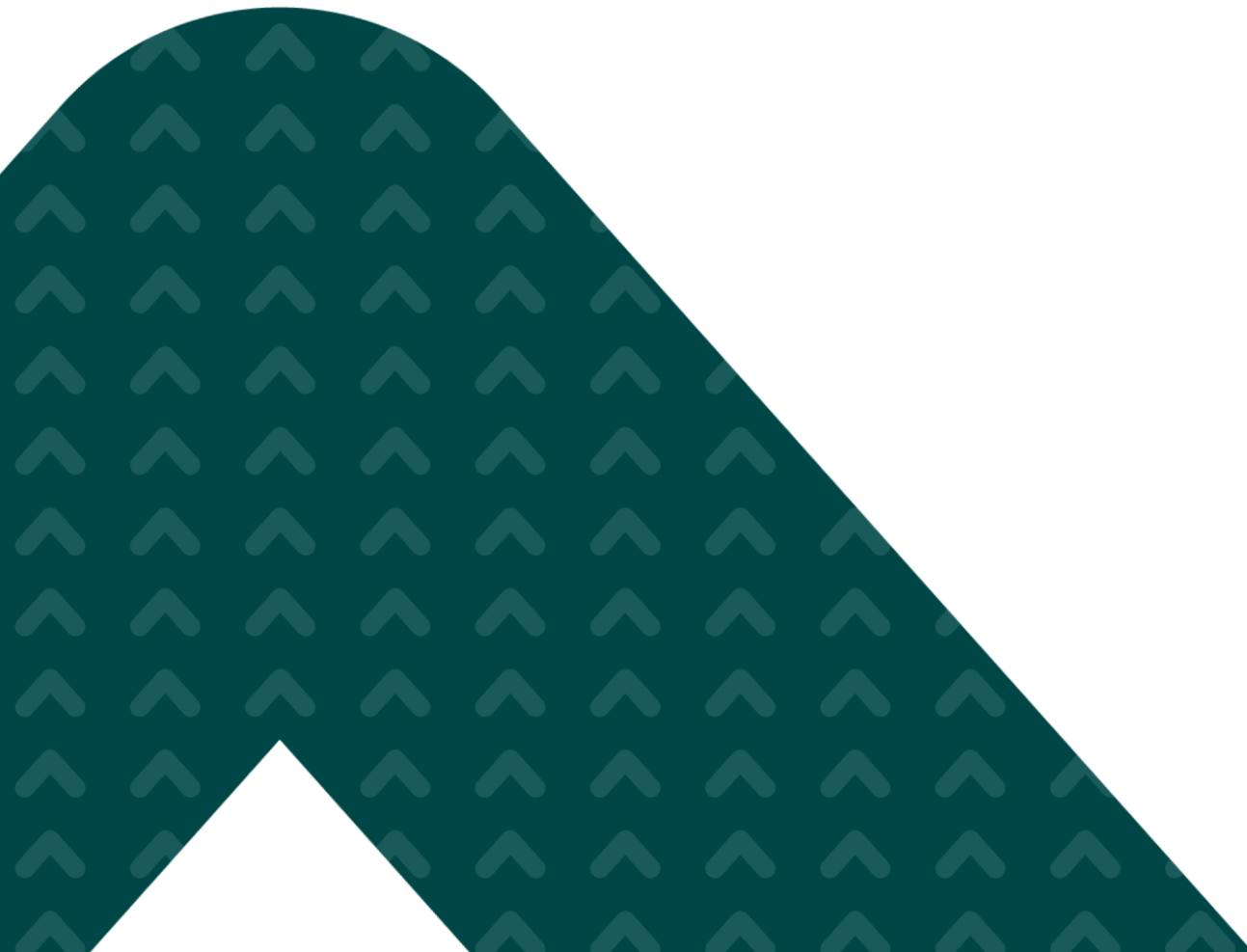




growtomatic

Building a Seamless Partner Portal on Salesforce for Optimized Partner Engagement and Sales

How we enabled streamlined partner onboarding and collaboration to drive 28%+ sales growth for our client.



