
CLIENT REFERENCE GUIDE

Clay × Salesforce Integration Guide.

A practical reference for clients deploying Clay alongside Salesforce - architecture, governance, and The GTM Studio operating model.

PREPARED FOR

**The GTM Studio
Clients**

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About The GTM Studio

The GTM Studio is a specialist Go-To-Market infrastructure agency. We design, build and operate revenue systems that connect data, tooling and process into a single, coherent engine. Every engagement is grounded in three principles: transparency, precision and accountability.

This document is produced for The GTM Studio clients who are deploying the Clay × Salesforce integration as part of their GTM stack. It explains what the integration does, how it is architected, what data flows where, and how The GTM Studio operates it on your behalf.

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How The GTM Studio Operates Your Integration

Your Dedicated Clay Instance

Every The GTM Studio client receives a dedicated, individually provisioned Clay workspace. This is a fundamental architectural decision - not a feature option. It has direct implications for data governance, GDPR compliance and operational transparency.

What 'Dedicated Instance' Means for You

- **Complete isolation.** Your Clay workspace contains only your data. No other The GTM Studio client can access it, query it, or observe it in any form.
- **Full visibility.** You have direct login access to your Clay workspace. You can see every table, every enrichment column, every workflow, and every record - exactly as The GTM Studio sees it.
- **Workspace ownership.** If you choose, you can hold the Owner role in your Clay workspace. GTM Studio operates as an administrator, but ultimate control of the workspace sits with you.
- **GDPR compliance by design.** Because your data never enters a shared environment, cross-client data leakage is architecturally impossible. This satisfies a core GDPR requirement: that personal data is processed in isolation and not commingled with data belonging to other controllers.
- **Auditable data flows.** Every enrichment run, every Salesforce push and every field mapping is visible inside your instance. The GTM Studio will walk you through these flows on request.

What This Means in Practice

When The GTM Studio sets up your Clay × Salesforce integration, the OAuth credentials connecting Clay to Salesforce belong to your instance. Data pulled from Salesforce exists only within your workspace. Data written back to Salesforce originates exclusively from your workspace. At no point does your Salesforce data touch any shared Clay environment or any system belonging to another The GTM Studio client.

You are welcome to request a live walkthrough of your workspace architecture at any time. We encourage it.

Integration Overview

Clay is a data enrichment and workflow automation platform that brings together more than 150 data providers under a single interface. The Salesforce integration extends Clay in both directions: Clay can pull records from Salesforce as the source of truth for a workflow, enrich and score them using any combination of its data providers, and push the results back into Salesforce - updating or creating records with full field-level control.

The integration is bidirectional by design. Salesforce acts as the system of record; Clay acts as the enrichment and decisioning layer. The two systems are connected via the Salesforce REST API, with Clay managing authentication, rate limiting, deduplication and field mapping on behalf of the operator.

Integration at a Glance

Aspect	Detail
Direction	Bidirectional (Salesforce ↔ Clay)
Authentication	OAuth 2.0 (User Sign-In) or Client Credentials (Server-to-Server)
Supported Objects	Leads, Contacts, Accounts, Opportunities, Tasks, Custom Objects
Actions	Create Record, Update Record, Upsert Object, Lookup Record, SOQL Query, Convert Lead
Sync Cadence	On-demand, scheduled (default 24 hours), or triggered by record change
Batch Mode	Salesforce Composite API (reduces API call consumption by ~5×)
Bulk Enrichment	Enterprise tier - millions of Salesforce records processed asynchronously

Authentication & Permissions

Clay supports two authentication methods for the Salesforce integration. The right choice depends on how your Salesforce org is governed and how The GTM Studio will operate the connection.

OAuth 2.0 - User Sign-In

The default and most common method. An authorised Salesforce user - typically a dedicated integration user - authenticates via the standard Salesforce OAuth flow. Clay receives an access token scoped to that user's permissions. This means the integration can only read and write objects that the authenticated user has access to in Salesforce.

Required OAuth scopes: api, refresh_token, offline_access. GTM Studio recommends creating a dedicated Salesforce integration user with a permission set that matches exactly the objects and fields required for the workflow - no more, no less.

