

Synechron Salesforce Capabilities

for Marketing and Sales Automation



Accelerating Digital for Banks, Asset Managers, and Insurance companies.

Synechron is a leading Digital IT Consulting firm and is working to Accelerate Digital initiatives for banks, asset managers, and insurance companies around the world. We achieve this by providing our clients with innovative solutions that solve their most complex business challenges and combining Synechron's unique, end-to-end Digital, Business Consulting, and Technology services. Based in New York, the company has 18 offices around the globe, with over 8,000 employees producing over \$500M+ in annual revenue.

18

Global Locations

8000+

Team Members Globally

Vertical

Focused only on Financial Services

\$500M+

Privately Held and Self-funded

150+

Marquee Clients

Power of 3

Digital, Consulting and Technology services

Our Value proposition

A unique approach to market differentiation in the financial services domain

Unlike other firms, Synechron's "Power of 3" approach and financial services expertise gives us a competitive edge to tackle our clients' problems from any vantage point with great depth. Synechron combines the "Power of 3" - business process knowledge, digital design and core technology delivery excellence - to drive transformative solutions. We have the unique ability to provide an end-to-end approach, from business consulting through technical development to digital enhancement. This empowers us to deliver solutions to some of the toughest business challenges.

Technology

- Technology Consulting
- Application Development
- Automation
- Enterprise Architecture & Cloud
- Quality Assurance
- Systems Integration
- Data & Analytics
- IT and Database Support
- Microservices and API Development
- Business Process Management

Digital

- Experience Design
- Deployment and DevOps
- Emerging Technology Frameworks
 - Blockchain COE
 - AI Automation COE
 - InsurTech COE
 - RegTech COE
 - AI Data Science COE
 - Wealth Tech COE



Business Consulting

- Enterprise Strategy, Architecture and Transformation
- Client Experience and Lifecycle Management
- Data Science, Engineering and Governance
- Regulatory Change and Compliance
- Finance and Risk Transformation
- Innovation Management
- Program Management Services



Overview

Synechron, a Certified Salesforce Partner

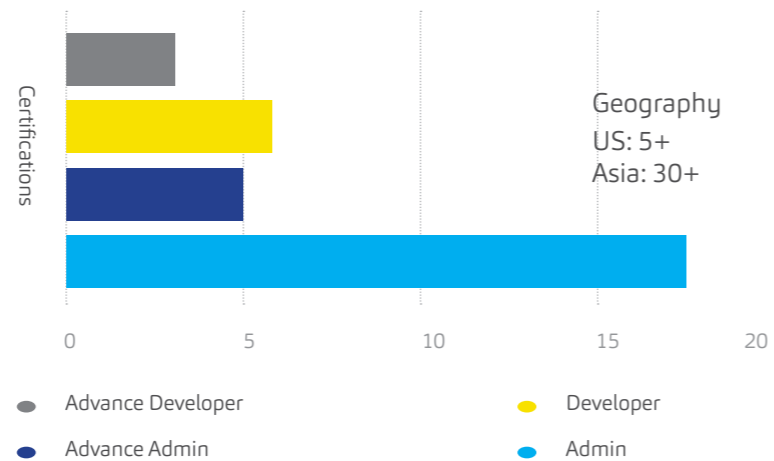
- Registered Salesforce Partner
- Team of certified experts
- Proven credentials on skills and large scale implementations
- Experience with all product modules and integration with adjacent applications and data bases

 **35+**
Salesforce professionals
across different teams

 **150+ Yrs.**
Total Experience
across the teams

Certifications

Synechron team members certified across salesforce roles



Products



Key Skills

- Administration set-up & execution
- Data management
- Maintenance & support
- Combination of business and technical domain expertise
- Product installation & configuration
- Customize or develop new functionalities
- Solution & architecture design
- Application & system/data integration
- Scaling and performance tuning

Salesforce CRM Capabilities

Synechron is a Salesforce Partner with development and implementation capabilities across Salesforce sales cloud, Salesforce service cloud, Salesforce Pardot and Salesforce data.com. We work with clients to understand how they are using these systems to support their business and to configure their sales ecosystem to meet these business goals.

Salesforce Sales Cloud is a customer relationship management (CRM) platform designed to support sales process. We can do SSO integration by which the SSO login credentials can be used to access Salesforce by active users and also define how Office 365 can be integrated with Salesforce where users can use corporate email, calendar functionalities on the Salesforce platform.

