

Introduction

Meet Seamless Ideas



I We help companies automate

We are a certified consulting and implementation partner of Salesforce – the world's #1 CRM software.

Our focus is on the strategic bottom line, making sure our clients get the best ROI from both our services and selected cloud platforms.

Our team have over 50 certifications in products including Sales, Service, Marketing, Community and CPQ. We are also a digital marketing agency and have expertise in Marketing Automation tools, plus full product design from UX/UI to branding.



Founded
2011



Headquarters
Manchester, UK



Global Offices
Manchester, UK.
Karachi, Pakistan



| Our Salesforce services



Salesforce Consulting Services

We help clients evaluate processes, structure their data and get the most from their Salesforce instances.



Salesforce CRM Strategy Development

The heart of any decision lies in the “why?”. That’s why we emphasise starting with a robust Salesforce strategy.



Salesforce Implementation Services

Services include CRM delivery, optimisation, system integration, training & technical support.



Custom App Development

Need a bespoke solution? We can design and configure your own custom application.



Salesforce Integration Configuration

Connect your internal systems together with our specialist services.



Salesforce CRM Migration

Don’t lose a thing from your legacy systems with a clean migration to your new Salesforce CRM.



Salesforce Support Services

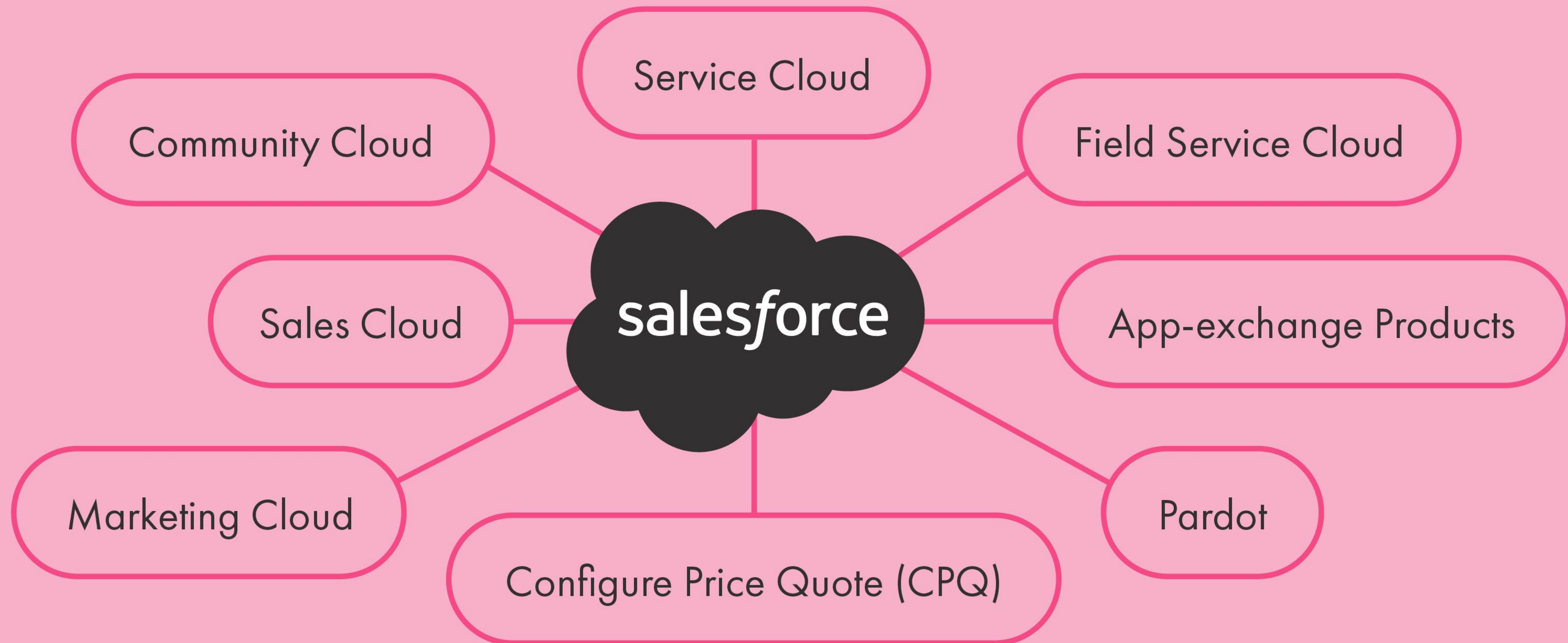
Enhance your system capabilities with our technical support across Salesforce platforms.



Salesforce Training Services

Up-skill your Salesforce users or train up an internal Administrator with help from our certified Consultants.

Our Salesforce Technology specialisms



Salesforce technology leadership

- 15+ associates with Salesforce certifications
- Major Salesforce portfolio competence (Sales, Marketing, Services, Community, Analytics, CPQ)
- Recognised in data and application integration
- Proven expertise in digital business transformation
- Team of certified Salesforce experts



Our Professional Certifications

Total Trailhead Badges: **994**



Total certifications:

57

Sales Cloud Consultant:	4
Salesforce Certified Administrator:	9
Salesforce Advanced Administrator:	3
Salesforce Certified Platform App Builder:	6
Platform Developer 1:	6
Platform Developer II:	2
Data Architecture & Management Designer:	1
Community Cloud Consultant:	3
CPQ Specialist:	2
Field Service Lightning Consultant:	3
Non-Profit Cloud Consultant:	5
Service Cloud Consultant:	5
Pardot Consultant:	2
Pardot Specialist:	2
Marketing Cloud Consultant:	2
Certified Marketing Cloud Email Specialist:	2

I Our marketing automation & design services



Marketing Automation Services

Power-up your Marketing strategy implementation with help from our specialists.



Customer Lifecycle Management

Identify a solid lead and customer lifecycle process that's failproof and accurate.



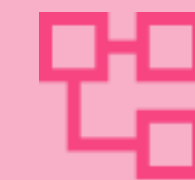
Campaign Automation

Form a cohesive automated engagement plan across channels & accelerate lead funnel progression.



