The LMS + CRM Relationship

Get your Marketing, Sales, Services and Learning & Development Teams Working Together

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Introduction to LMS + CRM

Now, more than ever, your learning management system (LMS) and customer relationship management (CRM) tool need to work together. Integrating these systems gives Marketing, Sales, Services and Learning & Development (L&D) teams the level of customer — and prospect — insight necessary to survive in today's business climate.

It's the key to fully understanding your prospects' and customers' needs so that you can ensure their success with your product.

With LMS + CRM You Can:

✓ **Boost win rates for your Sales organization.**

Sales reps can understand what learning content brought prospects in the door with shared data.

✓ **Help Marketing reach more qualified leads.**

By tracking which courses are gaining the most attention, marketing teams can use that data to better target audiences with the right content.

✓ **Reduce the strain on your Service teams.**

Automatically send customers suitable educational materials to keep them engaged and coming back for more.

✓ **Prove the value of Learning & Development teams.**

See directly in your CRM how courses in your LMS affect the bottom line.

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Back to Basics

„And If You Don't Know, Now You Know."

What's an LMS?

A learning management system (LMS) is software that manages, delivers and analyzes your online learning initiatives. LMSs create better learning experiences for customers, prospects, channel partners and more.

How Do I Know if I Need an LMS?

There are many scenarios when an LMS would benefit you and your organization. You may find yourself training customers on your platform, onboarding new employees or educating partners about your services, to name a few. If you're a smaller company just starting its growth phase, it might be possible for you to keep up with your current level of training on your own. As your business grows, which it will, training can quickly become unmanageable and ineffective. You'll need a flexible online learning solution that allows you to morph your learning programs from a few lessons to a full-fledged academy that meets your business's evolving needs.

There has been **16%** increase in **virtual training** and a corresponding decrease in Instructor-Led Training

Source: eLearning Industry

What's a CRM?

Customer relationship management (CRM) tools help you manage your relationships and stay connected with customers and prospects.

By organizing all this data in one place, you can automate interactions, like email follow-ups, segment contacts for a more personalized touch and customize reporting. CRMs show what's happening with anyone who engages with your business throughout the customer journey.

5 Benefits of CRMs:

1 You can segment customers and prospects for more meaningful outreach and engagement.

2 You can automate reporting to easily get the information you need to make smart strategic decisions.

3 You can automate data entry (emails, calls and more) to win your teams back the time they'd otherwise spend entering this data.

4 Seamless scaling capabilities let you grow quickly and efficiently.

5 Powerful forecasting capabilities help you make accurate and actionable plans for growth.

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Why LMS + CRM?

CRMs and LMSs have been around for years, which begs the question: Why are they only now coming together?

Knowing the answer to this question is fundamental to truly understand its value and what it can do for your business.

First, let's take a brief trip down memory lane.

For years, successful companies built around Sales, Services and Marketing. Learning was an afterthought, built out of necessity. Training was very manual, in-person, and expensive to run due to the cost of travel, renting venues, and printing material, not to mention the time of Sales and Customer Success team members spent on training vs. bringing in more business.
As the power of education became evident, learning teams developed but had few resources.

It makes sense that as technology became more prevalent in every aspect of business, larger departments had the budget to dive in headfirst. At the same time, early adopters of learning programs were again left behind.

