Teams & Small Business

Improve & Organize Your Customer Data

A look at how to keep your customer data organized, up-to-date, and enriched across four leading SaaS Platforms using Contacts+ for Small Business

contacts+

Introduction

In this eBook, we'll walk through four select use cases to show how Contacts+ for Small Business can help you maintain an accurate view of your customers. These use cases highlight our integrations that allows you to keep an up-to-date and enriched customer list across all of your marketing and CRM SaaS tools.

The four specific use cases we look at in this book look at integrating data with Hubspot, Copper, Nimble, and Mailchimp. With a Contacts+ for Business account, you can implement these for yourself and sync your contacts two-ways with 150+ other apps.

Contents

mailchimp

MailChimp & Contacts+, Better Together

Tips to get the most our of two-way sync between Mailchimp and Contacts+

Understanding Lists, Groups & Tags

Your Contacts+ Team database **is one single database** where all contacts are pooled together. Not all contacts are the same, so most definitely rely on Contacts+ **tags** to segment your contacts. But how does this work in Mailchimp?

Mailchimp is different - you manage different lists, and each list holds its own database. That's why the first step in setting up a sync will be to select which Mailchimp list you'll want to sync with. In other words, if you manage several lists, and need to sync with several lists, you'll have to set up parallel syncs.

Note: Mailchimp recommends you work with one master list.

Each list in Mailchimp can be segmented by a couple of data points. What you'll use most frequently in Mailchimp are **groups and tags**. (Mailchimp used to have something called segments but that's recently been renamed to 'tags'.)

We consider groups & tags to be different:

- **groups** are customer-transparent – a subscriber can see and even manage which group they're in when they choose to change their mailing preferences. On landing pages, they appear as checkboxes so they are most often the result of end-user input

- **tags** are seen only by you. Subscribers can't see which tags they've been given. They help you segment your audience.

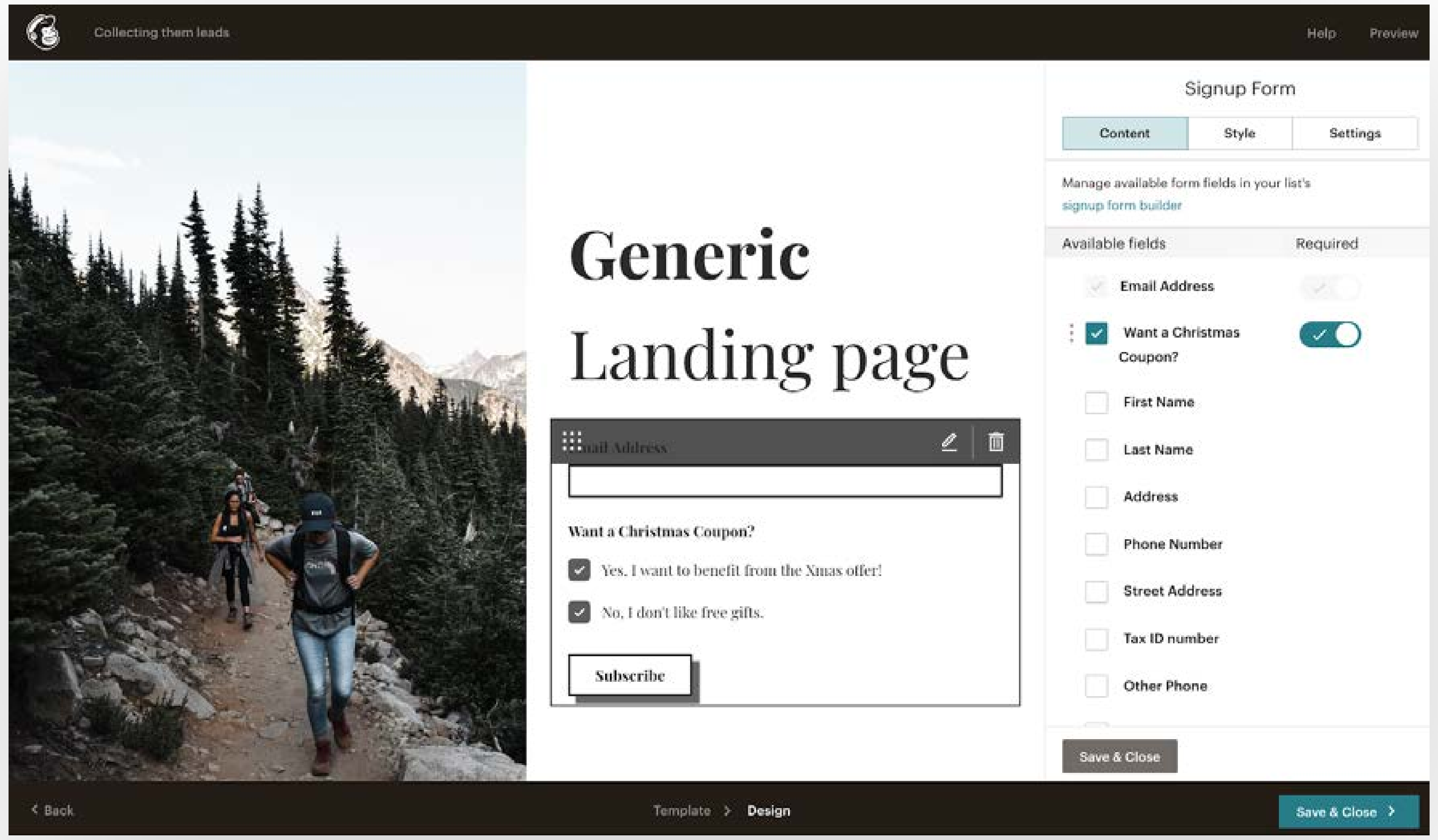
Winning email marketing means being in full control over your Mailchimp database. Both groups and tags are elements that you'll want to bring over in your sync with Contacts+… and vice versa - Contacts+ can manage groups & tags for you!

"Winning email marketing means being in full control over your Mailchimp database."

Landing Page Management & Audience Segmentation

A sync with Mailchimp would start off with **two simple rules** that represent the two-way sync. For optimal results, you will want to tweak these rules. There's no right way to set up a Mailchimp sync so we'll take you through an example.

