

Segment your customers and personalize outreach by centralizing your marketing analytics data

Target specific groups of customers with tailored content to drive higher conversion rates, increase sales, and improve customer satisfaction.

What data sources do you need?

Conversion: CRM/ERP & Ecommerce/POS

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

Your organization likely uses 1 CRM/ERP/POS platform. Choose 1 to get started:

- Salesforce
- SAP
- Stripe
- Square
- Oracle Fusion
- Shopify
- NetSuite
- Microsoft Dynamics

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 or web analytics platform. Choose 1 to get started:

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

Advertising

i.e. where you're spending money to advertise

Your organization likely uses 3 to 8 advertising apps. Choose at least 3 to get started:

- Google Ads
- Facebook Ads
- LinkedIn Ads
- Microsoft Ads
- TikTok Ads
- Snapchat Ads
- Campaign Ad Manager
- The Trade Desk

Email Campaign

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

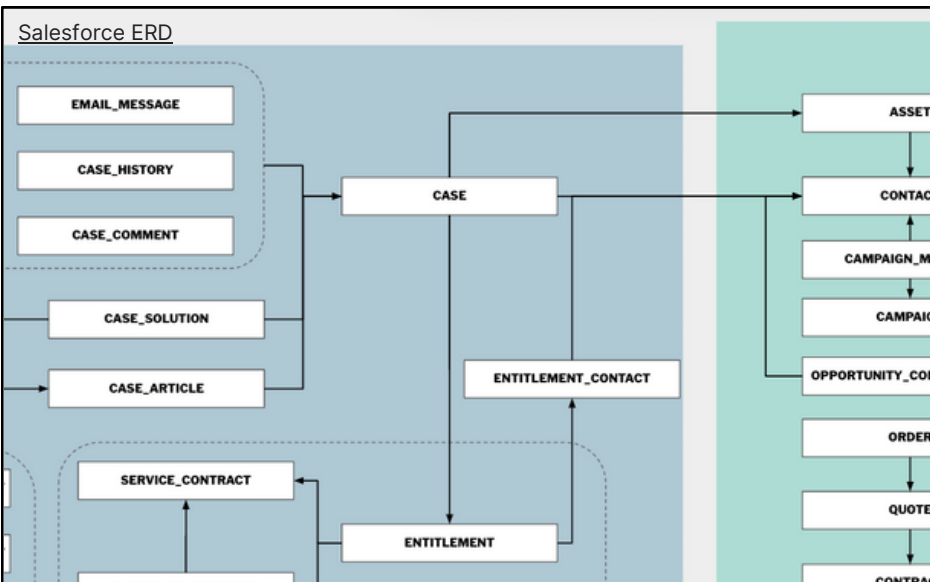
Your organization likely uses 1 email campaign platform. Choose 1 to get started:

- HubSpot
- Klaviyo
- Marketo
- MailChimp
- Salesforce Pardot
- Eloqua

[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).



- **Schema-Based:** Review the respective ERDs to understand which tables contain data on campaigns, ad group, ad history, organization-level tables and more. **Report-based:** Use a pre-built report template to get the fundamental data required for this type of analysis.

5. **For Events/Web Analytics** ensure the correct data is configured to sync:

- **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).

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

7. Initiate Historical Sync.

9. Use our free **Fivetran data models** to help with standardization of the data. [The HubSpot data model](#) enables you to generate models for contacts, companies, and deals with enriched email and engagement metrics. The data model also provides analysis-ready event tables for email and engagement activities.



10. Segment your customers to smaller cohorts based on characteristics such as demographics, behavior, interests or needs. Personalize outreach and offer individual customers tailored content to build stronger relationships, increase engage and loyalty.

Whats next? Check out other marketing analytics projects

Build a Customer 360

Start a free 14-day trial at fivetran.com/signup