Venturelytic

Mailchimp for Salesforce Integration
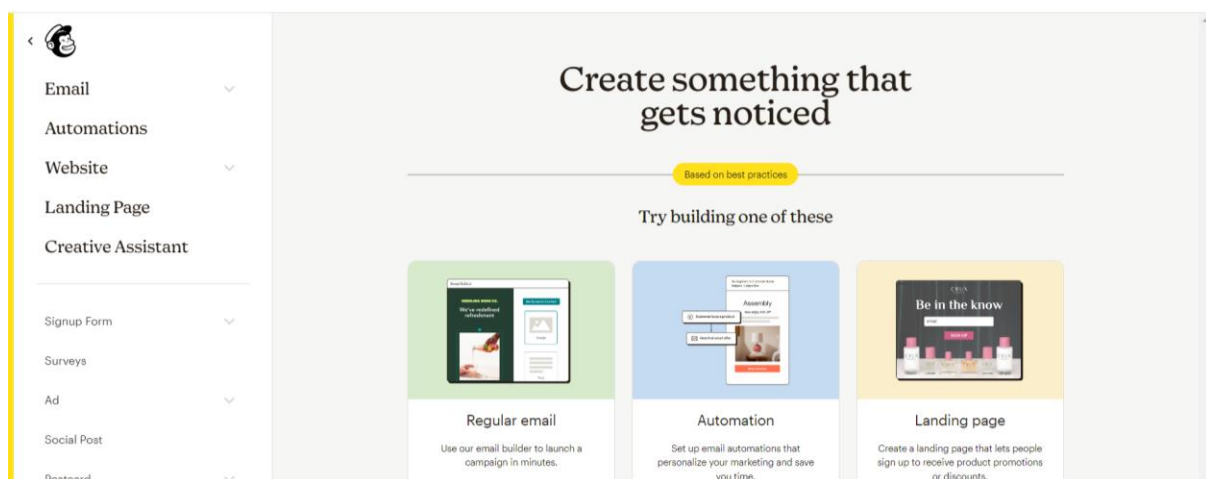
1. Background and Use Cases

Mailchimp is a leading all-in-one marketing platform providing small and large businesses powerful tools to engage with customers. The Mailchimp team developed an integration with Salesforce that Venturelytic customers can leverage.
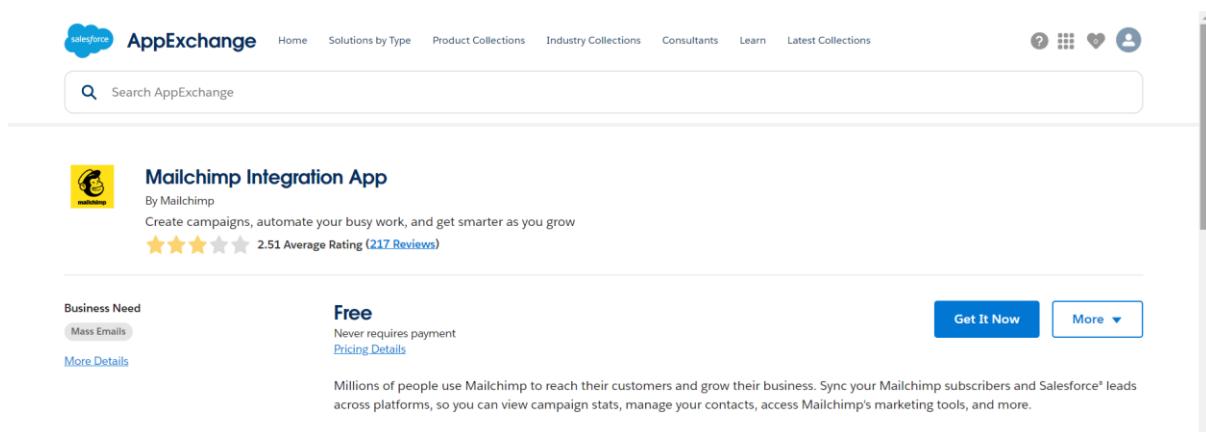
The app can be found on the AppExchange. Although its reviews aren't outstanding, the integration can be leveraged for a certain type of activities. The most common use case is the one where an investor has a periodical newsletter that it sends out to their audience via Mailchimp. Next to a newsletter, these can also be other expressions such as surveys or sign-up forms embedded on a website.