Say you're running a campaign through Mailchimp which involves a landing page to capture either new subscribers, or to ask existing subscribers for a bit of engagement (I do hope your landing page will look less generic than ours). The submissions to this page are linked to my main Mailchimp list which I'm keeping in sync with Contacts+.



As you can see from the screenshot, this landing page keeps it very simple. It collects the visitor's email address, along with whether or not they want to pre-register for a Christmas coupon. To stay within Mailchimp's terminology, when a customer answers ‘Yes’, on the form from the previous page, it will register as a **group** option. When you consider syncing Contacts+ with MailChimp, you’ll want to tweak the rules in order to capture that information in Contacts+ properly.

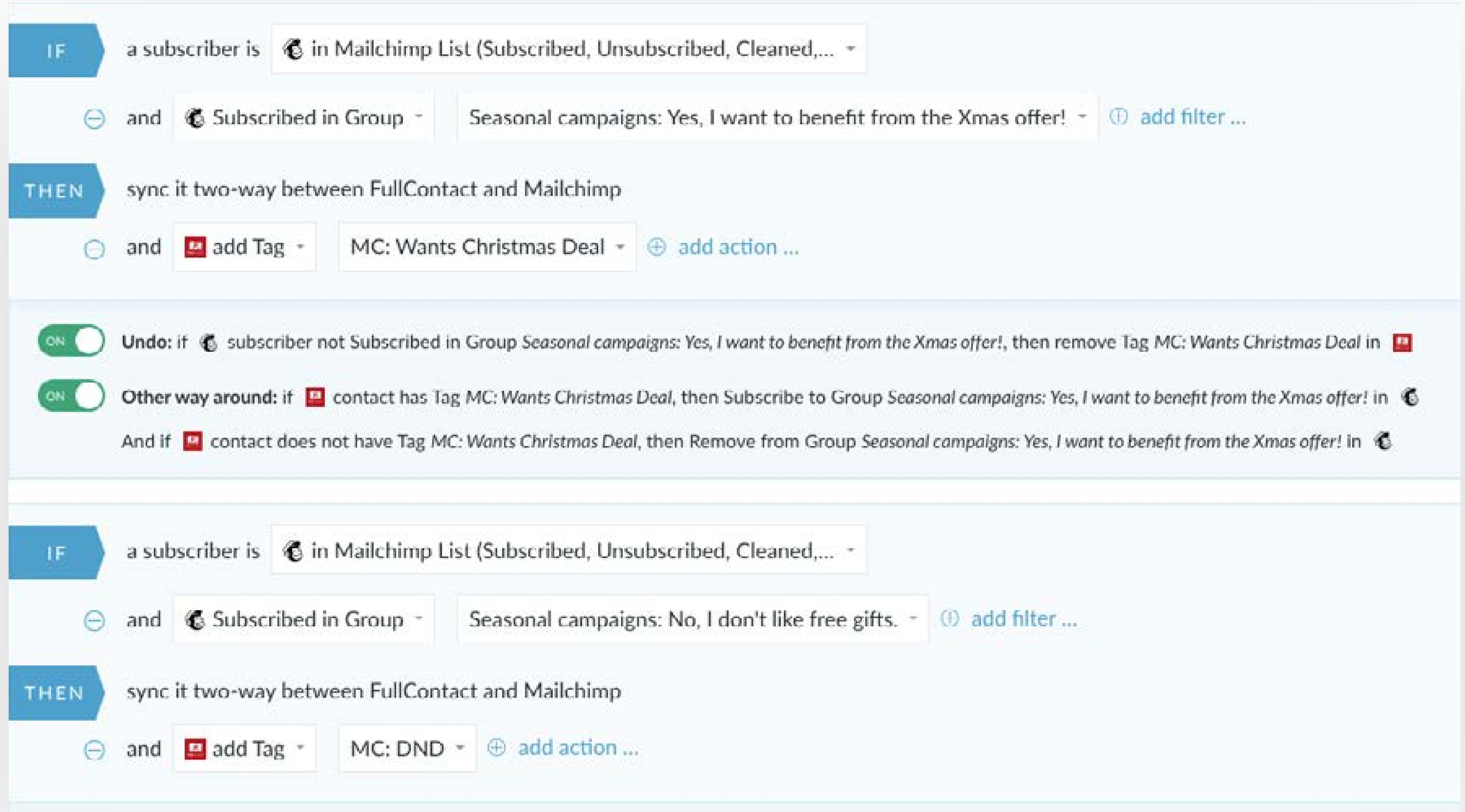
As you can see, there’s lots of creativity that can be applied to these syncing rules. Let’s go over them one by one.

First off, in the image on the right, I’m disabling the first rule that syncs from Contacts+ to Mailchimp. The reason is that we don’t want to just send anyone in Contacts+ to a mailing list. That would not be ok for this list, and given GDPR regulations, it rarely would be.

The second rule that moves contacts from MailChimp into Contacts+ gets broken down into three new rules. Each rule sees a different filter and a different tag applied in Contacts+. In order to set up these rules, inside Contacts+ we created three tags that I can link these Mailchimp responses to.

In the end, this sync recipe helps me to:

- Capture **positive** response to the Xmas campaign
- Capture the **negative** responses (if any!)
- Track **non-responses** to reach out to these people via other channels



