

The Integration Equation: CMS + CRM = Data Power!

Tech Forward 2024

October 2, 2024

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Digital impact for the greater good

Message Agency is Tech Impact's Digital Services Division.

We're a full-service digital agency that helps nonprofits use web-based technologies to enlighten, educate, engage, and enact change.

What will you learn today?

- Understand **why it's beneficial to integrate data** across a CMS and CRM—and what opportunities you are missing if you don't.
- Know more about the **range of options** for synchronizing data.
- Be equipped with **practical steps** to do some of this yourself.
- Be better prepared to make informed decisions about how and when to **work with a developer**.



DO IT YOURSELF



EXTRA HELP



HIRE EXPERTISE

"We have data in too many places."



How It's
Supposed
to Be



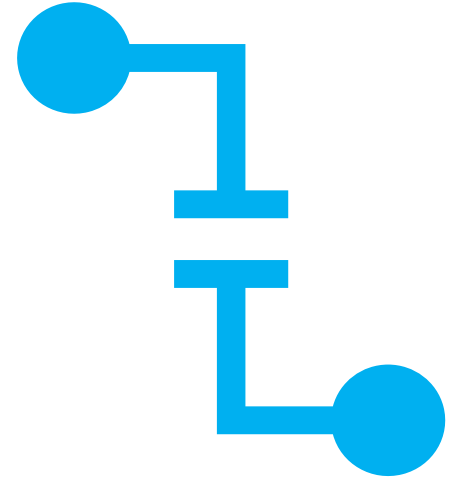
How It Is



Imagine
How It
Could Be

What's Stopping You? The Great Disconnect

- Distinct Data: On One Person, In Many Places
- Data Dead Ends
- Dreaded Duplicates
- Divorced Experiences
- Data-Driven Decisions



What Opportunities are You Missing?

- Personalization and Preferences
- Audience Segmentation
- Engagement Ladders
- Data as Content
- Division of concerns—and labor



“We need an integration.”

CMS + CRM: The Myths and Reality



Myths

- It's too difficult. It's just easier to move data manually.
- It always requires a developer and custom code.
- It will be really expensive.
- It won't be reliable and will need constant maintenance and data cleaning anyway.

Reality

- Manual data transfer can be rife with human error.
- There are many tools both within your CRM, within your CMS, and third-party platforms outside of both that can help you transfer data.
- If your needs are simple, it shouldn't be. Some of the tools are free.

CMS + CRM: The Benefits

- Stable, Supported Platforms
- Separation of Concerns
- Improved User Experience
- Get Around Licensing
- Front-End Agility
- Time to Market

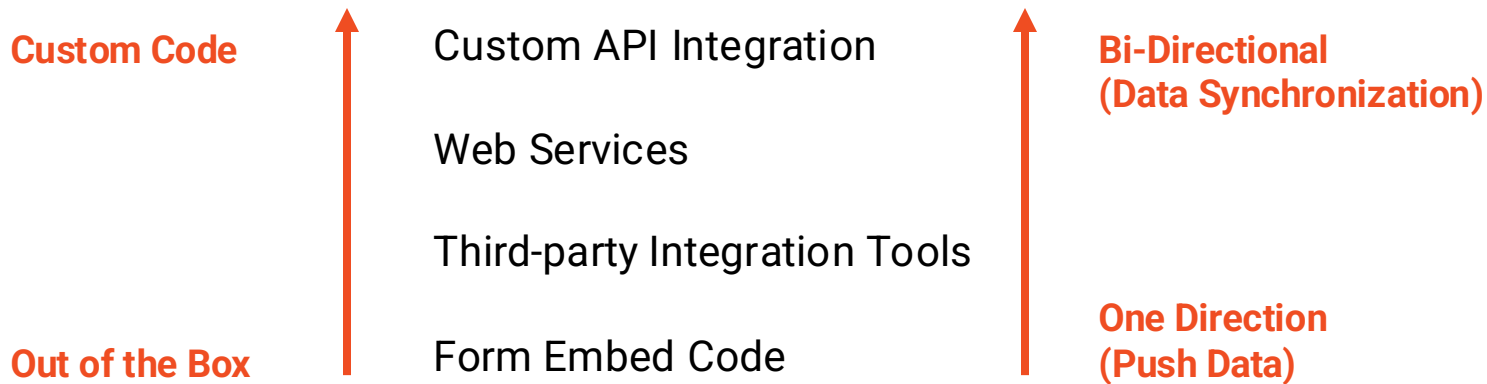


What's Possible? Depends on your CRM and CMS

- Some CMSs have modules or plug-ins that you can use—but not all and not for all CRMs
- Some CRMs provide forms, others have plug-ins, others have open APIs—but not all do



