

Private Client Data Security & Data Analytics Framework



Overcoming Data Security and Productivity Issues with Salesforce CRM.



CHALLENGES

The customer suffered from poor sales and marketing processes.

They faced various issues with data security

The client faced problems with data entry errors due to extensive paperwork.

The manufacturer could not send automated e- mail communications.

They lacked a good data analytics system



SOLUTIONS

As part of our tailor-made solution, we implemented Salesforce CRM. We also helped the injection mold maker to redesign their sales and marketing processes to enable them to use Salesforce effectively, besides developing an effective data security framework.

We worked with the manufacturing organization to customize Salesforce; we ensured all fields used to capture information about leads and page layouts were customized to meet the client's unique needs. We also created new user roles in the Salesforce system to facilitate hassle-free usage of the enterprise IT platform by the customer's team.

Our specialists integrated the client's email system with Salesforce; this enabled the injection mold company to launch email marketing campaigns and send updates to customers about their products, with little effort.



RESULTS

Automated threat detection reduced enterprise risk with near real-time precision alerting.

50% Increase in Sales Productivity

82% Reduction in Manual Task Processing

35% Growth in Sales Revenues

Forecast accuracy increased as trend data for all Salesforce objects can now be monitored over a long period of time, impacting Sales, Service, and the companies' overall revenue.

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

Manufacturing Client Solution on Breach Detection & DLP



Breach Detection across all systems of record (SOR) & Data loss privacy

CHALLENGES

A multi-org Salesforce environment created a security gap as there was no way to proactively monitor for potential security breaches across all systems of record.

This regional segmentation has inadvertently created data silos and limited the ability of the security team to efficiently monitor for potential threats.

As a further complication, the business struggled with Salesforce's limits related to two key data points. Retention periods for login history are too short to provide meaningful trends. Query timeouts are frequent when attempting to access event history.

SOLUTIONS

Secure Data Extraction - Data is replicated incrementally from Salesforce into the enterprises' on-premises relational databases. This replication retrieves key login and history data which is critical for threat detection analysis.

Data Consolidation - Each Salesforce organization maintains a unique SQL database which ensures the fidelity of the data and allows for individual org analysis.

Security Analysis - The single source of Salesforce activity is connected to an analytics tool, enabling visualization of trend data across all Salesforce production organizations.

RESULTS

Automated threat detection reduced enterprise risk with near real-time precision alerting.

A one-source privilege comparison ensured that the business enforced a global standardization for Salesforce data access.

Forecast accuracy increased as trend data for all Salesforce objects can now be monitored over a long period of time, impacting Sales, Service, and the companies' overall revenue



Ready on Road with Salesforce Sales Cloud

CHALLENGES

- No lead routing or opportunity management.
- No Follow ups on leads and opportunity. No business automation.
- Unable to Manage Pricing for products across globe.
- Data been managed in MS Excel. Create Draft Quotes. Hard to access information while travelling.
- No tracking of Sales Reps while meeting with prospects or clients.
- Analytics were done on MS Excel in the form of Pivot tables, etc.

SOLUTIONS

ClifyX Inc Guide reps through deals stages and educate best practices.

- Create and convey exactly sales cites easily. • Enabled Einstein Forecasting.
- Spare leads, contacts, and every one of their information into the client’s Salesforce framework.
- Determine at-risk opportunities with Opportunity Scoring.
- We incorporated the application with Google Maps for progressively advantageous and exact arranging by region.

RESULTS

Make and view a superior pipeline of quality leads.

- **Post our implementation, the business spiked to 25% in Q3, from 18%, which further increased to 30% in Q4.**
- Prevail upon more clients, increment benefits, and hit their business targets.
- Can see sales data in Salesforce1 Mobile App along with notifications.
- Opportunity Approval from Management on time with proof.
- Stakeholders can see sales, revenue details with few clicks using Salesforce Reports. Stakeholder can visualize monthly, quarterly, yearly revenue in Salesforce Dashboards.
- Managing products with multiple currencies with right price.
- Generate Quote pdf with products and prices with minimal clicks