compass

Everything you need to know about integrations

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What is CRM ?

From maintaining telebooks to using advanced self-learning tools for maintaining customer records, business processes have come a long way. One such innovation in this domain is CRM.

Customer relationship management (CRM) is a term that refers to practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle,with the goal of improving business relationships with customers, assisting in customer retention and driving sales growth. Not only does it give you a clear overview of a customer cycle, but it also helps you find new prospects by more accurate targeting. Businesses use strategic, analytical and collaborative CRMs.

Customer Relationship Management

Is using a CRM enough for a company?

It is not uncommon for organizations to consider managing sales commissions and incentives on CRMs. Logically, the CRM contains all the data you need about your salespeople and their sales activity. Therefore, wouldn't it make sense to manage your commission processes in this one place that will avoid duplicating effort and data with a separate sales commission software. But the question is, is this the most efficient way of calculating incentives?

Unfortunately, the answer is a big NO.

The reason? Poor product fit.
Successfully running sales commission programs needs to tick a lot of 'To do' checklists and it is almost impossible to automate considering the scale of customization.
CRM brings all of the benefits of modern enterprise software over spreadsheets. CRM handles the CRM tangent very well and is used and loved by companies across the globe but it doesn't handle commissions well, simply because it was not built for that.

CRM allows you to set up custom fields, calculate formulas and configure a few dashboards and reports. But it won't allow you to manage commissions except for the most simple cases. Anything more and you will need a full development team and custom development on any platform is always much more complicated than originally envisioned. It almost always fails to deliver crucial functionality because the platform is not fit for its purpose. And leaves you hanging to build a new product from scratch thus defeating the entire purpose and crushing the cost v/s benefit.

A few inherent problems with CRMs are that

- Difficult to set up and isn't really an easy DIY tool
- Impossible to update when commission plans change
- Difficult to audit
- Impossible to automate payments like bank transfers and reward points
- No mechanism for nudges and notification to motivate

A typical commission and incentive calculation program involves elements like

- Input data
- Defining variables
- Complex logic
- Tax implications
- Approvals
- Payouts, both as bank transfers and rewards

CRMs cannot do it. The real problem with current programs is that they are either easy to administer or accurate and never both.

This is a major reason WHY Compass exists. With Compass, we are building a product that addresses both, is easy to administer where you have to define the variables and create logic and let Compass take care of the rest to give you accurate results.

But if program admins have to manually upload data onto another system to calculate incentives, it defeats the purpose making it crucial to have a system that is connected to the CRM to eliminate wastage of time and resources and possibility of errors.

The answer to that is a link called 'integration' that connects the two systems seamlessly and in real-time.

CRM Integrations

CRM systems begin by gathering information from a customer's website, email, phone, social media, and other sources and channels.With the advent of agile and dynamic work practices, today CRM softwares have very holistic use cases. It can be integrated with your favorite business tools such as survey data, billing and invoices, accounting, and many more.

But, while we see its application across multiple industries and various departments, the CRM value proposition caters more to the external stakeholders. Its vision, processes and metrics are oriented towards creating a strong customer experience. However, it does not efficiently automate the incentive calculation for your sales reps.

Now that we know what Compass can do to solve this problem, let us delve deeper into how it can seamlessly integrate data from the CRM software so that all you need to do is, set it up and relax !