Client Credentials - Server-to-Server

A machine-to-machine authentication flow that does not require a named user to remain active. Suitable for Enterprise deployments where a persistent, user-independent connection is preferable. Configured using a Connected App in Salesforce with Client Credentials flow enabled.

Recommended Permission Set

Regardless of authentication method, The GTM Studio constructs a minimum-privilege permission set for the integration user. This set grants read/write access only to the specific objects and fields in scope for your workflows. This limits blast radius in the event of a misconfiguration and satisfies the principle of least privilege required under GDPR Article 25.

Importing Records from Salesforce

Before Clay can enrich or act on Salesforce data, it must import the relevant records into a Clay table. The GTM Studio configures these import sources during workspace setup. The following Salesforce objects can be used as import sources:

- Leads
- Contacts
- Accounts
- Opportunities
- Cases
- Custom Objects (any custom object visible to the integration user)

Each import source is configured with a SOQL WHERE clause that filters which records are pulled. For example, The GTM Studio might import only Leads created in the last 30 days with a specific Lead Source, or only Accounts above a revenue threshold. This keeps Clay tables focused and avoids importing records that will never be actioned.

Import Modes

Three modes are available when importing from Salesforce:

- **All records.** Pull every record matching the filter at the time of import.
- **New records only.** Pull only records that have been created since the last import run. Ideal for inbound workflows.
- **Updated records.** Pull records whose LastModifiedDate has changed since the last run. Used for CRM hygiene and lifecycle workflows.

Bulk Enrichment (Enterprise)

For clients operating at scale, Clay's Bulk Enrichment feature allows millions of Salesforce records to be imported, enriched and pushed back asynchronously. Canva used this capability to process over 10 million records - enriching their entire customer and prospect universe through Clay before synchronising the results back to Salesforce. Klaviyo and Figma have used the same approach to power large-scale data quality initiatives.

Bulk Enrichment is available on Clay's Enterprise tier and is included in The GTM Studio Enterprise engagements.

Salesforce Actions in Clay

Once a workflow runs in Clay, the output can be pushed back to Salesforce using the following actions. The GTM Studio selects and configures the appropriate action for each workflow during build.

Action	Description / When The GTM Studio Uses It
Create Record	Creates a new record in the specified Salesforce object. Used when Clay has identified a net-new Lead or Contact not yet in Salesforce.
Update Record	Updates one or more fields on an existing record. Used for CRM enrichment: writing firmographic data, intent scores, or contact details back to existing records.
Upsert Object	Creates a record if it does not exist; updates it if it does - determined by a matching field (typically email or an External ID). The workhorse action for most The GTM Studio workflows; eliminates duplicate creation risk.
Lookup Record	Queries Salesforce for a single record by a field value and returns its ID and specified fields into Clay. Used to retrieve the Salesforce Account ID before associating a new Contact.
Lookup via SOQL	Executes a full SOQL query and returns matching records into Clay. Used for complex lookups: matching Leads to Accounts by domain, retrieving open Opportunities associated with an Account, or pulling in custom object data.
Convert Lead	Converts a Salesforce Lead to a Contact + Account + Opportunity. Used in inbound qualification workflows once a Lead meets conversion criteria enriched in Clay.

Batch Mode

By default, each row in a Clay table that triggers a Salesforce action generates one API call. For tables with thousands of rows this can consume Salesforce API allocation rapidly. Clay's batch mode uses the Salesforce Composite API to bundle up to 25 records per API call - reducing consumption by approximately 80% for large workflows.

The GTM Studio enables batch mode by default on all Clay tables with more than 500 rows that write to Salesforce.

Salesforce Objects: What Can Be Written

Clay can read from and write to the following standard Salesforce objects. The GTM Studio maps each workflow's output fields to the appropriate object during build and documents the mapping in your workflow specification.

