



Personalized Food Company Case Study

The Situation

One of the first companies formed to personalize your food intake based on your body type. Sales are based on two different segments: The food subscription model and the Food coaching model. The decision was to have Sales Cloud and Marketing Cloud be ready by the launch day of New Year 2017.

The Problem

Leads challenges:

- Since there was no lead nurturing as people directly place subscription orders online, how do the waitlisters get handled? We do not have name and address data for these waitlists.

Account and Contact challenges:

- All contacts are primarily Person Accounts, do we use the Person Account feature of Sales Cloud with its limitations? XYZ wanted all leads to come into Sales Cloud as Accounts and Contacts since this was all personal information of people.

Opportunities and Order challenges:

- The lifecycle of an opportunity is long. There are several stages before which an order is generated, eg. Kit purchase for health diagnostics, Kit Shipped to the customer, Kit shipped back to XYZ, doctors review of the Kit, and once the doctors give an ok can the customer the email is sent out to the customer that they are ready to place an order
- The orders are of two types on any given opportunity, Coaching and Food
- Food type of orders are subscription hence recurring

The Solution

Marketing Cloud keeps track of all the customer journeys' from when the customer created an online account to all the various phases not based on any amount of time the customer takes to perform the next action and the customer receives marketing emails based on each of the steps.

Sales Cloud tracks all the customer interactions with their online user account on the XYZ website to the purchases of food and coaching and is integrated with their website and the Marketing Cloud. This makes Sales Cloud the system of truth for XYZ Inc.

The Outcome

With the limited amount of time till New Years', 2017 Apphienz was able to complete the setup, implementation of Sales Cloud and Marketing Cloud. From start to finish the project was completed in about 6 weeks. The startup had a smooth launch.



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