



trə'dish

CASE STUDY

Recipe for Success: Transforming Tre'dish's Hospitality Sales with Salesforce and Marketing Cloud

The Brief

Develop and integrate custom objects within Salesforce to efficiently store critical information, including orders, purchases, and store-related data. This customization aimed to streamline data management and provide a more tailored approach to Tredish's client interactions.

Reach Out to us at

[Genetrix Technology](#)
[Pune, India](#)
admin@genetrix.tech



OBJECTIVES

The primary objective of this project for Tre'dish was to enhance its customer relationship management and marketing capabilities by implementing custom data structures and synchronized processes between Salesforce and Marketing Cloud.

Streamline Data Management

Develop and integrate custom objects within Salesforce to efficiently store critical information, including orders, purchases, and store-related data. This customization aimed to streamline data management and provide a more tailored approach to client interactions.

Synchronization and Integration of Data

Establish seamless data synchronization between Salesforce and Marketing Cloud, ensuring that the newly created custom objects and associated fields are readily available for marketing campaigns and customer engagement strategies in Marketing Cloud.

Segmentation and Personalization

Utilize Marketing Cloud's capabilities to segment customer data. This segmentation was crucial for targeted and personalized marketing campaigns, enabling Tredish to tailor their messaging to specific customer groups.

Campaign Development

Design and implement multiple customer journeys within Marketing Cloud for high-profile and normal chefs. These journeys were strategically crafted to get the chefs to book a call and create a store with Tredish.

Our Approach

To address Tredish's objectives of improving data management, segmentation, and customer engagement, we implemented a comprehensive solution that involved the creation of a brand new Sales Cloud data model, custom objects, synchronization with Marketing Cloud, integration with Calendly and the development of customer journeys.

➔ **Sales Cloud Data Model Enhancement**

We revamped the existing Sales Cloud data model to accommodate Tredish's evolving needs, ensuring it aligned with their business processes and objectives.

➔ **Creation of Custom Objects**

We introduced new custom objects each with relevant custom fields. This allowed Tredish to capture and manage specific data points critical to their operations.

➔ **Synchronization with Marketing Cloud:**

Custom objects and associated fields were synchronized with Marketing Cloud enabling real-time data sharing and accessibility for marketing campaigns.

➔ **Automated Audience Segmentation**

Automation processes were implemented to segment the audience effectively by creating specifically filtered DEs.

➔ **Customer Journeys**

Customer journeys for chefs were carefully designed and implemented. These journeys helped the client to acquire relevant details about the chefs while nurturing them by collecting their preferences.

➔ **Calendly Integration**

Calendly was integrated with Salesforce to track whether a customer had booked a call. Email communications contained CTA buttons linked to Calendly for booking appointments. Successful Calendly integration ensured that when a customer booked a call, the record was transferred to Marketing Cloud and stored in the data extension.

RESULTS

We began the implementation for Tre'dish by creating an initial storyboard that illustrated our vision for the project and concluded with a high functioning architecture and successful journeys.

- 1 A system that allows for modifications to existing assets, enhancing the flexibility of the data model.
- 2 Customization of the Salesforce object to align with Tredish's specifications.
- 3 Automations that utilize multiple SQL activities to synchronize data from the Sales cloud.
- 4 Successful creation of a welcome journey tailored for chefs.
- 5 Seamless integration with Calendly, marking the successful completion of this project.



Amanda Wong, Product Lead at Tre'dish shares her experience

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