DATA CLEAN-UP AND LEAD-CAPTURE AUTOMATION
PROVIDE FOUNDATION FOR SALESFORCE RE-IMPLEMENTATION AND LONG-TERM SUCCESS

Overview

It's important for growing companies to get their data clean before implementing Salesforce solutions. Allied Machine & Engineering Co., an Ohio manufacturer of hole-making, boring, and other precision metal-cutting tools, knew this. They understood that their success with Salesforce CRM and Pardot depended on data.

Challenge

Allied Machine's sales and marketing capabilities were limited by data duplication and inconsistency, as well as flawed implementations of both CRM and Pardot. To get the full value of its existing and future Salesforce solutions, the company needed to get its data 100% right, and then re-implement Salesforce and Pardot.

Solution

Originally brought in to provide managed services, ForeFront was asked to handle the project when the original CRM partner did not meet expectations. To de-dupe and normalize the data, ForeFront used an advanced technique to identify and eliminate redundant accounts and contacts.

Then, to acquire potential leads that were leaking out of Allied Machine's ordering and shipping processes, ForeFront built an app to capture order information coming from its distributors. Additionally, the app compares free text in shipping addresses, emails, online transactions, and distributor drop ship details to account information already in Salesforce. A fuzzy match scoring system identifies key customers and non-customers, then automatically creates potential leads in Pardot for sales follow-up.

salesforce
| Salesforce Sales Cloud
| Salesforce CRM
| Pardot

+

FOREFRONT
| Managed Services
| Implementation
| Training

Global Metal Cutting Tools Market:
$76 Billion

Outcome

The bottom line: Now Allied Machine can move forward with, and get the full value from, Salesforce CRM and Pardot.

ForeFront leveraged its data expertise to create value. Today, Allied Machine's data is accurate and reliable. The company has a new source of leads, and sales staff can adjust the matching and scoring logic as needed. Perhaps most importantly, it has visibility into who its customers and potential customers are.

ForeFront
A global Salesforce multi-cloud solutions provider keeping market leaders at the forefront.
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ForeFront is part of NEORIS. Together, we accelerate global digital business transformation. To learn more, contact:
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