



Greenfield Salesforce Sales Cloud CRM implementation to unify data and standardize on process

THE OPPORTUNITY

Skinade were looking for a system which could unify their customer data and processes. They needed a solution for managing and tracking leads from trade shows, centralising data management for sales, partners and customers, and the automation of key qualification tasks and cyclical calls to B2B customers. The system should assist with reporting, capturing and managing campaigns, GDPR and key B2B and B2C account demographics.

PARTNER IMPACT

With an existing Magento e-commerce front end, bespoke integration from Magento into Xero, many spreadsheets and manual processes, Coacto streamlined the lead, sales and marketing campaign processes with centralised data management in Salesforce. This brought together management, inside and field sales functions. Having demographic data across leads, customers, partners and sales now allows for effective cross company reporting. The workflow automation of key follow-up and cyclical calls has yielded better customer engagement for Skinade.



“We chose to work with Coacto due to their diligent and thoughtful proposition, which demonstrated to us a good understanding of our business needs. During the project, they made frequent contact with us and maintained clear lines of communication. The project was delivered on time and to spec, which is a rare thing in IT development.”

Daniel Cohen, Business Development Manager

Cloud:
Sales

Industry:
Retail and B2B

Apps:
Outlook, G-Suite, Spanning, Mailchimp, Salesforce for Outlook, Xero and Magento

Partner Role
Integrated Solution Provider