

Modernizing a Global Investment Research Firm's Client Engagement Process

Client Profile

With 1,700 employees across 4 continents, the customer is a multi-national global investment market research firm. The organization provides investment advice to over 1,000 of the world's largest hedge funds, mutual funds, private equity funds and management consultancies.

Business Challenge

The customer was looking for a strategic partner to help them fully leverage their Salesforce Marketing Cloud Account Engagement investment. In addition to business analysis, project management, and Salesforce expertise, the organization wanted a vendor that would be willing to act as a long term partner and trusted technical advisor.

[Salesforce Marketing Cloud Account Engagement is a robust marketing automation platform that helps businesses create personalized email, mobile, and web marketing journeys for customers.](#)

The application uses customer data to predict preferences and automate messages for more relevant, efficient customer interactions. The software's powerful automation capabilities help organizations to optimize a wide range of client engagement and sales process functions.

Business Solution

The RadixBay team conducted a series of business analysis discussions with the customer to identify their current client engagement activities and sales team processes. During their investigation, RadixBay identified the customer's current needs, pain points, areas for improvement, and future goals.

Throughout the analysis process, RadixBay educated the client on the application's features that would help them improve sales and marketing activities and better interact with their wide range of clients.

“Our goal is to help our clients leverage technology to optimize their business processes and improve operations – not just implement software.”

Miriam Vidal Meulmeester Senior Director, Salesforce Practice

Business Outcome

After the analysis process was complete, RadixBay's team of Salesforce certified implementation specialists used the business analysis findings to configure the new application to:

- Use forms and landing pages to capture prospect information to generate personalized client engagement campaigns
- Improve lead qualification and ROI tracking using the application's automation and scoring capabilities
- Automatically qualify prospects by assigning numerical scores and letter grades based on their marketing asset engagement activities
- Automatically assign qualified prospects to sales reps based on region and asset class
- Analyze engagement data for prospects that converted to clients to attribute revenue to the marketing department
- Display reports for lead qualification metrics and revenue generated from converted prospects
- Provide better insight into the sales funnel
- Tightly integrate with the customer's existing Salesforce CRM platform

About RadixBay

From analysis and implementation to optimization and ongoing support, RadixBay provides a robust set of Salesforce services.



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