Bart Roofhooft

Marketing and
Integration Director

The Reference: content management, web metrics, mobile websites & applications, social media, online marketing, custom application development, search engine marketing, strategic consultancy, Sitecore, marketing automation, cloud applications, branding, e-commerce, and digital transformation.

Company size: 51-200 employees

HQ Locations: Belgium and United States.

In Business since: 1993

"I had a lot of fun with the initial setup. Testing out I realized that by making some simple changes in Salesforce, I could have a very customized synchronization with Marketo via PieSync."

The Reference is much more than a digital agency. The Reference operates at the intersection of marketing and technology. With over 20 years of experience, they "think, build and run" multichannel services for many of the best companies worldwide. With 170 multidisciplinary experts they create added value for their international clients. This full-service agency is known for its result-oriented approach, reflected in its motto, "It's more than digital, it's your business."

The missing piece of the gear

Inside The Reference's outstanding software stack, Salesforce and Marketo have a crucial role, and PieSync steps in as one of the tools that keeps these two applications together. Bart Roofhooft, Marketing and Integration Director at The Reference shared his experience with these tools.

From a very early stage of the sales process, Salesforce gathers valuable information about people's interests. On the other hand, the engagement score tracked by Marketo can be a useful extra to have in Salesforce. At the start, sharing information between the two tools was a challenge. Integrations between Salesforce and Marketo are possible, but they tend to be rather large endeavors. The time and resources for this were not available when we first installed these tool, so it was not a seamless integration from the start.

Every week, the team would do a manual import/export with changes and additions in either system to keep them both up-to-date. Before PieSync, this "copy/ paste" technique was very time-consuming and delaying other more important processes.

"The delay in upload time would not only delay the engagement plans in Marketo, but also for example make managing subscription information in both tools a tedious task."

The Solution

PieSync keeps The Reference's contacts lists from Marketo and Salesforce in sync with a simple but powerful setup. They created a bidirectional sync that ensures that whenever a contact's information is modified in either app, the other one is updated, following certain filters and rules.

Additionally, whenever a Salesforces user registers an interest in a specific service of The Reference (e.g., web development, digital marketing, mobile solutions, etc.) it
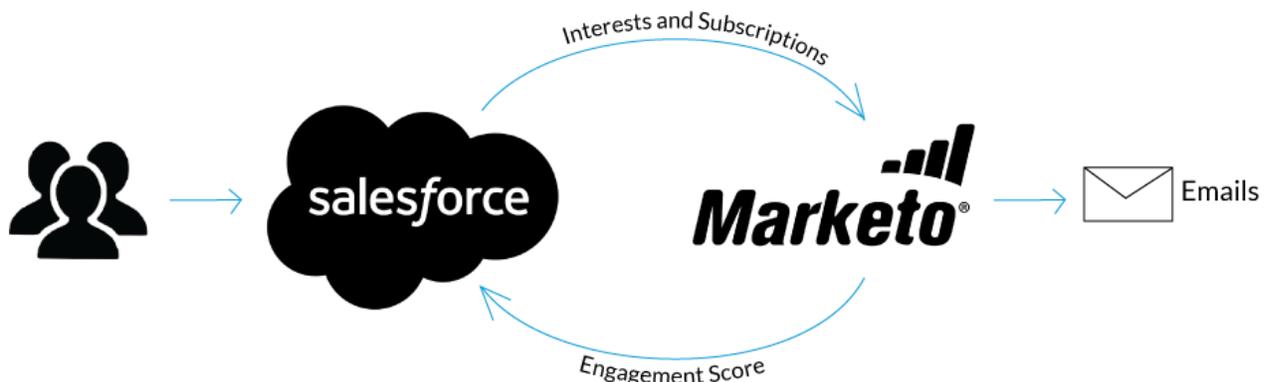
gets automatically added to the right engagement plan in Marketo.

> *"The PieSync connection allows us to use the information collected in Salesforce to send out automatic emails through Marketo according to interests."*

In the other direction of the sync, Marketo tracks the engagement score of each email recipient and sends that information back to Salesforce.

A Happy Customer

Today Bart is not only a customer but also an advocate of the service for certain client setups.

"We don't sell products at The Reference, we just want to offer the most effective solutions for our customers in any situation. We want to solve all their issues, but sometimes it is good to be able to efficiently fix the small problems, so our teams can focus on the larger items. PieSync is at this time one of the easiest ways I can think of when it comes to connecting apps and I'm happy to have found it. The time I have saved after installing PieSync allows me to focus and prioritize my time in a much more efficient way. This is why I am also happy to recommend it to clients if the need arises."

About PieSync

PieSync works in the background and syncs your contacts two-way and in real time. This means you'll have access to the most up to date customer information, no matter where you are or who entered the data. PieSync will help you to:

Set it and forget it

No more import/export

Avoid manual errors

Have all contacts available on your smartphone

Share contacts with your team

Save time spent on data entry