

Hamburg, May 2023

Reference Letter

Pawlik Consultants GmbH has been working with Cludity since November 2021. The goals of the cooperation included automating and integrating company processes, obtaining a single source of truth, increasing customer satisfaction with an efficient account management module, and providing visibility into the sales process.

The scope of the project was as follows:

Salesforce Sales Cloud implementation enhanced with:

- Lead Management – generation, segmentation, and qualification of leads, duplicate verification, and conversion of leads to accounts;
- Account and Contact management;
- Task and Event management;
- reporting;
- product catalog management – setting up a catalog of products and training courses, one standard price list;
- quote and opportunity management;
- project and project training;
- resource management – (trainer search), functionality that helps find the right trainers in terms of skill sets and availability, book slots and send invitations;
- forecasting;
- invoicing – resource allocation;

ERP functionality within Sales Cloud:

- extensive, highly customized financial module linked to Juston (PAWLIK's accounting system);
- customization of Salesforce to function seamlessly with Juston;
- creation of "trainer search" functionality, which makes it easier to find trainer data according to specific customer requirements.

Tableau implementation:

- a self-updating dashboard, presenting the financial condition of the entire holding;
- comparative analysis with the sales target per month/ employee/ business sector;
- creation of data source and adapting it to scale in the future;
- extensive reporting model;
- admin training.

We are very satisfied with the outcome of the cooperation, and we would like to recommend Cludity to companies that wish to implement Salesforce solutions and push their business forward.

Best regards,



Chiara Kelm, Pawlik Consultants GmbH

Verification

Transaction 09222115557495521002

Document

PAWLIK reference letter

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*Initiated on 2023-06-26 10:24:38 CEST (+0200) by
Cloudity (C)*

Finalised on 2023-06-27 06:07:36 CEST (+0200)

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Signed 2023-06-27 06:07:36 CEST (+0200)

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