Key capabilities include:

- **Vendor Analysis and requirements gathering across the full Marketing and Sales**
Synechron can provide a detailed product analysis to determine if Salesforce is the right solution, the service level agreement required, and the program scope creation.
- **Data migration**
We work with clients to map their existing sales and account data from manual systems or other CRMs to clean the data, and seamlessly migrate the data into the new system with regional, business unit, and account hierarchies.
- **System customization and configuration**
We help to customize the fields that the team wants to maintain across Lead, accounts, contacts and opportunities.
- **System integration**
We integrate the Salesforce solution business workflow and data for single sign-on and with other solutions including Marketing, email and Finance. This includes, but is not limited to
 - Marketing Automation Systems like Pardot
 - Office 365 integration
 - SAP for automated quoting and billing and to enable seamless Financial record-keeping
 - Oracle integration for financial forecasting
- **Cloud**
SaaS implementation – We work with clients to leverage Salesforce’s cloud capabilities to run various SaaS solutions, including:
 - Sales cloud
 - Marketing cloud
 - Service cloud
- **Training and Maintenance**
We conduct user trains and provide customer service support including Case management and Ticket management with a community cloud and reporting – automatically passing tickets to developers to solve and address.
- **Hosted Applications**
We help our clients to use Salesforce Application Builder to create custom integrated infrastructure and applications, such as Human Resource Management System (HRMS) integration to connect employee data with billing rate data to automate invoicing and time sheets, Supply Chain Management Systems, and others.



Our Proven Methodology

Assessment and strategy: Interview stakeholders across functional areas and identify scope.

- Define how the teams collaborate with each other and leads/contacts can be created and nurtured.
- Develop strategy and configuration needs analysis, considering best practices compared to company processes.

Implementation and Go-live

- Go Live and Integration with external systems or websites as defined in scope.
- Signoff on Implementation. User onboarding and dashboard creation with Prod data.

Design and planning

- Design Tech Architecture and Process mapping.
- Identify fields and objects to be developed.
- Create Account and Roles hierarchies.
- Define how the integration with SSO, Emails system needs to be done to enable users to use Salesforce to interact with leads and contacts in the system.

Operations and support

- Provide Training and Adoption Support.
- Manage Documentation and Go Live closure.
- Create internal communications and training videos, user scoring and certification programs.
- Develop a training plan and user adoption strategy.

Develop

- Migrate data.
- Configure the Sandbox environments.
- Create Objects, Fields, Rules, Workflows.
- Quality Assurance. UAT

Integrate with Marketing Automation and Inbound Sales Systems - Pardot / Engage

Factoring in Marketing Automation, Lead Generation, Lead Nurturing, Engagement, and Conversion strategies.



Case study #1

Synechron Salesforce CRM and Pardot Implementation

Business Problem

As the organization continued to invest in maturing its global sales systems and processes, Synechron was looking for an enterprise-scale CRM solution to increase corporate sales memory, facilitate collaboration across global accounts, and provide better financial forecasting. The Business selected Salesforce CRM and Pardot to be used for its Sales and Marketing automation in order to create an end-to-end integrated platform to track the journey of a lead to a customer and a view of the sales life cycle.

Solution

Salesforce CRM

- Worked across 9 global Business Units with 20,000 customer and cleaned the data down to 10,000 records across the Lead, Account and contact hierarchy.
- Set up 121 Salesforce users, 5 Pardot users, and 20 Salesforce Engage users from configuration to training and ongoing support.
- Managed customization against business requirements allowing for business line revenue tracking and partner tagging to track partnership revenue shares.
- Mapped account hierarchy to allow for seamless workflow of data based on lead nurturing criteria.

- Set up Office 365 integration to optimize data integration into Salesforce for easy meeting tracking and conversation audit trail.
- Set up global training and reporting methodology and analytics.
- Enabled sales targets to be shared with the team with different views and integrated with HR and Finance systems.
- Facilitated WooBot app integration and provided development support across the new Salesforce UI platform Lightning and Talend ETL for back-end records processing.
- Incorporated marketing, lead generation, sales lifecycle, customer service and business analytics

Pardot

We worked with the Global Marketing Team across the \$500M business to implement Pardot for Marketing Automation, Lead Generation, and Lead Nurturing strategies with focus on Salesforce Engage implementation to support Inbound Sales. The objective was to enhance the Sales team's ability to run targeted account-based marketing campaigns with a library of content and automated workflows.

- **Phase 1 Implementation**
Focused on database migration, content-lead marketing library creation, user training, analytics dashboard creation, and lead scoring methodology creation.
- **Phase 2 Lead generation**
Integrated website lead generation forms into the system from contact us, thought leadership downloads, event registrations and webinar pages and assigned these leads to the BU and Account heads based on pre-defined business logic.
- **Phase 3 Inbound Sales**
Trained Salesforce Engage beta users to run inbound sales campaigns following receipt of a new queue of commercial leads with the ability to draw from a library of over 40 mailers.

Benefits

- Increase of 5K records, up to 15K records over the last year
- Global infrastructure to manage leads, pipeline building and analysis across 250 accounts
- Revenue Forecasting with integration of oracle Finance



Case study #2

Contract Management

Customer Overview

A Wall Street Major and member of the Forbes 2000 list and a global provider of equity, fixed income, hedge fund stock market indexes, and multi-asset portfolio analysis tools.

Solution 1

Implemented Contract ,Price & Quotes (CPQ) using Apttus & integrated with SAP for billing.

