

# Digital transformation with Salesforce

# Company snapshot

As a software development company, iTechArt helps VC-backed startups and fast-growing tech companies build successful, scalable products that users love.

## We are global

- Headquarters in New York, offices in San Francisco and Atlanta
- Extensive presence in the UK and Austria
- Software development centers in Belarus and Poland

## Service areas

- Staff augmentation
- Custom software and app engineering
- QA and testing
- DevOps

## Industries and verticals covered

**30+** Diversity serves as a core component of our tech culture

## A pool of go-getter engineers

**1800+**

## Our team knows how to marry tech and money

**\$500k** The average amount clients save with us, per year

**\$8B** Our clients collectively raised

A black and white photograph of a man and a woman working together on a laptop in a modern office setting. The man is on the left, leaning over the laptop, and the woman is on the right, smiling and looking at the screen. They are both wearing lanyards with 'itechart' tags. The office has large windows overlooking a city skyline. A small potted plant and a piggy bank are on the desk.

# Digital transformation with Salesforce

[itechart.com](https://itechart.com)

# — Digital transformation consistencies

The success of any digital transformation starts with four areas that any company should keep in mind. These are the foundation for making the company truly digital:

## Culture and leadership

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By reconsidering the impact and role of technology in daily work, business owners and stakeholders can see the ways to improve business processes while making digital transformation a company-wide endeavor

## Operational agility

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Supported by every employee who becomes a digital transformation ally, operational agility helps employees fully realize what they're doing, how it fuels success in the future, and how they benefit from the transition to a digital-first experience

## Customer experience

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Empowered by the concept of building connected customer experiences, businesses can provide services or products their clients need through channels they prefer and at a time they expect them

## Workforce empowerment

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By giving your workforce access to a customizable platform and engaging ecosystems, businesses can keep communication open between team members while creating a culture that delivers continuous innovation

# — Digital transformation with Salesforce

Salesforce is a recognized leader as a #1 CRM, as well as #1 solution for sales, customer service and marketing. On average, companies using Salesforce envisage:

**+27%**

Increase in **sales revenues**

**+32%**

Increase in **lead conversion**

**+34%**

Increase in **customer satisfaction**

**+56%**

**Faster deployment**

# Salesforce practice at iTechArt



**60+** Salesforce experts (and steadily growing)

**8+** years of hands-on Salesforce experience

**100%** Salesforce certified team

# — Helping companies thrive

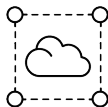
Here at iTechArt, we've helped both mature businesses and fast-growing companies leverage proven Salesforce solutions for the maximum impact