Design Services

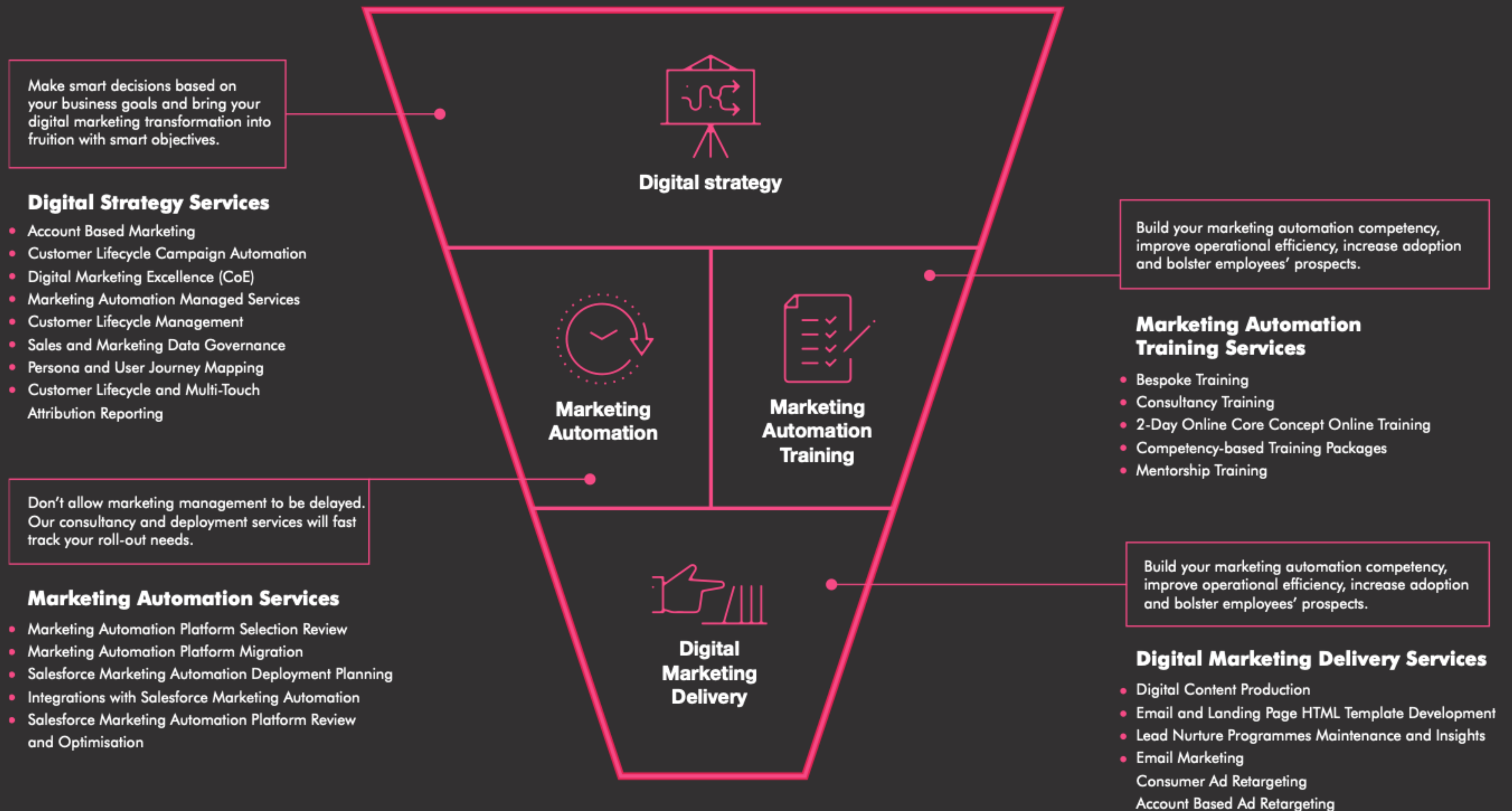
We have full product design capability from Branding and web design to packaging.



UX/UI Design

Need an impactful, user-friendly, mobile compatible website interface? Look no further.

Our marketing automation services



Meet our leadership team



Rizwan Malik

CEO, Salesforce Solutions Architect & Consultant

With over 10+ years Salesforce experience, Rizwan's entrepreneurial attributes has grown strength to strength in leading Seamlessideas into becoming a successful consultancy and strategic Salesforce partner.



Rehman Ali

Co-Founder, Salesforce Operations & Technical Director

With a vast depth of certifications and experience within the Salesforce economy, Rehman is the man behind the scenes getting involved into the nitty gritty areas ensuring that only quality results are achieved.



Muhammad Adil

Co-Founder, Salesforce Consulting & Projects Director

Adil focuses a majority of his time with clients', focusing on delivering a streamlined and governed project experience through transparent communication channels in providing a cohesive nurturing experience.



Jill Tracey

Head of Program Management & Salesforce Consultant

With over 10 years of client-side Marketing, Sales & Project Management experience, Jill brings a client-centric approach to Programme Management ensuring the key objectives are met and projects delivered.



Tarik Shafi

Senior Designer Creative Lead & Consultant

As a professional designer for over twenty years, Tarik aims to develop and produce the right solution that suits the clients design, business and marketing needs. Tarik has naturally progressed into the UX field and is constantly looking to find ways to help himself and the client grow.

| Customer success



250+

customers



9.5/10

Satisfaction ratings



12+

global projects

So far we have helped over 250 international clients get the most from their Salesforce org; driving increased revenue, insight, efficiency and customer satisfaction.

