



LIMITLESS
TECHNOLOGIES



Case study

INDUSTRIAL AUTOMATION MANAGED BY SALESFORCE

The main objective of the project was to find a platform that would optimise the work of the sales and marketing departments.

It has also become important to enhance cooperation with partners who are particularly significant for the Client: they actively participate in the sales process.

The Client was one of the market leaders in industrial automation and building management solutions.

The company has been implementing intelligent solutions in institutions, municipalities, industrial plants and for individuals around the world for more than ten years

Project objectives:

- intensifying the marketing and sales cooperation,
- creating a portal for partners,
- ensuring efficient business processes,
- activating existing partners, increasing sales,
- increasing the perception of events on the market.

Challenge

The Client's activity is based on a wide range of services and is addressed to a diverse target group. The basis for implementing the solution was the need to consolidate activities on several levels of the business process, taking into account the role of business partners.

Project areas:



Solution

The Client decided to implement the Salesforce platform to efficiently manage and monitor a complex business process.

Selected modules:

- Sales Cloud
- Salesforce Pardot
- Partner Community

It was important to choose a partner service tool that would allow knowledge sharing, efficient collaboration and joint sales, as well as provide access to dashboards and reporting.

Benefits

- enhancing the process of acquiring new customers,
- organising and achieving better control over business processes,
- organising and extending the base of marketing tools,
- controlling the effectiveness of marketing tools in promoting a wide range of products,
- increasing partners' activity in the process of customer acquisition, and acquiring new business and implementation partners.

Implementation

Implementation stages:

Sales module

First, a dedicated sales module created on the basis of the Sales Cloud license was implemented. At the analysis stage, five sales processes, characteristic for certain product groups, were specified. In the course of implementation, e-mail accounts in Outlook were integrated, which allowed the users to synchronise messages and events between calendars. In addition, users of the sales module have access to a number of reports that can be configured and adjusted to their own needs.

Pardot marketing module

As a part of the marketing module implementation, the users were given the possibility to generate leads through marketing activities. Pardot was linked to the forms on the website to allow the quick capture of potential customers.

Contacts generated in this way are automatically sent to the sales module, where sales team can take the next steps to specify the customer's requirements. Additionally, the tool has been equipped with functionalities that enable marketing activities on social media (Facebook, LinkedIn). Users of the marketing module can track the effectiveness of their campaigns using the reporting functionalities.

Portal for partners

One of the most important objectives of the project was to strengthen cooperation with partners. For this purpose, the Community portal which will facilitate faster communication between partners and employees of the company has been implemented. Within the portal, partners may access documentation that will help them during the valuation process and first contact with customers. Additionally, they can register potential customers and conduct sales processes if they are authorised to do so. To enhance the customer service process, sales team and partners can assign to each other tasks with a specified deadline.



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Partner:



About Limitless Technologies

The strength and main competitive advantage of Limitless Technologies lies in our unique team of experts. We have developed our competencies through years of work at our Salesforce headquarters in San Francisco (USA) and at our European headquarters located in Dublin (Ireland). Years of experience in software development departments – going up the career ladder, from junior programmer to senior manager positions, and managing teams dealing with the development of the Salesforce platform – have provided us with complete knowledge of this system and a deep understanding of the possibilities provided to entrepreneurs by each of the solutions offered.

By establishing Limitless Technologies, we have created a space for entrepreneurs that will enable them to seamlessly step onto the path of digital transformation. We quickly and accurately identify the specifics of a given company, we approach clients' needs individually and believe that properly implemented technology can elevate the management in every company to a new level.

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