Sales Cloud



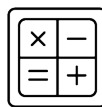
Service Cloud



Marketing Cloud



Pardot



CPQ



Community Cloud



Heroku



Einstein



Force.com



Health Cloud



AppExchange

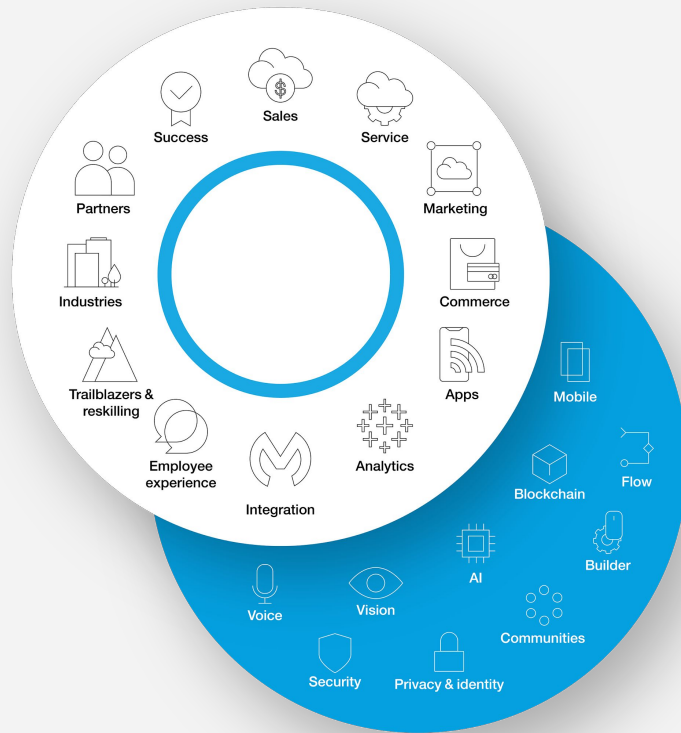


IoT

# Making a forward-thinking step

Digital transformation is driving the business world by changing the way companies operate and deliver value to customers. Here are the things to know about digital transformation with Salesforce:

- There is an entire ecosystem of tools and products designed to provide a comprehensive customer experience
- Using Salesforce, employees are motivated to rethink existing workflows
- Salesforce simplifies communication and collaboration across employees and customers
- Salesforce emphasizes continuous process improvement





# — Domain awareness



Financial services



iGaming



Media



Real Estate



Healthcare



Insurance



E-commerce



Travel



Pharmaceuticals



Non-profit



SaaS



E-learning

The iTechArt client roster encompasses a wide range of industries and sectors. Our team has hands-on expertise across 30+ verticals, and this number is constantly growing.

These are some of the industries where our team provided digital transformation services:

# — Digital transformation: What we do

Our approach in helping companies step onto a digital transformation road:

- Analyze pain points to be addressed and opportunities unexplored to unlock full potential
- Conducting a gap analysis to address inefficiencies and redundancies
- Evaluating your organization's approach to current technological trends and modern applications
- Understanding budget and financial resources to structure your strategy, identify priorities and finalize scope
- Create a digital transformation roadmap to ensure the evolution of business in alignment with the changing digital landscape
- Deploy mission-critical Salesforce products, solutions, or clouds and their further customization to address business processes and needs
- Guarantee of 100% system adoption through comprehensive user training and onboarding sessions

# Digital transformation: where to start

With a proven track record of successful digital transformation projects, we've identified five key steps to jump start the digital transformation process:

## Define goals

01

Seeing clearly where you are and where you want digital transformation to bring you is a cornerstone of success. Set clear objectives to achieve with technology regarding the lead volume, opportunity win-rate, ways of communication with your clients, etc.

## Set the timeline

Knowing what you want to achieve is as important as knowing when you want to get the results. Define time-based milestones for your future project to manage the process more effectively.

02

## Ensure stakeholders' support

03

Getting a consent of key stakeholders facilitates resource management and ensures proper level of visibility and wide adoption of your DT initiative.

## Choose your software solution

As soon as your existing business needs are analyzed, it's time to explore the market of digital solutions that have functionality to get these needs addressed. We believe that an effective sales process is impossible without a CRM that facilitates lead, contact, and opportunity management along with sales reporting and forecasting. From our CRM experience, we know that Salesforce is the top solution for the goal.

