



Empowering SureStep with a Scalable Lead Generation Solution

Salesforce Customization Case Study

Client Overview: surestep

SureStep is a global leader in Governance, Risk, and Compliance (GRC) Design and strategy consulting, with offices in Canada, the United States, Singapore, and Hong Kong. The firm specializes in delivering integrated risk management strategies for financial services and enterprises, helping them unify their GRC narratives across diverse markets.

Project Background

SureStep faced a significant challenge with their existing website infrastructure powered by Webflow. While Webflow had limitations in scaling lead generation and gated content management—especially for non-technical users.

Salesforce Implementation by CX Labs

CX Labs developed a custom Salesforce Flow and content distribution solution integrated with Salesforce Communities to provide SureStep with dynamic, public-facing pages. This solution allowed SureStep's marketing team to create campaigns, manage content, and capture leads with minimal technical intervention. When campaigns or promotions ended, these forms could then be easily deactivated or set to redirect to another lead form.

The system was designed to:

- Allow for easy creation of campaigns and public facing lead forms that could be quickly distributed.
- Seamlessly recognize and bypass the lead form for existing leads.
- Notify the sales team via Slack whenever a new lead is captured.

Business Impact

The new solution has dramatically enhanced SureStep's ability to manage and grow its lead pipeline. With over 75 content items now gated and accessible through the campaign system, SureStep has gained substantial visibility into its lead generation process. Moreover, the technology team has been relieved of the burden of content management, allowing them to focus on more strategic initiatives while empowering Sales users.

Future Plans

Looking ahead, SureStep plans to work with CX Labs on additional features to their existing forms along with automations to streamline their current business processes.