The Client

Our client is a leading technology company that develops innovative software solutions for various industries. Their robust product line and customer-centric approach have earned them a significant market share. To expand their reach and drive sales growth, the client sought to establish a partner portal that would streamline onboarding and enhance collaboration with channel partners.

The Problem

The client's partner management process was manual and inefficient, causing delays in onboarding and hindering effective collaboration. Specific challenges included:



Overview of Problems

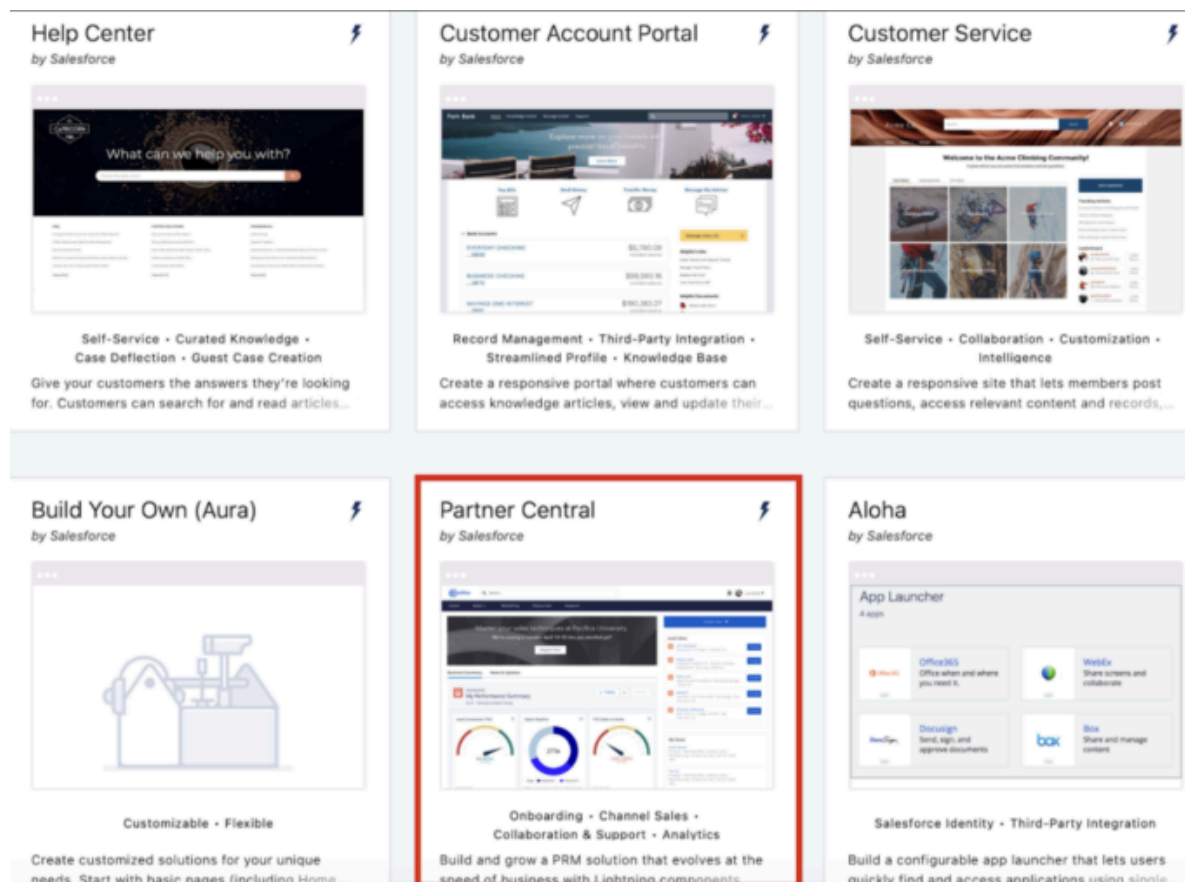
During our engagement with the client, we identified 6 key problem statements as mentioned below:

- 1. Manual Onboarding Process:** The existing onboarding process was time-consuming and error-prone, leading to delays in partner activation.
- 2. Ineffective Communication:** There was no centralized platform for partners to access resources, submit inquiries, or receive updates, resulting in fragmented communication.
- 3. Limited Visibility:** The client struggled with tracking partner performance and engagement, making it difficult to identify and support high-performing partners effectively.

