

Industry

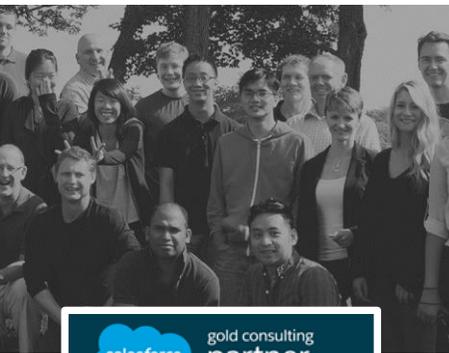
- Financial Services
- Technology

Project Outcomes

- Modernized customer engagement strategy
- Less manual effort
- Improved lead generation
- Improved lead nurturing

Solution Features

- Sales Cloud
- Pardot



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 Symcor

Symcor is one of Canada's largest providers of business and payments processing services. Symcor supports multiple industry verticals including financial services, insurance, retail and telecommunications.

Challenge

Symcor had already made an investment in the Salesforce platform in the form of Sales Cloud. Unfortunately, the system had not been properly configured to support their business needs and user adoption suffered as a result. Additionally, Symcor's marketing team lacked an efficient way to engage with their customers and sought to explore a marketing automation solution.

Solution

Hoping to generate more value from their investment in the Salesforce platform, AppCentrica was engaged for a two-part engagement.

In phase one, AppCentrica assessed the current configuration of Sales Cloud, identified problem areas and optimized the solution to help Symcor fill critical gaps in their sales processes.

Phase two was focused on Symcor's marketing team. AppCentrica was engaged to implement and optimally configure Pardot for marketing automation. The implementation was comprehensive and included the creation of web forms, email templates, engagement programs as well as training and best practices. Additionally, AppCentrica helped Symcor evaluate a few different tooling options for survey and event management.

Finally, AppCentrica worked closely with Symcor's IT team to build out an effective and automated opt-in/opt-out process to stay fully compliant with CASL (Canada's Anti Spam Legislation) and Symcor's own unique data retention requirements.

Outcomes

Symcor has experienced considerable success with their decision to re-invest in the Salesforce ecosystem.

Their Sales Cloud instance is now properly configured to support their business needs and user adoption has increased as a result.

From a marketing perspective, the team is now better equipped to engage with their customers proactively. As well, the web forms have enabled Symcor to utilize their website as a lead generation engine, all while staying completely compliant with CASL and internal data requirements.

"The Symcor marketing team decided to invest in Pardot marketing automation to help us easily share content. We engaged AppCentrica to help us configure Pardot and train us on how to use the platform effectively. The AppCentrica team went above and beyond to ensure all of our unique business requirements were accounted for. They were patient and responsive to our needs and I am confident we now have a solution that will enable us to achieve our marketing outreach goals. Thank you AppCentrica!"



Maria Policelli

Manager, Digital and Social Marketing, Symcor