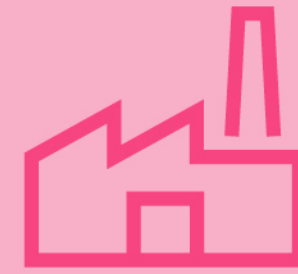
| Some top companies working with us



| Industry Focus



**Transportation &
Hospitality**



Manufacturing



**Consumer
Goods & Retail**



Energy & Utilities



Communications



Financial Services

Some cross-sector work at a glance



Manufacturing

2Furnish - Sales Cloud
AICO - Sales Cloud
Air₂O - Pardot
COSAF - Sales Cloud
Ecodek - Sales Cloud
Ferndale Pharmaceuticals - Community Cloud
Engro Polymer – Sales Cloud, Community + integrations
FT Leisure - Sales Cloud
MGA Controls - Sales Cloud
Pilot Group - Sales Cloud + integrations, Pardot
Shelton Flaming - Sales Cloud



Energy & Utilities

Greenfrog Energy – Sales Cloud
Push Energy – Sales Cloud



Transportation & Hospitality

3T Logistics - Sales Cloud
ARK Handling – Sales Cloud
B2B Holidays – Sales Cloud + integrations
Smart Group - Sales Cloud, Pardot, Community
Victoria Warehouse - Sales Cloud



Consumer Goods & Retail

Aestheticare - Sales Cloud
Britannia Mobility - Sales Cloud
Coupang - Sales Cloud, Community, Marketing Cloud
Exigo UK - Sales Cloud + integration
LuxetoKill - Sales Cloud + integrations
UKSA - Sales Cloud



Communications

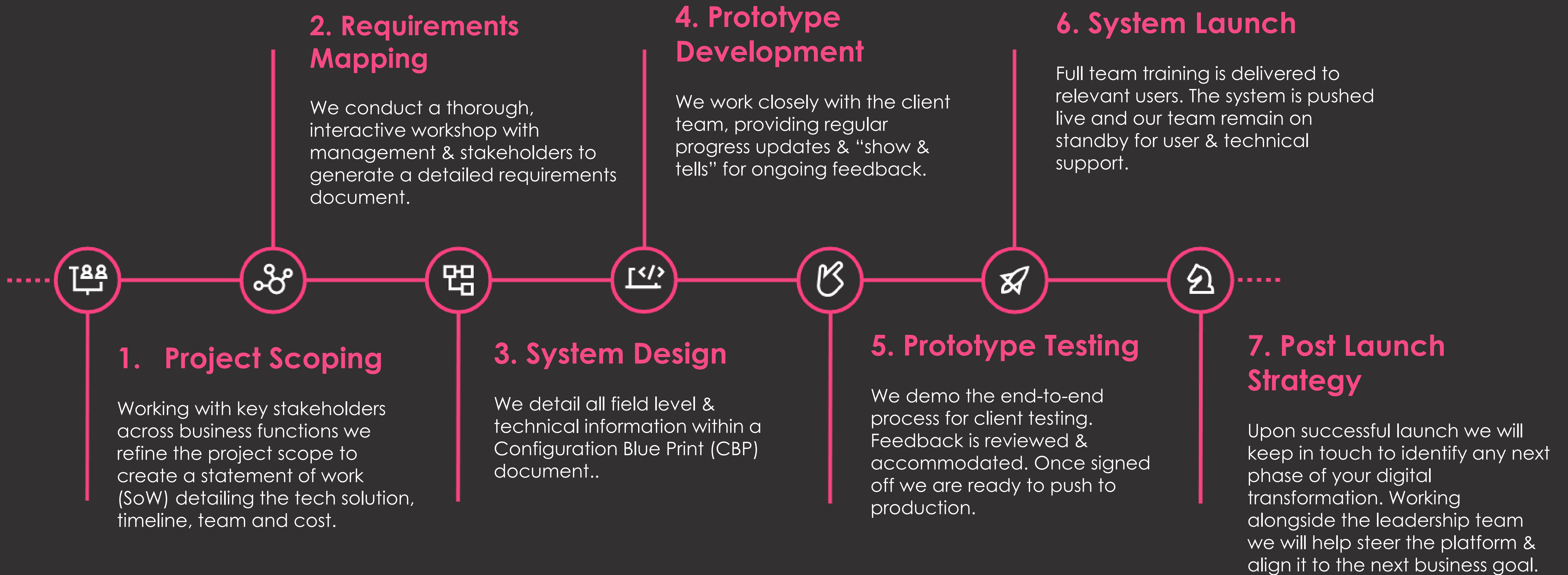
360 Resourcing - Sales Cloud, Pardot
Buffalo7 - Service Cloud
LPI - Pardot
MobySoft - Service Cloud
Omnix - Sales Cloud
Response Tap - Sales Cloud
Seldon - Pardot
Servicedek – Sales Cloud, Service Cloud
VeryPC - Pardot
XQ CyberScore - Pardot
XYFil - Service Cloud
Unibuddy - Pardot



Financial Services

Best Distribution - Sales Cloud
CMS Payment Intelligence - Sales Cloud
Viewture – Sales Cloud

Our Roadmap to Project Success



Customer Success Stories

A selection of our most relevant work to your business.



I Smart Group

Smart Group is a collection of corporate hospitality, catering and event management businesses with over two decades of experience. They have hosted, catered and managed sporting events such as the Royal Ascot Village, Olympics 2012 & Wimbledon, as well as corporate functions like the Sports Industry Awards, Christmas parties for Mercedes-Benz Formula One and conferences for Adobe and Google.

BUSINESS CHALLENGES

- **High volume of manual booking management:**
Manual intervention was needed to manage enquiries and bookings.
- **Time and resource required for tedious manual tasks:**
Manual creation of proposals, manual record checking and manual email reminders from finances.
- **Teams & Systems working in silos:**
Separate booking and reservation systems for event parties and drinks.

- **Limited data flow:**
Inadequate and non-integrated self-service booking systems.
- **Lack of data governance:**
Data was compromised due to human error and gaps in different processes.
- **Weak user adoption:**
Lack of user ownership and leadership.
- **Absence of automation:**
Lack of automated workflows and processes.