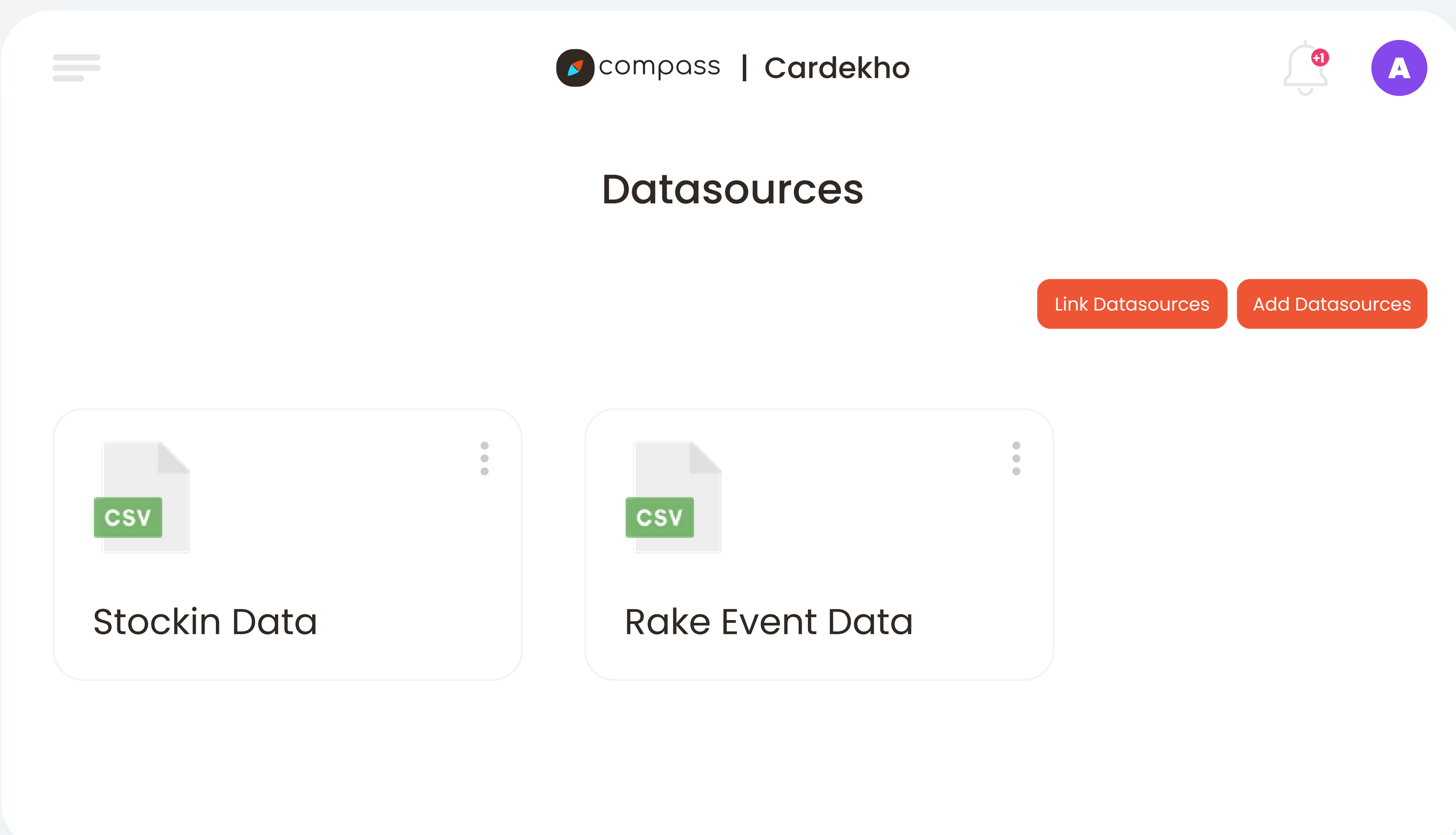
5 steps to ingrate your CRM software with Compass

