

# Case Study

Implementation of Sales Cloud and Dextara CPQ for a Leading IoT Connectivity Provider

## Client Overview

Our client is a prominent IoT connectivity management technology provider specializing in intelligent hardware, network access, and modem management cloud services and applications.

## Problem Statement:

The client needed assistance to simplify sales processes and attain high-quality lead generation by transforming their inefficient sales process and overcoming the complexities of relying on manual processes and disparate tools.

## Our Solution

To address these challenges, the Dextara Team implemented Sales Cloud to streamline the client's business operations and improve their sales process. The implementation involved significant customizations and integrations to enhance functionality and address specific business requirements.



## Major customizations:

- › **Custom Tab:** The Dextara team developed a customized tab for a specific record type using Lightning Web Components (LWC)
- › **Field Dependency Paths:** Paths were created based on field dependencies using LWC to guide users through the sales process
- › **Dynamic Page Layouts:** Dextara configured page layouts that displayed only required fields during record creation and all fields afterwards
- › **Notifications:** The Dextara team implemented a notification system to inform followers about updates and changes
- › **Scoring Model:** A lead, account, contact, and opportunity scoring model was implemented to prioritize sales efforts
- › **Duplicate Management:** The Dextara team designed a mechanism to handle duplicate contacts and leads, redirecting them to another object
- › **Chatbot Customization:** The chatbot was tailored to handle leads and contacts effectively
- › **Custom Quote ID:** Dextara developed a custom unique ID for each quote, the Customer Proposal number
- › **Dextara CPQ Integration:** Several additional Dextara CPQ features, such as quote PDF template customization, email attachments, and product code enhancements, are done to customize configure, price, and quote process.

## External Integrations:

- › **Calendly:** Integrated with Calendly for scheduling and managing appointments
- › **MailerLite:** Integrated MailerLite for email marketing and campaign management
- › **Slack:** Integrated Slack for efficient team collaboration and communication
- › **Apollo.io:** Integrated Apollo.io for data cleansing and maintaining accurate contact information
- › **ZeroBounce:** Integrated ZeroBounce for handling email verification and minimizing bounce rates
- › **Einstein Activity Capture:** Leveraged Einstein Activity Capture for gathering email and activity data
- › **Web-to-Lead:** Utilized Web-to-Lead functionality to capture leads from the client's website.

## Challenges Faced and Overcome:

- › **Custom Tab:** While implementing, the Dextara team overcame challenges handling asynchronous methods for various integrations, such as Apollo.io, MailerLite, and ZeroBounce
- › **Limited Email Recipients:** Overcame limitations of sending emails to a limited number of recipients using the SendEmailAction in flows
- › **Email Signature Constraints:** Worked around email signature character count limitations to ensure accurate and concise email communication
- › **Data Migration:** Successfully migrated data from another Salesforce org and ensured a seamless transition
- › **Redirecting Duplicate Leads:** Managed the redirection of duplicate leads received via the managed package (Calendly) to another object
- › **Regional Owner Assignment:** Implemented a mechanism to assign owners based on regions received through different channels like live chat, web-to-lead, and Calendly
- › **Evolving Slack Packages:** Adapted to changes in Slack packages throughout the development process to ensure uninterrupted collaboration
- › **HTML Email Templates:** Utilized HTML email templates (SendEmailAction) while preventing them from being sent to the record's email



## Outcomes:

- › **Streamlined Sales:** Custom workflows removed manual errors from the sales process, improving efficiency and accuracy. The seamless integration of external systems simplified their sales process, improved sales pipeline visibility, higher-quality lead generation, and enhanced operational efficiency.
- › **Enhanced Visibility:** The client achieved increased visibility across the entire sales process, enabling better lead tracking and real-time sales data analysis through dashboards.
- › **More Lead Follow-ups:** The number of outbound follow-ups to leads increased by approximately 70%, ensuring timely engagement and nurturing.
- › **Better Team Collaboration:** The implemented solution enhanced sales team productivity, enabling them to focus on high-value activities and close deals effectively.



50+

Clients

4.9/5



AppExchange

600+

Active Projects

