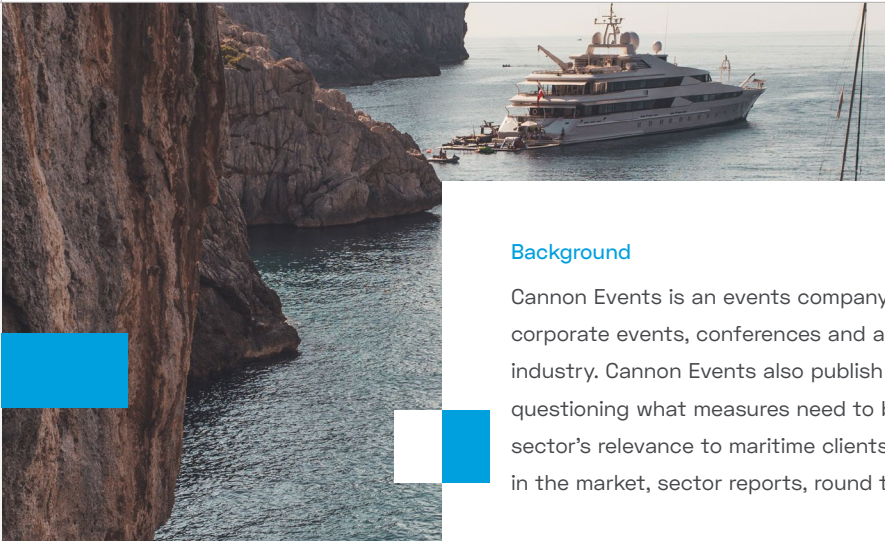# Adapt IQ

The Marine Insurer
Corporate Events

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Background

Cannon Events is an events company based in London, specialising in corporate events, conferences and award dinners for the Marine Insurance industry. Cannon Events also publish a quarterly journal, 'The Marine Insurer', questioning what measures need to be taken to maintain the insurance sector's relevance to maritime clients, with collaboration from influential figures in the market, sector reports, round table discussions and analysis.

With a team of experts based in the UK, Cannon Events generate interest and exposure to key developments in the sector, whilst maintaining a positive impact on the industry vertical as a whole.

Objectives

Cannon Events needed a cloud-based system to allow their team to work together in communication and nurturing of their client base. Their key objective was to have an integrated solution, centralising their data and email communications in a system that supported real-time updates and comprehensive reporting capabilities. Given Cannon Events' reliance on telephone marketing, having tasks, notes and events synched to the system was a high priority.

Cannon Events previously used disparate systems (Mailchimp/ Outlook) and static spreadsheets to track customer interactions. As these systems were not tied together, this resulted in a distorted view of their data, re-keying information, duplication of data, and the inability to surface required data at the right time. Tracking customer interactions within the team was difficult and time consuming, resulting in team members contacting the same client several times. The existing systems were too time consuming and erroneous to allow Cannon to grow at their expected rate.

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Our Solution

01. Understanding their Objectives

With a thorough and proven discovery process, Adapt IQ fully understood Cannon Events business processes and requirements. As such, we were able to advise on the design and technical configuration of Salesforce Sales Cloud to target their pain points and provide an integrated solution, with a centralised source of client data, activities and communications.

02. Defining their Approach

Our solution utilised the in-built Salesforce Outlook Integration to bring together the teams tasks, calendar events, and emails, with bi-directional syncing between Salesforce and Outlook, in real-time. Adapt IQ improved Cannon Events' productivity and team alignment by providing a unified view of client accounts and contacts, with crucial data surfaced for each record. This allowed Cannon Events to continue with their existing processes, but drastically improved their efficiency.

03. Customisation

Adapt IQ ensured that Salesforce was configured to allow Cannon Events to work at their traditional high cadence, with a streamlined interface allowing their team to access, and record data in minimal time. We created automations to negate the need for repetitive, manual entry of data, further saving the team time in their day-to-day activities. Reports and Dashboards were configured to provide insights into the client base, allowing the team to contact the right customers at the right time, and use customer profiles to identify suitability and interest for upcoming events.

04. Delivery

Adapt IQ were able to provide confidence and familiarity with Salesforce for Cannon Events, by hosting regular touchpoints throughout the engagement. These 'show and tell' touchpoints showcased the work in progress, and allowed Cannon Events to have crucial input into the solution. Adapt IQ provided a data template to Cannon Events to allow us to seamlessly import their existing data, as well as providing the tools and training for Cannon Events to import their data in the future.

To further ensure adoption, Adapt IQ created fully customised and comprehensive training material, and delivered to the Cannon Events team in an interactive session. The training material was then also provided to Cannon Events to act as a resource for future benefit.

> *Adapt IQ have revolutionised the way we work on a day to day basis. We have gone from not knowing who was doing what and when, to now having full visibility into all team members actions. This has not only saved us time, but has made our client data, which is the foundation of our business, absolutely bulletproof. We now have one single source of truth with Salesforce. We highly recommend Adapt IQ, and we are already looking into adding telephony integration, working with Adapt IQ to define our roadmap for the future.*

Dan – CEO - The Marine Insurer

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