You can integrate your CRM software with Compass in **5 simple steps**

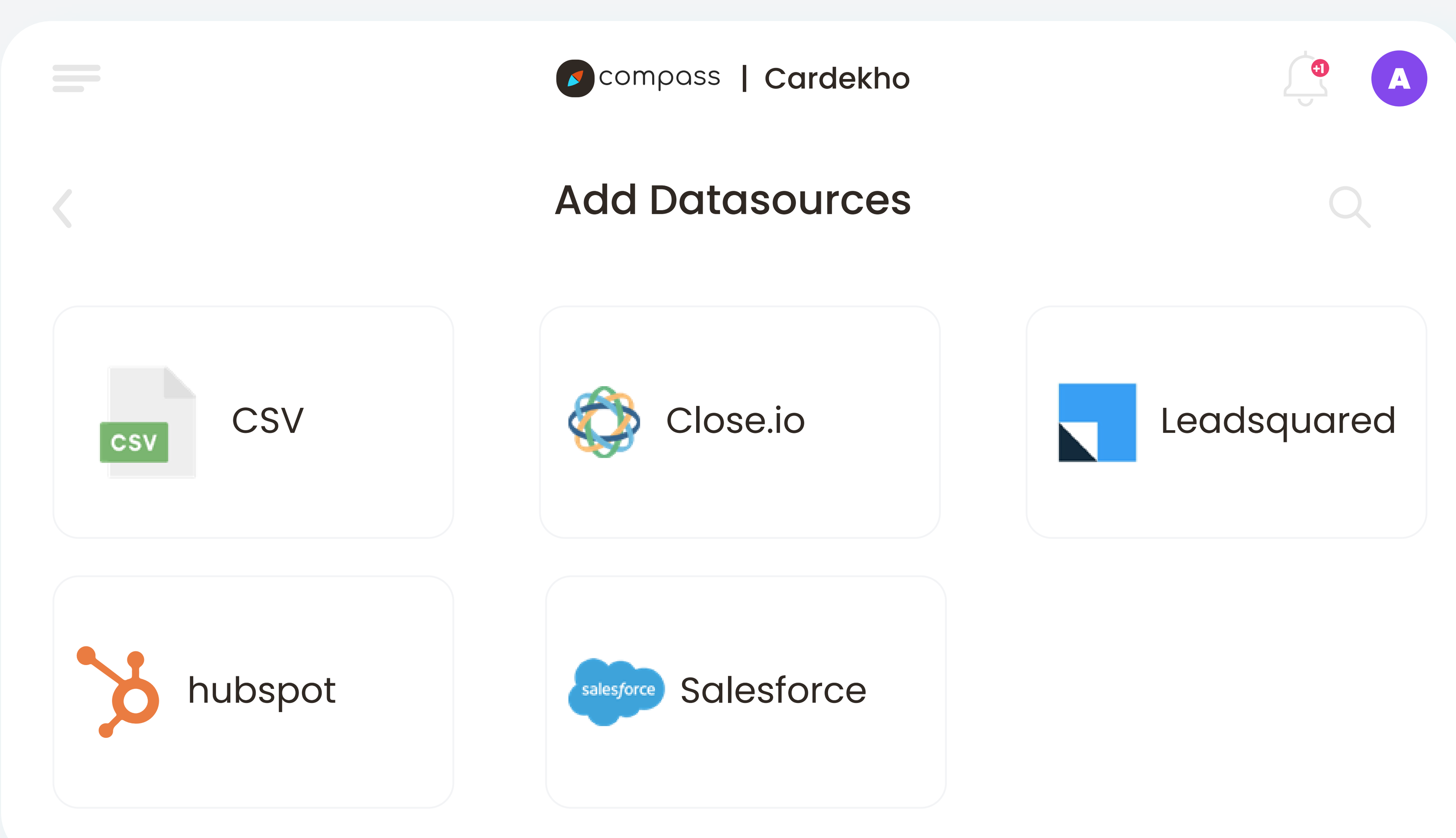
Step 1 Log into the Compass Account

Step 2 Set up your Compass Account

Step 3 Click on add data sources



Step 4 Select your desired CRM



Step 5 Create and launch contests

Benefits of integrating Compass with your existing CRM

5 reasons why integrating your CRM with Compass is the best decision you take

Straight to Program Creation

You can get straight onto incentive program creation for your sales teams and leave the data upload work to the Compass integration.

Real-Time Programs

Program admins can run live programs based on real-time performance and achievement data of the end-users.

Auto-Pilot through Compass Administration

Don't lose focus over complex manual incentive processing! Get self-started with what's most important - program creation, management, and tracking.

Uniformity across your Enterprise Systems

Get your data onto Compass in the same form that it is present on Close. This incredibly reduces the efforts of data standardization and compliance.

Single Source of Truth

Structural changes made on Close will now reflect onto Compass in real-time, ensuring that there is only one source of truth for the data.

Close.io

How to integrate with Compass

Compass seamlessly fetches data in real-time from Close CRM. This integration helps you autopilot contest publishing and have a single source of truth for all your sales achievement data.

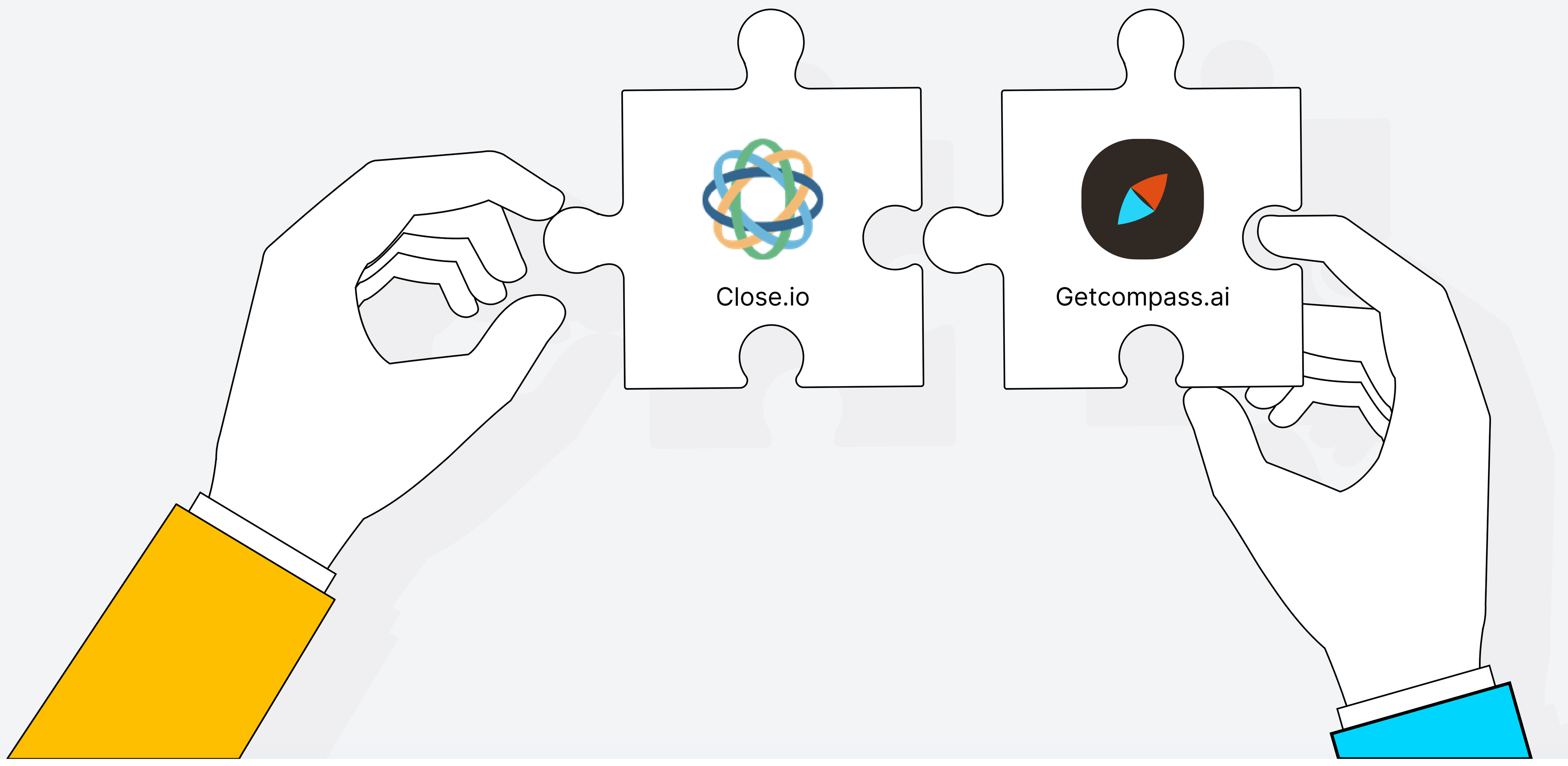
Sales leaders love Close for how the CRM is intuitive and, in a way, custom-crafted for that sales singularity - closures. Compass magnifies this focus of Close users by making incentive contest creation and automation a process that takes just a few minutes. In a world where incentives are inseparable from sale success - this integration conserves many valuable hours from a Sales leader's workday.