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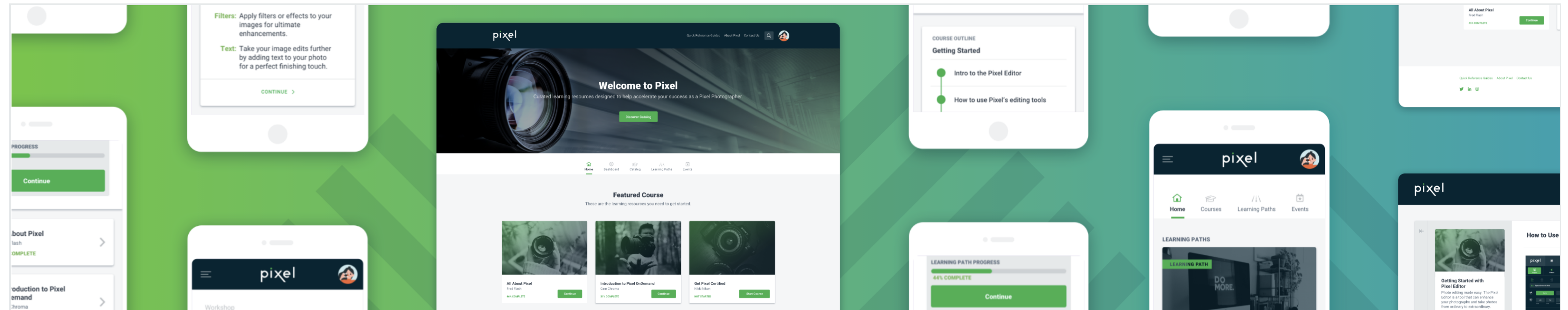
56%

of companies are retooling their **training programs**

Source: Training Industries Magazine

Fast forward to today.

The value of Customer Education is clear. L&D teams are finally getting the recognition and support they need from the business. Companies are shifting resources to Learning and Development. They are starting to invest in the appropriate technology to support internal and external education programs.

The way we do business has changed forever.

In 2020, the world that was slowly meandering into an online-first mentality was, as we all know, in the blink of an eye, thrust from face-to-face interaction to exclusively screen-to-screen interactions. This shift affected learning of all types, especially Customer Education.

Online software is the new standard for almost every team. Now, the only thing left to do is connect the technologies that run Sales, Services, Marketing, and L&D teams. We need all these systems to communicate seamlessly — including your LMS and CRM. Integrating your LMS and CRM is a way to set you apart and give your customers a better experience.

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LMS + CRM Benefits

Integrating your LMS and CRM can positively impact all stages along the customer journey, from pre-sales to post-sales and everything in between.

Connecting your LMS and CRM opens up communication between these two systems. This allows you to:

Centralize learning activity data within your CRM;

Track that learning data alongside customer-centric information;

Use it to take action — without ever lifting a finger.

When you integrate your LMS+CRM you can:

Build: Quickly create an engaging customer academy that encompasses all points of contact throughout the customer journey.

Automate: Streamline customer education workflows using learning and CRM data.

Centralize: See all learning activity data from your LMS within your CRM.

Share: Programmatically share data between your CRM and LMS.

Incorporate: Include customer education into your content strategy.

How does this translate into something usable for my business?

Integrating your LMS and CRM makes these tools work harder for you so that your teams can focus on what really matters. You'll free up time by reducing support tickets and hand-holding customers. Give your customers the knowledge they need to be successful and create real fans.

Look at these 5 benefits you can only get by integrating your LMS and CRM.

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Onboard Customers Faster and Expedite Their Time to Value

As you know, automation of your processes and segmentation of your database give customers and prospects a better experience. Now, what would happen if your CRM could tell you when a new customer finished your onboarding course or, even more importantly, if they got stuck along the way? Integrating your CRM and LMS allows you to ensure customers are encouraged and provided with the resources to help them make the most of your product.

Pro Tip: Set up notifications that remind you to check in with new customers if they stall during their onboarding process.

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Increase Retention and Product Adoption

Customer education alone drives product adoption and increases retention. When you connect your LMS to your CRM, you can trigger email series to ensure they maximize their value with the product or feature. Creating a personalized and continuous information cycle keeps customers engaged with your product.

Pro Tip: Set up a drip campaign tied to each course so that when a customer completes one course, it leads them directly to the next piece of content.

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Cultivate Brand Advocates

What does it take to turn a customer into a brand advocate?

The answer? Well, many things, but one is certifications.

Advocates need to feel like they are a part of your business. A certification course gives customers the chance to show off how much they know about your product and shout it from the rooftops. What happens when you add your CRM data to that? When a customer completes a certification course, you can quickly recognize it with a certificate, or badge, to empower them to keep advocating for you and themselves.