Technical Integration Options



Integration Options

Webforms to CRM



Third-Party Platforms
to CRM



CMS Integration Modules
& Plugins



How do you know which option to choose?



Webforms to CRM



Webforms to CRM



What are They?

- Simple HTML forms generated by your CRM or platform
- Copy and Paste into a web page
- Responses are posted to your CRM automatically

When are they useful?

- You need to get basic user data or inquiry information into your CRM.
- You want to take advantage of workflows in your CRM to assign follow-up tasks to staff.
- You have little to no expertise in web development.
- You need something quick and easy.

ISMP
Institute for Safe Medication Practices

ABOUT CONTACT NEWS SUPPORT

Consulting and Education Tools and Resources Publications and Alerts Error Reporting

Contact ISMP - Services

First Name

Last Name

Title

Organization

Work Phone

Work Email

Secondary Email (Optional)

What services are you interested in learning about?

☐ Consulting Services

☐ Group Collaboration

☐ Gap Assessments

☐ Professional Development - Mentorship

Organization Type

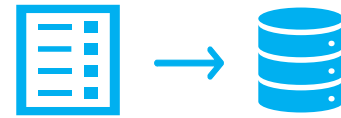
If a Health System, how many locations?

How I heard about ISMP Services

Question/Comment

☐ I would like to receive updates from ISMP

Submit



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EXTRA HELP



HIRE EXPERTISE

Use Cases

- Contact and Inquiry forms
- Service Requests
- Incidents and Cases
- Simple RSVP
- Applications

Webforms to CRM



Pros

- Flexible
- Customizable, if you can add fields to CRM objects
- Easy to change and add new forms quickly
- Easy to customize by editing HTML
- Can tie into workflows in your CRM to automate processes

Cons

- Forms usually need some clean up/styling
- Usually only useful for leads or cases; not ideal for creating standard objects like contacts or organizations

Third-Party Platforms to CRM



Third-Party Platforms to CRM



What is it?

- Software-as-a-service (SAAS) platforms or form-building tools.
- You can embed their forms onto your webpages or send users to forms on the platform's website.
- They provide integrations to your CRM and post data there automatically.

Third-Party Platforms to CRM



What are some examples?

- **Form Builders:** Formstack, Wufoo, iATS Payments
- Plug-and-Play Platforms
- Workflow Automation Tools



Third-Party Platforms to CRM



What are some examples?

- Form Builders
- **Plug-and-Play Platforms:**
Give Lively, Click and Pledge, Cvent, Classy, Soapbox Engage
- Workflow Automation Tools



Classy

cvent

CLICK & PLEDGE®
it pays to be good

give lively

Third-Party Platforms to CRM



What are some examples?

- Form Builders
- Plug-and-Play Platforms
- **Workflow Automation Tools** like Zapier and Workato



Third-Party Platforms to CRM



When is this useful?

- You need to pass both user and transaction data into your CRM
- You don't need the information to move in both directions.
- You may want users to log in to submit a form or return to the form and provide more information later.
- When you want sophisticated solutions that don't really need to customize.

- Donation forms
- Event registration
- Peer-to-Peer fundraising
- Volunteer, Scholarship, or Program Applications

Third-Party Platforms to CRM



Pros

- No development for advanced functionality
- Someone else maintains your solution for you
- Dramatically limits liability
- Some forms can be embedded within your site; others will let you theme the form to look like your site.

Cons

- Takes users off your site; non-branded forms raise fewer dollars. When embedded, they sometimes don't look good!
- Off-the-shelf solutions, customizations are limited.
- Can lead to duplicate contacts in your CRM.
- Some require monthly fees + per transaction cost.
- If users log in to your site and the platform, they will likely have two sets of credentials.

