Grazitti Interactive®
Marketing for Digital Natives

Case Study

6,000 Hours Saved, 7% Higher Win Rate: The Power of Seamless Salesforce-Clari Integration

Client Overview

Industry
Software Development

Region
New York, USA

Company Size
1,001-5,000 Employees

Featured Solution
Salesforce - Clari Integration

About the Client

The customer is an online brand management company that provides AI-based search solutions enabling top-notch brands to excel across customer service, eCommerce, marketing, development, and more. Serving brands like Subway, Lego, Samsung, and Verizon, it has been designated as a 'Leader' in over five G2 categories.

Sales Precision at Risk: The Challenge of Disparate Systems

Disparate systems create data silos, skew operational expenses, slow down decision-making, and limit pipeline visibility. Without seamless data flow, sales teams operate without a clear picture, and leadership makes decisions based on incomplete insights.

For this digital presence platform provider, the lack of seamless integration between Salesforce and Clari led to manual data collection, increasing errors and consuming valuable time.

With their systems not integrated and data scattered across systems, they faced:

- Inconsistent and error-prone sales forecasts
- Delays in data consolidation slow down critical business processes
- Slow decision-making due to delayed data consolidation
- Stalled deals due to limited pipeline visibility

"Every hour used on administrative chores is one not spent with customers. We wanted a faster, smarter approach to handle our pipeline."

Efficiency Bottleneck: Administrative Overload and Disconnected Systems

Even with the client using robust platforms like Salesforce and Clari, technical problems dogged their sales operations. This lack of seamless connection hampered real-time insights, limited view of prospects, and made proactive pipeline management difficult—all of which clearly created a need for an automated, unified solution.

How This Impacted Efficiency

Forecast deviations

Manual data collection led to a 25% variance in sales forecasts, complicating strategic planning.

Productivity bottlenecks

Sales representatives spent 40% of their time on administrative tasks, limiting their focus on revenue-generating activities.

Missed opportunities

Limited real-time pipeline visibility made it difficult to act on high-potential deals.

Collaboration gaps

Disparate systems slowed communication, affecting deal momentum.

From Fragmented Data to Unified Precision: How Seamless Integration Transformed Sales Performance

Achieving seamless integration between Salesforce and Clari demands technical expertise and a deep understanding of data alignment. Recognizing their challenges, the client partnered with our team, trusting our extensive experience to ensure a smooth, scalable integration.

What Our Salesforce Certified Experts Executed

- Integrated Salesforce and Clari to unify data sources and eliminate silos.
- Automated sales activity capture for real-time insights, removing the need for manual data entry.
- Customized opportunity stages within Salesforce to enhance deal visibility in Clari, improving pipeline transparency and accelerating sales velocity.
- Developed a custom AI-driven dashboard in Clari, enabling sales representatives to make data-backed decisions and focus on high-potential deals.
- Implemented real-time pipeline management tools, empowering sales managers to monitor deal statuses and swiftly address bottlenecks.

From Hours Lost to Deals Won: The Measurable Shift in Sales Performance

Having real-time analytics at their disposal and the elimination of tedious processes, the sales team made tangible improvements right away that directly affected the bottom line.

Highlights

7%
Increase in Sales Win Rate

10%
Improvement in Sales Productivity

80-90%
Reduction in Manual Sales Data Analysis

6000
Hours Saved Annually

Conclusion

"Our sales teams no longer wastes time chasing down data or manually updating reports. With real-time insights and automated processes, our team is more effective. The boost in productivity and accuracy has helped us win more deals and scale without adding overhead and hitting our targets with confidence."

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