



**STREAMLINED SALES PROCESS
FOR A LEADING IOT CONNECTIVITY
PROVIDER BY IMPLEMENTING
SALESFORCE SALES CLOUD**

DATAMATICS

ABOUT CLIENT:

The client is a pioneer in IoT connectivity management technology, offering intelligent hardware and network solutions. They collaborate with global cellular network providers to facilitate local connectivity.

INDUSTRY:

Information Technology

REGION:

APAC

BUSINESS NEED:

The client wanted to simplify sales processes and attain high-quality lead generation by transforming their inefficient sales process and overcoming the complexities of relying on manual processes and disparate tools.

BUSINESS CHALLENGES

01

The client was struggling with a complex and inefficient sales process, which relied heavily on manual operations and a variety of disconnected tools.

02

They faced numerous challenges, including handling asynchronous methods for various integrations, overcoming email sending limitations, navigating email signature character count constraints, and managing data migration from another Salesforce organization.

03

They also had to deal with redirecting duplicate leads, assigning owners based on regions, adapting to evolving Slack packages, and utilizing HTML email templates.

04

These challenges highlighted the urgent need for a solution to streamline their sales process and enhance lead generation.

DATAMATICS SOLUTION

In response to the client's challenges, the Datamatics Team deployed Sales Cloud to enhance their business operations and sales process.

This involved substantial customizations and integrations. Key customizations included:-

Custom Tab: The Dextara team developed a customized tab for a specific record type using Lightning Web Components (LWC)

Field Dependency Paths: Created paths based on field dependencies using LWC to guide users through the sales process.

Dynamic Page Layouts: Dextara configured page layouts that displayed only required fields during record creation and all fields afterward.

Notifications: The Dextara team implemented a notification system to inform followers about updates and changes

Scoring Model: A lead, account, contact, and opportunity scoring model was implemented to prioritize sales efforts.

Duplicate Management: The Dextara team designed a mechanism to handle duplicate contacts and leads, redirecting them to another object

Chatbot Customization: The chatbot was tailored to handle leads and contacts effectively

Custom Quote ID: Dextara developed a custom unique ID for each quote, the Customer Proposal number

Dextara CPQ Integration: Several additional Dextara CPQ features, such as quote PDF template customization, email attachments, and product code enhancements, are done to customize and configure the price and quote process.

Furthermore, they integrated several external tools to augment functionality, which included:-

Calendly - for appointment management

MailerLite - for email marketing

Slack - for team collaboration

Apollo.io - for data cleansing

ZeroBounce - for email verification

Einstein Activity - Capture for data collection.

Web-to-Lead - to capture leads from the client's website.

BUSINESS IMPACTS

Outbound follow-ups to leads increased by 70%



Streamlined sales enhanced operational efficiency

Enhanced Visibility



Improved team collaboration

ABOUT **DATAMATICS**

Datamatics enables enterprises to go Deep in Digital to boost their productivity, customer experience, and competitive advantage. Datamatics' portfolio spans across three pillars of Digital Technologies, Digital Operations, and Digital Experiences. It has established products in Intelligent Document Processing, Robotic Process Automation, AI/ML models, Smart Workflows, Business Intelligence, and Automatic Fare Collection.

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