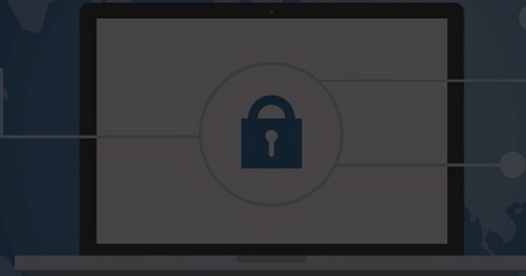


CASE STUDY



INDUSTRY

Hi-Tech

A Cloud and Data Security Organisation that help businesses protect their data, and constantly thrive to secure cloud infrastructure and fix vulnerabilities before hackers identify and exploit them, manage customer relationship using Salesforce.

Value Creation Modules

SPANCO Process / Customer Onboarding

Automated customer onboarding and lifecycle management with defined milestones.

Better opportunity collaboration using multi-currency

Sales/SE/Finance team across globe collaborate to win an opportunity as team.

Point to Point Real Time Integrations

Integrations with Zoho, Hubspot, and DocuSign allowing real time flow of data

Subscription management

Contemporary portal to manage subscription model.

Intelligent Reporting

Real time reports and dashboards for the business owners and operations team to keep a check on business health

Personas

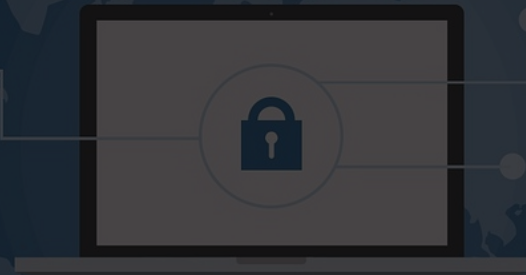


- Sales Team
- Operations Team
- Management Team

Products & Technologies Used



CASE STUDY



INDUSTRY

Hi-Tech



CHALLENGES

- No view of customer unified data across different business vertical.
- Duplicity of customer accounts and contacts causing manual errors
- Managing enquiries from multiple sources was a challenge
- Unorganized and generic marketing campaigns leading to very less churn rate.
- Lack of Coordinated efforts from different departments within organisation
- Lack of unified business health dashboard across sales
- Dis integrated systems leading to operational in efficiencies.

- Capturing new prospect details from HubSpot, qualifying them to onboard as customers, and managing business relationships .
- Creating new opportunities with multiple products of interest across regions/countries/states using multiple currencies.
- Multiple opportunity teams work on opportunities for closure.
- Closed opportunities trigger Zoho Books to generate invoices.
- Quote creation and PDF sharing, along with digital signatures from DocuSign.
- Salespersons/Management can have a 360-degree view of accounts and business pipelines, achievements based on value, and activities assigned & completed within Salesforce with just a click of a button.
- Integration helps coordinate efforts with the Marketing, Sales, Finance teams, as well as leadership.



SOLUTION



BENEFITS

- Better lead conversion and grooming of leads by virtue of Bi-directional integration with HubSpot.
- Unified view of customers with all integrated system.
- Efficient customer onboarding process reducing lead time.
- Reduction in average handling time and increased customer satisfaction.
- Single source of truth for teams due to real-time integrations.
- Better control over business through holistic real-time reports and dashboards for business owners.
- Operational efficiencies through real-time, data-backed collaboration across teams.
- Better visibility and control over the business