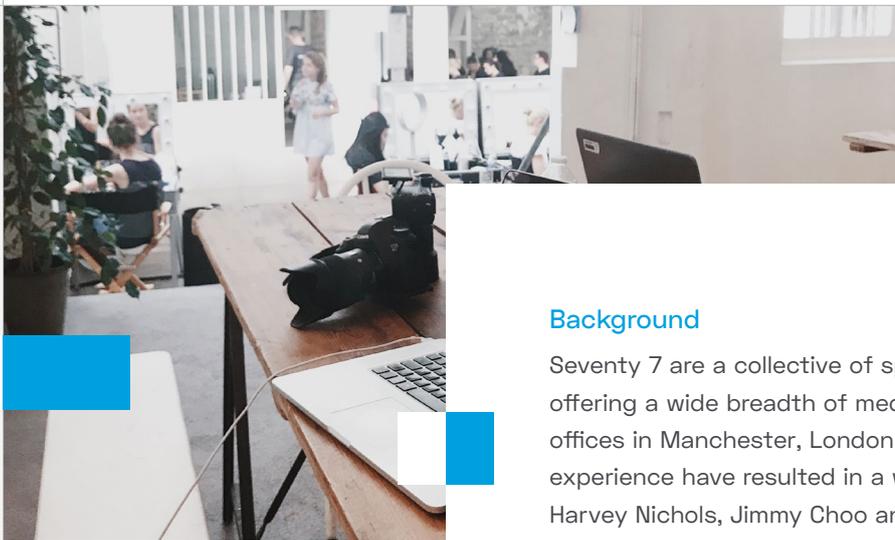


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Background

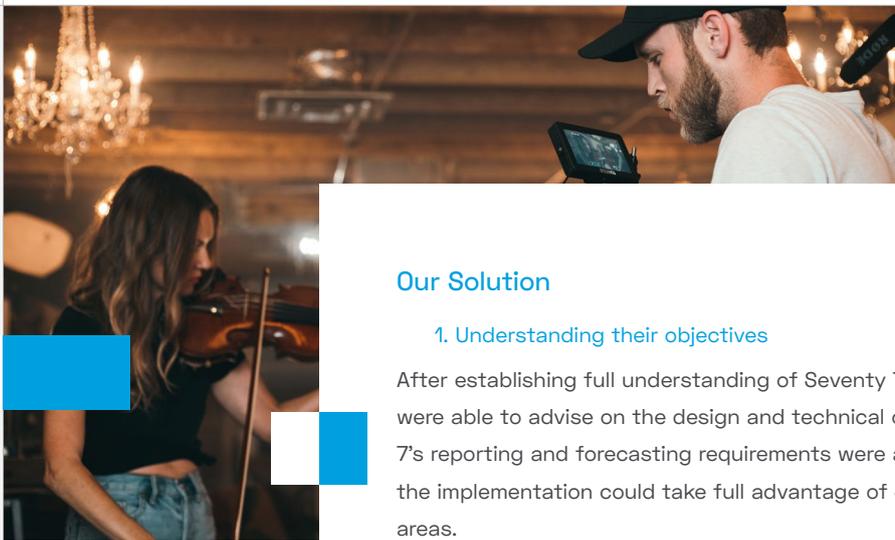
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Objectives

Adapt IQ were tasked to configure Salesforce Sales Cloud to manage Seventy7's sales process, from lead entry through to closed opportunity, ensuring that the system was able to scale with the growth of the business. Reporting was a particular focus, to allow Seventy7 to easily identify growth and pipeline throughout the organisations' products and locations. Adapt IQ worked with Seventy 7 to understand their current processes and advised how Salesforce could streamline these processes, yet still allow for strategic growth.



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Our Solution

1. Understanding their objectives

After establishing full understanding of Seventy 7's sales and business processes, we were able to advise on the design and technical configuration of their solution. Seventy 7's reporting and forecasting requirements were also assessed at this stage to ensure the implementation could take full advantage of Salesforce's integral capabilities in these areas.

2. Defining their Approach

With Seventy 7's requirements and potential scalability in mind, our solution was established in line with industry best practices. We ensured that our solution would not only support Seventy 7's Sales Management and Lead conversion processes, but also improve the efficiency and efficacy of these processes.

