



Streamlining Sales and Marketing Operations through CRM Expertise

Global Leader in Online Payment Solutions

Business Challenge

A Global Leader in Online Payment Solutions is currently in the midst of a strategic effort to broaden its merchant services business and re-position its product offerings. As part of this effort, the client utilized Acumen Solutions to align various Sales and Marketing business processes and technologies. Specifically, Acumen Solutions integrated new users of the client into their existing Salesforce.com instance, automated key lead management processes for SMB Marketing, and implemented a Lead Nurture Automation program for SMB Marketing through the e-mail management application ExactTarget.

The client purchased another company's payment gateway and needed to quickly assimilate the acquired resources into its existing Telesales team in order to meet critical business objectives. This assimilation required former employees of the acquired company to be integrated into the client's existing Telesales' Salesforce.com application, data to be migrated from legacy systems, and web leads to be re-routed to Salesforce.com.

At the same time, the client needed to increase the productivity of the combined Telesales groups by automating lead assignments. Lead assignment automation would eliminate time consuming non-sales tasks performed by Telesales and increase the amount of time spent interfacing with customers. Automated Lead Assignment would also prevent Telesales reps from "cherry-picking" or ignoring leads, thus ensuring a standard of care for all of the client's Telesales customers.

Finally, the client's SMB Marketing group wanted to achieve greater value and return on investment for its Lead Nurture campaigns by automating the current manual process and by utilizing lead information stored in Salesforce.com. Lead Nurture Automation using ExactTarget would decrease the sales cycle, increase customers' response rates, and decrease campaign costs. The major challenges to these projects included:

Acquired Company Salesforce.com Integration

- An extremely aggressive timeframe for integrating the new employees into the client's existing Salesforce.com environment – roughly three weeks from project kickoff to go-live
- Significant project scope for such an aggressive time frame: business process alignment, Salesforce.com configuration, data migration from the acquired company's legacy system, change management, on-site support
- Combined business sales processes were significantly different which required reconciliation between both groups
- No access to acquired company's proprietary data until two days before go-live date
- No new employee experience with Salesforce.com

Lead Optimization



- Complex business requirements that in some cases fell outside of out-of-the-box Salesforce.com functionality

Lead Nurture Automation

- The client had no experience with e-mail campaigns
- No existing market segmentation or identification of relevant to the client's customer subgroups
- No existing communication strategy (i.e. messaging) for customer subgroups
- No existing communication content (e-mail copy)

Solution

Acquired Company Salesforce.com Integration

Acumen Solutions worked closely with both the acquired company and the client's Telesales personnel to identify business requirements. The Acumen Solutions team facilitated a Business Process Alignment session where the client's sales process was compared and reconciled with the acquired company's sales process and data requirements. The result was a Summary of Findings deliverable that documented the changes to be made to the user's Salesforce.com environment. Acumen Solutions then utilized Salesforce.com best practices to configure the Salesforce.com application to fit combined business needs.

During this time, Acumen Solutions was also working with Marketing to plan and execute a data migration from the acquired legacy system. Acumen Solutions mapped the legacy data to the client's Salesforce.com data structure and applied the appropriate business rules to ensure data quality and integrity were preserved. For proprietary reasons, Acumen Solutions was not allowed to have access to the legacy data until two days before the scheduled go-live date, yet still successfully migrated all data by the go-live deadline.

Lead Assignment Automation

Acumen Solutions resources worked closely with the client's SMB Marketing management to define the current lead management business process. The client needed to re-route leads captured on both team's websites into Salesforce.com where they would be assigned to Telesales users via round-robin or rules-based criteria founded upon certain data attributes. Acumen Solutions leveraged its extensive Salesforce.com knowledge to generate a creative solution for the non-standard round-robin lead assignment that was easy to administer.

Lead Nurture Automation

The Acumen Solutions team utilized its CASE methodology to first define SMB Marketing's business goals, objectives, and metrics for the Lead Nurture Automation project. Acumen Solutions was able to lead the client through the key steps of creating a successful Lead Nurture program which included: identifying customer subgroups or segments that would respond to more specific messaging, defining segment messaging, and creating e-mail content based upon e-mail campaign best practices. Acumen Solutions then utilized its deep expertise to



integrate ExactTarget and Salesforce.com, thus allowing SMB Marketing to segment the client's Salesforce.com leads appropriately before sending mass e-mails to each of the segregated groups.

Technology

Acumen Solutions leveraged a team of resources across its CRM and High Tech practices to complete the project. CRM expertise was utilized in the Salesforce.com implementation and optimization effort and in the design and configuration of the ExactTarget application.

The technologies implemented included:

- Salesforce.com
- ExactTarget

Return on Investment

Acumen Solutions' efforts on these projects allowed the client's Telesales and Marketing personnel to become more productive by:

The technologies implemented included:

- Enabling the acquired company's payment gateway employees to immediately sell client products by utilizing Salesforce.com as soon as the acquisition was finalized
- Decreasing non-sales time spent manually assigning leads thereby increasing customer interface time
- Increasing cross-selling and up selling due to increased customer interaction
- Decreasing Lead Nurture campaign costs
- Increasing campaign response rates
- Defining an e-mail campaign and communication strategy that can be utilized in coming months and years