

## #Case Study

# Salesforce implementation for a Talent Assessment Firm

A company providing assessment and hiring solutions for companies belonging to different verticals/ industries (IT companies like Accenture, Cognizant etc. have been their major customers)



B2B &  
B2C



India, Middle East, China, USA,  
Philippines & Sub-Saharan Africa

### About the company

The firm has developed products which they use to pitch to businesses so that they can hire the right talent and ensure efficient job skills matching by crafting credible and intelligent assessments.

### Lean IT Solutions

Lean IT executed the Salesforce implementation for B2B model (B2C was handled outside Salesforce)

### Key Highlights

- Migrated data from their existing CRM (VTiger) to Salesforce
- Data architecture and system setup as per the business needs and models/modules/requirements
- Data validation rules and automation to ensure data quality and efficiency increase of sales reps for their daily tasks
- Efficient reporting to make sure that the respective team leads/managers can see how their teams are performing and be able to use it to adapt to their goals

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### Key Highlights

- Super efficient lead and opportunity lifecycle management
- User on-boarding and users' Salesforce adoption
- Custom solutions were built to have managers get a 360 degree visibility around how leads/opportunities the team is handling, which includes notifying them about status updates/MoM in real-time
- Implemented marketing automation through Active Campaign and integrated with SF. Proper analytics related to each email campaign was visible in SF ( bounce rate, open rate, links clicked etc. )
- Custom order and invoicing module was built based on various rules/business rules specified by the leadership/management to ensure company can track orders and invoices efficiently in Salesforce
- Integration with custom ERP to track revenue and accounting from within Salesforce