marketers Please Stand Up</b>	3,502	2,591	2,332	933	\$4,665,000
<b>10 Tips For Effective Op ...</b>	4,802	2,689	1,506	136	\$680,000
<b>Summit Lineup 2019 Is ...</b>	19,993	8,997	3,194	63	\$315,000
<b>Your Virtual CMO Is Here</b>	2,294	1,285	578	46	\$230,000
<b>Fight Back In The Board ...</b>	3,504	1,962	883	79	\$395,000
<b>Going Toe-to-Toe with CFO</b>	6,182	4,333	3,466	1,040	\$5,200,000

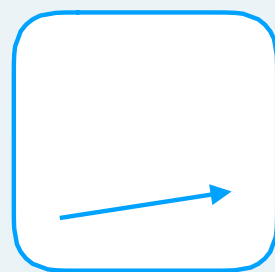
# Analysis Workspace View . . .



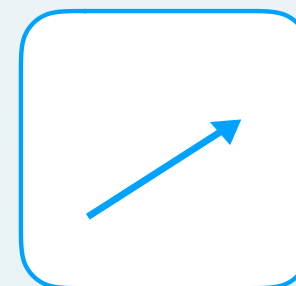
# Reason to believe #3

## *More Customer Attributes and More Powerful Customer Attributes*

- +** *With our solution you can configure Customer attributes and take the Lead, the Contact, or any custom object.*
- X** GA can only take the attributes off of the Lead.



GA Dynamics  
Customer Attributes Capability



AA+Dynamics  
Customer Attributes Capability

Fahui

+

Schedule

On

Manage Schedule

Last Run: 02-20-2019 2:44:03 pm  
Next Run: 02-22-2019 2:44:03 pm

Run Now

sam@thestokegroup.com:Exchange Stoke

+

Name  
Fahui  
Opportunity

If **All** the following conditions are met:

Currency Type

StageName  
Equals  
"CLOSED - WON"

Delete Condition

+

Then send data to Adobe Analytics:

eVar Custom eVar B

# Reason to believe #4

## *We Connect Multiple CRMs*

**+ Our AA+Dynamics Integration configures multiple Dynamics instances and other CRM instances**

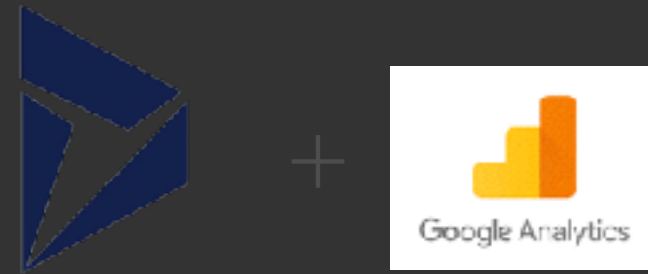
**X GA can't handle multiple CRMs or non-Dynamics CRMs**

GA Dynamics



AA+Dynamics





Ease of setup  
Visitor ID passthrough



Extremely tedious, manual process involving multiple teams



Fully automated with Adobe Launch extension

Customizable conversions



Only integrates lead statuses, opportunity stages, or any single custom field



Integrates any conversion metric

Customer attributes



Only integrates customer attributes on Lead (not Contact or Account)



Able to integrate from Lead, Contact or Account

Multiple CRMs



Only integrates with a single instance of Dynamics (not any other CRMs)



Integrates multiple instances of Dynamics (developing integrations with Dynamics and others)



# AA + Dynamics Integration Demo . . .

YouTube Link: <https://youtu.be/m4DHdIUUq4>

# AA + Dynamics Integration Timeline

## Day 1

### *Email or call:*

Introduction to AE, client team, and Stoke team— Sam Fonoimoana and Nate Jackson. Details and approval of SOW discussed.

### Actions:

1. Client provides email.
2. Client approves SOW.
3. Stoke then provides login link and credentials.

## Day 2

### *Video Call:*

Integration discussion (60 min.) with marketing lead (down-funnel and AA knowledge) from client:  
A) Access requirements

- Dynamics creds
- “Modify All Data” permission AA creds with access to Customer Attributes and Data Sources

B) Access to DTM/ tag management system and web analytics team lead.

### Actions:

1. Connect Dynamics with AA during the call.
2. Verify tag deployment.
3. Decide which down-funnel conversions client wants to integrate.
4. Decide which customer attributes to pull.

## Day 4

### *Email:*

Integration complete.

### Action:

1. Send progress report via email to client.

## Day 7-10

### *Call:*

Follow up call; View custom Workspace reports.

### Actions:

1. Discuss how to use data in Analysis Workspace.
2. Answer any questions.
3. Discuss reporting customizations/needs.

# Easy set-up with . . .

## A. Adobe Launch

<https://www.adobeexchange.com/experiencecloud.details.101530.adobe-analytics-Dynamics-integration.html>

**--or--**

## B. Using your DTM

\*reference companies and contact info available upon request

# **Save hundreds of thousands . . .**

- 1. Integrations cost hundreds of thousands in developer, analyst and consulting fees.**

--2018 manufacturing company case study: took 7 months of meetings, form submissions, manual stitching, consultant fees, dev fees, and their solution still has problems connecting all of the data each day

**--and--**

- 2. Integrations take 1-2 employee resources converting/uploading the data manually each day.**

# **Security peace of mind . . .**

## **A. We do not store data and do not use any PII**

**We pass through the visitor ID**

## **B. Passes through your existing data**

**We integrate your existing data to your instance of Adobe Analytics**

**Thank you!**

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**[sam@thestokegroup.com](mailto:sam@thestokegroup.com)**

**stoke**