Enriching Leads Through Contacts+

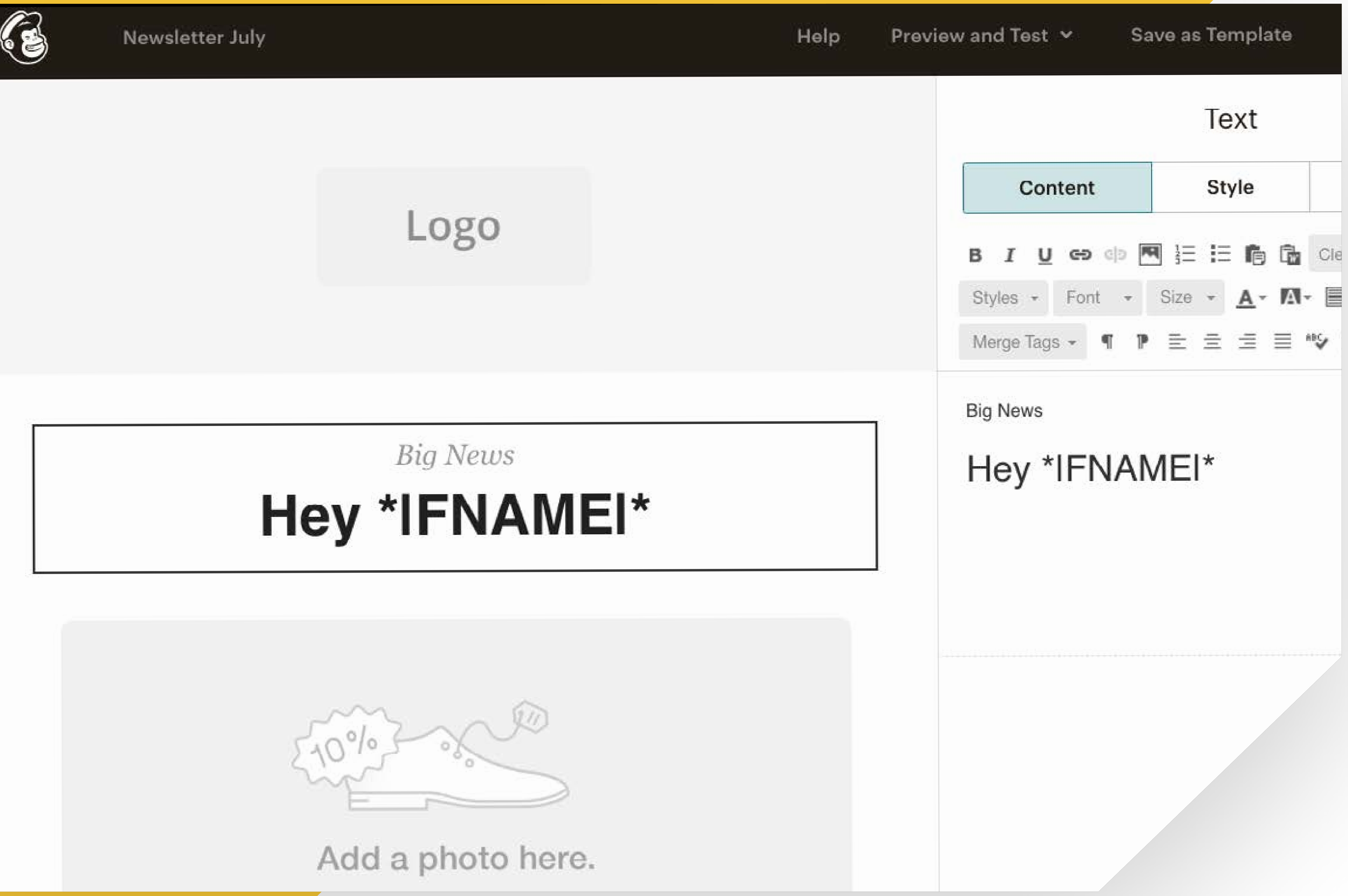
In the example above, even though the rules all depart from MailChimp, and we turned off the sync from Contacts+ towards Mailchimp, it's still syncing bi-directionally. This delivers some very nice side effects which we'd like to get into.

For one, you can now simply tag someone (or bulk tag several contacts!) in Contacts+, and they will be automatically registered as “wanting a coupon” in Mailchimp. And in return, Contacts+'s enrichment does magic to your contacts data.

Look at what happens when our landing page captured a lead that filled out our form. Remember, we only asked for the email address.

The changelog not only shows that a new contact was added to the Contacts+ database, it also shows the right tag was added to the contact so we know this guy wants a coupon.

But then, not much later, we registered some updates in Contacts+. Since contact info was found on the web, Contacts+ now found out something more about our lead, like a full name, and where he works.
Now there is clean and complete contact data! If you choose to apply this update to the Contacts+ database, the bi-directional sync will sync that updated contact's data back into Mailchimp.



Initially, you were looking at a bare email address, but thanks to Contacts+ enrichment, you can now actually send out personalized mailings. Mailchimp stores all extra contact attributes like a first and last name in merge tags. It is the FNAME merge tag that you'd need in this case.

There's a huge difference between an email that starts with "Hey, you" because you don't have the data, and an email that starts off with a warm "Hey, Aron".

Contacts+ & Mailchimp, better together.

Syncing Contacts+ with a Hubspot Team

Tips on how to improve your business card imports and customer identity inside of Hubspot, using Contacts+.

How to Get Started?

Hop over to the heading "Sync Sources" under your Contacts+ for Business workspace settings, because this is where we'll have Contacts+ talk directly to Hubspot moving forward. Completing this step couldn't be easier if you are already logged into Hubspot : it's just a matter of granting access to PieSync, which is the technology that what will sync the data between Contacts+ & Hubspot.

You'll be greeted with the default setup of a Contacts+ - Hubspot bi-directional sync two rules representing each direction. Let's see how these rules can be tweaked to fine-tune business processes.

Hubspot /
Hubspot CRM

Sending Business Cards into Hubspot CRM

Let’s take a look at the first rule: moving contacts from Contacts+ into Hubspot. At Contacts+, we’re well-versed with scanning business cards so this sync is pretty handy.

The ease of use for the built-in sync is due to the fact that a lot of contact attributes automatically sync. Name, Prefixes, Company name, Job Title, Notes, Email, Phone, Fax, Website, Address immediately populate the contact attribute fields in Hubspot.

Note that these fields continuously sync two-ways. If you were to further process this contact in Hubspot, the information syncs back into Contacts+. When Contacts+ attains on updated information through its enrichment, it can sync back into Hubspot to update the record there.

There are certain default fields inside the contact schema of Contacts+ that you may even want to sync to custom fields in Hubspot. They could be present on the original business card, or Contacts+ may pick up on them, so don’t let that information go to waste. Those fields are “Department”, “Nickname”, “Assistant’s name”, and several social media identifiers.

Who is This? Who Knows This Contact?