- Team Size : 5
- Data synced Daily with SAP billing Module
- Status of the billing is updated back in salesforce
- Implemented Sales forecasting
- Created detail reports using interactive graphs, dashboards and customized reports
- Advanced Analytics and reporting using QlikView and Qlik Sense
- Major challenge was to integrate and sync with different applications like SAP

Tools

- Apttus
- Qlik
- SAP
- DBamp



Case study #3

Customer Service Support

Customer Overview

A Wall Street Major and a global provider of equity, fixed income, hedge fund stock market indexes, and multi-asset portfolio analysis tools.

Solution 2

Implemented Service Cloud as a customer service solution.

- Team Size : 8
- Case Management using Queues, Assignment Rules, Escalations & automate response rules
- Implementation of Community Cloud enabling transparent and easy communication between Customers, Partners & Organizations employees
- Effective logging of Cases in Salesforce via Email for both Clients and internal organization employees & also email alerts on progress of the cases
- Advanced Analytics and Case SLA adherence and violation reporting using Qlik

Tools

- Case Management
- Qlik
- Article Management
- Community



Case study #4

Human Resource Management System

Customer Overview

A provider of financial services technology. The company's clients include banks, thrifts, credit unions, securities broker dealers, leasing and finance companies, and retailers. BAI ranked the company third by revenue among technology providers to U.S. banks.

Solution

Implemented Resource management System and automated invoice generation.

- Team Size : 3
- Manages different Engagements, Accounts, Invoicing and employee billing related information on the Sales Cloud
- Customised Performance and Skill Review System
- Automated invoicing
- Analytics and graphical reports for Vendor Management
- Integration with PowerBI to design and launch rich UI reports

Tools

- PowerBI
- DBAmp
- MS SQL Server



Case study #4

Supply Chain Management System

Customer Overview

Largest US Based organization dedicated to group purchasing and supply chain management.

Solution

Implemented Resource management System and automated invoice generation.

- Team Size : 10
- Supplier Score Card Dashboard helped decision making
- Integration with .NET applications for actual revenue calculations
- Scheduled report subscription
- Analytics and graphical reports for Vendor Management

Tools

- SOQL
- .NET Apps
- SQL Server
- Lightning



Case study #5

Synechron CRM

Customer Overview

Synechron, one of the fastest-growing digital, business consulting & technology services providers, is a \$500 million firm based in New York.

Solution

The Sales and marketing team got an end to end integrated platform to track the journey of a lead to a customer and a view of the sales life cycle. The marketing team got marketing automation and real time lead activity tracking using Engage.

- Team Size : 10
- Incorporated marketing, lead generation, sales lifecycle, customer service and business analytics
- Revenue Forecasting with integration of oracle Finance
- Case Management for Sales Users. (Email to Case)
- Pardot and Sales cloud integration with Marketing Automations
- Data.com implementation
- WooBot for MS Teams, an advanced collaboration tool -- implementation in progress

Tools

- Pardot
- Oracle Finance
- Talend ETL
- Engage
- Lightning
- WooBot



Case study #6

Client

US Tier-1 bank and a global provider of equity, fixed income, hedge fund stock market indexes, and multi-asset portfolio analysis tools.

Objective

- Improve quote to cash process
- Improve quality and speed of contracting, pricing & quoting and billing

Solution

- Integrate and sync different applications with Salesforce Cloud
- Daily (meta)data sync between systems & billing modules
- Billing status updates in Salesforce
- Implemented sales forecasting
- Data quality analytics using interactive dashboards and reports based on QlikView and Qlik Sense using rich UI and real time data.



Case study #7

Client

US global provider of equity, fixed income, hedge fund stock market indexes, and multi-asset portfolio analysis tools.

Objective

- Improve quality and speed of customer support services for internal and external customers.
- Scalable and robust ticketing system

Solution

- Implementation of Salesforce Cloud
- Consolidation of multiple ticketing systems
- Standardized Case Management using Queues, Assignment Rules, Escalations & automated response rules.
- Integration with applications for Email, reporting, document management and SSO.
- Implementation of Community Cloud for transparent and easy communication with customers & employees.



Case study #8

Client

A large provider of financial services technology. Clients include banks, thrifts, credit unions, securities broker dealers, leasing and finance companies, and retailers.

Objective

- Improve time writing & billing process.
- Streamlining yearly assessment of employees

Solution

- Implementation of Salesforce Cloud
- Automated invoice creation including sending invoices to account owners.
- Customized performance and skill review system
- Design and launch rich UI reports by integrating different applications with Salesforce Cloud



Case study #9

Client

Largest US Based group purchasing and supply chain management company

Objective

- Increasing efficiency by the automation of contracting and supplier management

Solution

- Integration of Salesforce Cloud with dotnet applications • Customized reports and email schedule

Global Footprint



Synechron
Digital / Business Consulting / Technology

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Proprietary material

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