The program admin can directly get a data dump onto Compass from the Close CRM on-premise and get straight onto Program Creation, focusing on incentivizing and motivating his sales teams. The Compass team has set up a data source integration with the Close CRM that seamlessly fetches data in real-time. This integration offers dynamic gamified incentivization and improved engagement for sales teams.

This integration also removes the need for Compass admins to manually upload End User data (both user data and achievement data) via an Excel/CSV to create Programs. It even removes the need to make data connections and performance variables since even these (if configured in Close CRM) are imported into Compass via the integration.

Workings of Compass-Close integration

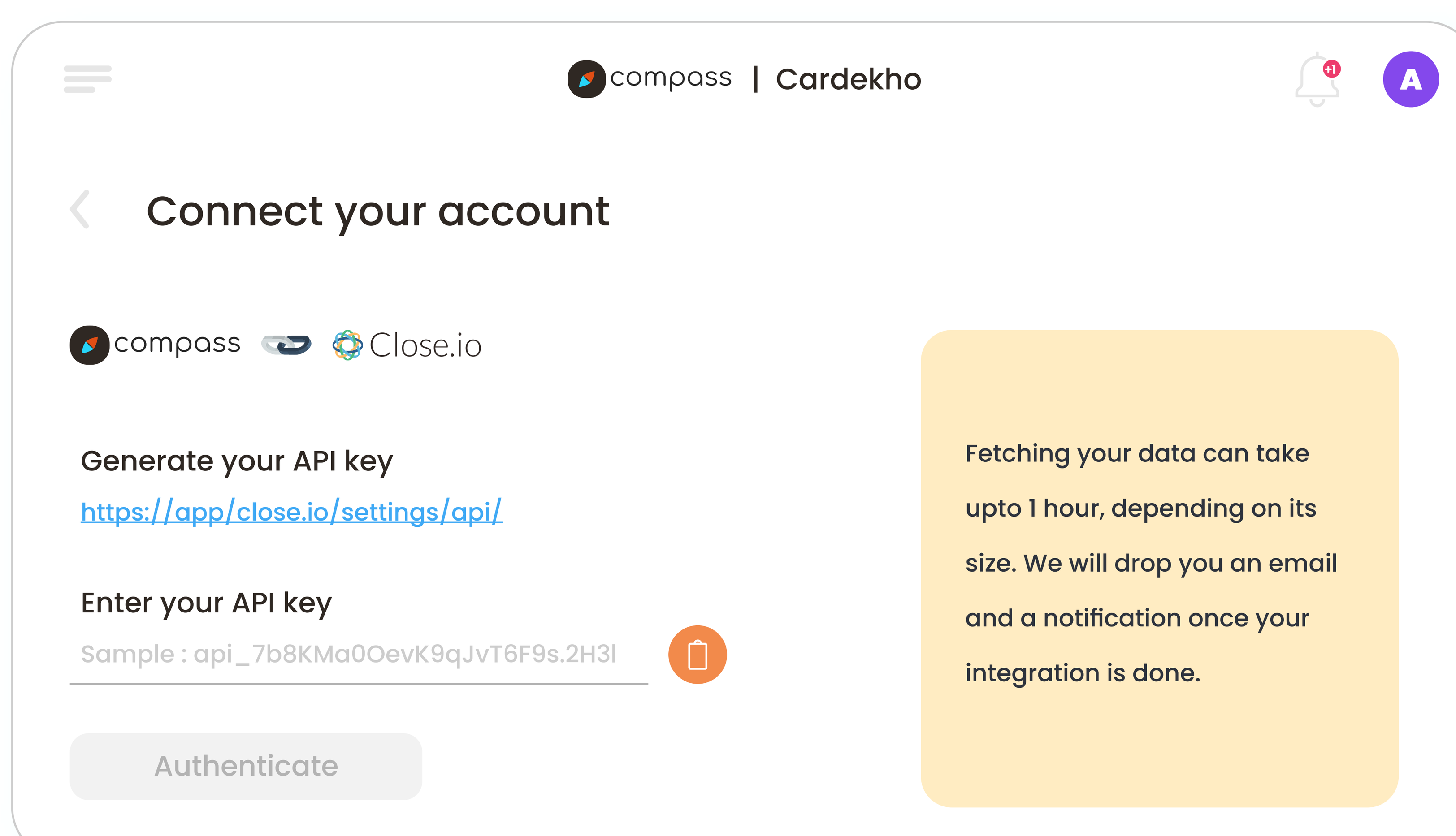
Below given is the brief process of connecting Close CRM with Compass.