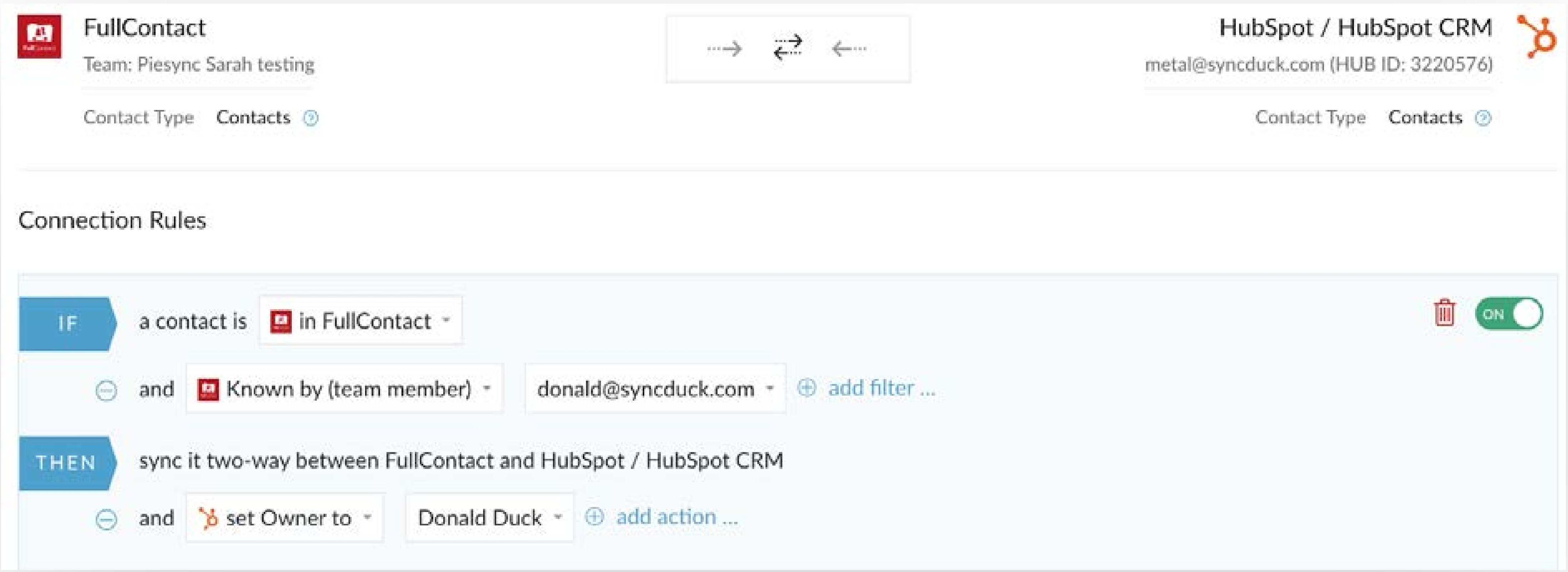
Syncing data in and out of Contacts+, and getting those contact records dropped inside the company's main CRM is very much a process of set-it-and-forget-it.

Over time you'll see contacts being added automatically in either system, which is why it's especially important to leave some sort of a trace so you know where the contacts came from.

For instance, colleague Donald meets prospect Bart and scans Bart's business card through Contacts+.

The contact gets added into the Contacts+ shared workspace. In this case, it's important that the whole company now knows about this new contact, Bart. But it's also important that the whole team knows that it was Donald who met Bart. In Hubspot, this is commonly set through the contact owner.

Consider this simple sync rule for each team member that needs its ownership transferred. We'll see all contacts added into Contacts+ automatically attach to the respective owners in Hubspot:



On the other side, your Hubspot account will be equipped with various mechanisms and integrations, that constantly bring contacts and leads into Hubspot. Think about website form entries, emails, webinar participants, and so on. Those contacts deserve the Contacts+ treatment, so a rule needs to be in place to ensure they get sent from Hubspot to Contacts+.

This rule comes with an “add action” option. This action could be to “add a tag” so that you can easily filter on these
contacts inside Contacts+ afterwards. Here’s a search in Contacts+ for contacts that still are labeled as Leads.

This is what Contacts+ is all about. A continuous influx of new contacts, and contact updates from Hubspot into Contacts+ – and vice versa. All Hubspot’s data is automatically made available inside the Contacts+’s web and mobile interface.

And once a contact is in Contacts+, their data will also be synced to your Google Contacts, your Outlook, or your iCloud accounts too!

“This is what Contacts+ is all about. A continuous influx of new contacts, and contact updates…”

