

Client:

Initiafy

Industry:

IT/Software

Headquarters:

United States

Project:

Pardot Implementation and Salesforce Customization

Implementing Salesforce and Pardot for a growing Contractor Management Software company

Challenge

With a growing team and an expanding global footprint, Initiafy needed to ensure that marketing processes were robust enough to be delivered consistently from one market to another, whilst maintaining the flexibility to localize campaigns to the needs of prospects in each region. Execution of their strategies were furthermore complicating the matter due to the nonintegrated sales and marketing systems.

Platform

After doing a needs-based assessment, it was determined that the best-suited platforms would be:

- Salesforce Sales Cloud
- Pardot

Solution

After developing an adoption strategy and implementation plan, our experts successfully implemented a fully-functional marketing automation tool for Initiafy. The tool tells the pre-sales story of any prospect/customer in the system. By syncing the system with the Sales Cloud CRM, duplication of efforts was removed, which allowed team members to focus on customer-centric sales and marketing communications that aligned with a global strategy, rather than wasting time in tracking the marketing efforts manually.

We were able to amplify ad-hoc email sends by leveraging Pardot's 'engagement program' functionality. Prospects who start the communication with Initiafy's emails could enter a communication stream tailored to their area of interest. Using Pardot's automation functionality, relevant content can be distributed to the prospects as per their past activities and engagement behavior.

We also leveraged Pardot's lead scoring functionality to track a prospect's engagement, ensuring the sales teams could contact customers at the right time in the purchasing process. Due to the full-fledged integration between Salesforce Sales Cloud and Pardot, the sales team can be notified about the prospects' activities in real-time.

Results

Marketing automation has helped Initiafy's marketing team to achieve more customer engagement and lead generation through email campaigning and other PPC campaigns. Real-time data synchronization has reduced manual processes and maximized time for the sales team to develop more business. A streamlined marketing process is resulting in better ROI. Initiafy is now able to deliver the right content at right time to the right prospects. It's easy for them to share the new product releases or updates with their customers and prospects with the help of segments they have leveraged from the Pardot automation functionality.