Getting started

After the Admin user logs in and sets up their Compass account, they need to go to the ‘Data Sources and Variables’ menu. Click on ‘add a data source’ and select 'Users'. Close as a data source to take the user to the connection screen.

Clicking on the link below ‘Generate your API key’ takes the user to the Close API settings page (if already logged into Close). User can create a new API key here by clicking on the “New API Key" button on the top right. Return to Compass with the API key must be entered in the above connection screen to authenticate it.



Data Transfer between Close and Compass

Compass has built-in mechanisms to ensure structural consistency is maintained in the data transfer. It is crucial to verify the imported data from Close onto Compass for consistency. There are multiple objects and Fields in Close, all of which can be imported and synced into Compass. For large amounts of data, the sync can take to up to an hour. Compass sends an email to the admin’s email upon successful data transfer.

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New User Creation from Close

As per their set permissions, all admin users and sales agents are updated from Close onto Compass as Admin users and Partners, respectively. Compass automatically manages this process. User hierarchy and accessibility rights are maintained and kept the same on Compass, matching how they were on Close.

Different types of Data and Data Fetches

Compass can import below given types of Close Data into Compass:

1. Productivity-related Data consisting of Data such as number/type of calls made, number/type of emails sent and received, tasks, meetings, etc.
2. Pipeline-related Data covering the sales pipeline. For example; Interest expressed follow-up call, Demo schedule call, Demo Presentation, Payment made, Deal Closed, Retention Metrics, etc.

Below given types of Data fetches can be done by Compass:

1. One-time Data Fetch: When The admin executes the import from Close onto Compass, all data existing at Close is fetched at once.
2. Real-Time Data Sync: After the one-time fetch, all future data updates immediately reflect on Compass because of real-time data sync. This feature is enabled by default in the admin’s Compass account.
3. Third-Party Bulk imports: Imports done in Close before the Close-Compass integration will be fetched along with the rest of the data. However, we do not support auto-transfer of third-party imports which are added to Close after the integration.

