



Objective

The client, a US-based venture providing a wide range of eco-friendly items for homes and offices, wanted to overhaul their existing marketing processes before expanding their business.

Scope

- Lead Conversion Rules - to ensure that leads cannot be converted without important fields
- Pools of marketing reps were created to cater to specific segments as well as product categories.
- Web-To-Lead facility - to allow website visitors to fill up a form to reach out with their specific requirements.
- Lead Assignment Rules - to route the leads to the correct pools.
- Reports and dynamic dashboards for the reps & the top management

Technology

Salesforce Marketing Cloud

Benefits

- The time taken for the marketing reps to get in touch with their leads reduced by half.
- Reps were quick to work on the leads as they landed in their assigned pools
- The sales reps were able to get in touch with more contacts on a daily basis
- The Lead Form on the corporate website turned out to be the biggest source of leads.
- The up-to-date dashboard charts enabled top management to make strategic decisions faster.
- The company implemented their expansion plans within a span of 6 months.

Challenges

An internal study had unearthed following issues:

- It was taking more than 1 day for the reps to get back to the leads.
- Some of the leads were falling through the cracks as it was not clear who should handle them.
- Leads with incomplete information created problems downstream for the sales reps.
- Marketing reps needed a handle on the sources generating more profitable leads.
- They needed a better way for the website visitors to reach out to the company than the current 'Contact Us' tab.
- The top management was not getting relevant reports on time.

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