The Tech Stack

The solution required a comprehensive integration of Salesforce and various custom-built components to create a seamless partner portal. The integrations included:

- **Salesforce Communities:** Utilized to build the partner portal, providing a secure and customizable platform for partner engagement.
- **Custom Onboarding Workflows:** Automated workflows within Salesforce to streamline the onboarding process.
- **Partner Relationship Management (PRM):** Implemented Salesforce PRM features to enhance collaboration and performance tracking.
- **Document Management:** Integrated document management systems for easy access to resources and training materials.



Our Approach

To address these challenges, we developed a multi-faceted approach that ensured seamless integration and efficient functionality:

Phase I: Portal Development

- **Salesforce Communities:** We designed and built a user-friendly partner portal using Salesforce Communities, offering partners a centralized platform to access resources, submit inquiries, and receive updates.
- **Custom Branding:** The portal was customized to reflect the client's brand identity, providing a cohesive and professional experience.

Phase II: Automated Onboarding

- **Workflow Automation:** Implemented automated workflows to guide partners through the onboarding process, reducing manual intervention and errors.
- **Self-Service Capabilities:** Enabled partners to complete onboarding tasks at their own pace, improving efficiency and satisfaction.

Phase III: Enhanced Communication and Collaboration

- **Centralized Communication Hub:** Created a centralized communication hub within the portal for partners to interact with the client, access support, and receive announcements.
- **Resource Library:** Developed a comprehensive resource library with training materials, product documentation, and marketing assets.

Phase III: Performance Tracking and Analytics

- **PRM Features:** Leveraged Salesforce's PRM features to track partner performance, monitor engagement, and identify high-performing partners.
- **Dashboards and Reports:** Designed custom dashboards and reports to provide real-time insights into partner activities and outcomes.

The Solution

Through this project, we delivered a fully integrated partner portal on Salesforce that addressed the client's needs. Key components of the solution included:

1. Salesforce Communities Portal

We developed a secure and user-friendly portal for partner engagement, ensuring easy access to resources and communication channels.

2. Automated Onboarding Process

We implemented workflows that automated the onboarding steps, significantly reducing the time and effort required to activate new partners.

3. Centralized Resource Access

We created a resource library within the portal, providing partners with easy access to training materials, product documentation, and marketing assets.

4. Enhanced Communication Tools

We established a centralized communication hub, facilitating seamless interactions between partners and the client.

5. Comprehensive Performance Tracking

We utilized Salesforce PRM features to track partner performance, enabling the client to support and incentivize high-performing partners effectively.

