



Allocadia — & YOUR — Marketing Tech Stack

*Integrations to help you
#RunMarketing**Better***

 **ALLOCADIA**

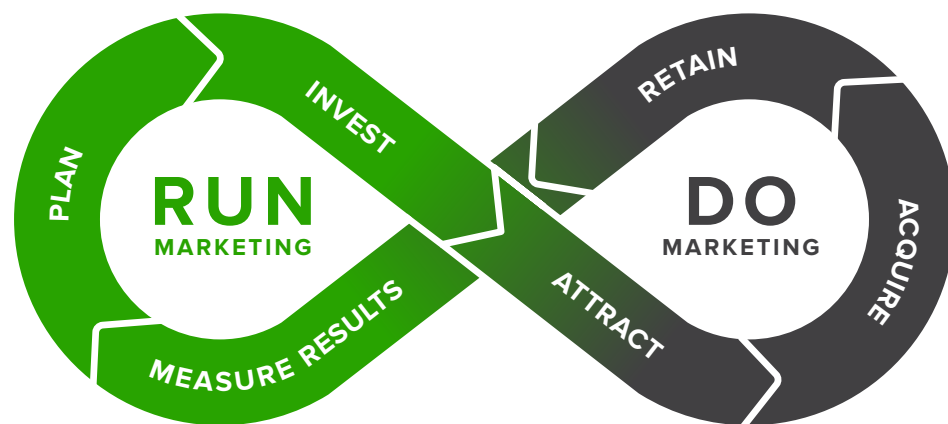
Integrations to help you #RunMarketingBetter

Whether it's by streamlining your workflow, providing better visibility into your marketing investments or helping you measure marketing ROI, Allocadia integrations give you the power to run marketing better.

We enable you to connect your marketing plans and investment data to the rest of your marketing tech stack. Instead of having each piece of marketing software operate in isolation, Allocadia's integrations provide a standardized framework to share data and connect workflows among your entire martech stack.

The result: more consistent and clearer data, huge time savings, and better knowledge of your marketing performance.

In this guide, you'll find out about the four types of integrations Allocadia offers, and how each one can add value to your marketing organization.



“Right from our founding in 2010, we shared our customers’ vision of leveraging technology to make smarter decisions. That means building and supporting a platform that connects to other systems efficiently, and of course securely. We also know that integrations come in many forms and must satisfy many different requirements, so we made a commitment to being flexible. With several integration paths to follow, our customers can choose the one that suits them best.”

Ryan Marples

Chief Technology Officer
Allocadia

The Power of Tying Systems Together with Allocadia

Achieve end-to-end data consistency and control across your entire marketing technology stack

This guide talks about specific use cases for integrating Allocadia with other systems. But no matter which of them you decide to take advantage of, you'll realize the benefits of unifying the data and workflows in your marketing technology stack.

It all starts with the plan

Allocadia is the place where your marketers will plan out their marketing activities. They'll organize them using the structure and hierarchy that makes most sense for your business — Allocadia makes this easy. Plans could be structured by region, functional area, product line, or according to a methodology like the SiriusDecisions Planning Framework.

As the marketers plan, they'll also be creating what we call “metadata”: all the attributes that go along with any given marketing activity, such as its planned cost, objective, target segment, brand, region, and much more. Additionally, each individual marketing activity gets assigned a unique Allocadia ID number.

A common structure

This structured marketing plan data is what gets passed along to other systems when you integrate those systems with Allocadia. Instead of relying on marketers to obey naming conventions and data formats in each of the systems they use, the properly-structured data will be automatically ready for them through the Allocadia integration.

For example, an integration between Allocadia and Salesforce means that all Campaigns in Salesforce will automatically carry the names, structure, and taxonomy that were created when they were planned in Allocadia.

Benefits

Why is tying together the systems your marketing team uses a benefit to your overall marketing organization?



Data structure and consistency — with Allocadia at the center of your marketing tech stack, all the systems your team uses will share a common data structure and taxonomy, ensuring clean, consistent data and making reporting and analysis much clearer.



End-to-end visibility — With the Allocadia ID, every single marketing activity can be easily traced throughout its lifecycle, from plan to execution to measurement. Marketers can use the Allocadia ID to zero in on the cost, results, or ROI of any marketing activity, no matter which of your systems it was executed in.

Finally, integrations between Allocadia and other technologies simply make your team stronger. They give you the power to control marketing spend, increase productivity, measure ROI, and do advanced reporting and analysis in external tools. We'll expand on each of these four in this guide.



1 Spend Control Integrations

Once your team starts using Allocadia, it will become the central source of truth for your marketing budgets and plans. An integration with one or more of your organization's financial systems of record will give marketers an accurate, up-to-the-minute view of their marketing investments.

