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Head of Sales & Marketing
TradeCard



TradeCard Transforms Marketing Efforts With Campaign Management From Salesforce.com

CHALLENGE

Marketing executives at TradeCard had plenty of great ideas for effective marketing campaigns. But demanding and disconnected marketing tools frustrated their attempts to pursue new, creative marketing concepts.

SOLUTION

After evaluating ten alternatives, TradeCard selected salesforce.com Campaign Management. Working seamlessly with the already deployed salesforce.com CRM solution, Campaign Management provided marketing executives a way to test, measure, and pursue their best marketing ideas. By integrating sales and marketing processes, TradeCard marketing was able to deliver better leads for less and tie revenues directly to marketing campaigns.

RESULTS

The result was an explosive improvement in productivity: from maintaining one ongoing promotion to running 16 campaigns simultaneously. Meanwhile, both marketing and sales work hand in hand to convert prospects into customers.

DEMANDING AND DISCONNECTED TOOLS CREATE HEADACHES

Brad Scheller knows something about headaches. As head of sales and marketing for TradeCard, Inc., a New York provider of financial supply chain services, Scheller manages the sales efforts of a company whose singular focus is to relieve the pain points that plague business-to-business procurement. TradeCard's Financial Supply Chain platform helps companies cut their procurement costs by streamlining all aspects of their transactions: from inspection and purchase order approvals, to data compliance and payment issues. For companies like footwear giant Wolverine World Wide — maker of Hush Puppy shoes — using the TradeCard platform saves the company 20 cents for every pair of shoes sold internationally.

Scheller's headaches, however, hit a bit closer to home. With a mission to provide air cover for TradeCard's sales force, the marketing team struggled to create lead generation marketing campaigns for a global sales team. The marketing group was hobbled by an outdated system and marketing data spread across five different systems. "They had a lot of ideas for creative campaigns," Scheller explains, "but our existing infrastructure kept them from pursuing them."

MARKETING AIMS TO TAP INTO SALESFORCE.COM'S CRM SOLUTION

Even more frustrating was that marketing executives were anxious to tap into data housed in salesforce.com's CRM solution, which TradeCard's sales team had been successfully using for over two years. "Sales reps were inputting information every day that marketing just didn't have the tools to leverage," Scheller says. "They didn't have an easy way to understand the status of prospects in the sales cycle, so they couldn't target them with campaigns to push each prospect to the next level. And manually gathering data on customers and prospects devastated productivity."

A marketing manager spent up to a week every month culling information from five different sources and manually reconciling data to purge duplicate records. TradeCard's one ongoing campaign — a monthly

Case Study

e-newsletter — was so overwhelming that marketing couldn't do anything else, such as putting more time into leveraging trade show leads or mounting direct mail campaigns. Managing the database of 12,000 email addresses was all-consuming. "There was so much overlap between the different data sources that we had to manually check for duplicates, and then remove them one by one," explains Scheller.

The marketing team knew that the fastest route to creating strategic marketing campaigns was to leverage the information already stored in salesforce.com. After an exhaustive review of ten solutions, TradeCard selected salesforce.com Campaign Management. The hosted service provided a fast and easy way for TradeCard to integrate sales and marketing, deliver better leads for less, and tie revenues directly to marketing efforts.

"With salesforce.com Campaign Management, we've gone from maintaining one marketing promotion to operating 16 campaigns simultaneously."

—Brad Scheller
Head of Sales & Marketing
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While Scheller believes tying sales opportunities and revenue directly to TradeCard marketing campaigns is valuable, he thinks the complete customer history that resides in the hosted Campaign Management service is priceless. "By leveraging salesforce.com, we automatically create a campaign history for every prospect and customer. This allows a sales rep to see how a prospect has been marketed to — and that's a huge advantage for sales. Now we can target specific verticals with customized messages that have proven successful with that vertical in the past."

Deployment was also a snap. "You can't stop selling to bring on a new solution," says Scheller. "But the sales team already knew how to use salesforce.com, and many liked the changes we made to the CRM fields to accommodate our new integrated approach with Campaign Management. Just by inputting account data every day, salespeople were helping with marketing campaigns and didn't even know it."

NEW FOCUS ON CREATING, REFINING NEW CAMPAIGNS

Benefits came swiftly. Just weeks after implementing salesforce.com Campaign Management, TradeCard went from maintaining one ongoing promotion to simultaneously operating 16 separate campaigns: trade shows, focus groups, direct mail, seminars, and user group meetings. "Marketing no longer spends all its time on database management and instead spends 80 percent of the time executing new campaigns, maximizing their value, and pumping new ideas into the pipeline," says Scheller.

Along with Campaign Management, TradeCard uses the response tracker to tie specific sales contacts to the marketing campaign that reached out to them. Recently a customized telemarketing campaign to 216 previously targeted prospects resulted in three promising opportunities.

POWERFUL FEATURES INTEGRATE MARKETING INTO SALES PROCESS

Scheller says salesforce.com's Campaign Management service is rich in features: the marketing team views customized records to see which prospects were targeted, analyzes ROI to view converted leads and identify opportunities, and uses attachments to store copies of campaign elements such as labels or mailers. All of it makes the team's job easier, and for the first time, enables marketing to become integral to the sales process. "This is the way it's supposed to work," says Scheller. "Our biggest worries now are how to keep our operations up to pace with the capabilities of salesforce.com Campaign Management."

ABOUT SALESFORCE.COM

Salesforce.com is the world's leader in delivering software-as-a-service. It offers the award-winning salesforce.com family of on demand solutions for integrated sales force automation, campaign management, customer service and support, and document and file management to help companies meet the complex challenges of global customer communication. It has also introduced sforce, a new service that will change how applications are built as significantly as salesforce.com changed how applications are delivered. The company has more than 8,400 customers and 120,000 subscribers running its services in 11 languages.

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