The audience of the investor can subscribe themselves to the activity (whether receiving periodical newsletters or signing up for an event), after which it becomes possible for the investor to pull in these leads as contacts in Venturelytic.
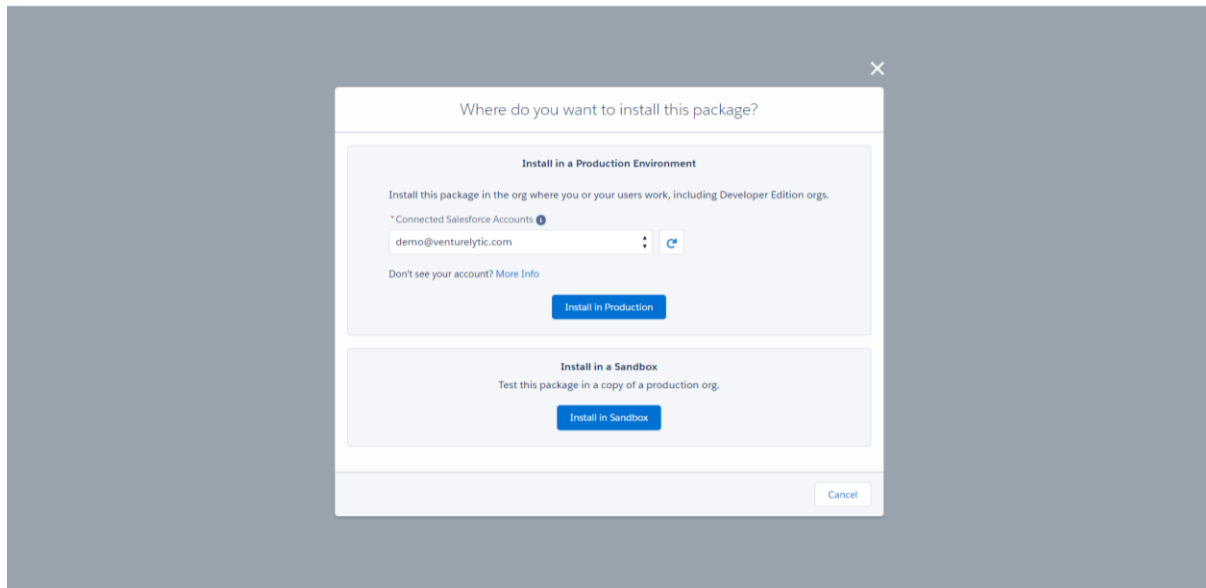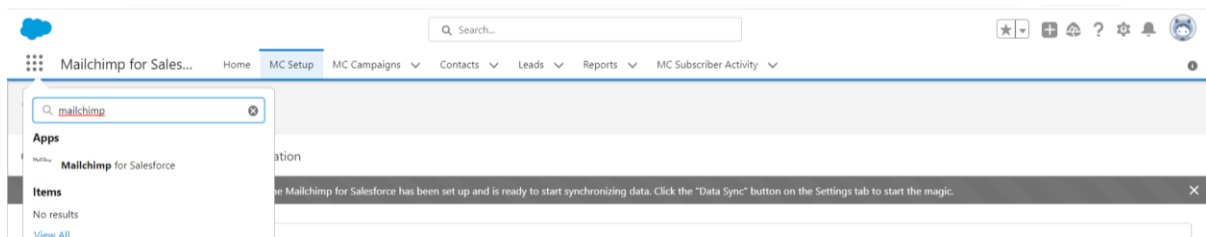

2. Installation of the App

The Mailchimp for Salesforce integration can be found on the Salesforce AppExchange.

