

Modernizing a Global Investment Research Firm's Client Engagement Process

Client Profile

With 1,700 employees across 4 continents, the customer is a multi-national global investment market research firm. The organization provides investment advice to over 1,000 of the world's largest hedge funds, mutual funds, private equity funds, and management consultancies.

Business Challenge

The customer was looking for a strategic partner to help them fully leverage their Salesforce Marketing Cloud Account Engagement investment. In addition to business analysis, project management, and Salesforce expertise, the organization wanted a vendor that would be willing to act as a long term partner and trusted technical advisor.

[Salesforce Marketing Cloud Account Engagement is a robust marketing automation platform that helps businesses create personalized email, mobile, and web marketing journeys for customers.](#)

The application uses customer data to predict preferences and automate messages for more relevant, efficient customer interactions. The software's powerful automation capabilities help organizations to optimize a wide range of client engagement and sales process functions.

Business Solution

The RadixBay team conducted a series of business analysis discussions with the customer to identify their current client engagement activities and sales team processes. During their investigation, RadixBay identified the customer's current needs, pain points, areas for improvement, and future goals.

Throughout the analysis process, RadixBay educated the client on the application's features that would help them improve sales and marketing activities and better interact with their wide range of clients.

“Our goal is to help our clients leverage technology to optimize their business processes and improve operations – not just implement software.”

Miriam Vidal Meulmeester Senior Director, Salesforce Practice

Business Outcome

After the analysis process was complete, RadixBay's team of Salesforce certified implementation specialists used the business analysis findings to configure the new application to:

- Use forms and landing pages to capture prospect information to generate personalized client engagement campaigns
- Improve lead qualification and ROI tracking using the application's automation and scoring capabilities
- Automatically qualify prospects by assigning numerical scores and letter grades based on their marketing asset engagement activities
- Automatically assign qualified prospects to sales reps based on region and asset class
- Analyze engagement data for prospects that converted to clients to attribute revenue to the marketing department
- Display reports for lead qualification metrics and revenue generated from converted prospects
- Provide better insight into the sales funnel
- Tightly integrate with the customer's existing Salesforce CRM platform

Deliver personalized customer engagement at scale, with marketing software built on the world's #1 CRM.

Marketing Cloud Customer Data Platform

Unify, segment, activate, and analyze all your data with a customer data platform.

Marketing Cloud Engagement

Build customer relationships with personalized marketing and customizable journeys.

Marketing Cloud Intelligence

Use one platform for all your marketing data, investments, KPIs, and decisions.

Marketing Cloud Personalization

Deliver real-time, 1-to-1 customer experiences at every touchpoint.

Marketing Cloud Account Engagement

Unite marketing and sales on a single platform for B2B marketing automation.

Loyalty Management

Win customers for life — and keep them coming back — with personalized loyalty programs.

Know your customers.

- ✓ Gain a unified view of your customer by connecting their data across every channel and device
- ✓ Reach new audiences with first-, second-, and third-party data

Personalize their experience.

- ✓ Pair customer data with AI to deliver personalized, connected experiences
- ✓ Listen, interpret, and respond to customer intent

Engage across the entire journey.

- ✓ Create two-way, real-time engagement from awareness to advocacy
- ✓ Anticipate and deliver the next best action for every customer
- ✓ Engage customers across the entire journey by connecting marketing, commerce, sales, service, and more

Analyze your impact.

- ✓ Get deep insights across all channels and devices with AI and Google Analytics 360
- ✓ Act on those insights with data-driven, personalized experiences across every stage of your customers' relationship with your brand

RadixBay Marketing Cloud Services

From strategic planning and initial system design to optimization and ongoing support, RadixBay's team of certified Salesforce experts help you to achieve the maximum value from your Salesforce Marketing Cloud environment.

Our functional and technical support specialists are able to tailor your Salesforce Marketing Cloud products to your business needs, easily integrate your platform with other systems and fully leverage all of Salesforce's enhanced features.