Industry sector
**Transportation
& Hospitality**



Size of business
Mid Market



Number of users
50



Company turnover
£25m



Solution type
**Sales Cloud
Community Cloud
Pardot**

I Smart Group

IMPLEMENTED SOLUTIONS

- **Integrated systems and enhanced data flow:**
Fully integrated enquiry and booking system across business units.
- **End-to-end customer management:**
Lead, account, contact and opportunity management system on Salesforce Sales Cloud.
- **Improved event scheduling:**
Customised, centralised calendar for event scheduling across services.
- **Operational community portal for end-users:**
A fully functioning customer community for ticket purchasing and order management.
- **Digitized and automated invoicing:**
Digitized product catalogues and pricing systems with automated invoicing, billing & customer statements.
- **SagePay online integration:**
Online payment integration with SagePay plus a refund management process.
- **End-user engagement program:**
Automated Email campaigns and surveys utilising Salesforce Pardot and Salesforce Sales Cloud.



Results

- ✓ **Improved customer experience:**
Increased customer engagement and satisfaction levels.
- ✓ **Increased operational effectiveness:**
Optimised internal team efficiency with a vast drop in manual intervention required.
- ✓ **Greater data governance:**
More secure data management across integrations, data flow and data handling.
- ✓ **Centralised diary, booking management & reporting:**
One central view of all Events and Bookings and the ability to report across all business units.

| Smart Group

CLIENT FEEDBACK

We partnered with Nadcoms back in 2016 when our company had no CRM system and we were looking to move our multiple, complex business processes onto the Salesforce platform. Nadcoms worked with us from the very beginning: from requirements mapping to complex data migration, process automation (both standard and custom APEX code), building our customer portal using Communities and integrating our Marketing function with Pardot.

Since implementation they have remained our principal support, and we have continued to develop and improve the system further, including recently converting our instance to Lightning.

Nadcoms are a committed partner who have worked hard to understand our business processes and always gone the extra mile.

Angela Serrano, CRM Manager, Smart Group Ltd



I Pilot Group

Pilot Group is one of the UK's leaders in providing tailored technology solutions for a carbon neutral future. They are a group of six companies covering areas such as Electrical Vehicle Charging, Energy Management Systems, Traffic Management systems and IT solutions.

BUSINESS CHALLENGES

- **Six silo sales processes**

Each of their six business units adopted a different process utilising different systems including an in-house ERP, Gateway, Sage Accounting and Excel spreadsheets.

- **No visibility of client communication**

The sales team were at high risk of repetition or losing track of potential sales.

- **Inability to track cross-selling opportunities between business units**

Missing out on sales opportunities which were relevant to other services offered across the Group.

- **Lack of client insight and pipeline visibility**

Management had no overarching view of cross-company prospects, trends and sales due to the reliance of individual Excel worksheets.

- **Absence of Marketing automation**

No sophisticated Marketing processes to qualify and nurture leads, and manage campaigns across the brands.



Industry sector
Manufacturing



Size of business
Mid Market



Number of users
30



Company turnover
£60m



Solution type
**Sales Cloud
Pardot**

I Pilot Group

IMPLEMENTED SOLUTIONS

- **Centralised Data “hub” tailored to each Business Area process**
Single go to system (Sales Cloud) to manage all opportunities for all five business units. Built bespoke processes and Record Types for each business unit to reflect their individual product and process.
- **Implemented Lead to Opportunity plus Custom Objects**
Custom Objects such as Sites, Project and Partners enabled accurate tracking and reporting.
- **Customised Reports and Dashboards**
Dashboards designed to cater for differing requirements across Sales, Operations and Management.
- **Full Marketing Automation and Consultation - Pardot**
Creation of Targeted lists and both practical and strategic advice on Campaign planning and creation.
- **Bi-lateral API integration with in-house Gateway Ordering system**
Both systems aligned to ensure key Contact data passed between systems to eliminate manual duplicate data entry.



Results

- ✓ **Increased visibility and culture of collaboration and cross-selling across companies**
Detailed team training supported the team in adopting and embracing the system and sharing information.
- ✓ **Increased efficiency and improved customer service**
Due to 360-degree view of all communication with both prospects and clients.
- ✓ **Increased Sales productivity**
Driven by reduced data entry and increase in automation and system integration.
- ✓ **Greater Insight for Management and CEO**
Management teams have access to real time dashboards and reports.
- ✓ **Enhanced data quality**
Fewer duplicated records and data validation rules preserve data integrity.

| Pilot Group

CLIENT FEEDBACK

Seamless Ideas are extremely organized, efficient and are experts in the CRM field. They have given me the confidence to implement Salesforce across our 6 businesses from the ground up, even though I have limited Salesforce knowledge. They have exceeded expectations, are flexible and very proactive when it comes to support.

Seamless Ideas provide a full Salesforce support package from discovery and implementation to training and retainer support. Having a technical retainer with Seamless Ideas allows us to have a trained admin in-house but allows us to avoid the expense of a full time CRM manager. I would highly recommend them as a Salesforce implementation and support partner.

Grace Bowden, Marketing Manager, Pilot Group



I Ecodek

Established in 2002, Ecodek have been manufacturing composite decking and fencing since 2004. As UK's market leader in Wood Polymer Composite decking materials, they manufactured over 1 million linear metres of decking in 2017, consuming 3600 tonnes of recycled wood and plastic.

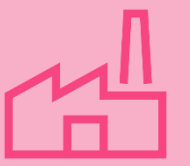
BUSINESS CHALLENGES

- **No single “home” for all lead and client information, order history and communications**
Relied upon a combination of email inboxes and spreadsheets.

- **Lack of insight on sales and the inability to report effectively**
Due to gaps in their current system and process.

- **Laborious quoting process using Excel spreadsheets**
Combined with separate client-facing pdf documents.

- **Need for pipeline visibility for management**
No overview pipeline conversion probability and value.



Industry sector
Manufacturing



Size of business
SMB



Number of users
40



Company turnover
£5m



Solution type
Sales Cloud

I Ecodek

IMPLEMENTED SOLUTIONS

- **Sales Cloud Implementation to manage Full Sales Life Cycle**

Lead to Quote process created, encompassing: Lead, Account, Contacts, Opportunities, Quotes and Projects. We also incorporated the Activity Timeline for a full paper trail of client communications across teams.

- **Designed Bespoke Quoting Solution**

Created to manage Ecodek's complex quotation process and components.