:copper

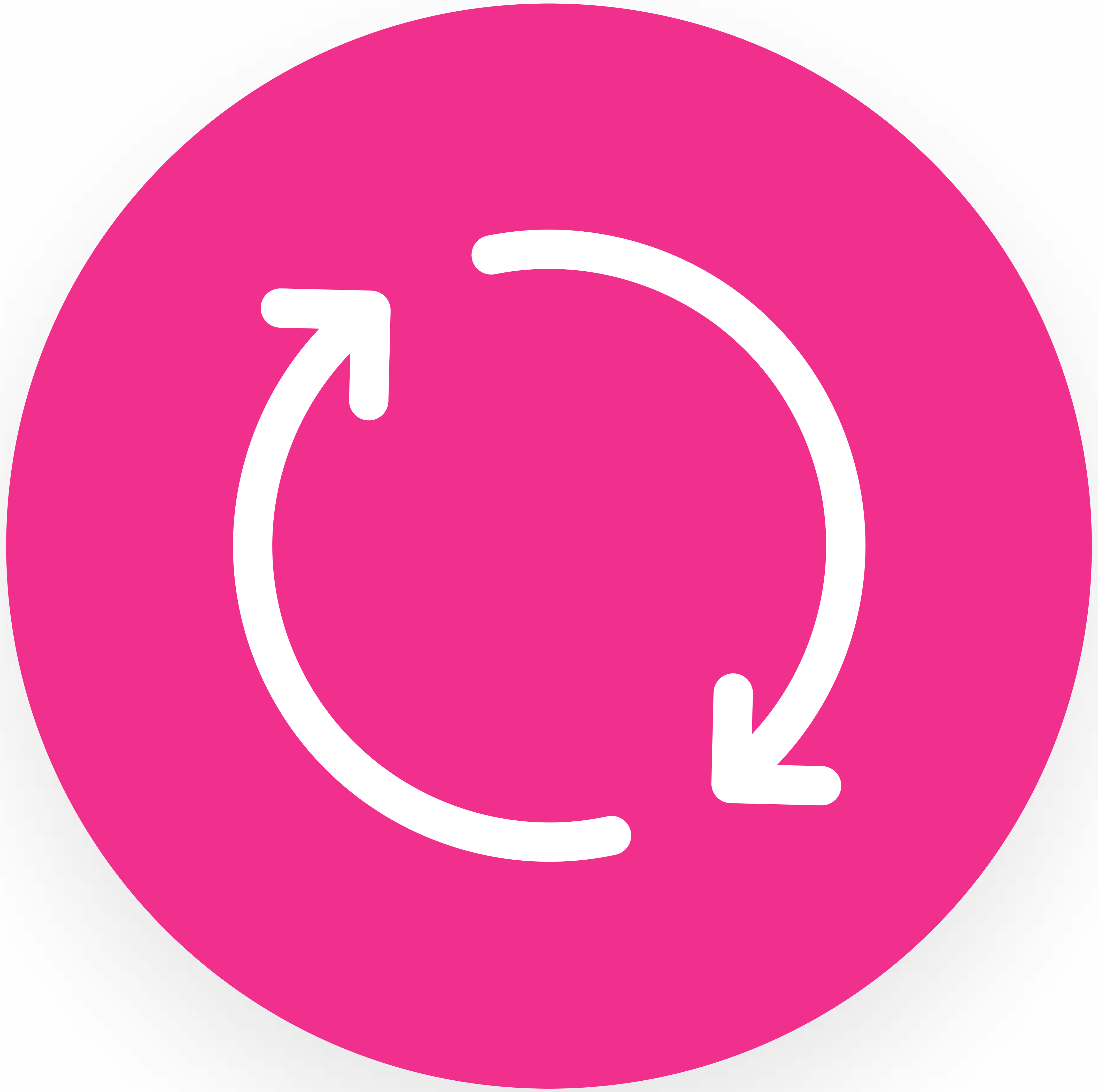
Extending Copper CRM into Contacts+

How to get a great contact management and CRM solution by syncing Contacts+ and Copper.

Essentials of a Good CRM Sync

Copper, which you may remember from its previous name Prosperworks, is the CRM optimized for a G Suite environment. It delivers a native sync to your Google assets such as Meetings, Mail & Contacts.

Let's focus on contact management, because not having the right contact data at hand means all else will fail. Meetings are held with contacts, invoices are addressed to contacts, emails are sent to contacts, and incoming calls on your phone get proper caller-id because of your phone knowing them as… *contacts*.



Copper comes with a handy browser plugin that sits inside Gmail, allowing you to push contacts you are interacting with in Gmail directly into Copper. Copper then makes sure this data syncs back to your Google Contacts. And since your phone reads into Google Contacts, your CRM data is always with you.

A workflow available out of the box:

First, you meet new people inside your mailbox and push them into Copper as a new lead or contact. Then, in Copper you'll continue to do all of your contact data management, relying on Copper's continuous data flow into G Suite to ensure data consistency.

Somewhat disappointingly, Copper's data sync only goes one way. This means that if you make some changes directly on the source data in Google, like through your phone's contact app or inside the web interface of Google, those changes will not register back into Copper.

If you are reading this, you know Contacts+ has already mastered two-way syncing with Google Contacts. Furthermore, you're not limited to syncing with G Suite. It supports Outlook and iCloud, too. So, Contacts+'s direct two-way integration into Copper's lead and contact data can overcome all of these limitations and more.

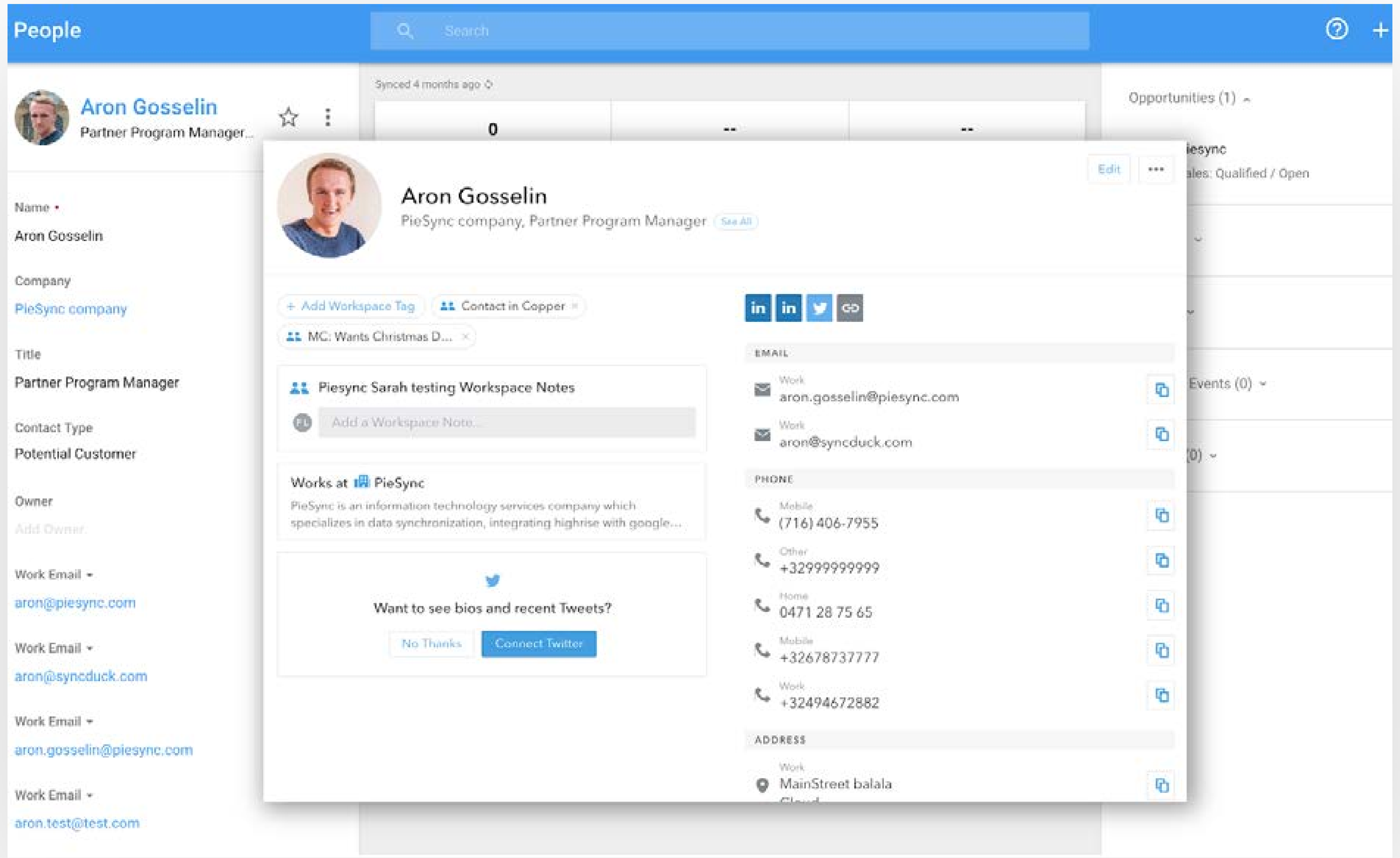
How do we set this up?

