

# CRM integration guide: The Student Room leads

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## Integration benefits

We encourage all our university partners to integrate leads directly into their CRMs. There are many benefits:

1. **Automated Lead Processing:** By integrating your CRM with our systems, you eliminate manual data entry. Leads flow seamlessly into your CRM, reducing administrative overhead and ensuring timely follow-up.
2. **Accurate Attribution:** Integration allows you to track the origin of each lead. Whether it's from a specific campaign, website form, or referral source, you'll know exactly where leads come from. Accurate attribution helps measure the effectiveness of different channels and optimize your marketing efforts.
3. **Faster Response Times:** When leads arrive in real-time via webhooks, your team, or systems can respond promptly. Students seeking information or assistance won't face delays, leading to better customer satisfaction and increased conversion rates.
4. **Consistent Data:** Integrating systems ensures that information remains consistent across platforms. Whether a lead updates their contact details or expresses interest in a program, the data syncs automatically. This consistency prevents errors and enhances overall data quality.
5. **Enhanced Security:** Webhooks use secure protocols (such as HTTPS and SSL) to transmit data. By integrating through webhooks, you maintain data security during transit. Additionally, restricting incoming requests to specific IP addresses adds extra protection.

## Integration options

We have several flexible options to help universities automate the import of leads into their CRM systems. We are happy to work with your team to find the best approach for your institution.

Depending on your available technical resource, tools used and preferred options, we currently support two main approaches:

1. direct integration via a webhook
2. integration via automation platforms commonly used by UK universities i.e. Microsoft Power Automate or Zapier

We are also in discussion with several of the main UK HE specialist CRM providers to provide direct integration, so can work together with you and your CRM provider in those instances.

Whichever CRM you use, please reach out to us, and we will help you navigate the process of choosing and implementing the best approach with your team. Here are some options:

CRM	Integration methods
Microsoft Dynamics	Microsoft Power Automate, Zapier

CRM	Integration methods
Salesforce	Microsoft Power Automate, Zapier
Azorus	Direct. Being scheduled by Richard Scothern
Hubspot	Microsoft Power Automate, Zapier
Sugar CRM	Zapier, Make
Anthology Reach	Microsoft Power Automate, Zapier
Uniquist	TBC
Student CRM	TBC. In discussion with Dom Yeadon.
Any other CRM	Direct integration via webhook, Microsoft Power Automate, Make or Zapier

## Integration via webhook

Webhooks are a powerful method for enabling real-time communication between different software applications. They allow one application to automatically send data to another application in real-time when a specific event occurs, making them highly useful for creating seamless integrations and automations.

When a lead is submitted on The Student Room or The Uni Guide, it triggers the webhook to send an HTTP request to a predetermined URL connected to the university CRM. This request is sent in real-time and includes the lead details.

Once configured, the webhook operates automatically, listening for the specified event and sending data whenever a lead is submitted.

You can integrate with our webhook directly, or via an automation platform.

## Automation platforms

Automation platforms connect software applications seamlessly, eliminating custom code and direct integration complexities. They offer user-friendly interfaces and pre-built connectors for creating automated workflows (known as “zaps” or “flows”) by dragging and dropping elements.

They have native integrations with the larger CRM platforms, to enable fast and simple "drag and drop" integration of The Student Room leads.

Some CRM teams will have these platforms in place already, and be able to implement new integrations with no, or very minimal, support from IT or development teams.

### Benefits

- **Efficiency:** Reduced development time and minimal technical expertise needed.
- **Data Management:** Efficiently manage data across multiple systems.
- **Adaptability:** Quickly adapt to changing needs without custom integration hassles.

### Popular platforms

- **Microsoft Power Automate:** Ideal for institutions with existing Microsoft infrastructure. Integrates well with Microsoft products like Dynamics.

- **Zapier:** Widely used across sectors, including education. Offers extensive app support and a user-friendly interface. Has native integration with MS Dynamics, Salesforce, Hubspot and others
- **Make (formerly Integromat):** Known for advanced automation capabilities.

## Pricing (May 2024)

Please reach out to these suppliers directly for specific pricing, or your organisation may already have licenses, but indicative pricing starts at:

- **Microsoft Power Automate:** £12/month (or part of broader Microsoft license)
- **Zapier:** £16/month
- **Make:** £7/month

## Security

Our clients will provide us with a designated webhook URL for their CRM or integration platform.

We utilize HTTPS and SSL protocols to safeguard data during transit.

Additionally, our webhook JSON payloads will consistently originate from these specific IP addresses, which can be whitelisted:

3.253.204.180  
46.137.93.106  
54.76.124.54

## Integration process

This will depend on the approach you choose to take and will be coordinated by your Customer Success Manager.

If you provide your CRM or IT team with this integration guide and The Student Room's lead data schema, then they should have all they need to get started. Our team will be happy to support them further as required.

## Via Zapier

Please follow the steps below, and if you have any questions, or issues during the process just contact us, and we will be happy to help:

1. You will create a new zap and use Catch Hook as the event prompt
2. Your webhook URL will be generated automatically. Copy and paste this and send to your customer success manager. Let us know if there are any specific event details that we can put in your test data, that would help you test your set-up process.
3. We will add your Webhook URL to our systems and confirm this has been done
4. You will switch your webhook to 'test trigger'
5. Once you receive successful test data, which should be within 2 days, click continue and go to the Action section
6. Select, or type in the name of your CRM e.g. salesforce, hubspot, MS Dynamics

7. Choose the equivalent action for creating a lead and click continue
8. Select the CRM object equivalent to a prospective student i.e. Lead or Contact, and click continue to verify
9. Create the field mappings for the other fields we send
10. Click continue to verify that the data is in the correct columns
11. Once verified, click Test Action, and after a few seconds you will receive confirmation
12. Select Publish, or select the On toggle from Zapier's home screen.
13. Once happy carry out a test lead from your page on The Uni Guide to check the lead is flowing through correctly

## Direct integration with your CRM provider

Where we have direct integration with your CRM provider, then please contact them to initiate the CRM integration process, and notify your Customer Success Manager, and we will work together to get you up and running.

## Sample JSON payload

Following the specification provided in our leads data schema pdf, here is an example of the JSON payload that will be sent to your webhook.

Note that if there is no value for a field, then we will send an empty string.

```
{  
  "created_at": "2023-11-30 01:11:05.000",  
  "lead_type": "prospectus_lead",  
  "is_international": "false",  
  "first_name": "Example",  
  "last_name": "Lead",  
  "email": "example@example.com",  
  "mobile": "+447787123123",  
  "post_code": "BN1 3XE",  
  "city": "Brighton",  
  "country": "GB",  
  "nationality": "FR",  
  "intended_study_level": "UG",  
  "university_start_year": "2024",
```

```
"primary_subject": "medicine",  
"all_subjects": "pharmacy; medicine",  
"open_day_date": "",  
"marketing_consent": "true",  
"website_source": "The Student Room Group"  
}
```