- **Creation of a Suite of Reports and Dashboards**

Worked with Management to define Reporting requirements and designed visual real-time dashboards and reports enabling both top level and detailed analysis.

- **Utilised PandaDoc Document Management Tool**

Enables the creation of professional, client-facing quoting documents with e-signature and tracking functionality.



Results

- ✓ **Huge improvements in Sales Productivity with efficient digital quoting system**
Manual processes and multiple document creation all rolled into one automated process.
- ✓ **Improved Customer Service**
Full visibility of all communication with leads and clients.
- ✓ **Accurate Pipeline and Sales Reporting**
Ability to track each user's conversion rates using individual Dashboards and Reports, and team-wide reports for Management.
- ✓ **Greater data governance**
Full control of Prospect and Client database and adherence to GDPR regulation.

| Ecodek

CLIENT FEEDBACK

Salesforce has been a success across our Marketing and Sales teams, as a business we now have visibility and insight to help drive us forward. The board have been impressed with the result of the implementation and as a business within a group we are now setting the benchmark for our marketing, sales operational efficiency and reporting capabilities.

Seamless Ideas have played an important part in ensuring our project were realised and the implementation, training and ongoing support has been outstanding.

We will continue with our development of our Salesforce solution as we look to bring in other areas of the business onto the platform and will leverage the expertise of Seamless ideas and their team to ensure our success.

Robin Appleby, Managing Director, Ecodeck



I Engro Polymer & Chemicals Ltd

Engro Polymer & Chemicals Limited (EPCL) is the only fully integrated Chlor-Vinyl chemical complex in Pakistan. It is a subsidiary of Engro Corporation, managing the manufacturing, marketing and distribution of quality Chlor-Vinyl allied products and PVC under brand name 'SABZ'.

BUSINESS CHALLENGES

- **Separate, disjointed systems with no common view**

Both Sales & Customer Service functions utilised different software to manage its client base.

- **Lack of integration**

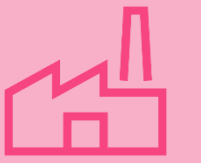
There was no integration between client data and their SAP Order Management System.

- **Need to centralise processes**

Order Placement, price fetching from SAP, Customer balance, Customer ledgers and Customer complaint management needed to be centralised.

- **No Web portal or Mobile app**

There was a lack of online touchpoints to help both end-users and partners manage their Account.



Industry sector
Manufacturing



Size of business
Mid Market



Number of users
50



Company turnover
₹35m INR



Solution type
**Sales Cloud
Community Cloud
Integrations**

Engro Polymer & Chemicals Ltd

IMPLEMENTED SOLUTIONS

- **Sales Cloud Implementation with customised Field Sales Modules**
Implemented the core Lead to Opportunity sales process, along with customised Visit Report and Journey Plan functionality for their field sales team.
- **Daily Master Data Sync**
Configured a nightly Custom Customer Master Data Structure sync using Jitterbit to ensure data was consistent across all systems.
- **Real time SAL integration using .NET**
We built a customised integration solution to achieve real time data transfer between Salesforce and their SAP Order Management System.
- **Partner Portal**
We developed a Partner portal so clients could view child customer balances and place orders for both parent and child Accounts.
- **Customer Portal**
We configured an end-user portal to enable customers to view their Account balance, pricing and place orders in real time.



Results

- ✓ **30% Increase in Sales & ROI**
Each division reported marked Sales increases.
- ✓ **40% increase in overall EPCL Sales**
The overarching Group saw an even larger sales increase.
- ✓ **Increase in Sales Rep Productivity**
Now that Sales Reps have a 360 degree view of their customer Account and interactions, they were able to collaborate and manage their work more swiftly.
- ✓ **Management Access to Analysis**
For the first time, the CEO and Senior Management team have access to real time reporting and dashboards.
- ✓ **Greater Efficiency with on-the-go working**
Harnessing the Mobile app, the Sales team are able to record meetings and updates on the go.

| Engro Polymer & Chemicals Ltd

CLIENT FEEDBACK

We are extremely happy and satisfied with Salesforce and its partners Nadcoms regarding implementation of Sales Cloud.

Since our master data was housed in SAP a lot of customisation was required to not only ensure that the integration between the two systems was smooth but there were a number of objects and validations that needed to be incorporated to meet our multi-product business.

Given this we were pleasantly surprised with the smooth and efficient implementation and few issues post implementation.

Salima Hasham, Engro Corp



| Air2O

Air2O is a leading next generation hybrid air conditioning system manufacturer, providing efficient and environmentally responsible cooling and ventilation. They have completed a variety of successful projects in Europe, the Middle East and Americas among other parts of the world. Their systems have been installed in shopping malls, pharmaceutical processing and storage plants, and for the outdoor cooling of stadiums and theme parks.

BUSINESS CHALLENGES

- **Legacy systems with limited capacity to grow:**

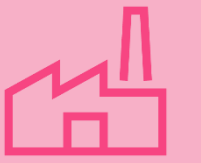
Scaling up on previous systems with a growing business would have been expensive and resource intensive with little flexibility for changes to processes.

- **Lack of insight on sales operations:**

The company had little statistical insight into the sales team's efforts and how those were affecting the business

- **Outdated CRM technology stack**

Lack of capability to meet the growing company's needs.



Industry sector
Manufacturing



Size of business
SMB



Number of users
10



Company turnover
£2m



Solution type
**Sales Cloud
Pardot**

| Air2O

IMPLEMENTED SOLUTIONS

- **Business technical transformation**
Implemented an integrated system between marketing and sales, streamlining business activity and insights.
- **Robust processes for growth**
Salesforce implementation capable of scaling up in the future without overtaxing resources.
- **Data governance**
New data security measures and data access levels across users.
- **Enhanced operations with automation**
Configured workflow automation to make business processes more efficient and eliminating the need for manual intervention.
- **Insightful Reporting and Dashboards**
Produced end-to-end digital analytics at both operational and strategic levels.