Preparing Copper & Contacts+ to Work in Tandem

Inside Copper's settings, you'll want to turn off their one-way sync, since Contacts+ is going to take care of syncing Copper data and Contacts+ data in two directions. Contacts+ in turn will also ensure your Google is up to date.

Then hop over to the 'Sync Sources' under your Contacts+ Business settings, because this is where we'll have Contacts+ talk directly to Copper moving forward. You'll need the Copper API key to contiunue which the system will explain where to find.

When Contacts+ runs your company's entire address book, a two-way sync makes sense. Contacts+ pulls in data from external sources and is the best place to do contact cleanups. But in Copper CRM, you're also doing a fair amount of contact management. Both interfaces should contain the same information.



Leads or People...
or Why Not Both?

In setting up a sync with Contacts+ and Copper, you have to choose whether to sync Copper Leads or People. These are the two stages of Copper contacts. As the typical sales process dictates, as soon as successful contact has been established, Leads should convert into People along with an Opportunity and an Account.

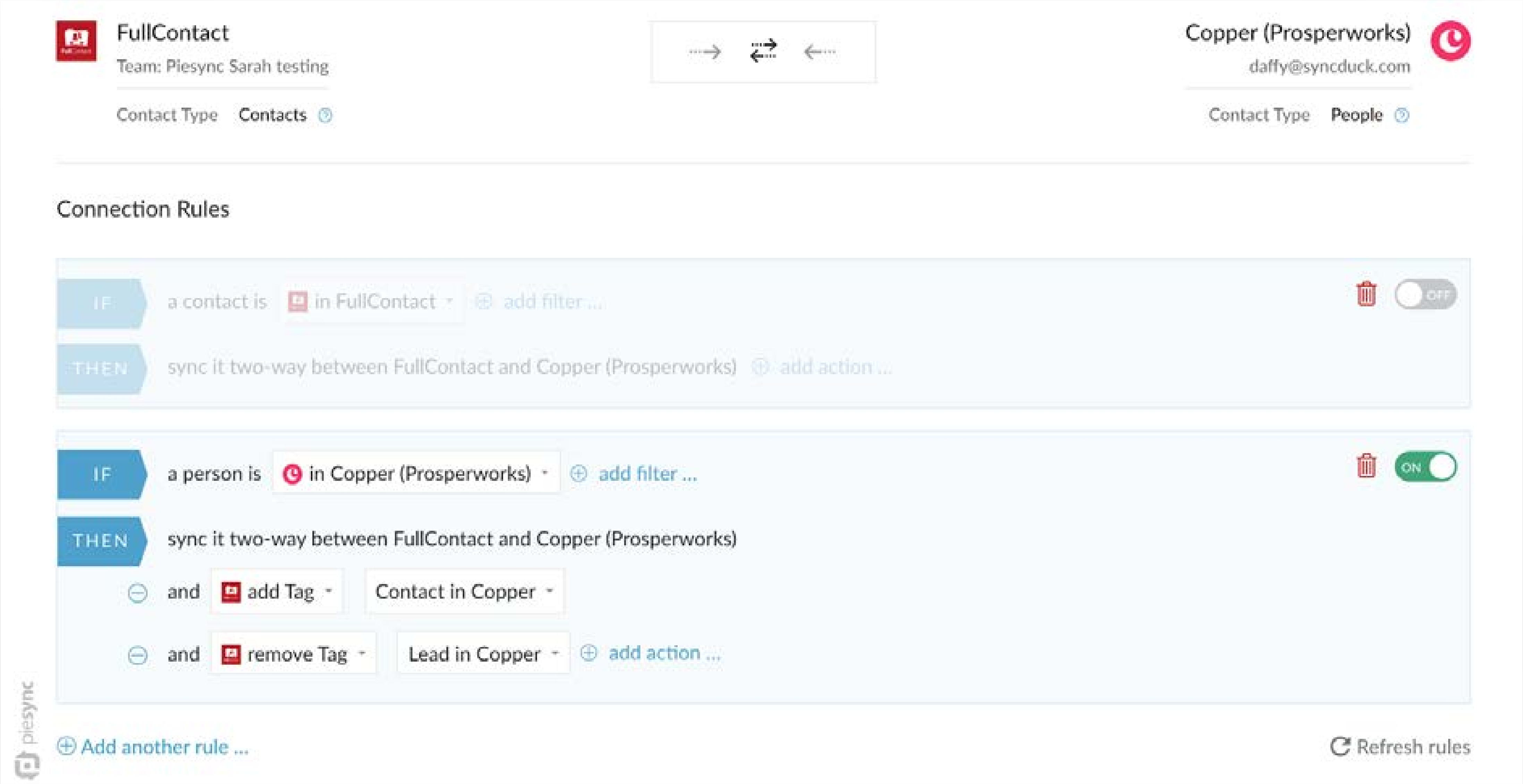
Technically, leads and contacts exist as separate databases inside Copper, while Contacts+ just works off a single database. This means you have to set up separate syncs that run concurrently if you need both objects to be kept in sync with Contacts+:

A first sync from Contacts+ to Copper Leads,
A second sync from Contacts+ to Copper People

Since we're going to have two syncs run side-by-side, it's important you respect some guidelines to avoid conflicts. For the sync with Leads, you'll want to restrict the sync by means of a filter.