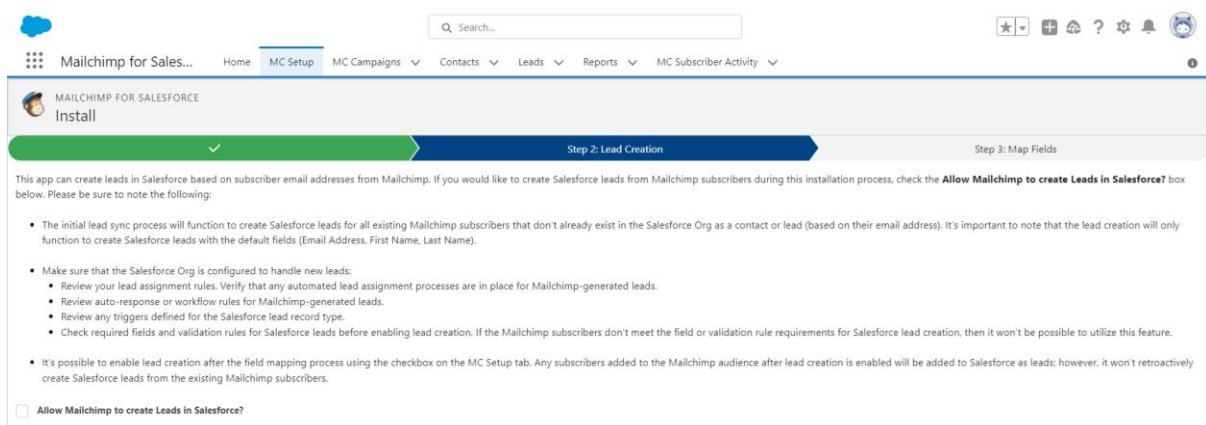By clicking on "get it now", you'll be asked to login with your Salesforce/Venturelytic credentials.

Once successfully installed, you can find the integration as an app in the App Launcher, within your Venturelytic org.
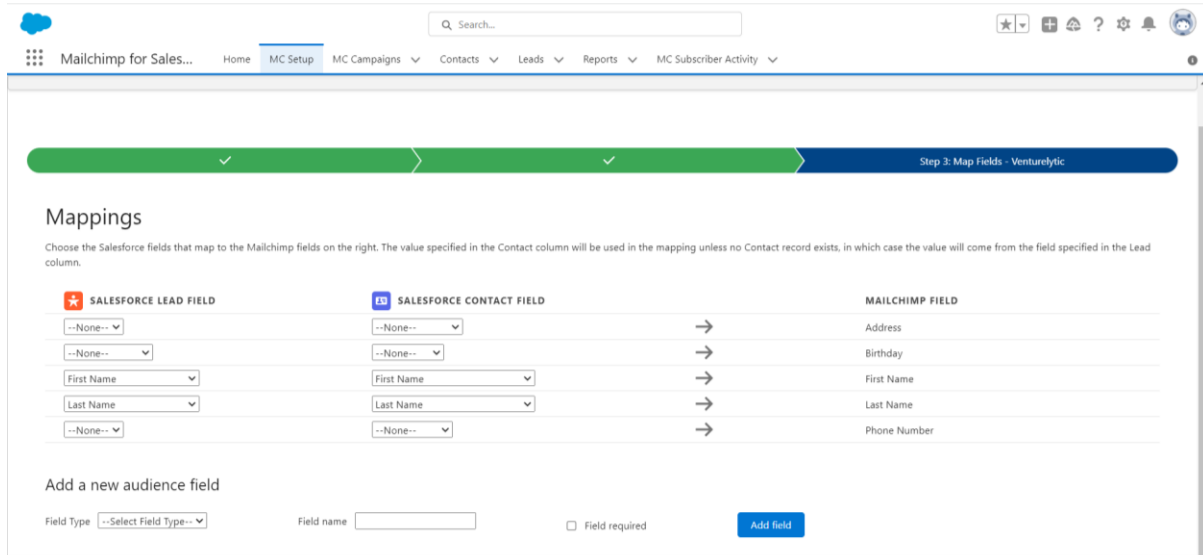

3. Setting up the App

After navigating to the app via the App Launcher, users can click on the MC Setup to get started with the setup.