Results

- ✓ **Improved user experience**
Increased user engagement, satisfaction level and user platform adoption.
- ✓ **Increased team performance**
Optimised internal team performance with a vast drop in manual intervention required to complete tasks.
- ✓ **Greater security**
Greater data handling with specific user access types and hierarchy role levels adding with flexible permission sets.

| Air2O

CLIENT FEEDBACK

We have used the Seamless team since we first signed up to Salesforce back in 2015. They implemented a quick start which was fine for us at the time, but since then we have scaled as a business and now have a global presence. The Seamless team have been instrumental in the development of our Salesforce platform during our growth providing us with guidance and best practice across our Marketing, Sales and Operations for our teams in Europe, Middle East and the US.

We also leveraged their Design and digital team who have helped us with our branding and website development across our group of businesses. Working with one vendor for our Salesforce CRM and digital marketing requirements has made the whole process much simpler while scaling in different regions.

I would highly recommend Seamless Ideas to any organisation considering Salesforce CRM.

Mike Sullivan, CEO, Air2O



I Push Energy

Push Energy's is a leader in the UK market in developing, constructing and operating high quality renewable energy assets. To date, they have concentrated in the development and realization of PV power plants of every size from site selection to plant construction and ongoing operational and maintenance support.

BUSINESS CHALLENGES

- **No centralised database**
All prospect and client data, documentation and communication stored in different locations and email providers.
- **Lack of defined, standardised sales lifecycle**
The sales team were unable to track and report on leads and opportunities accurately.
- **Inability to track cross-selling opportunities between business units**
Missing out on sales opportunities which were relevant to other services offered across the Group.
- **Absence of commercial and operational reporting**
The task to create reporting for Senior Management was entirely manual and there was no operational task management in place to support the sales team's daily work.
- **Complex Project Structures**
Push's projects often involved Parent and Child Accounts, partners and multiple sites. They had no way to structure this with their current systems.



Industry sector
Energy & Utilities



Size of business
SMB



Number of users
5



Company turnover
£15m



Solution type
Sales Cloud

I Push Energy

IMPLEMENTED SOLUTIONS

- **Created a “Corporate Memory”**
Utilising related lists, the Activity Timeline and Notes & Attachments features, the team could create one view of all Lead and Client history and interactions for effective Client management.
- **Developed a structured Sales Process**
Working with the client we defined their sales stages and key data to collect at each stage.
- **Harnessed Data Validations and Automation for Quality control**
We implemented data validation rules, Sales Path Guidance to Success notes and automated workflows to manage lead qualification and formal checks along the sales process.
- **Robust system architecture**
We utilised Account hierarchies and the Partner and Sites objects to provide an accurate structure for tracking complex projects.
- **Outlook Integration**
We understood the team’s reliance on Outlook so integrated it with Salesforce for a user-friendly, joined up sales approach.
- **Tailored Reports & Dashboards pack**
We built a suite of reports and tailored dashboards for different roles within the business.



Results

- ✓ **Digital Transformation of C&I Division**
We successfully digitised the C&I sales process, establishing a defined sales path.
- ✓ **Robust System Architecture**
Using Account hierarchies, Partner and Site objects, projects are accurately structured for reliable reporting.
- ✓ **Increased Sales Team adoption and efficiency**
The mobile app and Outlook integration helped the sales team manage their accounts swiftly.
- ✓ **Automated Commercial and Organisational Reporting**
We removed this manual task with a suite of automated reporting for Management and Operational teams.
- ✓ **Increased data quality and integrity**
Through data validation rules and workflow automations, every lead and opportunity is accurately qualified and checked.

I Push Energy

CLIENT FEEDBACK

Unreserved 5-Star Recommendation

Seamless Ideas provided us with a customised proposal focusing on exactly what we wanted - speed of delivery, customisation of the solution and price.

Their expertise in our industry was impressive and allowed them to understand how our business runs and how to make sure we got the best benefits out of Salesforce.

The project was managed in great detail and we knew exactly what we needed to input into the process at each point and we also had frequent update calls to inform us how the project was progressing.

After 6 weeks, we have encountered no issues with the use of the system and have found that all of the work that Seamless Ideas did upfront has ensured smooth implementation and user-engagement.

I would whole-heartedly recommend Seamless Ideas to anyone seeking a consultative, detailed approach without compromising value for money.

Amit Oza, Chief Commercial Officer, Push Energy



I 360 Resourcing

360 Resourcing is a versatile resourcing company that operates in many spaces ranging from technology, advertising and traditional headhunting and more. They have an extensive team of consultants, resources, IT developers and support that helps them provide recruitment strategies and solutions to clients of all sizes.

BUSINESS CHALLENGES

- **Lack of automation:**

Leading to manual processes, manual reporting and insights gathering.

- **Dependency on Excel reports:**

Tracking sales and all prior work with Excel reports.

- **Ineffective use of resources:**

Double entry required from Engage to Sage.

- **Weak data governance:**

Data governance and validation suspect, potentially capable of compromising data integrity.



Industry sector
Communications



Size of business
Mid Market



Number of users
31



Company turnover
£15m



Solution type
Sales Cloud

I 360 Resourcing

IMPLEMENTED SOLUTIONS

- **Robust Salesforce data structure:**
Migration to Salesforce in a way that is responsive to change required for further development.
- **Legacy Systems data migration:**
Complete data migration from the legacy system.
- **Transformational sales operations processes:**
Implementing Lead, Opportunity, Account and Contact management into one platform with automated workflows to streamline operations and capitalising opportunities with integrated marketing.
- **B2B marketing automation engagement:**
Implementation of Salesforce Pardot marketing automation and integration with Sales Cloud. Configured automated engagement programs.
- **Improved quoting process:**
Customised “Quoting” solution to make quoting process less time consuming and more efficient.



Results

- ✓ **Increased sales**
Greater insight with single customer-view and opportunity handling via joined up marketing integration efforts.
- ✓ **Improved customer retention**
With greater insights available and automation in place, improved customer retention figures.
- ✓ **Efficient and streamlined business activity**
Implementation of an integrated system data flow and automation facilitated operational workflows and business processes.

| 360 Resourcing

CLIENT FEEDBACK

We were introduced to Seamless Ideas by Salesforce to help with our custom implementation requirements. We needed a partner who could come in and understand our working culture and help develop a solution that would be adopted by our Sales team and provide ongoing development and support. This was by no means an easy challenge, but one that the Seamless Ideas team delivered with great success.

