

APPCENTRICA CUSTOMER SUCCESS STORY

Kinectrics



Industry

- Utilities
- Engineering
- Professional Services

Project Outcomes

- Improved lead generation
- Improved forecasting
- Less reliance on manual processes

Solution Features

- Sales Cloud
- Pardot
- Einstein Analytics
- Zapier Pardot Integration for LinkedIn
- Salesforce Inbox
- Microsoft Dynamics CRM replacement



About AppCentrica

We've built our Salesforce practice one customer at a time based on quality and strong relationships. We deliver proven solutions for:

- Sales Cloud + CPQ
- Service Cloud + FSL
- Einstein Analytics
- Community Cloud
- MuleSoft
- Pardot
- B2B Commerce
- Heroku & Custom Lightning Development

About Kinectrics

Headquartered in Toronto, Canada, Kinectrics is an integrated life cycle management services company which provides testing, inspection, certification and engineering consulting for electric power generation, transmission and distribution markets worldwide. Their core focus is on keeping electric power construction and refurbishment projects running smoothly.

Challenge

The Kinectrics team had previously implemented Microsoft Dynamics as their CRM and sales platform but adoption was low and the utility of the solution prevented further investment. As a result, Kinectrics staff reverted back to managing operations via legacy systems, spreadsheets and manual processes.

Solution

When Kinectrics decided to move to Salesforce, AppCentrica was introduced by Salesforce as a trusted implementation and consulting partner.

The implementation itself was broken into three distinct phases.

First, AppCentrica worked to implement Sales Cloud and complete the data migration from Microsoft Dynamics. Salesforce was configured to support Kinectric's unique business requirements, including the creation of a custom project object to track business engagements. As well, for internal compliance and data governance requirements, a custom opportunity approval process was built out which checks for specific factors including deal size, margin, contract type and more, before an opportunity can be closed.

Second, AppCentrica worked to implement Pardot for marketing engagement and outreach. Web forms were created to capture inbound inquiries. As well, an integration with LinkedIn forms was setup via Zapier to generate leads via LinkedIn advertising.

Finally, AppCentrica implemented Einstein Analytics and configured a series of complex data sets and custom forecasting models. Using this data, AppCentrica built a fully interactive forecast dashboard which can be manipulated based on several variables including: business unit, geography, energy sector, forecast model and much more.

Outcomes

Since making the switch to Salesforce, Kinectric's user adoption is much higher than it was previously.

The sales teams can easily create and advance opportunities without unnecessary internal correspondence and the marketing team has been able to generate and engage with more leads.

Most importantly, thanks to Einstein Analytics, management no longer needs to spend a material amount of time amalgamating data from various sources; instead users can easily view and filter financial forecasts all in one place.



"Overall excellent experience implementing Pardot, Sales Cloud & Analytics studio."



Jarrod Shugg

Director, Strategic Marketing, Kinectrics