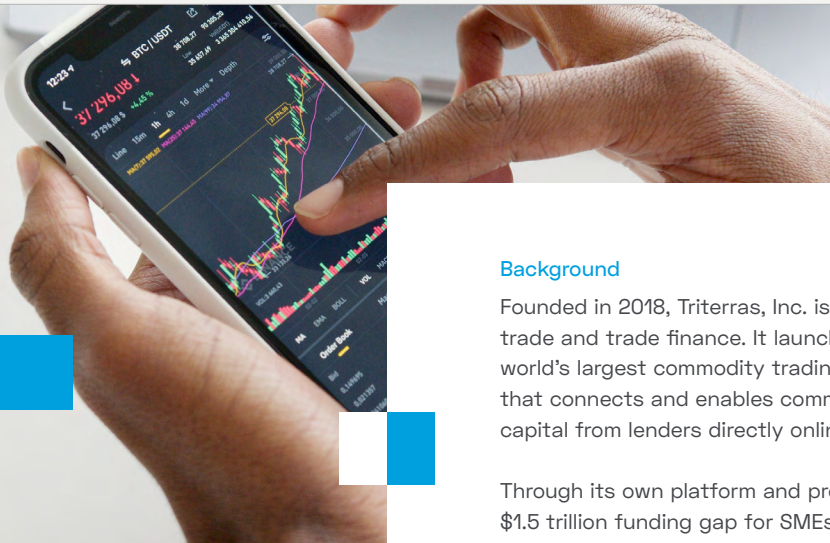


Triterras

Transforming Trade and Trade Finance

salesforce



Background

Founded in 2018, Triterras, Inc. is a leading fintech company focused on trade and trade finance. It launched and operates KRATOS™ —one of the world's largest commodity trading and trade finance digital marketplaces that connects and enables commodity traders to trade and source capital from lenders directly online.

Through its own platform and processes, Triterras aims to address the \$1.5 trillion funding gap for SMEs in trade finance.

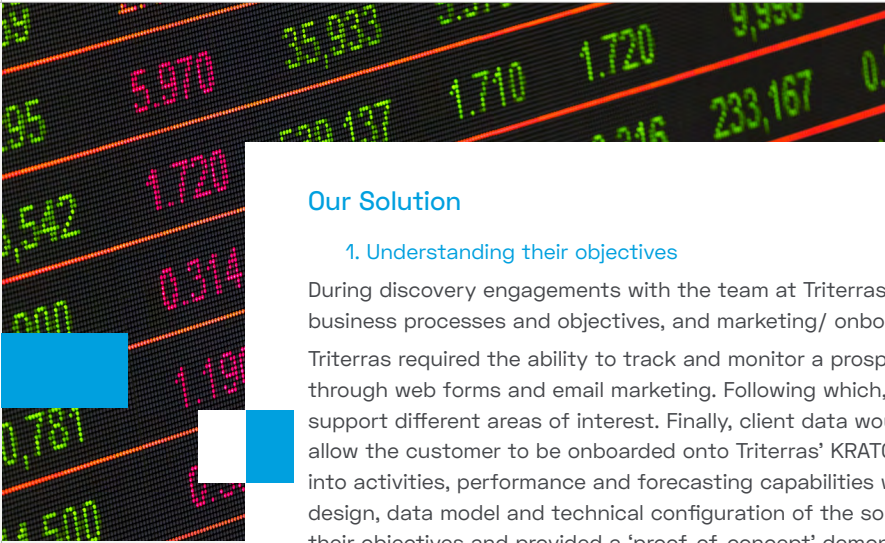
Objectives

Triterras is endeavoured towards the continuous building of its brand, educating and engaging prospective clients on their comprehensive suite of trade financing solutions, and the digitalisation of end-to-end trade processes via its blockchain-enabled platform.

Post the deployment of targeted online and offline marketing initiatives to generate awareness amongst Buyers, Suppliers and Alternative Lenders, Triterras was looking to capture key learnings gleaned from these programmes, and further translate this data into meaningful analysis. This led them to discover Salesforce. Salesforce meets these objectives by providing a single source of truth, rich analytics and automation to enable data-driven decisions in real-time for this onboarding process.

In addressing Triterras' need for a marketing automation tool to increase their lead flow, create, nurture and maintain meaningful connections, and ultimately empower their team to create more trades, Pardot provided the perfect accompaniment to meet this need with Salesforce's Sales Cloud.





Our Solution

1. Understanding their objectives

During discovery engagements with the team at Triterras, Adapt IQ sought to understand Triterras' business processes and objectives, and marketing/ onboarding campaigns.

Triterras required the ability to track and monitor a prospect's interaction with Triterras, captured through web forms and email marketing. Following which, different sales processes were required to support different areas of interest. Finally, client data would need to be recorded and presented to allow the customer to be onboarded onto Triterras' KRATOS™ platform, and comprehensive insights into activities, performance and forecasting capabilities were required. Adapt IQ advised on the design, data model and technical configuration of the solution to enable Triterras to succeed in their objectives and provided a 'proof-of-concept' demonstration to the team.

2. Defining their Approach

After mapping the desired business outcomes against the technical requirements, and having gained feedback from our demonstration, our solution was established. With Triterras' requirements and objectives in mind, we ensured that the complete client journey was defined by the area of interest and type of entity, and the required data was surfaced at the end of their journey, ready for seamless onboarding to KRATOSTM. Enhanced activity functionality through Gmail integration, and comprehensive reporting capability was defined.

3. Customisation

Adapt IQ customised Salesforce Sales Cloud with automations to provide a solution to the matching requirements, and other automations to replace mundane repetitive tasks previously performed by the team. Lead allocation was defined for different geographical territories, and client areas of interest, enabling regional teams to focus on their clients. The creation of Contracts was automated upon a successful Opportunity Close Win to record the data required to onboard the client to KRATOS™, negating the need to sift through large amounts of data required for the onboarding process only.

Extending our customisation in a further phase, we configured a mechanism to relate and capture appropriate Counterparties to an Opportunity. To support Triterras' need for this addition, we also configured reports to surface Counterparty information with relevant information from both Counterparty and associated Opportunities.

4. Delivery

With daily touchpoints with the Project Team and 'show and tell', Adapt IQ delivered the solution within the planned timeframe. To ensure seamless adoption, Adapt IQ created fully customised and comprehensive training material, for both the Sales Cloud and Pardot implementations. With the addition of 'live' walkthroughs, we delivered the training in a 'train-the-trainer' approach.



Working with Adapt IQ has been a great experience from the start. They delivered a Salesforce solution with Pardot, to meet our needs and requirements, and together we have already built upon the initial implementation to include further customisations. We were also trained in our own environment and are equipped to train new users going forward.

With excellent support throughout the project, and beyond, we would not hesitate to recommend Adapt IQ

Adriel Wong - Assistant Vice President, Business Development



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