

## ONTARGET PARTNERS, LLC

### SALESFORCE, ZOOMINFO, AND LINKEDIN SALES NAVIGATOR INTEGRATION & PROCESS AUTOMATION USE CASE

#### Overview

OnTarget Partners are B2B growth experts offering intelligence for business to improve processes across sales and marketing. In phase four of this partnership, they enlisted TAP Innovations to automate Salesforce processes between their business systems, Zoominfo, LinkedIn Sales Navigator and Salesforce. **TAP Innovations is a premier system integrator and solved their automation gap quickly and affordably!**

#### Business Challenge/Problem

Working with three separate systems, OnTarget employees had to pull client requests from Salesforce manually, then extract data from both ZoomInfo and LinkedIn Sales Navigator. Once all of the raw data was collected, it had to be validated with existing information in Salesforce, filtered as new or existing and reentered into Salesforce in the appropriate fields. Manual efforts became extremely time-consuming, so this long-time partner and client enlisted TAP Innovations to reduce efforts and errors.

*"The Salesforce training was awesome. It seems you're viewing programs the same as we are and approaching them exactly the way I would."*

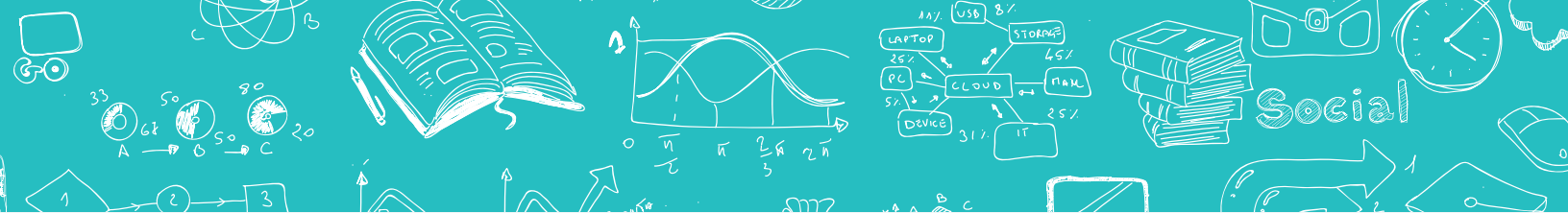
OnTarget Partners

#### Digital Tools

**TAP Innovations is an HR system integration expert and closed their system integration gap with custom integration and new automated data processes.**







- Develop API integrations between Salesforce, ZoomInfo and LinkedIn Sales Navigator.
- Create automation to sort and enter data between systems.
- Transfer and hold data in a secure cloud location.
- Provide ongoing customer and technical service.





## TAP Innovations Solutions

TAP Innovations is a premier systems integrator and customer implementations expert for HR, CRM, Financial, LMS, POS, Restaurant and Healthcare (EMR and PM) software companies. Solutions are easily scalable and repeatable across multiple industries, including franchises:

-  Bi-directional integrations
-  Data transformations
-  Data capture
-  Bulk data loads to transfer data
-  Actionable Information
-  Easily scalable and repeatable



*"This is very good having a time table in front of us and knowing when everything will be done. 5 out of 5 satisfaction scores because TAP is guiding through and ironing out the goals to practically see what we will be getting."*

- OnTarget Partners

For more data integration use cases, visit [tapinnov.com](http://tapinnov.com).



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### About TAP Innovations

theAppPlace (TAP) Innovations, certified by the Texas SBA® as a minority-owned business, delivers cloud-based solutions to eliminate Manual Efforts and SpreadSheets (MESS). TAP Innovations...THE Integrated Digital Toolbox automates manual processes and greatly reduces spreadsheet sprawl, actions data into information and performs intelligent content organization across people and entity enterprises. A growing set of Digital Tools for CRM, Business Intelligence, Integrations, and more are web and mobile enabled and quick to fill data interoperability gaps with core business systems. TAP Innovations solutions have been implemented to streamline business processes for leading healthcare and financial management organizations as well as internal departments for companies from 50-15,000 employees and users.

