

A partnership to strengthen partnerships

How we turned a static, informational portal into a dynamic business platform for our client, with Salesforce

Case study



Overview

Forging loyalty through experience

Our client is a leader in cloud-controlled networking that caters to businesses of all sizes and sought to offer its customers an enriching community experience. By leveraging Salesforce, we created an easy to maintain, intuitive, multilingual, and robust platform for enhanced collaboration, leading to a 25% increase in its partner sales.



Challenges

Partner management system (PMS) problems

The biggest obstacle for our client was its outdated and static partner management system. Specific problems included:

- A static system focused on sharing information and nothing else
- Portal information managed by multiple content management systems, creating haphazard and inconsistent content on the portal
- Limited visibility and tracking of the portal's performance with significantly fewer data points to identify issues or plan optimizations
- Manual overheads, which increased the quote cycle time and allowed for deviations in pricing structures and resulted in poor experiences



Solution

Upgrading the interface

We worked with Sales Cloud, Service Cloud, Experience Cloud, Salesforce CPQ, and Salesforce CMS to integrate with multiple CMS systems, SSO authentication schemes, and analytics tools to create a transformed and dynamic portal.

We focused our efforts and in the end:

- Redesigned the PMS to improve opportunity collaboration
- Simplified content management by implementing single-source content management
- Added site analytics with Tealium and community analytics with Google
- Put in place a configure price quoting (CPQ) tool with advanced approvals and pricing management



Impact

The community effect

The augmentations we made turned our client's partner portal into an engaging and enabling business driver.

Some of the impacts our Salesforce implementation delivered include:



A 25% increase in partner sales due to enhanced engagement



Easy content management with a single source CMS



Almost 50% faster partner onboarding



Approximately 40% reduction in quote cycle time through improved price discipline



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