



Industry

Consumer Goods, E-Commerce, Retail



Product

Community Cloud, Integrations, Marketing Cloud, Sales Cloud

Challenge

- Client had 200+ restaurant locations with disconnected POS systems and needed remote sales teams to have access to 500,000+ account data records for multiple locations as well as metrics for 50 person sales team performance
- Research and development department had no way of communicating with test store location customers about new items in test and were manually gathering surveys at the restaurant location level
Email platform was not connected to CRM system so sending emails to 2.5M record client list was manual and lacked personalization

Solution

- Implemented Sales Cloud and designed an integration utilizing SQL to bring in Aloha Takeout / NCR customer data to create customer records that their sales team could access remotely and complete activities on. Built out KPI's and designed reports/dashboards around team performance
- Built a customer portal to communicate upcoming test items and a points system to incentivize the customer to complete surveys to get key data on test item feedback
- Implemented Marketing Cloud and built data extensions around key customer segmentation

Results

Sales leadership has a window into the performance of their 50 person sales team and areas of opportunity as well as specific key indicators to provide coaching and development on. The client saw higher customer engagement with customer incentives in place and improved efficiencies at the store level by automating the survey process. The client saw a time savings in automating customer subscriber email sends and automating weekly sales engagement grouped by customer segmentation.