In addition to planned and forecast marketing spend, Allocadia will show your marketers all funds that have been committed (via an integration with a PO system) and those have been actually spent (via a connection with a finance or ERP system).

These integrations will also save dramatic amounts of time for your marketers. Your team will no longer need to manually reconcile numbers, deal with outdated spreadsheets, or wait for numbers from Finance before being able to make decisions.



Value to your marketing team:

- **Facilitate spend tracking** by importing purchase request, purchase order, or invoice data from your accounting systems.
- **Create reports** on planned vs. committed or actual budget amounts.
- **Measure ROI** — import financial data as the all-important “i” (investment) in ROI

Example Integrations

Allocadia's system-agnostic approach allows for data integration with nearly any finance software package. Here are some of the most common software packages our customers integrate with:



How it Works



Land O' Lakes set up integrations between Allocadia and Oracle ERP with the goal of bringing both purchase order data and actual cost data into Allocadia. Now, their 100+ marketers have real-time insight into their spending at all stages of the campaigns. Marketers are in control and on top of their budgets at all times without having to go through Finance. The company is also building on these capabilities with additional upstream and downstream integration that will further enhance their capabilities in performance review and analytics tools.

PHILIPS

Philips Lighting leverages Allocadia's integration with their finance system of record, SAP, to connect their marketing plan data with their finance data -- including both purchase orders and actuals. This means that their hundreds of global marketers can access instant insights into all stages of their marketing spend, independent of the Finance organization. Additionally, Philips marketers have a button within Allocadia to automatically send a pre-populated purchase request email to the appropriate procurement department — saving time and reducing manual data entry.



② Productivity/Workflow Integrations

A marketer's job is never over. That's why it's crucial to make marketers as efficient as possible. Our productivity/workflow integrations improve marketers' workflows by saving time, reducing manual data entry, and creating standardization across global marketing teams.



Value to your marketing team:

- **Easily create campaigns** in your CRM or Marketing Automation systems with the click of a button in Allocadia, ensuring that they all follow a standardized taxonomy or naming convention. The integration is two-way, meaning that all your CRM/MAP campaigns will appear in Allocadia, so you can associate them with individual budget items, and later create reports based on them.
- **Reduce the effort needed to create a purchase order or purchase request** by initiating it from within Allocadia — PO/PR creation can become part of your marketing activity planning workflow.
- **Initiate projects** in project management systems by using Allocadia to trigger them.

Example Integrations



How it Works

- Planned Investments
- Actual Investments
- Planned Results in Allocadia

Create/Associate



Shared/synced data/
attributes

Projects,
Campaigns,
Programs, etc
in Marketing
Execution
Systems



Marketers at **Palo Alto Networks** can create purchase orders with a single click. Once they've planned an activity and input its cost into Allocadia, they simply click the "Request PR/PO" button to send all relevant information about the item to Palo Alto's Salesforce instance, keeping the two systems in perfect sync and eliminating manual data entry.

A billion-dollar **international professional services firm** leverages the powerful integration between Allocadia and Workfront to give their marketers a more streamlined workflow. There's no need for their marketers to manually enter their planned activities into two systems, since at the click of a button in Allocadia, they can create a Workfront portfolio or program.

③ ROI Integrations

A marketer's impact is the most important thing he or she can measure. And without the all-important “i” in ROI, the investment (spend) data, no measurement can truly be an indicator of marketing efficiency, since it won't take into account what you spent to achieve your results.

That's why Allocadia is the ideal system for ROI measurement. We pull in marketing results data from CRM, marketing automation, advertising, social, and other systems. Using Allocadia's built-in analytics and reporting capabilities, we give you all the dashboards you need to make sense of your marketing results in real and tangible ways.



Value to your marketing team:

- **Measure cost-per metrics** such as cost-per-lead and cost-per-campaign by connecting Allocadia to your CRM or marketing automation system.
- **Create marketing attribution reports** by pairing Allocadia's built-in attribution engine with an integration with your CRM system.
- **Compare the ROI of various marketing channels** at as broad or as granular a level as you wish — at the campaign level, for example, or by broader metrics such as product line, geography, or tactic type.

Example Integrations

IBM Watson Marketing

ORACLE | eloqua

Marketo

salesforce

How it Works

Planned
Investments
& Results in
Allocadia

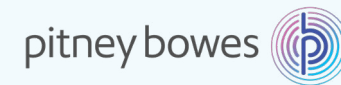
“R” in ROI

Create/Associate

Actual Results

Projects,
Campaigns,
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Systems

“I” in ROI



After **Pitney Bowes** had consolidated their global, cross-business marketing budgets into Allocadia, their next step was linking the investment (budget) data with marketing campaign results. The Allocadia/Salesforce integration let them do just that. They now conduct their ROI measurements at three levels: strategic/company-wide, by geography and business unit, and by campaign type. They also do cost-per metrics across these same dimensions, producing monthly performance scorecards.