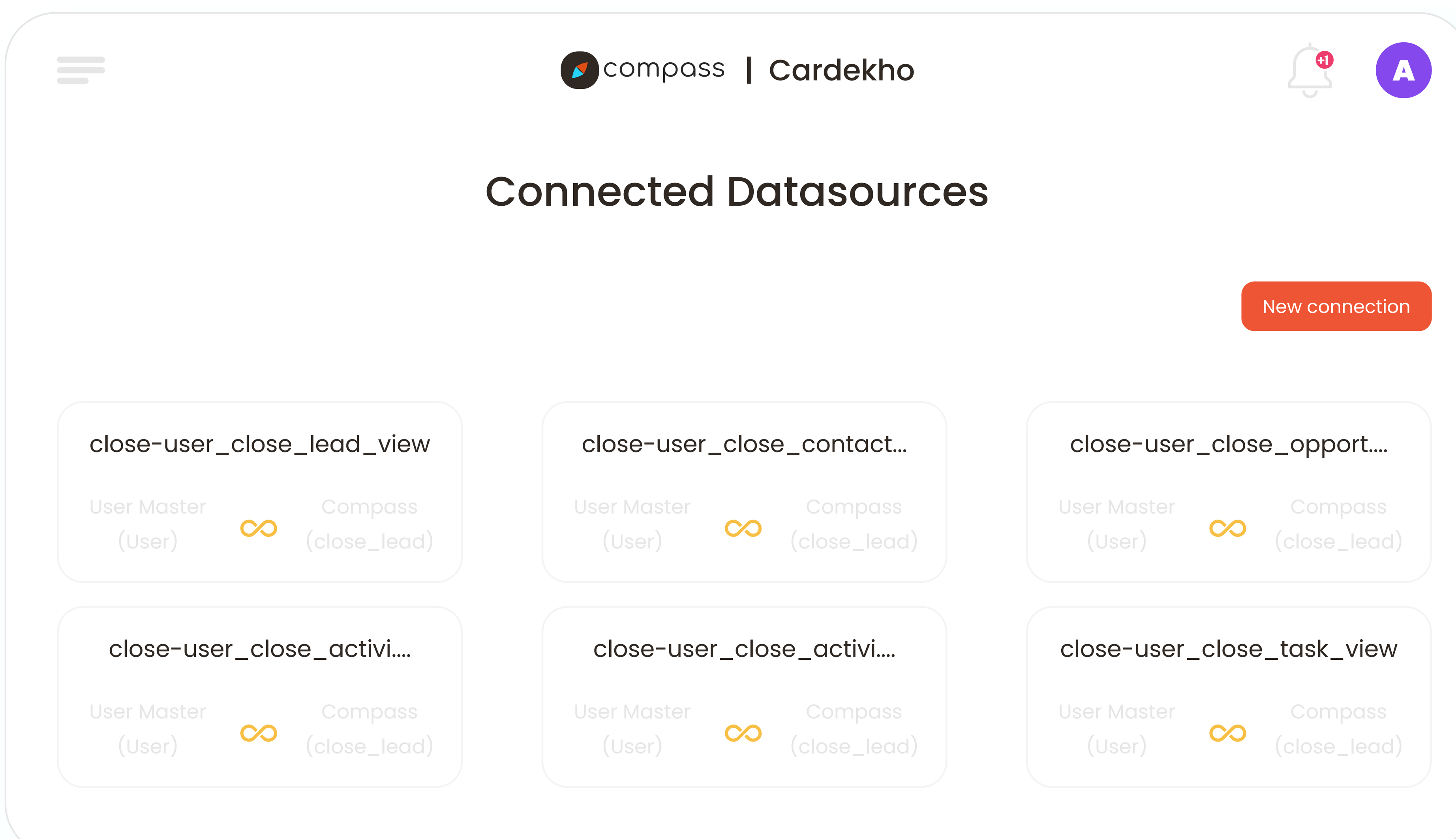
Pipeline and Metrics

Close allows the admin to customize their sales pipeline with opportunities. Opportunities add value to the Lead by specifying the status of the lead in the sales pipeline. Default values for Opportunities are 'Demo Completed', 'Contract Sent', 'Proposal Sent', 'Won', and 'Lost'. The admin can add custom Opportunity Statuses in the Organization Settings. These Opportunities can be viewed as a list or as a pipeline in Close. Compass auto-imports all Opportunities for all the Leads from Close. Compass can import even Productivity Metrics such as Calls, Emails, SMS and tasks, and sales Pipeline Metrics.

