

Optimize your marketing funnel by centralizing your email, events and customer success data

Analyze metrics at each stage of the funnel to improve effectiveness, understand what resonates and ultimately increases conversions.

What data sources do you need?

Email

i.e. where you're creating, managing and tracking email campaigns

Your organization likely uses 1 email campaign platform. Choose 1 to get started:

- HubSpot
- Klaviyo
- Marketo
- Mailchimp
- Eloqua
- Salesforce Mkt cloud

Events/Web Analytics

i.e. where you're tracking customer engagement and interactions with your site/app

Your organization likely uses at least 1 events/web analytics platform. Choose 1 to get started:

- Google Analytics
- Adobe Analytics
- Mixpanel
- Segment
- Pendo
- Heap

Customer Success

i.e. where you're tracking customer support tickets, satisfaction, and behavior

Your organization likely uses at least 1 customer success platform. Choose 1 to get started:

- Intercom
- Kustomer
- Survey Monkey

[Find more connectors →](#)

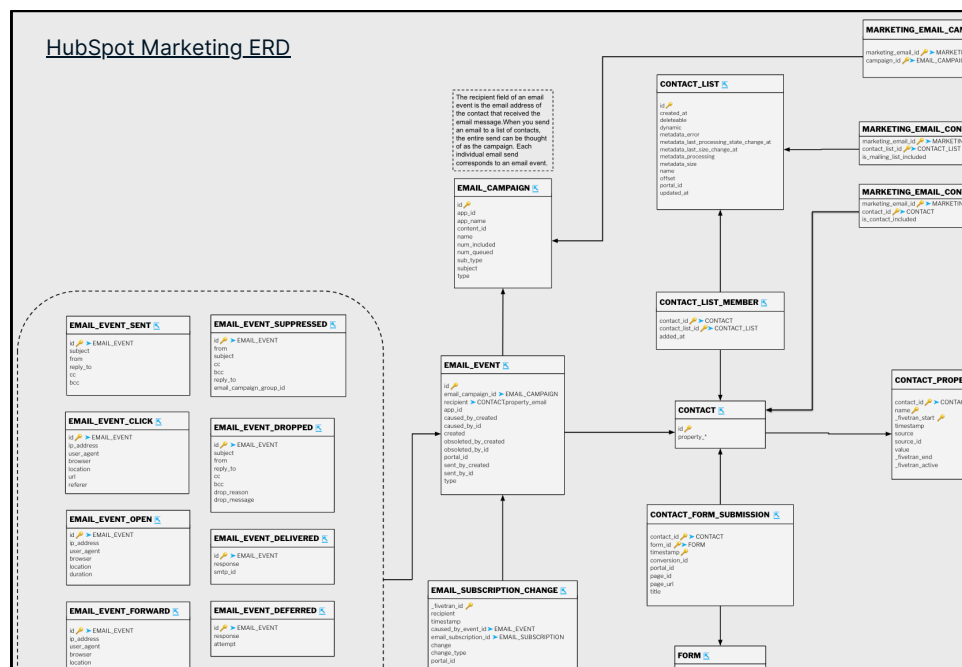
How do you get started?

1. Ensure the sources you plan to connect have appropriate access to all campaigns and accounts. Use an Admin account for each source where possible.

2. For connectors with an option to select “**historical timeframe**”, choose a more recent timeframe in order to speed up the historical sync and get insights quicker.

3. **For Email connectors:** Review the schemas within the respective Entity Relationship Diagrams (ERD) to understand which tables contain specific engagement metrics (open email, clicked email, etc).

4. **For Customer Success connectors:** Review the schemas within the respective ERDs to understand which tables contain specific engagement metrics (Customer, message, conversation history, etc.)



[Start a free 14-day trial at fivetran.com/signup](https://fivetran.com/signup)

5. **For Events/Web Analytics connectors** you have a few options:

- Report-Based: For connectors like Google Analytics 4, you can use a pre-built report template to get the fundamental data required for this type of analysis. You also can create a Custom Report.
- Schema-Based: For other events connectors, such as Heap or Mixpanel, review the respective ERDs to understand which tables contain specific metrics you are looking for (campaigns, events, page views, etc).