Pro Tip: Have your design team create actual badges and suggested copy that customers can post to social media and share with their networks and include them in all certification courses.

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Become THE Industry Leader

Utilize your academy as a lead generation tool that delivers prospects to you. Then, use that data to further your communication with prospects and customers. You can set up campaigns to entice people with your academy offerings, bring them in the door, and create loyal customers who love your product.

Pro Tip: Don't forget about the importance of brand awareness. It's ok to label a campaign as such, just to get more eyeballs on your company which will in time translate to qualified leads in the door.

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Convert Prospects Faster and Accelerate Win Rates

When you can see what type of courses prospects are interacting with, you can use that insight to tailor your outreach strategy and pitch to their needs. For example, if you noticed they took one of your higher-level courses, you can start (or continue) the conversation by talking about more advanced features you wouldn't necessarily discuss with someone who took an introductory course.

Pro Tip: Take advantage of cookie tracking technology to retarget people who have viewed your academy. Then, deliver them relevant learning materials.

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62% of businesses are spending **more on training** in 2021, influenced by the effects of the pandemic.

Source: Training Industries Magazine

3 Power Moves to Level Up Your Business

1. Incorporate Learning into Your Content Strategy

You likely already know that content plays a vital role in your company's success — think mail drips, SEO and social media. The same goes for online learning. Now, with your LMS and CRM working together, when you incorporate learning into your content strategy, you're not only impacting the marketing funnel but the entire customer journey.

2. Enhance Your Workflows with Learning Data

Using learning data as a programmatic trigger, you can activate your workflows effortlessly. Whether you're looking to automate task creation, marketing emails, send reminders and nudges, or any other workflow, your LMS can automatically share data with your CRM on your behalf.

3. Track Learning Progress and Results Inside HubSpot

Centralize learners' progress within your CRM so that you can visualize activity in one place. When you can view learning data alongside other relevant information, like sales revenue or support ticket submissions, you can better understand the impact customer education has on your business. Then, you can use data for contact segmentation and smarter decisions moving forward.

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How Teams Directly Benefit from Integrating Your LMS+CRM?

Strengthen Marketing Relevance

You need your Marketing and Sales team to work together. When your LMS and CRM work together, your Sales or Service teams can identify learning trends that positively affect their pipeline. The Marketing team can work with those data points to boost customer acquisition.

Connect Learning & Development to the Bottom Line

Learning & Development teams often struggle to prove their business value. But no more. When you can go into your CRM and see precisely how and where education impacts the sales process, it's easy. You can show exactly what content is working and for whom.

Increase Sales Velocity

When your L&D and Sales teams come together, magic happens. Integrating your CRM and LMS gives you a glimpse into the M.O. of your prospects, what they're looking for and what may be challenging them. With access to this information, your Sales team can have meaningful conversations from the get-go, accelerating the sales process like never before.

Support Your Support Team

Your Success or Support teams are at capacity. (Aren't they all?) Integrating your LMS into your CRM allows you to reach customers sooner with helpful educational resources, thereby reducing the strain on your Service teams. It also allows your teams to easily see which courses customers completed and can take that information to help guide conversations and get off the phone faster so they can help more customers succeed.

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This integration is the start of everything our team has needed to excel in our business using these two platforms. We use HubSpot and Northpass for thousands of internal and external users, and for this to work, we needed a seamless setup with reliable results, and this is precisely what Northpass provided.

Chance H., Puls

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How Can I Integrate My LMS and CRM?

While integrating your LMS and CRM is the next step to fully engaging your customers and prospects, not every platform has caught on quite yet. Options differ depending on the platforms you currently use. If you want to see what an LMS + CRM integration looks like, check out **Northpass for HubSpot**.

Northpass is the first advanced learning platform that integrates with HubSpot CRM. Now, you can easily unify the learning data in Northpass and apply it across the HubSpot Flywheel and customer and prospect data.

Want to see how Northpass for Hubspot accelerates your business growth?

Book a Demo

or email us at sales@northpass.com