Mailchimp works with the standard Salesforce' Lead object, which is available to Venturelytic users with an administrator account. The checkbox at the bottom of the first step of the setup asks users whether they want to allow Mailchimp to create new Leads in the app, thereby allowing contact persons within Mailchimp to flow into Salesforce via the Lead object.
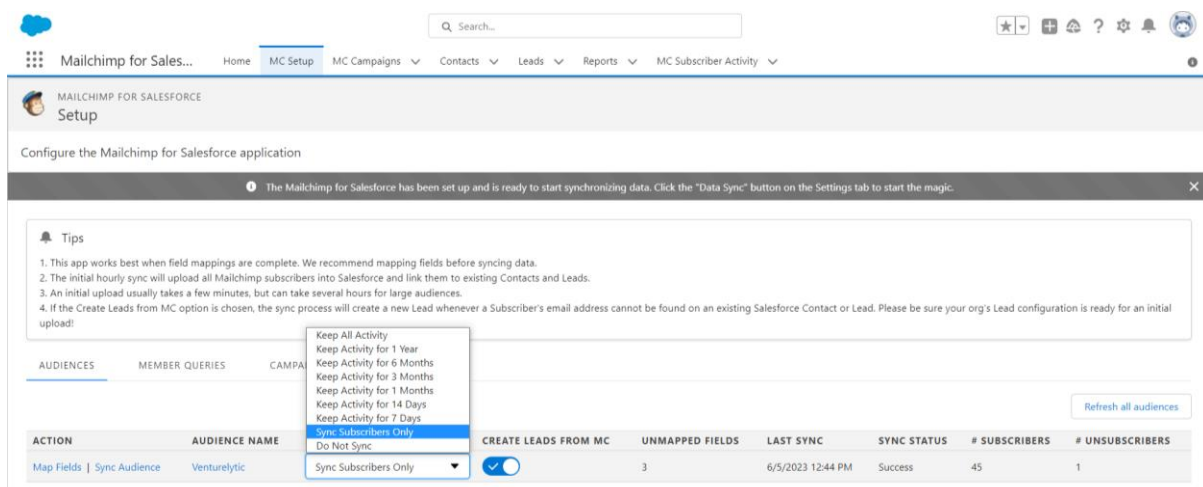
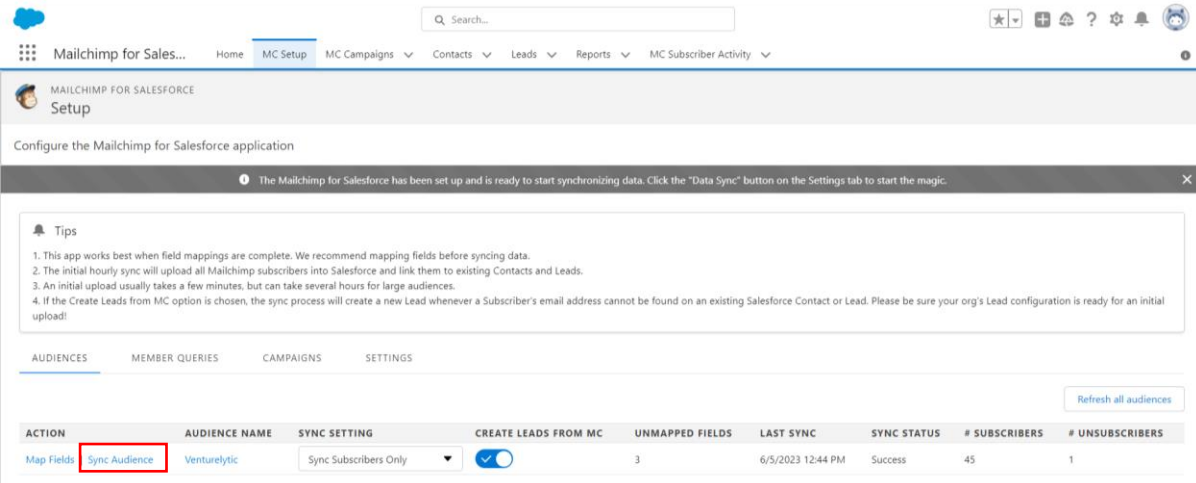In a second step, the user maps the Salesforce/Venturelytic fields with the fields in Mailchimp.

Once the mapping is done, users can start synching the audiences in the two apps.