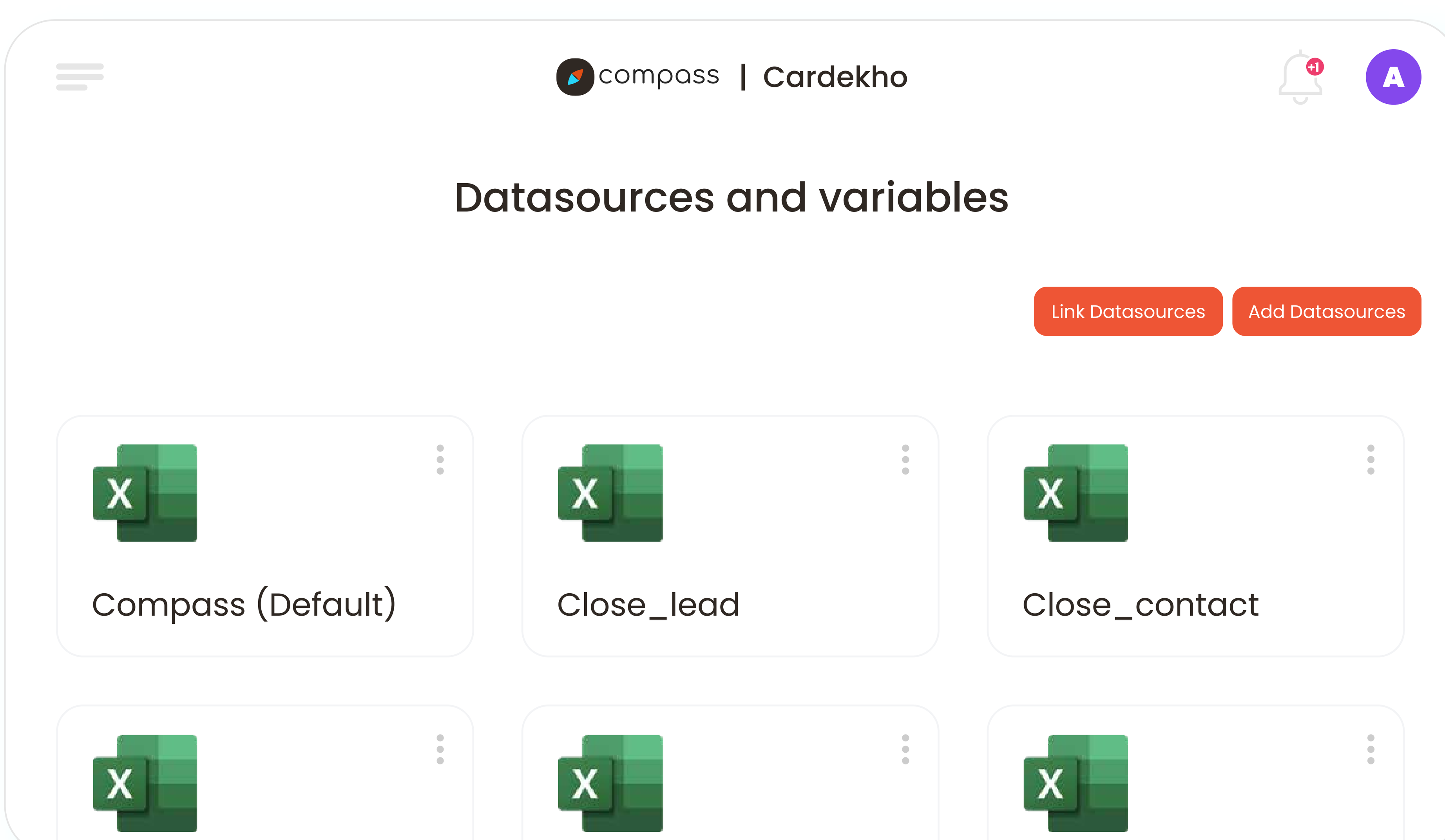
Standard Views, Variables, and Programs

The metrics coming in from Close CRM to Compass during the integration process are all auto-transformed to Compass-compatible data types to ensure the structural integrity of Compass with Close. On successful integration, the admin will be taken to Data Sources and Variables and can see all Close Objects, Fields, and Metrics of the admin's account auto-generated by Compass as per the imported data from Close.