Impact and Outcomes

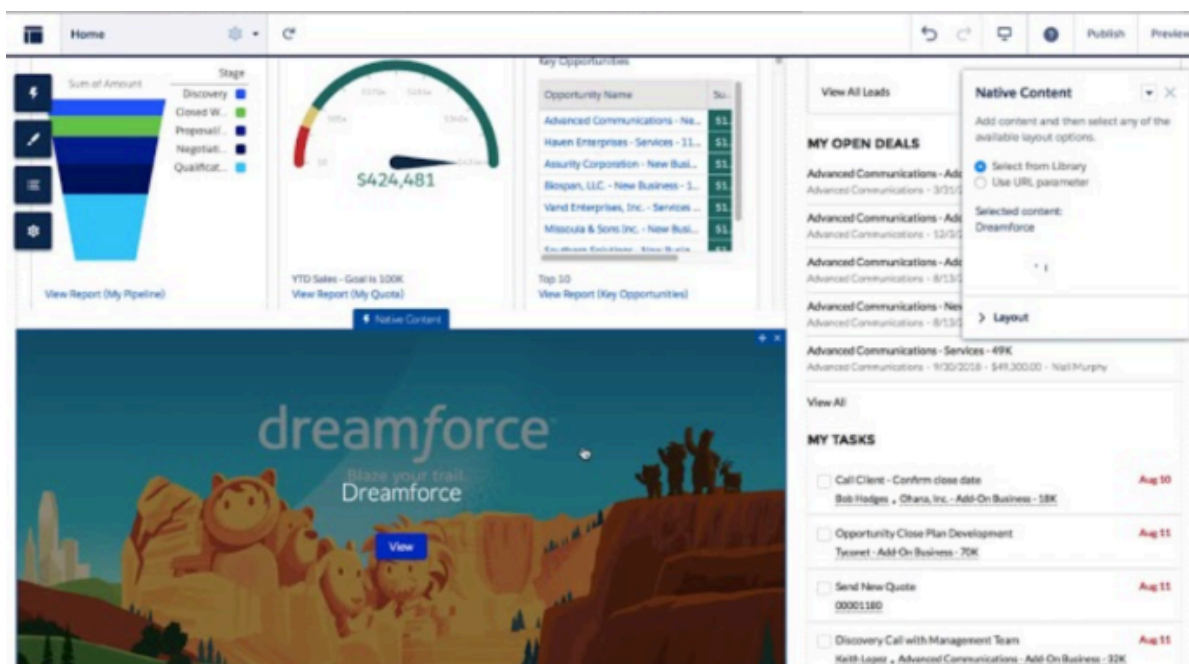
70% Reduction in Onboarding Time

28% Improved Sales Performance

50% Increase in Partner Engagement

1. 70% Reduction in Onboarding Time

The automated workflows and self-service capabilities reduced the time required to onboard new partners. The training material and marketing assets ensured that the onboarding process was comprehensive and seamless.



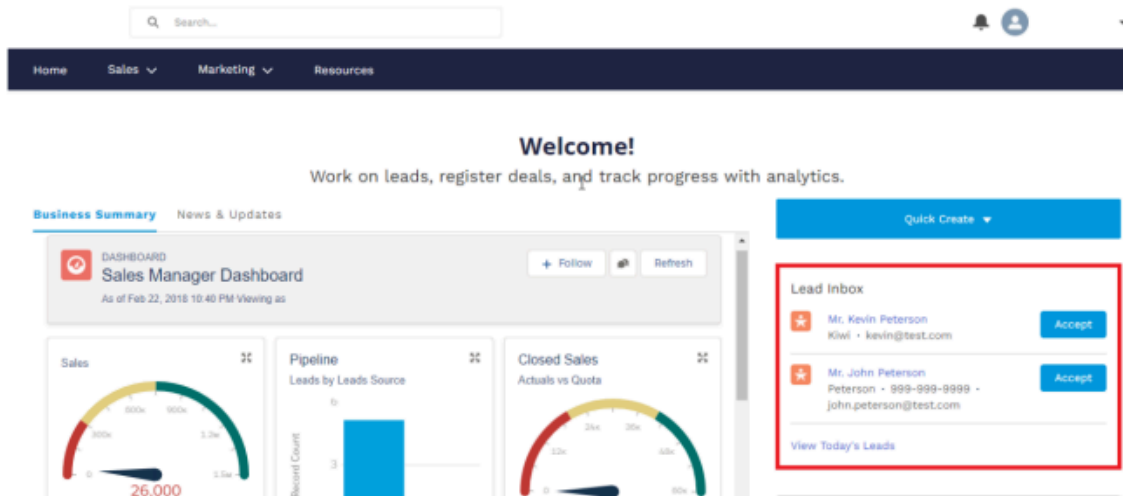
2. 50% Increase in Partner Engagement

We centralized communication and resource access. This led to higher engagement levels among partners, and better communication with the backend team.

3. 28% Improved Sales Performance

The resulting enhanced collaboration and support for high-performing partners contributed to a noticeable increase in sales. There was a seamless

single portal process for reviewing performance. The incentives additionally boosted overall team sales.



4. **30% Decrease in Support Inquiries**

The availability of a comprehensive resource library reduced the volume of support inquiries, allowing the client to focus on strategic initiatives.

Overall, the Salesforce partner portal enabled our client to streamline their partner management processes, enhance collaboration, and drive sales growth effectively.