

Build a Customer 360 by centralizing your CRM, email, and events data

Capture all data and interactions across all customer channels and touchpoints to create the best customer experience.

What data sources do you need?

CRM/Conversion

i.e. where you're tracking company sales

Your organization likely uses 1 application or database for your conversions. Choose 1 to get started:

CRM

- Salesforce
- HubSpot

ERP

- NetSuite
- SAP
- Oracle Fusion

POS

- Shopify
- Square
- Stripe

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

CRM/Conversion

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

[Find more connectors →](#)

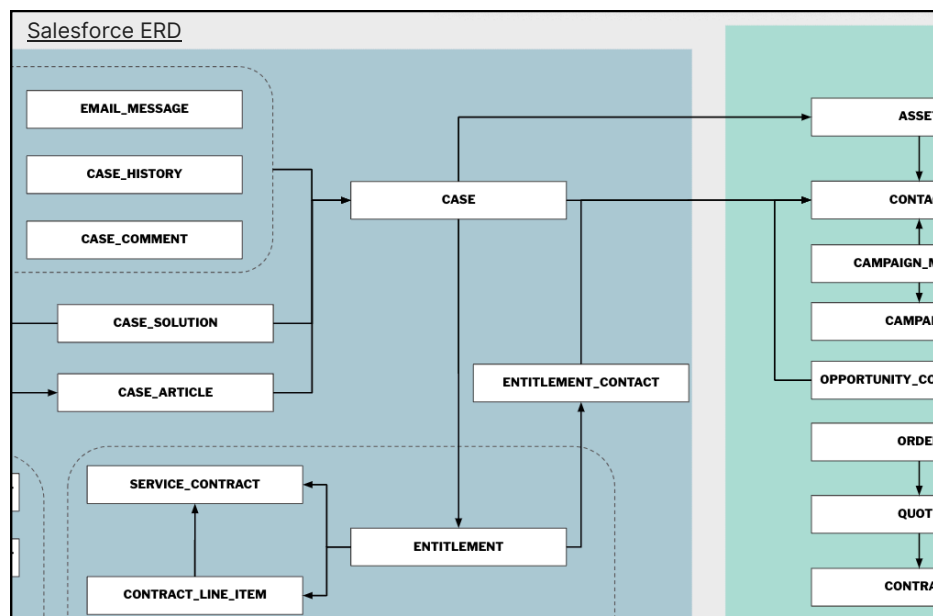
How do you get started?

1. Ensure the sources you plan to connect have appropriate access to all the 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 to insights quicker.

3. **For Conversion connectors:** Review the schemas in the Entity Relationship Diagram (ERD) to understand which tables contain the specific conversion metrics (purchases, contracts, subscriptions).

4. **For Email Campaign connectors:** Review the schemas within the respective ERDs to understand which tables contain the specific engagement metrics (open email, clicked email, etc).



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).

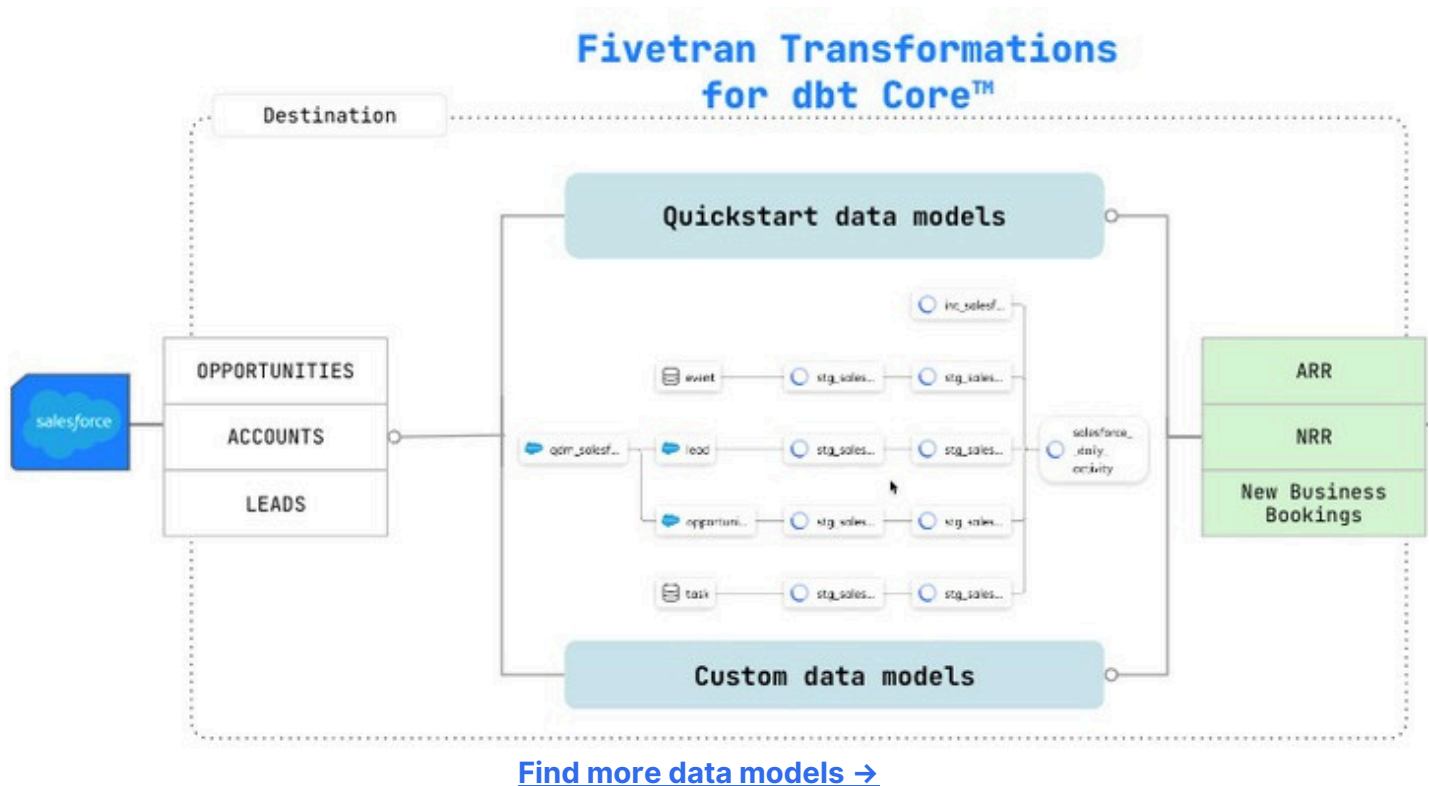
[Visit our Documentation to find schemas, reports, and ERDs for each individual connector.](#)

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 Salesforce data model enables users to:

- Understand the performance of your opportunities
- Have a daily summary of sales activities
- Leverage an enhanced contact list
- View more details about opportunity line items



9. Build a Customer 360 to better understand customer behavior patterns, anticipate their needs and provide tailored solutions. Create the best customer experience and build engagement and loyalty.

What's next? Check out other marketing analytics projects

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

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marketing funnel**

Attribution analysis

**Segmentation and
personalization**

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