Lead

- All standard Lead fields (First Name, Last Name, Email, Phone, Company, Title, Lead Source, Status, Industry, Annual Revenue, etc.)
- Custom Lead fields (any field visible to the integration user)
- **Clay-enriched fields:** seniority, department, LinkedIn URL, verified email, mobile, company headcount, funding stage, technology stack, intent topic, persona score

Contact

- All standard Contact fields
- Association to Account via AccountId (resolved in Clay using Lookup Record or SOQL before write)
- **Clay-enriched fields:** same enrichment set as Lead, plus any Account-level firmographics

Account

- All standard Account fields (Name, Website, Industry, Annual Revenue, Number of Employees, Billing Address, etc.)
- **Clay-enriched fields:** company description, HQ location, LinkedIn URL, G2 review count/rating, technology stack, funding round, headcount growth rate, buying intent signals

Opportunity

- Stage, Amount, Close Date, Next Step, Description
- Custom fields for ICP score, product fit indicator, account research summary
- Linking to associated Contacts via Contact Roles (managed separately)

Task / Activity

- Subject, Description, ActivityDate, Status, Priority

- Used to log Clay workflow runs as activities against a Lead, Contact or Account - providing an audit trail inside Salesforce of when enrichment occurred

Custom Objects

- Any custom Salesforce object accessible to the integration user can be queried (via SOQL Lookup) and written to (via Create, Update or Upsert)
- **Common use cases:** Intent Signal objects, Account Scoring objects, Competitor Tracking objects

Deduplication & Data Integrity

Preventing duplicate record creation is one of the most operationally sensitive aspects of any Salesforce integration. The GTM Studio applies a layered deduplication strategy on every workflow:

Layer 1 - Email Match

For Lead and Contact objects, email address is used as the primary deduplication key. Before any Create action, Clay executes a pre-sync Lookup to confirm no record with that email already exists. If a match is found, Clay routes to Update or Upsert instead.

Layer 2 - Domain Match (Accounts)

For Account objects, the company website domain is used as the deduplication key. Clay normalises domains (removing www, protocol, trailing slash) before lookup. SOQL queries retrieve the canonical Account ID, which is then used to associate Contacts and Opportunities correctly.

Layer 3 - External ID

For high-volume or cross-system workflows, The GTM Studio provisions a custom External ID field in Salesforce (e.g., Clay_ID__c) and uses Upsert with this field as the match key. This is the most robust deduplication method and is mandatory for all Bulk Enrichment deployments.

Layer 4 - Composite Key

Where no single field is sufficient as a unique identifier, The GTM Studio constructs a composite key in Clay (e.g., First Name + Last Name + Company domain) and uses a SOQL WHERE clause to check for existing records before writing.

THE GTM STUDIO DEDUPLICATION STANDARD

Every workflow that creates Salesforce records must pass through at least one pre-sync lookup before the create action fires.

Upsert is preferred over Create + Update wherever an appropriate match field exists.

All deduplication logic is documented in the workflow specification delivered to the client.

Field Mapping & Formatting

Clay uses a formula layer to transform enriched data into the format Salesforce expects before writing. The GTM Studio manages this translation during workflow build.

Picklist Fields

Salesforce picklist fields require the value written to match an active picklist value exactly (case-sensitive). Clay's field mapper validates picklist values and flags mismatches before a sync runs. The GTM Studio maintains a mapping table for each client's picklist fields to ensure values written by Clay are always valid.

Date and DateTime Fields

Clay outputs dates as ISO 8601 strings (YYYY-MM-DD). Salesforce DateTime fields require format YYYY-MM-DDTHH:MM:SSZ. Clay formulas handle this conversion automatically in The GTM Studio-managed workflows.

Boolean Fields

Salesforce Boolean fields accept true/false. Clay formulas map common source values (Yes/No, 1/0, TRUE/FALSE) to the correct Boolean before write.

Relationship Fields

Fields that represent relationships (e.g., AccountId on Contact, OwnerId on Lead) require the Salesforce record ID - not the record name. GTM Studio always inserts a Lookup step prior to any write that populates a relationship field, to resolve the name to the ID.

Sync Settings & Cadence

Clay tables connected to Salesforce can be configured to sync on different schedules. The GTM Studio selects the appropriate cadence for each workflow based on the business requirement.