Marketers at a 1000-employee Swiss **provider of customer communications management (CCM) software** are able to directly associate their marketing spend with their Salesforce campaigns, so they can easily see the investment tied to the return. With this insight, they can make decisions about how to reinvest dollars from lower-performing campaigns to higher-performing ones.



4 Integrations to Facilitate External Analytics

While Allocadia offers extensive built-in capabilities for performance reporting, some enterprise organizations prefer to use external business intelligence platforms for their analysis, which have often already been established in existing workflows.

Allocadia enables the export of marketing activity data (planned/actual investments, planned results, attributes, etc.) to support business analysts and data scientists as they work with the BI tools of their choice to deliver marketing measurements such as ROI.



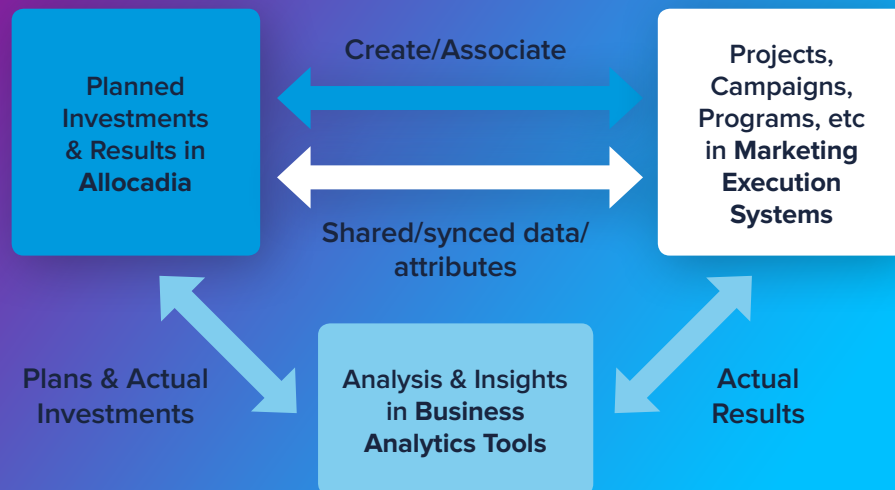
Value to your marketing team:

- **Measure marketing ROI** (or any other relevant metrics) using the external BI or analysis tool of your choice.
- **Aggregate** marketing investment data captured in Allocadia with data from any other source, workflow, or process.

Example Integrations



How it Works



*Allocadia has become the system of record for all field marketing activities at **Microsoft**. With the global scale of this enterprise, measuring ROI requires a method of unifying and standardizing all the marketing results coming out of the dozens of marketing technologies they use. The company has created a standard framework based on an Allocadia ID number that aggregates every marketing activity alongside its costs, housed in Allocadia.*

With the results side of the equation linked to the investments side through Allocadia, Microsoft has paved the way for useful, consistent ROI measurement, with analysis performed in external BI tools.



***Box** exports data from both Allocadia and Salesforce, combining it in Tableau to visualize ROI metrics.*

Making marketing technology integrations easy

Allocadia offers three methods of delivery for our integrations:



1. We deliver it

Allocadia's Professional Services team will configure and support a range of integrations with the leading ERP, CRM, project management and marketing automation platforms.



2. Use an Allocadia Partner

Use an authorized Allocadia partner to scope out and build your custom integration. We stand behind it as if we built it ourselves.



3. Use our API

Use our API to build the integration you need through your own in-house development team or technical partner of choice.

Marketing Tech Stacks, Visualized!

Here are two examples of how enterprise marketing organizations use Allocadia as a critical piece of their marketing tech stacks.