Thanks to the Seamless team the platform has been well adopted and we now have insights across Marketing and Sales which are used for monthly board meetings.

Mark Preston, Finance Director, 360 Resourcing



I Very PC

Very PC manufacture computers and customise ICT solutions for businesses and education providers across the UK. Their products and services include desktop PCs, laptops, mobile devices, 3D workstations, servers, backup & storage solutions, industrial computer appliances, audio visual equipment, customisation and managed IT support services.

BUSINESS CHALLENGES

- **Outdated Marketing Technology Stack**
Current digital marketing suite no longer met the needs of the business.
- **Skewed Campaign ROI metrics**
Required campaign ROI reporting was difficult to assess and not accurate.
- **Lack of Lead Lifecycle visibility**
End-to-end marketing efforts not captured through data and unable to accurately measure the quality of a lead.
- **Resource wasted on manual tasks**
Lack of process automation between Marketing and Sales to facilitate accurate and easy to manage reporting.



Industry sector
Communications



Size of business
SMB



Number of users
11



Company turnover
£1.5m



Solution type
Pardot

I Very PC

IMPLEMENTED SOLUTIONS

- **Salesforce Pardot Configuration with Salesforce Sales Cloud**
Implemented Salesforce Pardot and integrated with Salesforce Sales Cloud Leads, Contacts, Accounts, Opportunities and Campaigns
- **Automated Lead Profiling Qualification**
Defined and implemented Prospect Scoring and Grading.
- **Data Analysis**
Analysis of existing Leads in Salesforce Sales Cloud to determine 'Marketing' leads.
- **Marketing Campaign, Data Health and Lifecycle Insights**
Built marketing type reports and dashboard to track ROI, responses, opt outs and engagement.
- **Automated Workflows**
Automation of sales tasks and notifications when specific defined marketing activity had occurred.
- **Branded HTML Email Templates**
Designed and developed responsive HTML email templates in Salesforce Pardot.
- **Marketable Data Migration**
Removed all marketing leads from Salesforce and migrated into Salesforce Pardot.
- **Streamlined Data Visibility**
Displaying key Pardot information within Salesforce Lead and Contact records.



Results

- ✓ **Seamless Platform Migration and Digital Transformation**
Seamless transition from legacy systems to Salesforce Pardot with data consolidated and finely integrated with Salesforce Sales Cloud.
- ✓ **Significant Reduction in Manual Tasks**
Time saved with automated processes including reporting and tracking between Salesforce Pardot and Salesforce Sales Cloud.
- ✓ **Increased Operational Efficiency**
Increased ease and efficiency in scoring and grading through automated qualified leads being passed onto sales and data to report on status.

I Coupang

Coupang is Korea's largest online retailer, powered by a dynamic end-to-end e-commerce and logistics network. They provide exceedingly fast shipping speeds on millions of items including fresh groceries. They have designed and built over 100 unique fulfilment centres, covering 25 million square feet and housing millions of products. This translates into 70% of the Korean population living within 7 miles of a Coupang logistics centre.

BUSINESS CHALLENGES

• Seller Acquisition:

The business has ambitious growth targets and manual intervention was needed to manage the complex lead allocation process amongst BDRs and account managers, but the manual process had become a bottle neck.

• No automated Marketing Journeys:

As part of the seller acquisition drive they were unable to leverage marketing automation to convert leads.

• Slow and problematic seller registration process via email:

Sellers from overseas markets would have to submit emails and word forms in order to register on the platform.

• Limited data flow:

Inadequate and non-integrated self-service registration process.

• Lack of data governance:

Data was prone to be compromised due to human error and gaps in different processes.

• Seller guidance and support:

Content and the user experience was hindering sellers from problem shooting and contributing to a high churn rate.



Industry sector
**Consumer Goods
& Retail**



Size of business
Enterprise



Number of users
2,000



Company turnover
\$12bn



Solution type
**Sales Cloud
Community Cloud
Marketing Cloud**

I Coupang

IMPLEMENTED SOLUTIONS

- **Smart Lead routing:**
Custom developed automated lead routing solution
- **End-to-end Customer management:**
Lead, account, contact and opportunity management system on Salesforce CRM.
- **Automated Data insert:**
We developed an automated data feed which allowed Coupang to drop files of new leads directly into Salesforce and removed all the manual effort of using the data loader.
- **Online Market Place registration:**
A fully functioning website Layer leveraging our expertise in UI/UX for optimised registration.
- **Customer community:**
Custom designed community including the following features, user profiles, application and document submission, support requests, educational content
- **Marketing Consultancy:**
We worked with Coupang to Design and develop their lead acquisition Campaign
- **Marketing Cloud:**
We set up and implemented Marketing cloud and created several drip campaigns
- **End-user automated engagement:**
Email marketing automation and surveys.



Results

- ✓ **Increased seller acquisition:**
New monthly seller sign ups increased by 31%.
- ✓ **Increased operational effectiveness:**
Optimized internal team performance with a vast drop in manual intervention required to complete tasks.
- ✓ **Reduced Global Seller Sign up Time:**
The sign up processes for Global sellers has been reduced by 53%.
- ✓ **Accurate Reporting on Content:**
We now have insight on our content engagement with SF CMS reporting allowing us to optimise the quality of our content.

I Coupang

CLIENT FEEDBACK

Having shortlisted Seamless Ideas from several Salesforce Partners put forward, we were extremely impressed with their knowledge and approach in the RFP stage. They quickly understood our business, challenges and had skills and expertise outside of the Core platform which meant we could work with a single vendor across Salesforce, Marketing UX/UI and website design. This was really appealing to us as we had extremely challenging timelines.

Since the implementation went live we have increased our seller acquisition by 31% for our local market in South Korea. This has been well received by the board and we are in continuous talks with Seamless on how we can further improve our process and systems across the organisation.