3. Customisation

Adapt IQ customised Salesforce with automations taking the place of repetitive tasks previously performed by the users. Extending this customisation, we created a more versatile and user-friendly system, mitigating any potential issues with user adoption. With focus on the relevant processes, we were able to provide a more controlled, cohesive system for Seventy 7. This ensured data integrity and quality, providing increased and more accurate insight and forecasting capabilities

4. Delivery

After providing confidence and initial familiarity with regular touchpoints and 'show and tell' engagements, Adapt IQ delivered the solution to Seventy 7 within the planned timeframe. To ensure seamless user adoption, we created fully customised and comprehensive training material, which was delivered to Seventy 7 in a 'train-the-trainer' approach in it's primary use. The training material was then also provided to Seventy 7 to act as a resource for future benefit.



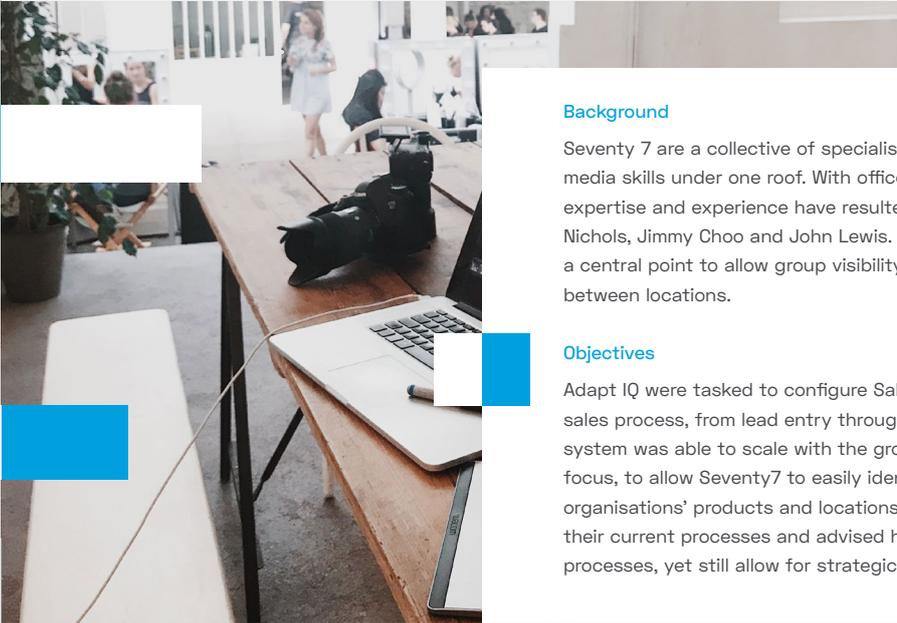
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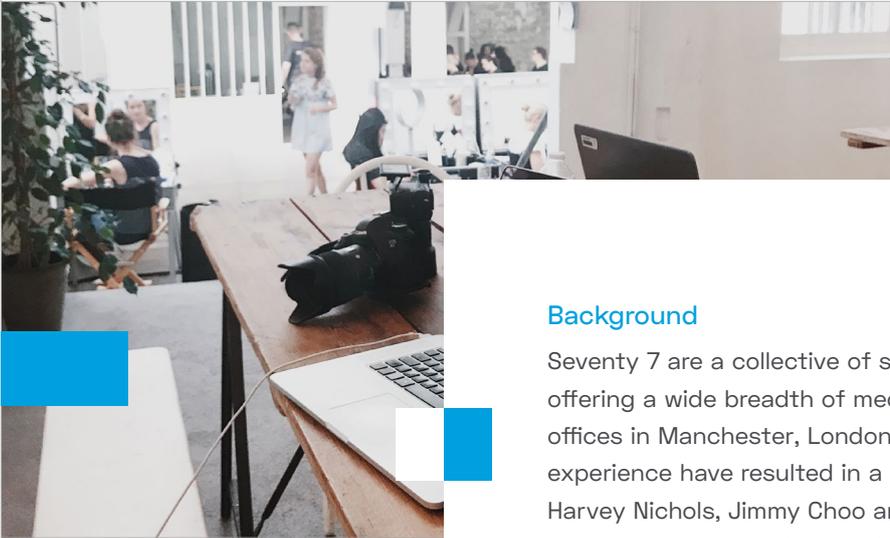
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