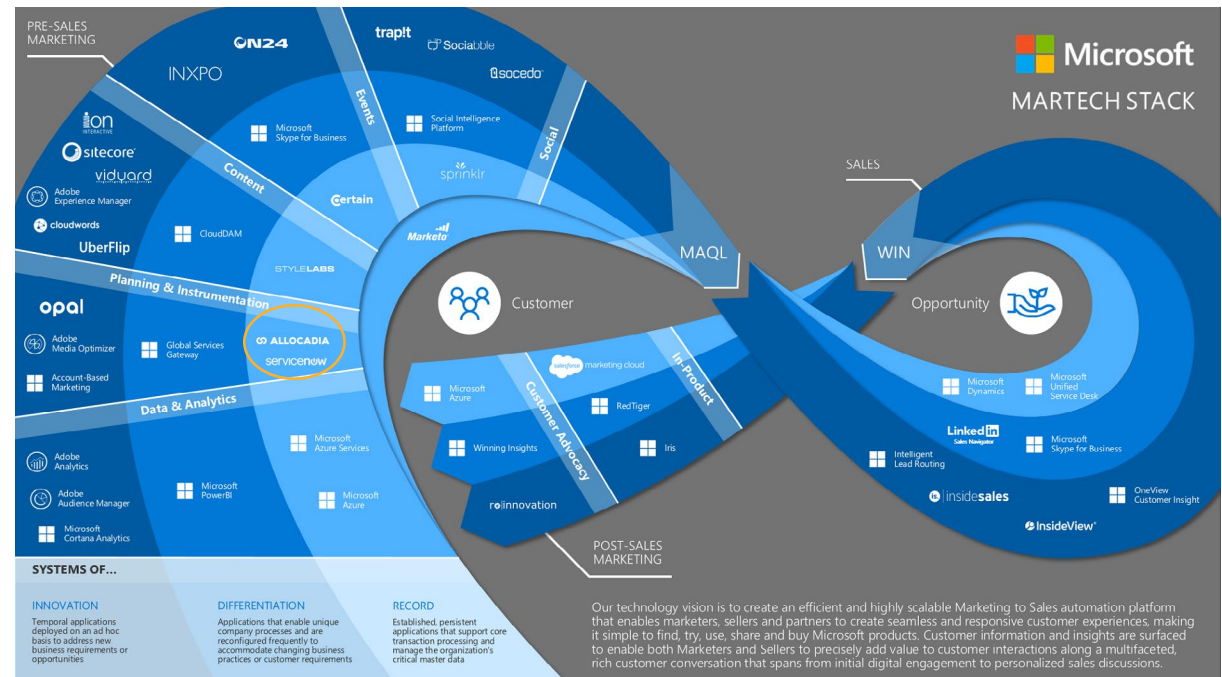
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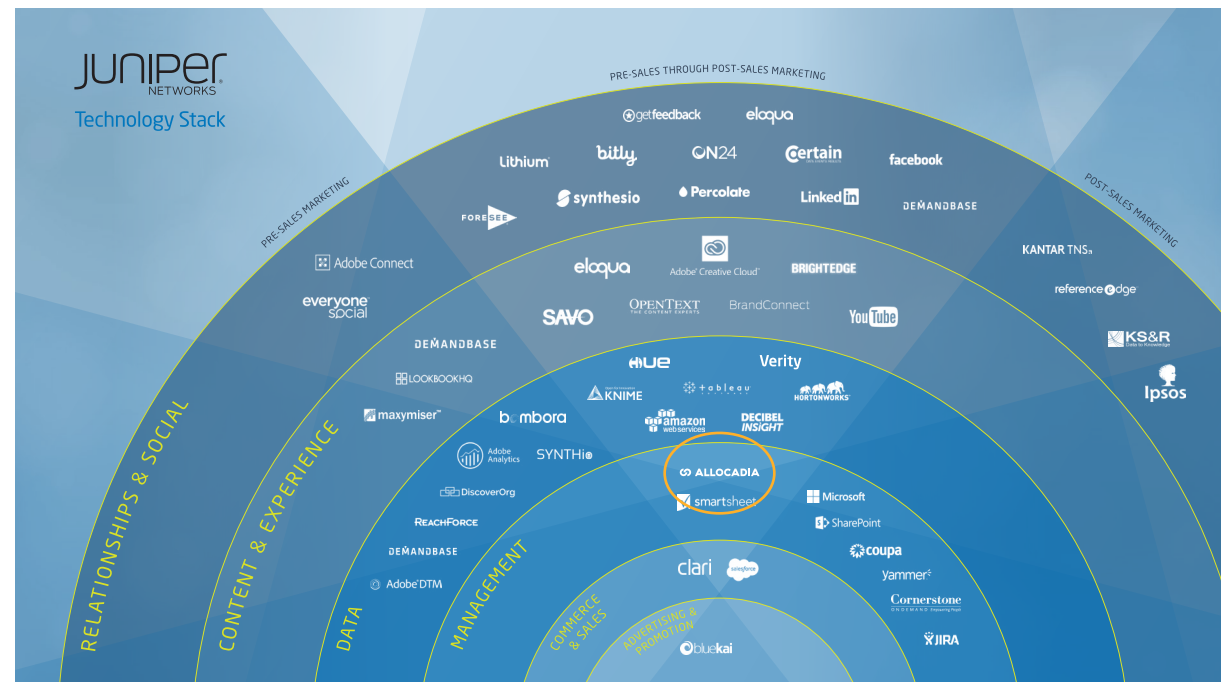
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