

Retail Company Automated Lead & Job Management



Marketing cloud pilot, followed by a Sales Cloud implementation, Marketing Cloud Connect and Mobile Connect



CHALLENGES

The client required a new CRM to fit their growing business needs, however were hesitant after a series of unsuccessful custom CRM implementations

- The client is a leading provider of tax depreciation schedules. They help customers claim the maximum tax entitlements on their property and reduce their taxable income
- With unsuccessful CRM experiences in the past, the client was left with multiple legacy custom CRM systems which were expensive to maintain, and left them reliant on several third party IT vendors. This made them cautious about yet another CRM platform.
- The client also had a growing pipeline of leads being passed to them by referrers, and were unable to manage contacting all leads in a timely manor as volumes continued to grow



SOLUTIONS

ClifyX Inc created a roadmap of release phases, targeting the client's biggest pain points first, to create incremental value and ensure they were comfortable with the platform

Phase 1 - Marketing Cloud implementation

- Email based lead onboarding journeys, created in Journey Builder, to manage and engage with leads and drive them towards converting into an opportunity

Phase 2 - Sales CRM implementation

- Migration from two legacy CRMs
- Marketing Cloud Connect
- Integration with website quoting engine, request a call, and other forms

Phase 3 - Mobile Connect implementation

- SMS added into journeys to facilitate client and supplier notifications



RESULTS

The implementation of Sales and Marketing Cloud created a single view of the customer and allowed the client to scale their business

- Single view of the customer, with all job and client information now stored in one system
- Reports and call requests can be made via the website, and are visible instantly in Salesforce
- Automated email journeys improved referral lead conversion rates and allowed the client to take on new referral partners
- Automated journeys also reduced the number of outbound calls required, freeing up staff to allow for more strategic initiatives and business development