- **On-demand.** Triggered manually or via Clay's API. Used for ad-hoc enrichment runs or event-triggered workflows.
- **Scheduled (default 24 hours).** Clay re-runs the import and enrichment on a recurring schedule. Suitable for daily CRM hygiene or weekly account scoring updates.
- **Record-change triggered.** Clay re-processes a row automatically when a specified Salesforce field changes. Used for inbound qualification: as a Lead's Status changes to MQL, Clay enriches it and pushes the enriched record back immediately.

Clay does not currently support real-time webhooks from Salesforce natively. For near-real-time use cases, The GTM Studio implements a polling workflow with a short cadence (typically 15 minutes) or integrates a Zapier/Make bridge to trigger Clay via its API on Salesforce record events.

GTM Use Cases by Function

The following use cases represent the workflows The GTM Studio most commonly builds for clients using the Clay × Salesforce integration. Each is a production-validated pattern.

Outbound Prospecting

- **Import target Accounts from Salesforce.** Pull Accounts matching ICP criteria via SOQL. Enrich in Clay with decision-maker contacts, verified emails, mobile numbers, LinkedIn URLs and technology stack.
- **New Lead creation.** Write net-new Leads to Salesforce for contacts discovered by Clay that do not yet exist in the CRM. Assign to owner, set Lead Source, populate all enriched fields in a single Upsert.
- **Persona scoring.** Score each contact against the ICP persona and write the score back to a custom field on the Salesforce Lead or Contact. Sales team filters by score to prioritise outreach.

Inbound Qualification

- **Form-fill enrichment.** When a Lead is created in Salesforce from a web form, Clay enriches it within minutes with firmographic data, seniority, intent signals and company funding. The enriched record is written back before the Lead is routed to a rep.
- **Lead scoring.** Clay calculates a composite Lead score using enriched signals and writes the score to a custom Salesforce field. Routing rules in Salesforce fire based on the score.
- **Lead Conversion.** Qualified Leads are converted to Contact + Account + Opportunity via Clay's Convert Lead action, with all enriched fields carried across.

CRM Hygiene & Data Quality

- **Waterfall email verification.** Clay sequences through multiple email verification providers (Hunter, Apollo, Prospeo, Datagma) and writes the first verified result back to the Salesforce Contact. Bounce rates on existing databases typically drop 30-60%.
- **Account firmographic refresh.** Quarterly or monthly, Clay re-enriches all Accounts in Salesforce with current headcount, revenue range, funding status and HQ location. Stale data in legacy CRMs is a persistent problem; this workflow eliminates it systematically.
- **Duplicate Account detection.** Clay identifies Accounts with matching domains and flags them in a custom field for review by the revenue operations team.

Account-Based Marketing (ABM)

- **Intent signal integration.** Bombora, G2 or Surge intent data is pulled into Clay, matched to Salesforce Accounts by domain, and written to custom intent fields. Marketing uses these fields to trigger ABM campaigns in Marketo or HubSpot.

- **Account scoring.** Clay computes a composite Account score from firmographic fit, intent signals, technology stack match and engagement history. The score is written to a custom Salesforce Account field and used to tier the target account list.
- **Personalisation data.** Clay enriches Accounts with specific conversation hooks (recent funding news, new hire alerts, product launches) and writes them to a custom 'Outreach Context' field visible to AEs in Salesforce.

Lifecycle Marketing & RevOps

- **Churn risk signals.** Clay monitors product usage data (via API enrichment), intent decline signals, and support ticket volume. A composite churn risk score is written to the Salesforce Account and triggers a Customer Success workflow.
- **Expansion identification.** Clay enriches existing customer Accounts with headcount growth signals, new department hires and technology stack changes. Accounts showing expansion signals are flagged in Salesforce for AE review.
- **Activity logging.** Every Clay enrichment run logs a Task against the relevant Salesforce Lead, Contact or Account. This gives the revenue operations team a complete audit trail of when data was enriched and by which workflow.

Clay MCP: AI-Native Workflow Access

In April 2026, Clay launched the Model Context Protocol (MCP) server - a direct integration between Clay and AI agents including Claude. MCP allows AI assistants to interact with Clay workflows programmatically: querying tables, triggering enrichment runs, pushing records and reading results - without requiring a human to open the Clay interface.