04

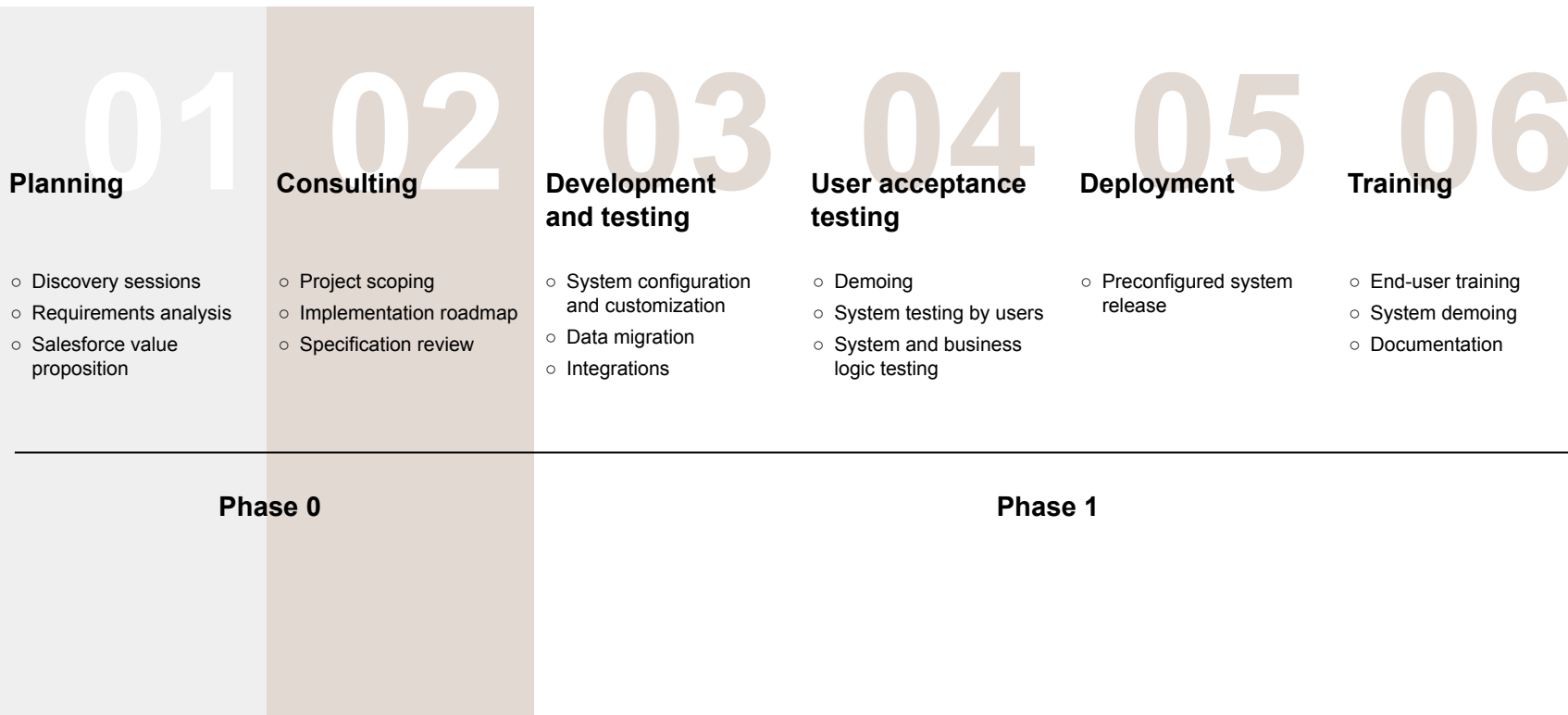
## Ensure stakeholders' support

05

Another vital thing is to choose the right implementation service provider that supports you all the way from purchasing Salesforce to the solution's release and user training.

# Salesforce implementation roadmap

To evaluate your current security strategy and provide recommendations for improvement, we split security audit into several stages:



# — Digital transformation stages

01

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## Planning

### GOAL:

To identify if Salesforce is the right fit for the existing business processes and able to cover all business needs and prepare the business strategy.

### TACTIC:

Technical consultant steps up to identify business pain points, what products/CRMs are used, Salesforce products/clouds that should be implemented, data that should be migrated to the Salesforce, integrations that should be made.

02

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## Consulting

### GOAL:

To come up with a detailed proposal on the Salesforce implementation strategy and roadmap.

### TACTIC:

Technical consultant comes up with a detailed Salesforce implementation roadmap that includes timelines, demo sessions schedule, system features, role permissions, integrations, etc.

03

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## Development and testing

### GOAL:

To customize the system in accordance with the specifications and requirements.

### TACTIC:

The iTechArt team is working on the system configuration (Fields, Page layouts, Reports), data migration, setting up access levels and user role permissions, integration with 3rd party systems, POC demoing, automation processes setup, system testing.

# — Digital transformation stages

04

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## User acceptance testing

### GOAL:

To ensure that the system fully corresponds to the needs of end users and is easy in daily use.

### TACTIC:

This phase is designed for the final system configuration based on users' feedback. Once the system is tested by the end users, we make the final adjustments and configuration.