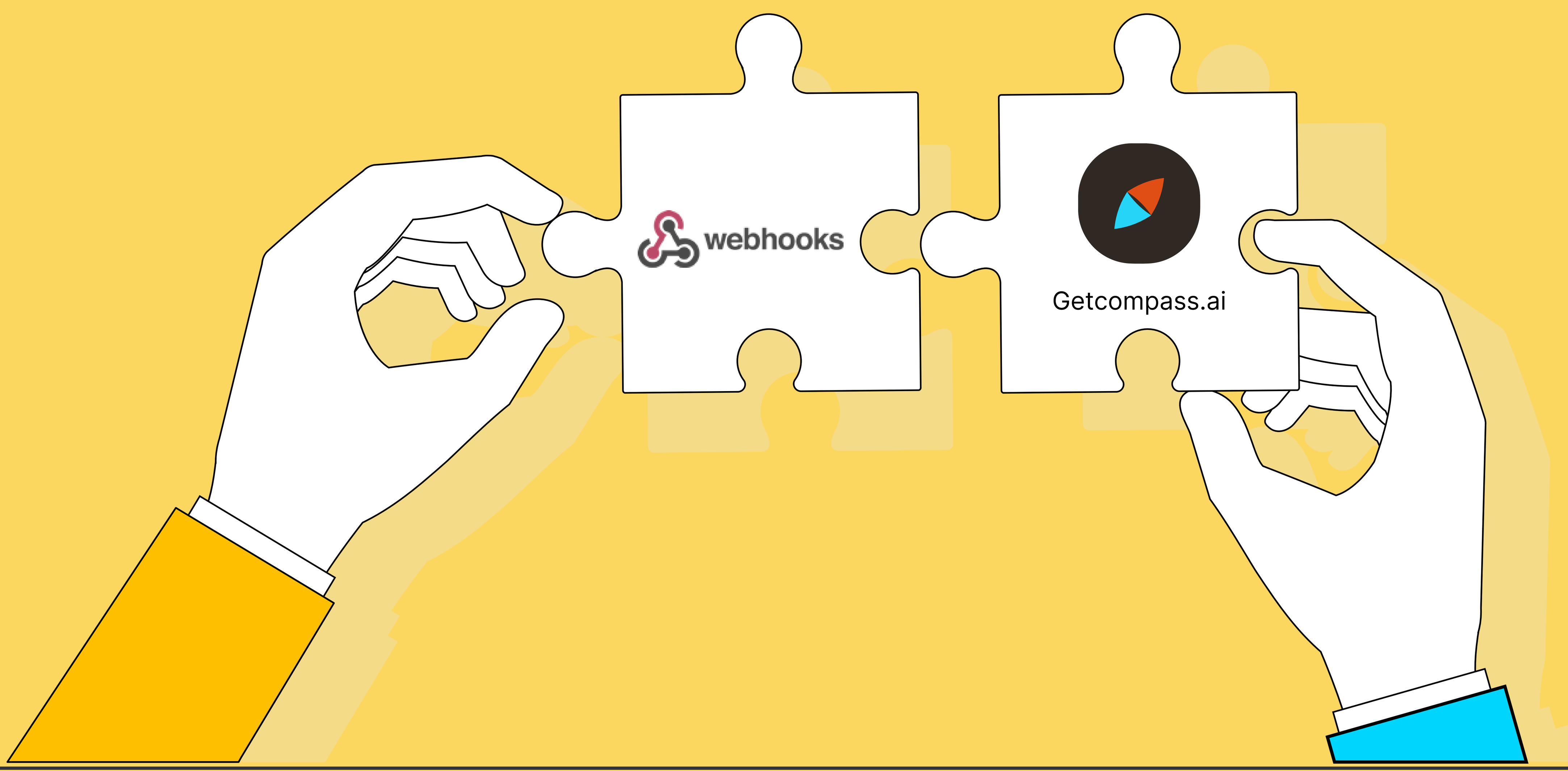
Click on 'Link Datasources' on the Data sources, and the variable screen shows all the views that are imported from Close. Here the admin can see all Views imported from Close as per leads, contacts, opportunities, emails, calls, notes, tasks, etc.



All data on leads on Close is imported to Compass.



Webhooks Integrations



If you are wondering how your company could take advantage of Compass if you do not have a CRM software or have a customized CRM, we have you covered. Compass is also compatible with other integrations such as webhooks. A webhook is an HTTP callback that is defined by the user.

Compass provides a public webhook URL for external organizations/client teams to push data into the Compass product seamlessly. This provides flexibility to client teams to push data with their own selection of table and corresponding fields along with parameters to define the unique identifier of the data points as well as the action that needs to be taken with the data point (e.g. create) This method of integration is best used in the absence of CRMs in the client tech infrastructure.The integration involves capturing information in JSON format, transforming them through an adaptive layer and store them in Postgres databases

Process to integrate webhooks to Compass

Step 1 Compass team shares the Webhook URL, Client ID and Client secret

Step 2 Client team finalizes the schema of the data which will be pushed through the Webhook and shares the schema + datatype + sample data information with the Compass team. An optimal way for webhook form of integration is to create the templates in Compass and upload the one-time data. This data dump with the schema and data type becomes the reference point for Compass.

(😀*It is important to maintain the schema after the first push of the data, if there are changes in the schema in the future, the same has to be informed to the Compass team in advanced in order to make the necessary changes)*

Step 3 From the webhook the Compass system automatically creates a database which is based on the sample data shared across earlier

Step 4 Eventually, the Client team can then share the new data dumps which should follow the schema of the one-time data dump shared across initially by pushing data records to the webhook URL shared in the above request body template.

Step 5 The database created within Compass system is then used to create/update view, variables and programs/campaigns based on business context and requirements

Components of a webhook request

clientid , clientSecret:

This is unique to every client organization and is provided by the Compass team. These details help Compass identify the organization the data is being retrieved from. This should be saved and kept secure by the organization.

Objectname

This is the table name of the data retrieved.

Id

There has to be a unique identifier in the data entry, it can be a separate name based on business context

Data

This should contain the data fields present in the table (objectname), this needs to be set by the client team and maintained throughout the subsequent data dumps. If there is a change in the schema, the same should be intimated to the Compass team beforehand - ideally this should not be the case

😮 In the above example there are 3 data fields (or columns) that are fetched from the client team are id (which is the unique identifier here), transaction_date, amount with the addition parameter of action that signifies whether the data point is created, updated or deleted

Action

This additional parameter helps in identifying whether the record or data point added needs to be created, updated or deleted in the event data

😮 The action parameter becomes important to distinguish between a record which needs to be created, an existing record which needs to be updated, and a record which needs to be deleted

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