4. Start Synching

Users can select their preferences in terms of synching as shown in the screenshot below. For the purpose described in chapter 1 it would not be necessary to sync all activities in Mailchimp with Salesforce. For this purpose, the most logical option would be to select the "sync subscribers only" button.
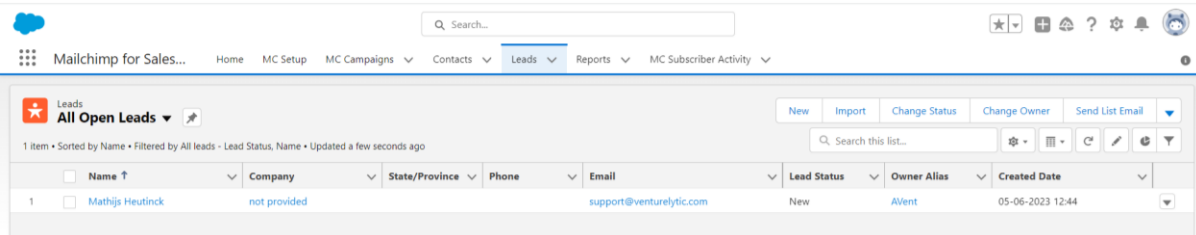
Now, it's time to start synching the audience.

After clicking on "Sync Audience", the integration will sync the subscribers from the Mailchimp account to the Lead object in Salesforce. Once clicking on the Lead tab, the list with subscribers from Mailchimp appears.
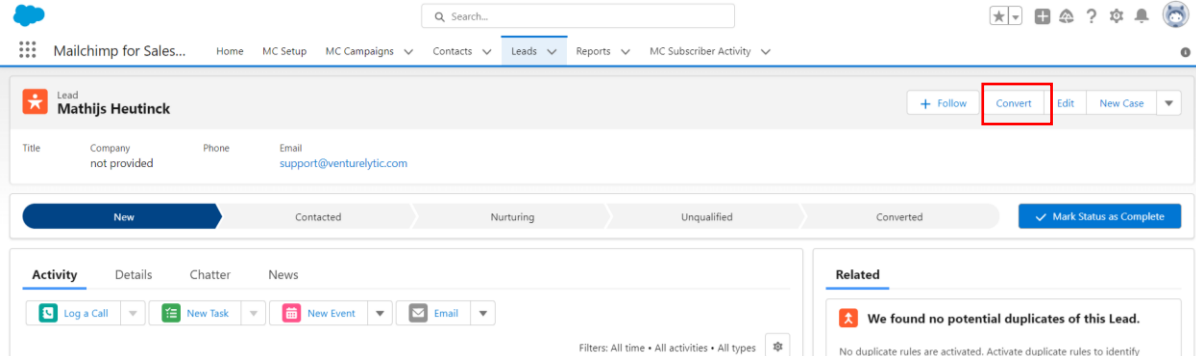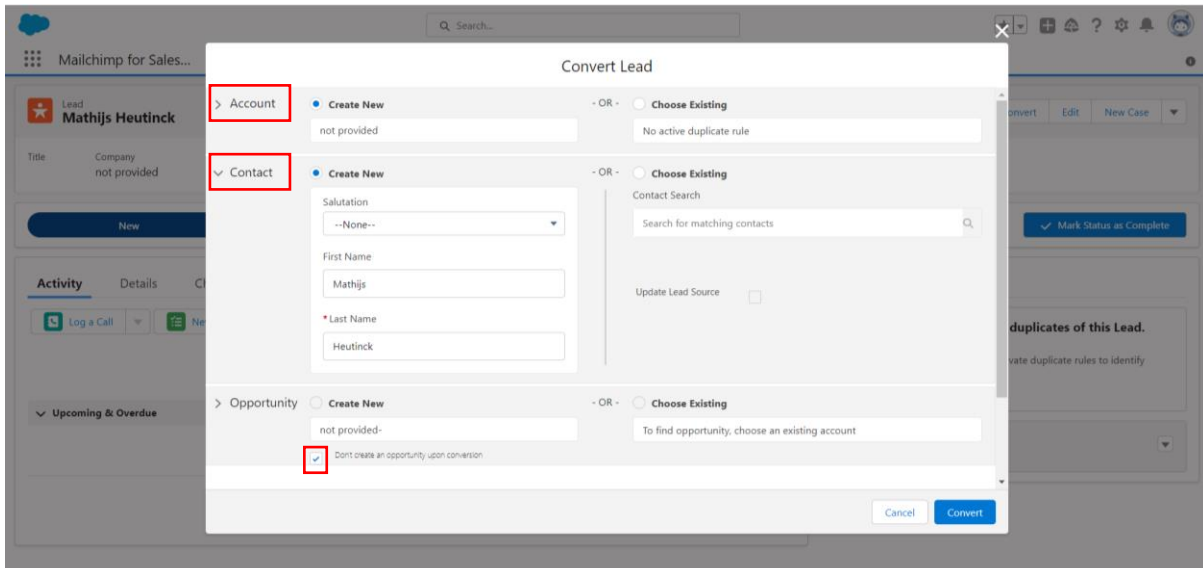