CMS Integration Modules and Plug-ins



CMS Modules and Plug-ins



What is it?

- Plugs-ins and Modules that are created and maintained by open source developers
- Installed directly into your CMS
- Tend to have mapping tools for object-to-object and field-to-field configuration
- Available for the two open source CMSs most widely used by nonprofits:
 - Drupal
 - WordPress

CMS Modules and Plug-ins

When is it useful?

- You want to fully leverage what both solutions have to offer.
- You want to customize/personalize the website experience using data stored in your CRM.
- You need data / content to move in both directions.
- You want to map custom objects, not just standard ones.
- You want to reduce duplicates in your CRM.
- You don't want to pay for CRM user licenses for portals or other experience that require sign-on.
- You want your user to login to update or access information about their transaction history and don't want them to have two sets of credentials or build a single sign-on solution.



CMS Modules and Plug-ins



What are some examples?



CRM	Plug-ins
Salesforce	Object Synch for Salesforce, Gravity Forms Salesforce CRM Integration,
Hubspot	Hubspot WordPress Plug-in
Neon CRM	Neon CRM Sign-in, Neon CRM Events Widget

CMS Modules and Plug-ins



What are some examples?



CRM	Plug-ins
Salesforce	Salesforce Suite
Hubspot	Hubspot Module + Hubspot API
MS Dynamics	Coming Soon!

One Direction

CMS to CRM

- Data entered in CMS native forms are pushed to CRM.
- No round trip is needed.
- Good for advanced admins who can map fields and objects but don't know PHP.

When is this useful?

- You can pass user data, transaction data, and content types/nodes, like events.
- You can keep the user on your website for all transactions and activity.
- You can use one-directional synch to keep the integration simple.
- You don't need updates in Salesforce to impact the user experience in Drupal.



REGISTRATION INFORMATION

SHOPPING CART

	Price	Quantity
General Admission (Unlimited slots available)	\$165.00	3
UPDATE		
Total: \$495.00		

ATTENDEE INFORMATION (OPTIONAL)

ATTENDEE 1

EMAIL

The email to associate with this registration.

ATTENDEE 2

EMAIL

The email to associate with this registration.

ATTENDEE 3

EMAIL

The email to associate with this registration.

[GO BACK](#)

[CONTINUE TO NEXT STEP](#)



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EXTRA HELP



HIRE EXPERTISE

Use Cases

- Event Registration


PHILADELPHIA BAR FOUNDATION
 Supporting Equal Justice - Donate Now

The Philadelphia Bar Foundation relies on the financial and pro bono contributions of dedicated individuals and organizations to advance the goal of equal access to justice for all. [DONOR PRIVACY POLICY](#)

The Bar Foundation is a 501(c)(3) nonprofit organization. Contributions are tax deductible to the extent permitted by law. Visit the Bar about for charitable organization information.

One-Time Donation

Monthly Donation

Choose an amount to donate:

☐ \$100
 ☐ \$200
 ☐ \$300
 ☒ \$500
 ☐ \$1,000
 ☐ \$1,500

Gift Designation

Select a campaign or specify your donation as a payment on a pledge

Name (optional)

Donor Information

Billing Address

First name

Last name

Street address

City

State

Zip

Work/Primary phone

Cell phone

Current Employer

☐ This gift is on behalf of an organization.
☐ This is a memorial tribute gift.
☐ I wish to remain anonymous

Payment Information

Credit Card Number

Expiration Date


PHILADELPHIA BAR FOUNDATION
 Supporting Equal Justice - Donate Now

CONTACT US | PRIVACY POLICY | LINKS | OTHER DONORS

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[www.philabf.org](#)

The Philadelphia Bar Foundation



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Use Cases

- One-Time and Recurring Donations

One Direction

CMS to CRM

Pros

- Limits complexity and therefore liability and errors
- Easier to support and make changes over time
- Drupal is still aware of activity and transactions, so you can continue to target the user and customize experience.

Cons

- Advanced development and knowledge of both Drupal and Salesforce schema are needed.
- You may need the help of a developer to set this up properly.
- Will still break if changes to schema in Salesforce are made by others and the mapping isn't updated.