05

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06

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## Development and testing

### GOAL:

To drive Salesforce adoption up to 100%.

### TACTIC:

To ensure smooth system onboarding and ease of use, the technical consultant organizes a training session or set of sessions for the end users. We can also provide detailed documentation on the system capabilities and configurations/integrations that have been made.

# — Marketing automation services

Since the start, iTechArt has become an instant classic for businesses wishing to build strong brands and grow ROI. Our team has diverse hands-on experience and a proven track record of working with Salesforce marketing automation services, helping to turn leads into long-standing customer loyalty.

## **Why choose iTechArt for fine-tuning your digital marketing strategy:**

- A dedicated team that works solely with the marketing tools, knowing all their ins and outs and ways how to maximize their ROI
- Deep knowledge of both Marketing Cloud and Pardot
- Comprehensive understanding of marketing processes and technology experts consultation on choosing the best solution to bridge the technology gap
- Hands-on experience in deploying marketing systems from scratch as well their integration with other third-party systems
- User training and onboarding that guarantees their further independent work with the implemented tools eliminates the need to further contact service providers

# — Discovering Marketing Cloud

## Key functionality

is a Salesforce certified expert with, on average, 6+ years of experience and a deep understanding of Salesforce platform and product set. Consultant is business-oriented and works to maximize Salesforce implementation ROI and make the platform a perfect fit for the existing business processes.

## Your benefits

With Marketing Cloud, any marketer will get a powerful artifact, enabling to generate better leads and you gain a 360-degree view of each customer, while leveraging AI to handle every single interaction and measure end-to-end marketing productivity across all possible channels and devices.



# — Introduction to Pardot

## Key functionality

Pardot offers the automatic distribution of new leads to sales reps, building email campaigns and landing pages, and tracking prospects' activities. Another useful feature is adding data from CRM systems — Salesforce, MS Dynamics, NetSuite, and SugarCRM.

## Your benefits

Engage with your potential customers in real-time, build a simple sales path and predict customers' needs and wants based upon their activities and tests.

A nice little bonus from Salesforce — an average 34% increase in their ROI, a 34% increase of revenues and 37% improved campaign performance.

# — Marketing Cloud vs Pardot

	Marketing Cloud	Pardot
BUSINESS SIZE	For mature startups and large-scale businesses	Loved by startups and SMBs
STRENGTHS	Consider it if your company is all about 1-on-1 customer journeys	Great facilitator of marketing and sales alignment
WORKS BEST	Even better in conjunction with Salesforce	Can be used without Salesforce
MAIN USAGE	Support customers through web, social media, ads, and email	Primarily an email marketing platform
COST	A whole universe of marketing solutions though reasonably priced	Practically synonymous with cost-effectiveness

# — How we drive Salesforce success

## Merge business and technology

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With our profound technical skills and ample industry expertise, we understand that Salesforce is not just a CRM tool, but a real driver of your business growth. We know that every business is one of a kind and, therefore, we create a unique solution design shaped around your specific business requirements.

## Craft a roadmap to Salesforce success

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After a thorough analysis and understanding of your business needs, our top Salesforce experts can easily grasp your business requirements and translate them into Salesforce language. They not only guide you through the technical process, but also build a personalized Salesforce roadmap to help you accelerate your company growth.

## Support our clients all the way

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Powered by 7+ years of Salesforce experience in 30+ industries, we bring Salesforce gurus into your projects, where they turn your Salesforce roadmap into reality one step at a time, from the early stages to wherever your aspirations take you. Starting from Salesforce consulting, we guide our clients all the way to user training and post go-live support.

## Ensure 100% user adoption

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To maximize the value of the new business solution, it's important for all users to master its functionality in full. To help them embrace the new processes and understand how features in the new system work to utilize their full potential, we provide online and offline user training. It results in company-wide user adoption and successful digital transformation with Salesforce.

— We have implemented Salesforce for



Unlimint


FOREX.com



RUPTLY

ARISTO  
DEVELOPERS





**Let's work on creative  
things together**