5. Converting Leads to Accounts and Contacts

Users can now manually go through the list of leads and deciding whether to convert them into records in Venturelytic. By clicking on the "convert" button on the top right on the Lead record, users can initiate the conversion process.
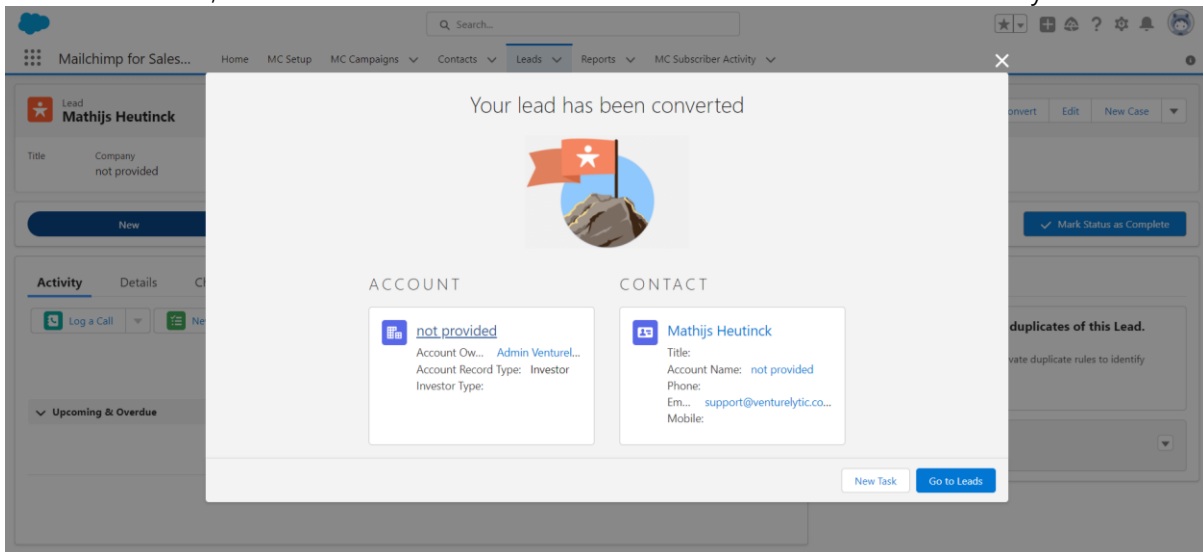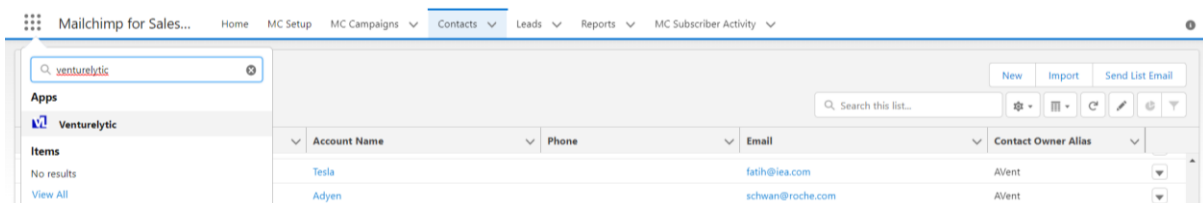
A pop-up will ask the user to which Account and Contact the user wants to convert the lead to. Venturelytic users should check the box on the bottom that triggers a conversion into an Opportunity record, as the Venturelytic package doesn't consist of a regular Salesforce Opportunity object (instead, Venturelytic uses its own Investment Opportunities object that is not a part of this integration).

After conversion, the records are visible as Accounts and Contacts within Venturelytic.

Users can switch back to Venturelytic to access these Contacts in their familiar Venturelytic environment.

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