



CASE STUDY

# Greenfield Salesforce Marketing Cloud implementation for macroeconomics firm

## OBJECTIVES

This firm required a new marketing automation platform so they could move away from 'batch & blast' communications to a data-driven, strategic communication approach. The business had already selected Salesforce Marketing Cloud as their preferred platform and required an experienced consultant to manage the full implementation of the platform.

## CHALLENGES

- The business had not used a data-driven marketing approach before so required buy-in across the departments for the change to be successful.
- Inconsistent sales processes across regions
- The business was undergoing a full strategic change which meant multiple changes for staff, particularly in the sales function, to manage
- The business was reliant, and comfortable, with manual processes which were not scalable so change management played a large role in this project

## SOLUTIONS

- Implemented Salesforce Marketing Cloud with full integration with Sales Cloud to facilitate a data-driven marketing communication strategy
- Changed the enquiry delivery process from email correspondence to integrated Salesforce tasks for contact owners improving response times to prospects
- Implemented SalesWings facilitating B2B lead-scoring and website tracking capabilities gathering first-party user behavioural data for the business
- Created a lead scoring model to identify Marketing Qualified Leads ready for hand-off to the sales team reducing time spent speaking with unqualified prospects
- Introduced gated content within automated campaigns to capture new client data
- Created and delivered email marketing communications programmes to targeted B2B audiences to generate leads and support event management

## AT A GLANCE

### Client Overview

A world-leading provider of independent economic insight with a team of 70+ experienced economists providing award-winning macroeconomic, financial market and sectoral analysis, forecasts and consultancy to a diverse global client base.

## KEY BENEFITS

### Improved sales support processes

Delivered a **30% time savings for the Sales Support teams** by reducing the need for them to manually redirect all enquiries to the correct sales person

### Full project implementation

Implemented Salesforce Marketing Cloud and SalesWings to facilitate data driven marketing campaigns, automate enquiry deliver, and improve data capture

### Custom lead scoring model

Developed model to identify Marketing Qualified Leads for sales team reducing time spent speaking with unqualified prospects