Two Directions

CMS to CRM to CMS

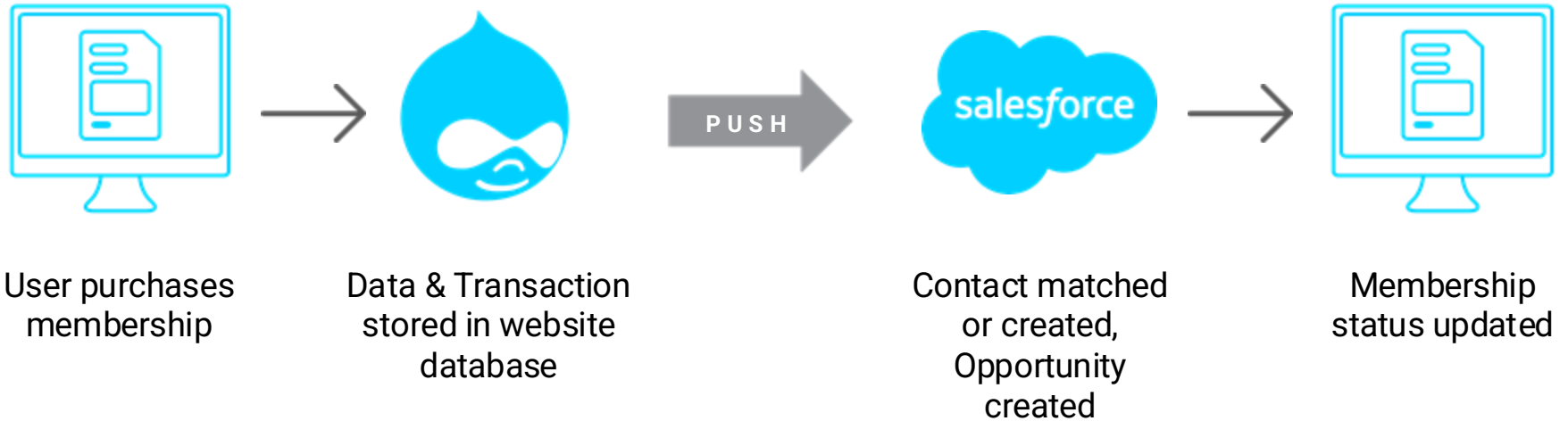
- Data entered in the CMS by the user and in the CRM by admins moves in both directions.
- Asynchronous updates keep information aligned in both systems.
- Highly advanced and requires well-formed schema and workflows across CRM and CMS.

When is this useful?

- Data entered directly into the CRM can impact what a user sees, has access to, or experiences on the website.
- Great for marketing automation and customized web experiences.
- Works well for sites that require user authentication or greater levels of user interaction.



Plug-in Example: Membership Purchase



Plug-in Example: Offline Membership Renewal



User access
member portal



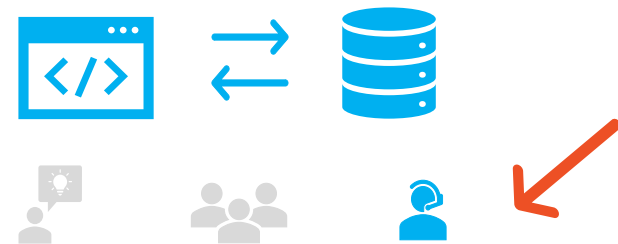
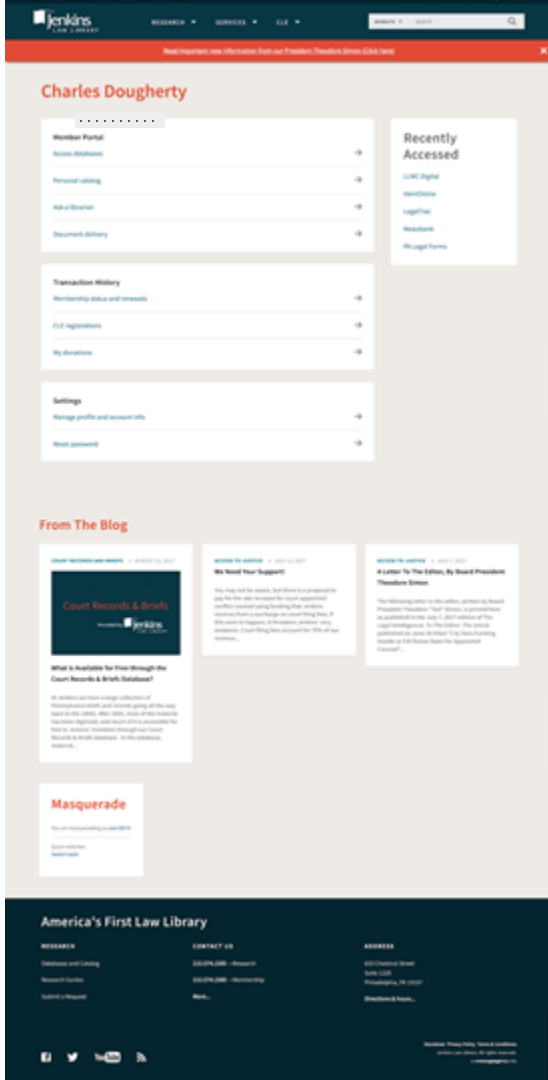
Opportunity and
membership
status updated