Our Global team has seen an increase in applications and has reduced the average application process time by 53% allowing us to onboard more international sellers and increase our Global reach.

Tommie O'Brian, Sales Director, Coupang PLC



Exigo UK

Exigo UK is the largest commercial gym equipment manufacturer in the UK and are recognised as a major source of quality products within the fitness industry. They distribute to more than 20 countries worldwide with a product portfolio across Strength, Functional and Boxing.

BUSINESS CHALLENGES

- **Over reliance on Excel spreadsheets**
All sales pipeline and manufacturing lists were managed in Excel – open to human error and data loss.
- **Lack of reporting functions**
The team had no means to report on the full sales lifecycle from Lead to Order.
- **Limited Data Governance**
Data was stored in various locations: Outlook, Campaign Monitor, Sage and Woo Commerce with no “Master”.
- **Inability to track sales efforts**
As sales activity was performed by phone and over email, there was no means by which management could track the sales team’s work and impact on conversion.
- **Manual order processing due to lack of e-commerce integration**
Online orders made via their website were populated in WooCommerce but then manually processed by Sales & Manufacturing teams.



Industry sector
**Consumer Goods
& Retail**



Size of business
SMB



Number of users
5



Company turnover
£12m



Solution type
**Sales Cloud
Integration**

| Exigo UK

IMPLEMENTED SOLUTIONS

- **Implemented full sales life cycle and product catalogue**
Configured Sales Cloud Lead to Opportunity process with Order object and Product Catalogue.
- **Integration with WooCommerce**
Orders automatically populating Salesforce, creating Account, Contact and Order records.
- **Tailored Reports and Dashboards**
We configured customised reports and dashboards for Management, Sales & Marketing functions.

- **Campaign Monitor integration**
Using the Campaign monitor app plug-in, Marketing could view prospect engagement within Contact records in Salesforce.
- **Activity management and Outlook integration**
Using tasks and activities the sales team could now log all their sales efforts, automatically populating Activity reports for Management visibility.



Results

- ✓ **Full Sales Lifecycle Management**
We migrated Sales processes from Excel into Salesforce with a robust, consistent sales process.
- ✓ **Creation of a central database with single customer view**
Through integrations with WooCommerce, Campaign Monitor and Outlook, all client data, communications and order history was now stored in one central location.
- ✓ **Increased Sales productivity**
Sales work was made easier with the mobile app, Outlook integration and activity management.
- ✓ **Greater commercial insight**
Reports and Dashboards gave teams instant real time access to sales pipeline and conversion reports.
- ✓ **More efficient order processing**
Orders from WooCommerce automatically fed into Salesforce and the manufacturing team.

| Exigo UK

CLIENT FEEDBACK

We could not be happier with the help and support we received from Seamless Ideas when implementing Salesforce into our business.

Not only did they quickly understand how our business operated, but they also added greatly to our own ideas and provided excellent suggestions! The team made the integration of Salesforce simple and was very quick to respond whenever we needed them.

Highly Recommended!

Aidan McIlvenny, Marketing Manager, Exigo UK



I Best Distribution

Best International Group is an established, leading provider of business services to companies who are looking for investment capital and who want to more effectively manage their capital. The Group helps companies access new investment capital and provides investment administration services to help them develop their business.

BUSINESS CHALLENGES

- **Dynamic Investment Tracking:**

The proprietary Investment Engine was unable to respond efficiently to change and would require continuous development.

- **Legal Compliance:**

As a group of companies, the Best Group now had to legally separate all three businesses and maintain a single system to provide their users with customer information across all three business while meeting compliancy laws set by the FSA.

- **Silo Systems:**

Each business unit had a separate customer database making it difficult to provide a 360 view of the customer.

- **Investor Communications :**

Unable to effectively manage investor and partner communications due to disparate systems.

- **No Reporting or Dashboards:**

Reports were always out of date when provided to the board as the data was dynamic

- **Governance, Process and Accountability:**

Lack of automated workflows and processes. No accountability due to disparate systems with no user audit trails.



Industry sector
Financial Services



Size of business
SMB



Number of users
15



Company turnover
£5m



Solution type
Sales Cloud

I Best Distribution

IMPLEMENTED SOLUTIONS

- **Single system with custom security and rules:**

We developed custom permission and sharing rules to allow all three businesses to leverage a single CRM for all three business units while maintaining compliancy.

- **End-to-end Investor and introducer management:**

Lead, account, contact and investment management system on Salesforce CRM.

- **Data Governance and Security:**

Custom permission sets enabling each business unit to see data while maintaining FSA and GDPR compliance.

- **Automated Investment Engine:**

Custom developed a yield engine to produce monthly investment yields.

- **Reporting and Dashboards:**

We configured custom reports and dashboards for investment tracking.

- **Internal User Adoption:**

We configured insightful reports and dashboards.

- **Wordpress and Salesforce integration:**

We integrated their content management system to allow them to control portal access directly from Salesforce.



Results



- **Single customer view:**

A single view of the customer across all three businesses allowed them to cross sell investment opportunities.



- **Increased operational effectiveness:**

The automated yield engine removed manual reconciliation and freed up time for the finance team.



- **Reporting and Dashboards:**

Realtime insight across the business.



- **Data governance and compliance:**

Secure data management, FSA and GDPR compliance across organisation.

I Best Distribution

CLIENT FEEDBACK

We initially contacted Seamless Ideas with the intention of implementing a basic CRM for Best Distribution. After our initial consultation with Seamless it became apparent we could extend our capabilities across the group. The scope of the project soon become larger than we anticipated, but Seamless Ideas broke this down over several phases and allowed us to realise the value for each release which suited our team and budget requirements.

I was extremely impressed with their attention to detail and strategic approach in building a scalable solution for a very complex group of business with stringent regulations.

I would highly recommend Seamless to any organisation especially those within the Financial services industry facing the same challenges we have.

Duncan McKay, Director, Best Distribution



**Work with us to digitally
transform your business**



seamlessideas.co.uk