

Creating a Turn-Key Marketing Cloud Solution for a Leading CAT Dealer

Carolina



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UPTAKE

THE SITUATION

Carolina CAT faced a challenge. They saw the next generation of equipment buyers expecting a more digitally-enabled buying process. This next-gen buyer is expecting to have tailored information at their fingertips and many of their first touch points with the business happen long before they engage with a sales representative.

The company saw an opportunity to address this new reality and deliver more tailored and effective digital journeys, but their existing martech platforms didn't offer the capability or flexibility needed, and the idea of completely replacing their existing CRM was not an option.

OUR APPROACH

Bold Orange stepped in and developed a turn-key set of solutions that connected Salesforce Marketing Cloud with their existing critical systems, including Uptake's SalesLink CRM and other adjacent solutions.

Bold Orange developed a Marketing Cloud integration that was laser focused on their business needs. The first step was the integration to their existing systems, but beyond that we ensured that their Marketing Cloud solution as a whole would support all of their business critical initiatives. These initiatives included identifying unknown prospects, driving upsell in the services business, nurturing leads based on previous buying intent, and a host of other use cases.

THE IMPACT

Carolina CAT's Marketing Cloud solution has enabled the company to:

- Use website personalization to more effectively convert unknown users to known prospects
- Automate the quote capture process and drive it through sales teams or automated journeys
- Augment their sales team to engage with more prospects than ever before
- Drive customer enrollment on MyCAT.com and Parts.CAT.com
- Capture more leads for their rental business
- Enable the ability to target smaller fleet prospects (3-15 machines) at scale

SOLUTION OVERVIEW

- Solution architecture and data model design
- Uptake SalesLink API connector
- Marketing Cloud Engagement implementation (Email Studio and Journey Builder)
- Journey and campaign configuration
- Advertising Studio implementation and journey integration
- Marketing Cloud Intelligence (Datorama) integration and implementation with reporting dashboards
- Marketing Cloud Personalization (Interaction Studio) implementation
- Training and enablement