

LEADOUS

The Integration Playbook

THE SMARTER WAY TO SYNC YOUR
SYSTEMS



The Ultimate Guide for
B2B Marketers Using
Marketing Automation
Platforms



Introduction



Why Integrations Matter

The fastest way to break your reporting, hurt deliverability, and frustrate your team is to rely on manual list uploads.

Integrations eliminate human error and create a single, accurate source of truth — giving you cleaner data, better segmentation, and more reliable insights.

1. BUILD YOUR INTEGRATION STRATEGY

What to define first:



Source Systems

- CRM, product data, event platforms, revenue tools, enrichment sources.



Data Ownership

- Decide who “owns” the record and which system gets priority in a conflict.



Field Mapping Rules

- Standardize meaningfully: status, lifecycle, region, job title, opt-in.



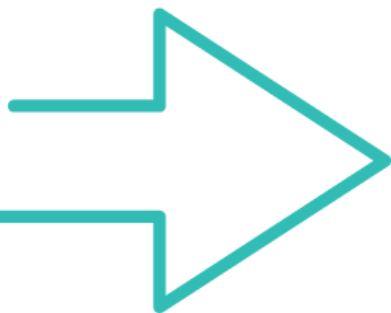
Sync Frequency

- Real-time for revenue-critical fields; scheduled for enrichment.

2. DESIGN YOUR DATA FLOW

Key considerations:

- One Direction or Bi-Directional?
 - Not all data should flow both ways.
- Normalization Standards
 - Reduce messy variations (US/United States/U.S.).
- Error Handling Plan
 - Logging, retries, alerts, governance.
- System of Record
 - CRM typically wins, but subscription/consent may live elsewhere.



Leadous Tip:

Visually map what enters Marketo, what exits, and what triggers automation. Make decisions before you touch any integrations.

3. SYNC WITH PRECISION

Integrations should serve clean, predictable data to your MAP.

Core sync elements:

- Leads/Contacts
- Accounts
- Activities & Interesting Moments
- Opportunities
- Subscription & Compliance Fields

Technical must-haves:

- API user with least-privilege access
- Field-level filtering
- Rate-limit monitoring
- Governance naming conventions

4. ELIMINATE MANUAL IMPORTS FOREVER

A smart integration replaces 5–10 recurring manual workflows:

- CSV uploads
- Quarterly clean-up lists
- Event attendance updates
- Webinar attendee imports
- Form submission spreadsheets

These should be ***automated*** - not “admin hours.”

5. MEASURE WHAT MATTERS

Once your data is flowing correctly, you can trust your metrics.

Track:

- Sync errors
- Field-level update patterns
- Duplicate rate changes
- Lifecycle advances
- Attribution accuracy

Good integrations don't just "work" they reveal insights you previously couldn't see.

6. LEADOUS INTEGRATION CHECKLIST

A simple checklist to see if your integration is healthy:

- CRM sync rules are documented
- All fields mapped & normalized
- Real-time sync enabled where needed
- Webhooks / API calls structured with retries
- No manual list imports required
- Error logs monitored weekly
- Compliance fields synced correctly
- Naming conventions established
- Clear governance for edits
- Reporting reflects accurate data flow



If you cannot check at least 8 of these, integrations are costing you time, pipeline, or data integrity.



7. HOW LEADOUS HELPS

Leadous applies platform-agnostic integration best practices across Adobe Experience Cloud, HubSpot, Salesforce, Eloqua, and hybrid stacks.

We support:

- CRM/MAP integrations
- Event integrations
- Data warehousing & CDP
- Multi-system orchestration
- Field normalization & governance
- Attribution accuracy tuning
- Real-time sync optimization



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ABOUT LEADOUS

Leadous is a full-service global consultancy for brands that deliver exceptional experiences to the journey makers and the journey takers, helping marketers and technologists turn complexity into clarity. Leveraging strategic partnerships (Adobe, Salesforce, HubSpot, IBM, and Oracle and more) to unlock the full value of their investments. With deep platform expertise and a human-first approach, Leadous helps clients streamline operations, activate data, and transform strategies into measurable outcomes. Whether optimizing for performance, scaling personalization, or architecting for intelligence, Leadous leads with insight, precision, and partnership every step of the way.

Digitally transforming the way marketing connects with people.

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