Membership
status and user
role updated



Membership
renewal by check,
entered by admin



DO IT YOURSELF EXTRA HELP HIRE EXPERTISE

Use Cases


- Portals
- Membership
- Account Management
- Course management, CEUs
- Content Access
- Directories

Cornell University

Website Name

HOME OPPORTUNITIES RESOURCES

Home > Dashboard > Page Title >

 **Judith Sargentini**
European Parliament, Dutch Greens
Member

6 Draft 12 Active 2 Archived

Dashboard - Applicants

Enter Keyword Use Search to narrow down selection below. The field will autocomplete.

Cornell in Barcelona - Spring 2018 26 Applications [Expand to see applicants](#) ▼

Cornell in Barcelona - Fall 2019 3 Applications [Expand to see applicants](#) ▼

Opportunity Name and Term 16 Applications [Expand to see applicants](#) ▼

Opportunity Name and Term 9 Applications [Expand to see applicants](#) ▼

Opportunity Name and Term 16 Applications [Collapse to hide applicants](#) ▲

Applicant Name ▼	Net ID	Status
Maria Lui	oam23	Withdrawn
Carol Rodrigues	iz26	Incomplete
Applicant Name	lp23	Pending Approval
Applicant Name	mkr45	Pending Approval
Applicant Name	lbp12	Withdrawn
Applicant Name	omn12	Incomplete
Applicant Name	pq123	Incomplete
Applicant Name	iz26	Pending Approval

Cornell in Barcelona - Spring 2018 26 Applications [Expand to see applicants](#) ▼

Filter Results By

Category

- ☐ Research
- ☐ Service
- ☐ Excursions
- ☐ Employment Settings
- ☐ Conferences
- ☒ Off-Campus
- ☐ Performance & Exhibit
- ☐ Immersions & Training
- ☐ Funding

Class Year ▼

College Affiliation ▼

Curricular Highlights ▼

Primary Language of Instruction ▼



Use Cases

- Multi-Stage Application Management: Student and Program Manager Perspectives
- Account Management

Two Directions

CMS to CRM to CMS

Pros

- Ideal for portals and other experiences that require authentication.
- Removes the need for per-seat CRM licensing.
- User experience can reflect business logic driven by the CRM.
- Performance issues due to live queries or dropped connections are mitigated.
- Fewer duplicates and errors.


Cons

- Usually requires the help of a developer
- Synchronization can be a hard problem to solve. Beware of race conditions and editing collisions.
- Almost always requires custom callbacks and hooks.
- Schema mismatches between CMS and CRM are compounded when data moves in two directions



Important Things to Consider





Things to Consider

- Be realistic about your capacity. Identify an MVP and iterate.
- Use the appropriate tool for the job.
- Start small, keep it simple, and phase in more robust integrations over time.
- Consider up-front costs versus long-term costs.
- Maintenance of both systems needs to be coordinated.
- Both systems are easily modified; changes in one system can break the synch if you aren't careful.
- Simple things like email addresses can be a big challenge, since email addresses are unique in most CMSs but not in all CRMs.

Thank You!



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