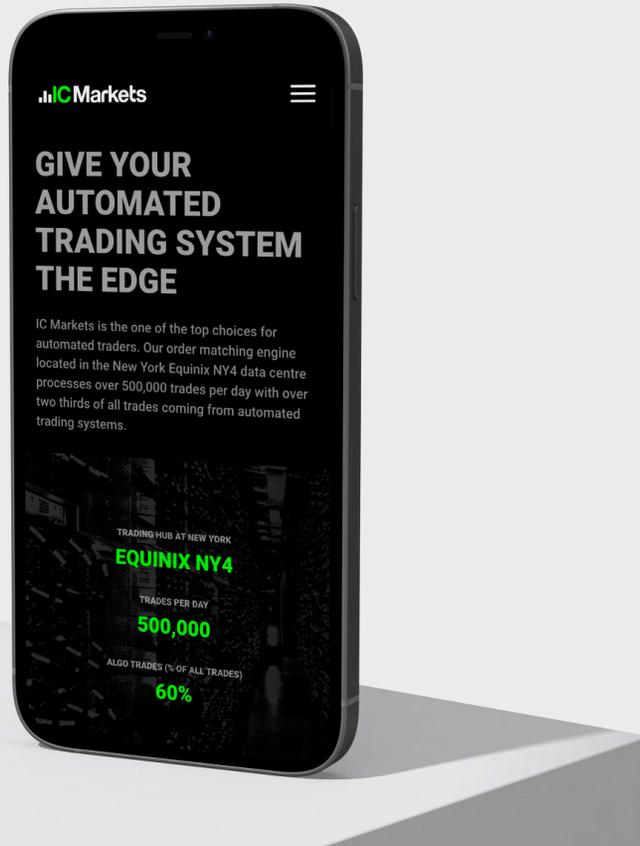


# IC Markets



IC Markets, one of the world's most renowned Forex brokers, recognised that they could better serve their 200,000+ active clients worldwide by going digital. The goals were ambitious: Replace a decade-old legacy CRM system with Salesforce and automate all core business processes.

In no time, we assembled a team of senior developers and consultants responsible for Salesforce implementation and further customisation.

First off, we interviewed key users and performed a thorough requirements analysis to get a grasp of the client's current sales processes and corporate hierarchy.

Once we had a clear understanding of IC Markets' goals, we outlined a detailed tech strategy, scheduling all required workshops and training sessions.

Next, our engineers worked on the initial Salesforce Sales Cloud setup, followed by data migration from the existing CRM, and finally customised the synced database to elevate the customer experience across every touchpoint.

# IC Markets



14

months of active engagement

5

Vention team members

200k+

users worldwide provided with an elevated experience of the new CRM

We configured advanced reports and dashboards to give IC Markets increased visibility into major KPIs, enabling the company to track spikes in sales and generate brand loyalty.

Our joint efforts have given IC Markets a 360-degree view of their customer base, as well as allowed them to automate the KYC (“Know Your Customer”), lead generation, and account management processes. The new CRM system also reduced new user onboarding time by 30 percent.

Tools & technologies

Salesforce Flow — Apex Triggers — Lightning Web Components — .NET Core — Sales Cloud