

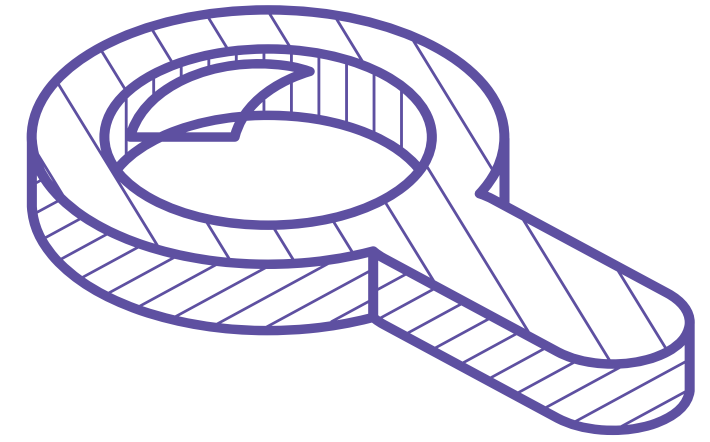
PAWLIK AUTOMATES BUSINESS PROCESSES

with Salesforce
Sales Cloud & Tableau



PAWLIK

Since 1996, PAWLIK has been developing organizations and their employees with a clear focus on achieving goals. The company has built unique methodological competence and makes science applicable to everyday work. PAWLIK's guiding principle is practical success.



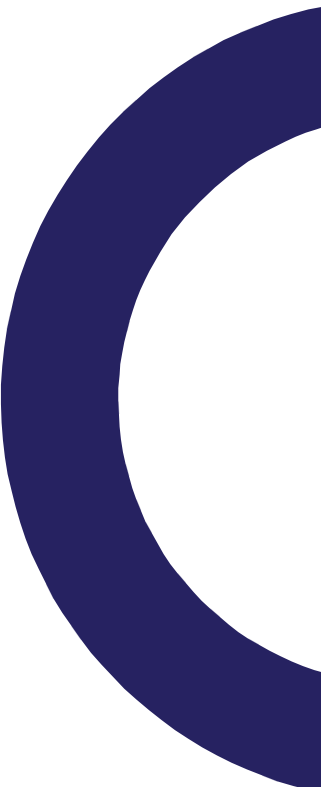
PAWLIK'S CHALLENGES:

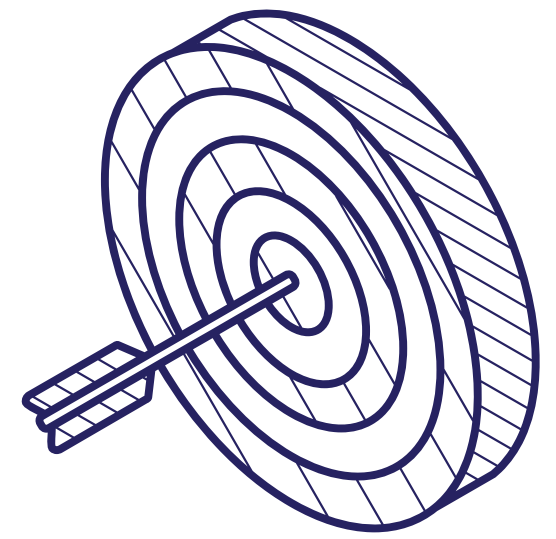
- #** Pawlik's previous system was outdated and lacked a user-friendly interface;
- #** the performance of the above tool was far from satisfactory;
- #** previous CRM tool could not provide 360-degree view of customers;
- #** the former system did not support PAWLIK processes with relevant automation;
- #** there was no visualization tool;



PAWLIK ALSO NEEDED TO:

- # incorporate a tool to help with automated reporting of the financial condition and reporting for the C-level;
- # introduce a 360-degree view of customers;
- # automate processes to reduce human error;
- # increase customer satisfaction by introducing an account management module;
- # improve the visibility of the sales process.

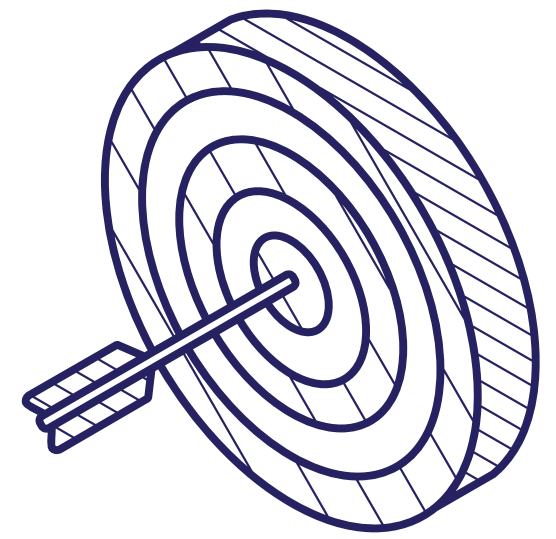




PROJECT SCOPE INCLUDED:

Salesforce Sales Cloud implementation enhanced with:

- lead management – generation, segmentation, qualification of leads & conversion of leads to accounts;
- account and contact management;
- setting up a catalog of products and training courses, one standard price list;
- resource management – (trainer search), functionality that helps find suitable trainers in terms of skill sets and availability, book slots, and send invitations;
- quote management;
- a powerful, highly customized financial module linked to Pawlik's accounting system




PROJECT SCOPE INCLUDED:

Tableau implementation:

- a self-updating dashboard, presenting the financial condition of the entire holding;
- comparative analysis with the sales & delivery target across multiple levels;
- creation of data source and adapting it to scale in the future;
- extensive reporting model;
- admin training.

KEY BENEFITS OF SALES CLOUD IMPLEMENTATION:

- # the risk of human error is significantly reduced;
 - # Pawlik's billing system works smoothly with Salesforce;
 - # ability to implement new processes;
 - # no limitations – the system will adapt to all processes, both current and future;
 - # 360-degree view of each customer;
 - # change in UX and use of the system – it is now very easy to use;
 - # single source of truth for the entire organization with a such a complex structure.
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KEY BENEFITS OF TABLEAU IMPLEMENTATION:

- # scalability and ability to combine the data that PAWLK uses in one tool;
- # the board can easily make data-driven decisions
- # transparent and user-friendly data visualization;
- # up-to-date, instant business insights;
- # change in UX and use of the system – it is now very easy to use;
- # ability to use predictive data models.