

The Leadership Circle Case Study



The Leadership Circle creates seamless customer touchpoints and increases visibility with Salesforce CRM and marketing automation.

Industry

Management Consulting

Location

Draper, UT

Solution

Marketing Cloud & Salesforce CRM Training, Migration, Implementation, and Support

Site

leadershipcircle.com



The Leadership Circle is a global team that provides leadership development and business performance services. With 30 years of helping leaders in every industry to foster excellence in business, The Leadership Circle’s innovative approach to developing and working with leaders is fueled by their own core values and leadership philosophy.

The Challenge

As an international organization, The Leadership Circle’s passion to enable effective leadership and drive outstanding business results for their clients is exemplary, to say the least.

Aware of the organization’s ability to deliver next-level customer service to its clients, The Leadership Circle wanted to dive into the world of powerful marketing automation with Salesforce CRM and Marketing Cloud.

In the past, The Leadership Circle had been utilizing their legacy business management system, Oracle NetSuite. While the tool predominantly served the financial team, it provided limited capabilities toward the organization’s marketing and lead generation efforts.

With this in mind, The Leadership Circle wanted to create a seamless experience across each customer touchpoint for clients to easily get the requested services. Integrated marketing tools—such as Journey Builder, Interaction Studio, and Email Studio—quickly attracted the organization to Salesforce CRM and Marketing Cloud.

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The main positive outcome that we've seen already is better transparency and visibility across all our teams, I am now able to see all the leads that are coming in globally through the form that EBQ helped us build.

Ty Peterson

Marketing Manager
at The Leadership Circle

Another key factor to migration was that the organization's founders had recently written a book and wanted to launch an email campaign around the new book release. To ensure success, The Leadership Circle sought a partner to get the email campaign sent out to their large prospective markets and reduce their platform downtime.

The Solution

CRM & MARKETING AUTOMATION CONSULTING AT EBQ

With dynamic marketing automation and powerful CRM now in their hands, The Leadership Circle partnered with EBQ to assist with implementation and training.

The Leadership Circle had another key driver: they wanted to parse all information from their previous siloed tools into Marketing Cloud's data architecture.

As a Salesforce Partner, EBQ's expert team was able to build a single instance of a lead capture form for the entire organization to use for lead routing. The form was developed so that if a lead was located in the U.S, it would be routed to the right rep in the appropriate territory.

The Results

Since the launch of the email campaign surrounding the book release and building clean workflows, The Leadership Circle saw a dramatic increase in web traffic and overall engagement.

"I was shocked as well how the email campaign performed, not only in terms of deliverability rate and open rates, but we had a lot of people reaching out to us directly," said Peterson.

That success led to The Leadership Circle extending its partnership with EBQ by signing on to Marketing Cloud Premium Support. This provided them a lifeline to a team of certified specialists that can field their questions and resolve any Marketing Cloud issues.