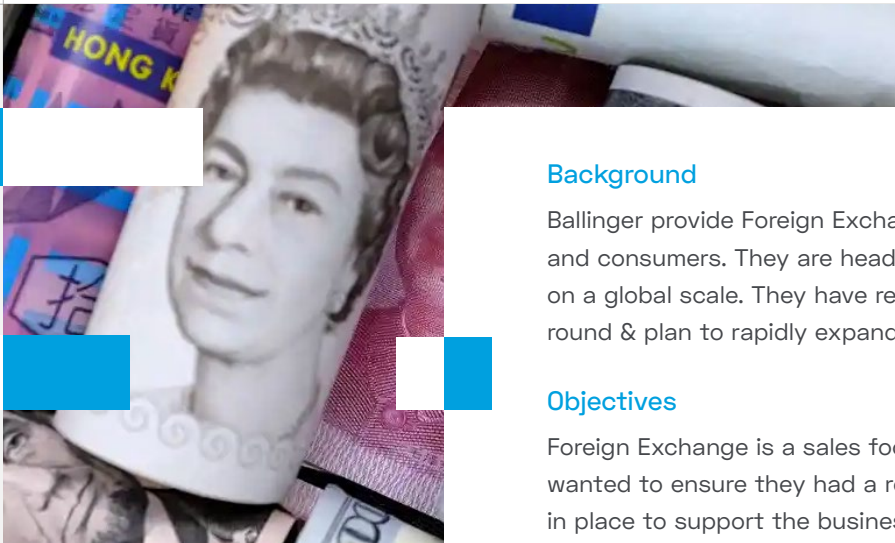


Ballinger Sales IQ Implementation



Background

Ballinger provide Foreign Exchange (FX) services for businesses and consumers. They are headquartered in London but operate on a global scale. They have recently closed a seed investment round & plan to rapidly expand their business in 2020.

Objectives

Foreign Exchange is a sales focused industry and Ballinger wanted to ensure they had a robust, futureproof CRM strategy in place to support the business' growth aspirations. Their needs spanned strategy, process definition and implementation.

Our Solution



01. Understanding their Objectives

The first step was to understand & define Ballinger's desired business outcomes and create an iterative strategy to drive them towards their goals. We mapped these business outcomes against technical requirements that formed the basis of Ballinger's immediate scope & roadmap requirements.



03. Integration & Customisation

To increase efficiency further, the 8x8 telephony system was integrated so that the sales team could spend more time building valuable relationships with customers & prospects and less on simple data entry.



02. Defining their Approach

We implemented Sales Cloud, enabling Ballinger to track Lead interactions & process customer on-boarding. The Leads are scored based on a number of criteria to ensure sales team contact the highest priority leads first. Upon conversion, the opportunities are processed through customer onboarding & corporate compliance acceptance before any FX trade can be placed.



04. Delivery

A comprehensive reporting suite was delivered, enabling Ballinger to manage their sales teams, trading teams, marketing efforts, trade exposure & treasury position providing them with the ability to make informed data driven decisions.



AdaptIQ were exceptional in delivering exactly what we wanted - strategy, implementation, and on-going support.

- Oliver Bridgen, Managing Director, Ballinger -



CSAT
5/5