

Sales Cloud Optimization and Lightning Migration



Business Problems

Improve and Streamline the sales process with regards to managing and assigning opportunities to **sales team** spread across **40 countries**

Turnaround Customer Dissatisfaction to Customer Success by managing **Salesforce** and Pardot better

Inability to **access the appropriate data** was preventing the client from **gaining access to intelligence on sales performance**

CitiusTech Solution(s) & Value Delivered

- ▶ Leveraged **Salesforce development and implementation expertise** to design a solution that **streamlined clients sales process** thereby ensuring:
 - **lead qualification** before an opportunity is created thus **controlling the volume of opportunities**
 - **contacts and opportunities** were assigned based on **territory mapping** which **drastically reduced lost revenue opportunities** and improved **customer satisfaction**
- ▶ Performed **campaign ROI analysis** by associating opportunities with campaigns so they could determine which **campaigns were the most successful**



800+

users added across on the new Salesforce platform

40+

countries covered under the change management effort

Speed & Accuracy

improved significantly post transition from Salesforce Classic to Lightning