Only contacts in Contacts+ with the tag 'Lead in Copper' will sync back into Copper. You don't have to apply that tag to Leads manually, you'll actually see it appear on a lot of contacts already thanks to the second rule which looks at leads in Copper and attaches that very tag in Contacts+. Magic!

Now, for the sync with Copper People, we need to be careful when setting up the rules. You want to turn off the



“*Your contact data needs to be in check.*”

first rule that would move anybody in Contacts+ straight into Copper. Otherwise you’re sending contacts into Copper directly, and you would be bypassing the crucial CRM process of converting those leads into qualified contacts.

The second rule from Copper to Contacts+ should of course be left active. It will label those qualified contacts accordingly in Contacts+, and - clever trick - it will remove the “Lead” tag if that is still on those converted leads.

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There you have it – a continuous influx of new contacts and contact updates from Contacts+ into Copper and vice versa. All Copper data is automatically made available inside the Contacts+ web and mobile interface. Once you find a contact in Contacts+, that contact will also be synced to your Google Contacts, your Outlook, or your iCloud accounts too!

nimble

Nimble for Simplified Contact Mgmt.

Setting up synced and up-to-date contact management across several sources.

Contact Management for the Hybrid G Suite, Outlook & iCloud User

Open your smartphone's address book and ask yourself: where are all of these contacts stored?

- On your phone?
- On your sim card?
- On iCloud?
- On Google Contacts? Your personal Gmail? Or the professional G suite account?
- On your company's Outlook/Exchange server?
- In your CRM?

They seem to be all over the place and worst of all, you can't really be sure what the origin of a contact is.

Where phone contacts are stored doesn't seem like an important question - as long as they keep showing up, all is fine, right? Think again. Knowing where you store your contacts becomes important when you switch to a new phone, or when you want to do some extensive contact cleanup.
Sure, having them all neatly organized in a CRM is one thing. But there are limitations to this.

- When you ask Google Assistant, Siri, Alexa, or Cortana, they can't look into your CRM.
- The software inside your car? It doesn't upload your CRM.
- When someone calls you? Caller-ID doesn't read into your CRM.

All of these examples still count on those contacts being stored deep inside your phone's address book, not a cloud app like a CRM. To make matters worse, it's not uncommon to work across multiple email addresses like your company's Outlook, your private business' G Suite, your personal iCloud, etc.

Even in 2019, synchronized contact management across G Suite, iCloud & Outlook is far from straightforward. For frustrating but obvious reasons, companies like Google, Microsoft, or Apple are not eager to have their proprietary contact services play nicely together.

In fact, it's probably the reason why you would rely on Contacts+ as a dedicated source to store your contacts instead. It just works and keeps all of the accounts in sync. For these very same reasons, you would consider a CRM like Nimble to take your contact management to new professional levels.

Why Use Nimble Alongside Contacts+?

Cookies and milk, peanut butter and jelly, pasta and pesto… some things are better when combined. The same applies for Contacts+ and Nimble.

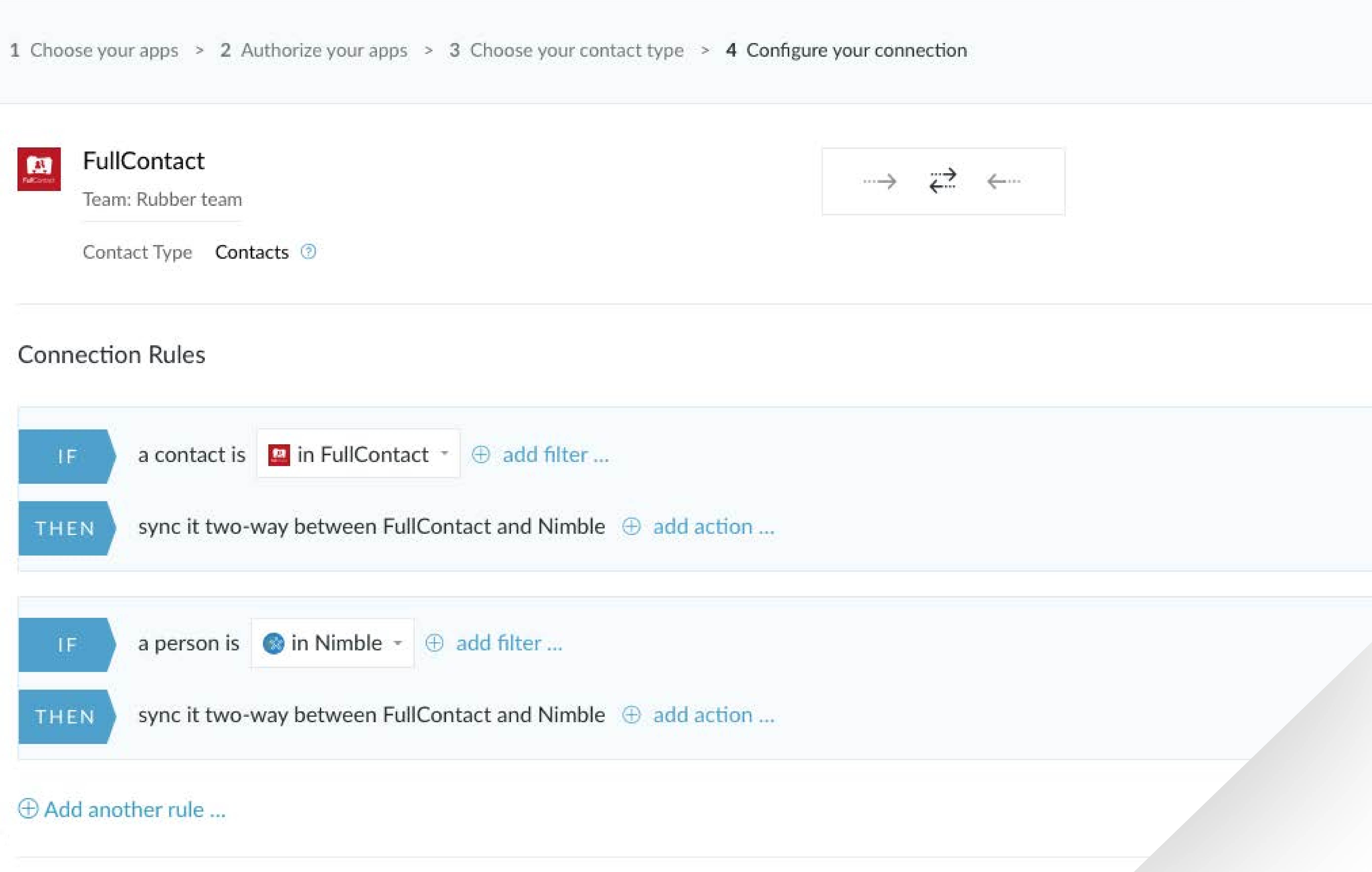
Nimble is a social CRM targeted specifically to Office 365 and Gmail users. It's a CRM that follows you everywhere you work. Nimble can be used in varying degrees from a simple contacts manager, like Contacts+, or as a full CRM with features like sales forecasting & pipeline management for $19 per user per month.