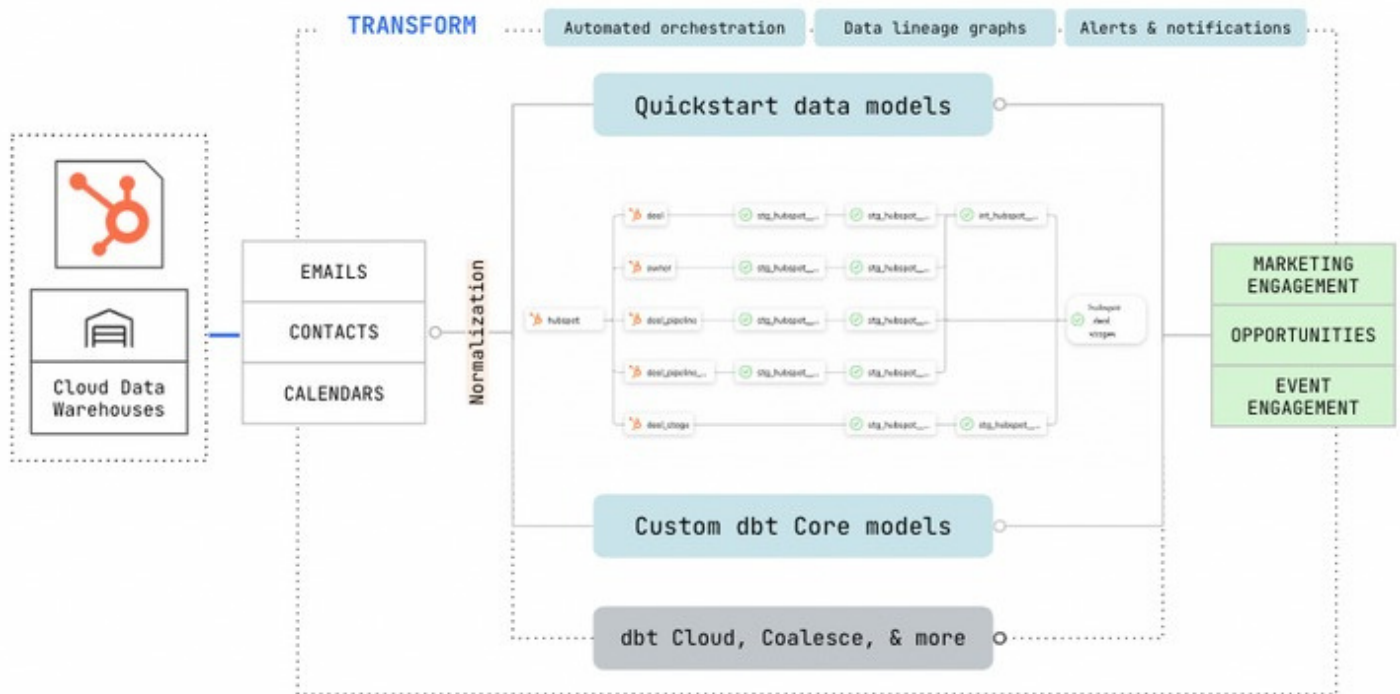
[Visit our Documentation to find schemas, reports, and ERDs for each individual connector.](#)

6. Initiate Historical Sync.

7. Validate and standardize data across each new source in the destination.

8. Use our free Fivetran Data Models to help with standardization of the data. [The HubSpot data model](#) enables you to better understand your HubSpot email and engagement performance by:

- Generating models for contacts, companies, and deals with enriched email and engagement metrics.
- Providing analysis-ready event tables for email and engagement activities.



[Find more data models →](#)

9. Analyze the data to understand what is resonating with customer, where they are spending time and pain points they experience. Implement changes to improve customer experience, increase conversion rates and boost ROI.

What's next? Check out other marketing analytics projects

**Increase return
on ad spend
(ROAS)**

Attribution analysis

Build a Customer 360

**Segmentation and
personalization**

[Start a free 14-day trial at **fivetran.com/signup**](#)