For The GTM Studio clients, Clay MCP opens a new operational model. Instead of manually triggering Clay workflows, sales reps and revenue operations teams can instruct an AI assistant in natural language. The assistant translates the instruction into Clay API calls via MCP and returns results directly.

What Clay MCP Enables for The GTM Studio Clients

- **Conversational workflow control:** "Enrich the 50 Accounts from last week's target list and push the results to Salesforce."
- **Real-time lookup during sales calls:** AE asks their AI assistant to enrich a prospect in Clay while on a discovery call.
- **Automated trigger chains:** an AI agent monitors a Salesforce report and triggers the relevant Clay workflow when conditions are met.
- **Workflow debugging:** AI assistant inspects Clay table rows, identifies enrichment failures, and re-runs affected rows.

The GTM Studio is actively integrating Clay MCP into client workflows. Ask your The GTM Studio contact about AI-assisted workflow management if this capability is of interest.

Security, Compliance & Governance

Clay Platform Security

- **SOC 2 Type 2 certified.** Clay has completed SOC 2 Type 2 audit, confirming that security controls for availability, confidentiality, processing integrity and privacy are operational and effective.
- **Data encryption.** Data in transit is encrypted via TLS 1.2+. Data at rest is encrypted using AES-256.
- **Access controls.** Workspace-level role-based access control. The GTM Studio provisions access per client workspace with minimum-privilege principles.

GDPR Compliance

- **Dedicated instance architecture.** As detailed above, each client operates in an isolated Clay workspace. No personal data is commingled across clients.
- **Data processing agreement.** The GTM Studio can provide a Data Processing Agreement (DPA) covering the Clay × Salesforce integration for clients who require one for GDPR compliance.
- **Right to erasure.** Records can be deleted from Clay tables on request. Because Clay is the enrichment layer and Salesforce is the system of record, deletion in Clay does not affect Salesforce records - this is by design and should be documented in your internal ROPA (Record of Processing Activities).
- **Data residency.** Clay's infrastructure is hosted on AWS in the United States. For clients with EU data residency requirements, The GTM Studio advises on the appropriate Standard Contractual Clauses (SCCs) and supplementary measures.

Sandbox Testing

The GTM Studio builds and validates all Clay × Salesforce workflows against your Salesforce Sandbox environment before promoting to Production. This ensures that field mappings, deduplication logic, picklist values and SOQL queries are verified without risk to live data.

The Sandbox connection uses a separate Clay integration credential scoped exclusively to the Sandbox org. Credentials are rotated when workflows move to Production.

How The GTM Studio Operates Your Integration

The GTM Studio does not build Clay × Salesforce workflows and hand them over. We operate them on your behalf as an ongoing managed service, with full transparency into everything that is running.

Build Phase

- **Workflow discovery and specification:** The GTM Studio conducts a structured discovery to define which data flows are required, which Salesforce objects are in scope, and what the success criteria are for each workflow.
- **Sandbox build and testing:** all workflows are built in a Clay development table connected to your Salesforce Sandbox, with test records used to validate every action and field mapping.
- **Production promotion:** once validated, workflows are promoted to your Production Clay workspace and connected to your live Salesforce org.
- **Documentation:** a workflow specification document is delivered to the client detailing every table, every action, every field mapping and every deduplication rule.

Operate Phase

- **Ongoing monitoring:** The GTM Studio monitors all active workflows for enrichment failures, API errors and Salesforce sync failures.
- **Credential management:** OAuth tokens and API keys are refreshed proactively. Salesforce Connected App credentials are rotated on a defined schedule.
- **Data quality reviews:** The GTM Studio conducts periodic reviews of enrichment match rates, field fill rates and Salesforce data quality scores.
- **Change management:** when your Salesforce org changes (new fields, new objects, picklist updates), The GTM Studio updates the relevant Clay workflows to remain in sync.

Reporting

Each The GTM Studio client receives a monthly workflow performance report covering: records processed, enrichment match rates by provider, Salesforce push success rates, and data quality improvement metrics. This report is produced directly from your Clay workspace data and your Salesforce reports - there is no black box.