Working with several colleagues? No worries, Nimble pools contacts together, just like your Contacts+ for Business account.

As for a lot of CRM's targeted towards subject matter experts, Nimble's core database is your ever-evolving contacts database. So of course it's important to ensure this database is kept in sync with Contacts+. This way you can enjoy best of both worlds:

- Contacts+ to keep contact data clean, and in sync with your email accounts and smartphones
- Nimble to fulfill all CRM duties for your business, with its database constantly fueled by Contacts+

Nimble pulls contact data from your social networks but it primarily takes contacts from your regular email accounts. Plus, all the integrations you would need happen right inside Nimble's settings.



But it's not always that simple, is it? What if you have different email accounts? What if different team members use different mail providers? It could get needlessly confusing setting this up inside of Nimble.

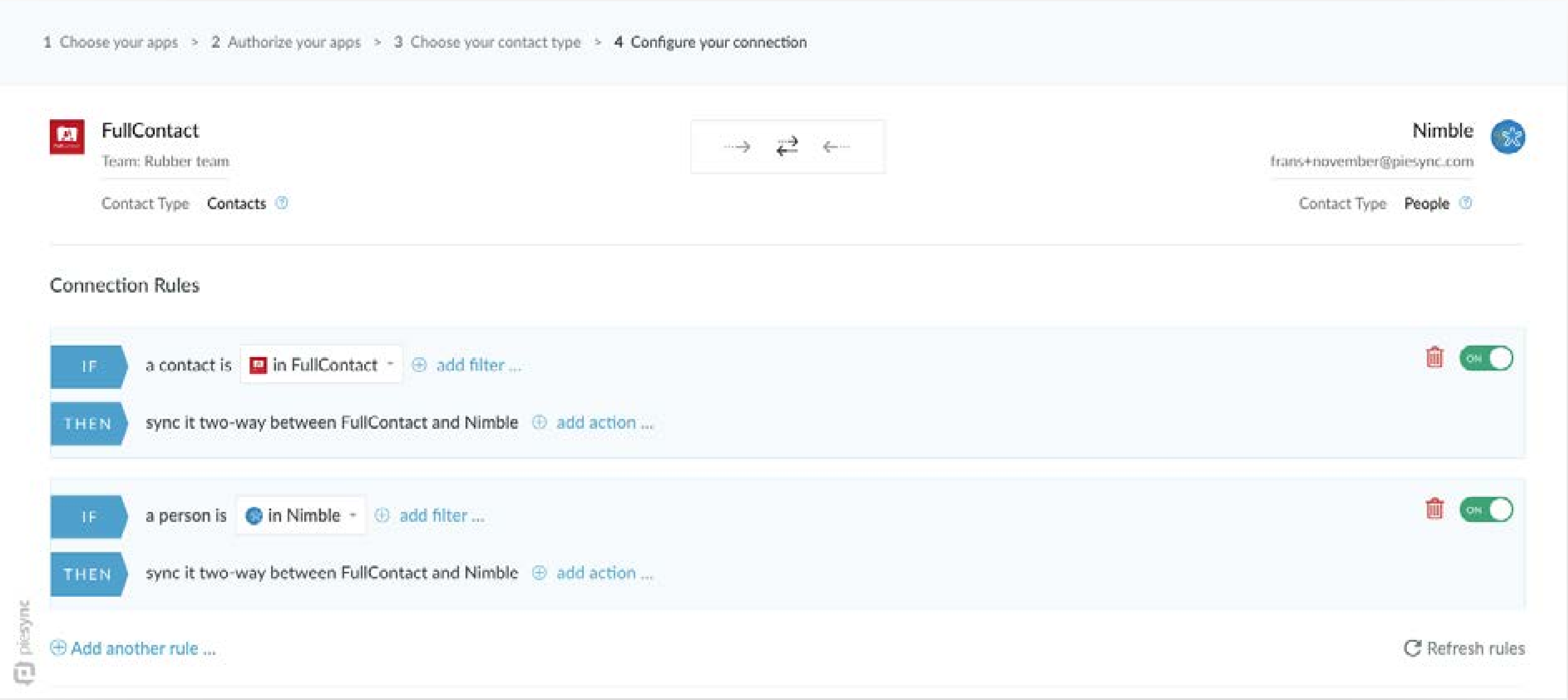
Since Contacts+ is already natively connected to various email accounts, one single connection between Contacts+ and Nimble is all you need – greatly simplifying what would otherwise be a quagmire of integrations across various email accounts.

"Cookies and milk, peanut butter and jelly, pasta and pesto… Some things are best combined. The same applies for Contacts+ and Nimble. "

Setting Up a Sync Between Nimble & Contacts+

The direct sync of Contacts+ from and to Nimble lets you skip Nimble's built-in contact sync, so you can enjoy two-way syncing and contact integrity across all of your email accounts in one single connection. Inside Nimble's settings, you can still connect your Gmail account so it pulls in email conversations, but you may want to uncheck the 'import contacts' feature.

Then, inside Contacts+, hop over to 'Sync Sources' and add a connection to Nimble. Depending on how you need contacts distributed across both apps, you can either keep or change these rules. The default setup will make Nimble and Contacts+ identical. For every contact in Contacts+, the sync will create or match existing contacts in Nimble… and the other way round!



A big thank you to our partners at PieSync for creating this content in collaboration with us. We're proud to have our two-way sync feature in Contacts+ for Small Business powered by PieSync.

For more information about our small business plans and pricing,
visit contactsplus.com/teams.