

CRM Integration Analysis Report

**Prepared By:
Payal Teyung**

STRATEGY AND FRAMEWORK

TASK 1.1 : Analysis Strategy

To analyze the integration campaign performance across several CRM platforms, I will conduct multi-metrics, data driven evaluation using the following methodology :

1. Data Preparation :
 - Merge the given datasets using common field i.e. customer_id .
 - Handle missing values and duplicates if any.
 - Convert date column into datetime format.
2. Performance Analysis:
 - Calculate revenue, CLV, CAC, ROI of each integration.
 - Group customers into different categories based on various features.
3. Insights:
 - Identify patterns in customer behavior and revenue.
 - Examine churn risks, engagement scores and performance metrics.
 - Create dashboards to share insights with the stakeholders.

Key Assumptions and Limitations that I'll be considering:

- There might be some missing information or duplicates.
- Some customers might show zero revenues or not have a churn score.
- We are analyzing for same 12 months for all CRM platforms but some might have been used for less time.

I'll handle data quality issues by performing data cleaning as:

- Handling missing values by either replacing the nulls with relevant values or deleting it as needed.
- Removing the duplicate rows/entries.
- Correcting the data types if there are any incorrect data types.

TASK 1.2 : KPI Framework

The key performance indicators (KPIs) that I will use to evaluate integration success are as follow:

1. Revenue Metrics:

- Total Revenue : Sum of monthly revenue per CRM
- Customer Lifetime Value (CLV) : Total revenue per customer
- Average Monthly Revenue

2. Customer Acquisition and Retention Metrics:

- Customer Acquisition Count : Count of customers acquired per CRM
- Conversion Time : Average trial to paid days
- Active Rate : Percentage of customers who are active or using the service currently
- Churn Risk Score : Average churn risk

3. Cost-effectiveness Metrics:

- Cost per Acquisition (CPA) : $\text{Total investment} / \text{New customers}$
- Return on Investment (ROI) : $(\text{Revenue} - \text{Cost}) / \text{Cost}$
- Cost per Lead

4. Strategic Value Indicators :

- Feature Usage Score : Average score per CRM
- Support Ticket Rate : Average support tickets per customer
- Referral Count : Total referrals by CRM

TASK 1.3 : Evaluation Framework

To compare different CRM integrations fairly, I will use a clear scoring system that weighs things like how long each campaign was active, how much money was spent, and the types of customers.

1. Accounting for Different Launch Dates :

Since CRM campaigns may have started at different times, only looking at total revenue or total customers isn't fair . So I will do the following calculations:

- Calculate average revenue per month
- Calculate how many customers are gained per month
- Calculate ROI per month

2. Factors that might affect performance comparison :

I will adjust the factors that might affect performance comparison by :

- Grouping customers by company size and industry, as big companies bring more money than the small ones.
- Comparing how much revenue and customers each dollar spent brings.
- Looking at how many customers are on higher subscription plans.

3. Weighting criteria for different success metrics :

I will prioritize revenue related KPIs such as average monthly revenue and customer lifetime value, as these directly reflect financial impact.

Other important indicators are :

- Return on Investment (ROI)
- Customer retention and engagement metrics

DATA ANALYSIS

TASK 2.1 : Data Exploration

The primary goal of this analysis is to evaluate the performance of various CRM integration campaigns.

From the initial observations , we can see what each csv file tells us above :

- integration_campaigns.csv : Details of CRM campaigns and platforms.
- customer_acquisition.csv : Customer acquisition records.
- revenue_subscriptions.csv : Monthly revenue of the customers.
- customer_lifecycle.csv : Customer stage (onboarding, churned, etc)
- campaign_costs.csv : Campaign costs by CRM platform

Data quality observations:

There are no missing values found.

All the duplicates were checked and removed if there were any.

TASK 2.2 : Performance Analysis

The key metrics by CRM platform are:

Total_revenue, avg_clv, customer_count, active_ratio

The top performers are:

1. HubSpot : Showed high revenue early in 2024 but declined afterwards.
2. Salesforce : Consistent mid to late 2024 gains.
3. Microsoft Dynamics : Peaked in late 2024 with steady growth.

The bottom performers are:

1. Active campaign
2. Monday.com

TASK 2.3 : Revenue Attribution

1. Calculating Customer lifetime value (CLV) by acquisition source :

CRM	Average CLV (US Dollar)
monday.com	1172.81
Pipedrive	1134.01
Microsoft dynamics 365	1109.28
Freshworks CRM	1107.75
Zoho CRM	1096.94
Salesforce	1077.50
ActiveCampaign	1058.13
HubSpot	1031.38

Customers from [monday.com](#), pipedrive, and microsoft dynamics 365 show the highest lifetime value.

2. Analyzing Subscription Tier Distribution

Most platforms have a diverse mix of customers across tiers.

HubSpots, Zoho CRM, and Salesforce have a large share of Business and Enterprise tier customers.

Pipedrive and Freshworks CRM are Starter and Professional.

3. Calculating ROI for each integration campaign

CRM	ROI
HubSpot	2.82
Zoho CRM	1.26
Salesforce	1.66
Microsoft Dynamics 365	1.43
Freshworks CRM	1.04
Pipedrive	0.39
ActiveCampaign	0.03
Monday.com	-0.10

TASK 2.4 : Insights and Patterns

The most valuable customer segments are :

Company size	Industry	Average Revenue
Small (1-50)	Education	1238.01
Large (201-1000)	Manufacturing	1206.55
Enterprise (1000+)	Retail	1197.98
Large	Healthcare	1191.03
Large	Retail	1164.43

Small companies in education and large companies in manufacturing has higher revenue.

The factors correlated with higher revenue can be identified by correlation matrix:

- Feature usage score shows positive correlation with avg_monthly_revenue and total_revenue_to_date
- Referrals made is positively correlated with revenue
- Churn Risk Score is negatively correlated with revenue

There are seasonal and timing effects on the revenue:

- Peak revenue was observed around mid to late 2024
- Revenue was higher during may to august which are summer months.

REPORTING AND RECOMMENDATION

TASK 3.1 : Executive Summary

The analysis of the CRM integration campaign reveals critical insights into customer behavior, revenue generation and campaign performance. Among all the platforms, **HubSpot**, **Zoho CRM** and **Salesforce** are the top performing integrations based on their ROI and CLV. [Monday.com](https://www.monday.com) and **ActiveCampaign** are the bottom two performing platforms. These platforms saw relatively low customer acquisition and failed to generate sufficient lifetime value to justify their high investment costs, especially in marketing and development. Overall, the ROI results show a big difference in how well each integration is performing. While a few integrations are delivering outstanding value, others show signs of inefficient spend and weak customer retention.

Task 3.3: Strategic Recommendations

Invest More In:

- HubSpot, Zoho CRM, Salesforce
 - High ROI and customer engagement.
 - Customers show strong feature adoption and low churn risk.
 - Consider expanding budgets and marketing around these platforms.

Optimize or Reconsider:

- Monday.com (Negative ROI)
- ActiveCampaign (Low ROI despite high cost)
 - Review campaign targeting and acquisition quality.
 - Optimize marketing spend or consider replacement CRM partnerships.