



## Financial Services: Sales-to-Prospect Communication

### A Case of Sales Channel Enablement

*Sales runs on information. A cost-effective, trackable, scalable, managed communications program is essential to repeatable sales and healthy customer relationships.*

#### EXECUTIVE SUMMARY

A national, publicly traded provider of REIT investment opportunities sought to enable its direct sales and broker network with customized pre-sale materials using a secure self-service digital storefront. A secure online solution integrating IFS's fulfillment center with the client's Salesforce.com CRM was deployed to empower sales, track activity and account for assets, while minimizing management overhead.

## CHALLENGES

The client's operations team, based in Denver, Colorado, was experiencing issues with their previous fulfillment provider. Issues included:

- Incorrect materials inside an investor kit (outdated materials, incorrect kit items, etc.)
- Difficulty making changes to their eFulfillment platform

## RISKS

Despite the client's dissatisfaction with their previous vendor, the move to a new fulfillment provider was perceived as risky for the following reasons:

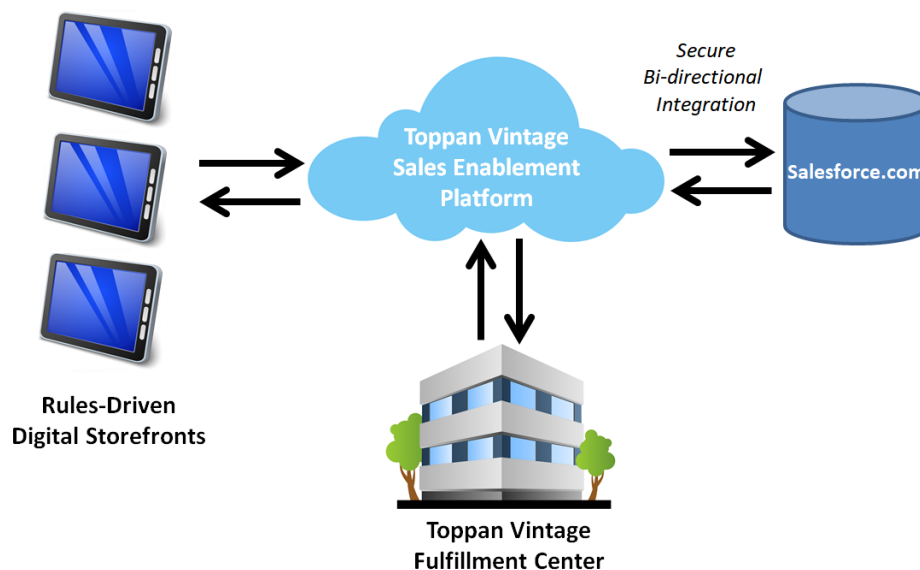
- A new provider would need to integrate the web store into Salesforce.com (SFDC), with all the associated business rules
- The current custom order process used to allow "approved" distributors to order a subset of approved materials directly from the client's website
- Potential disruption to in-process sales activity
- IFS's fulfillment center is located in Massachusetts; client operations occur in the Mountain time zone, which presented concerns about order cut-off times and same-day fulfillment

## THE IFS SOLUTION

Using its proprietary, cloud-based B2B process platform, IFS was able to securely integrate with the Salesforce.com application to provide seamless access to a rules-driven catalog from the CRM contact or company record. As a result of the vertical integration of storefront, customer service, fulfillment and inventory control, the client's sales managers have a real-time view and pinpoint control of the relationship between marketing material and revenue generation for each customer and sales rep.

The following rules, implemented in the IFS platform, further enabled the client to control and track the relationship between marketing investments and sales:

- Ability to make certain products unavailable to broker-dealers based on whether the product was approved for distribution in the state or not;
- Ability to set approval requirements for quantity limits and shipping service levels (e.g., FedEx next day service);
- Ability to put all orders in a “pending” status for 30 minutes which would allow the person that placed the order to modify it before it is released for processing;
- Ability to create user profiles which limit access to ordering a specific category of items. For example, if someone is not a member of the trade show and conference team, they would not be able to order trade show/conference items; and
- Ability to push all order details back into the Salesforce record, including shipping costs and tracking information, in real time. All reporting is aggregated with other sales performance reports.



### RESULTS

Integrating IFS's fulfillment center with Salesforce.com to provide a seamless digital storefront and reporting allowed the client to enable its sales channel while maintaining control and accountability for marketing expenses. Integration, business rule set-up and receiving and configuring all inventory items at IFS's fulfillment center took just under four months. With the system up and running, the results have been impressive.

**+99.9%**  
same-day fulfillment  
performance

**100%**  
accurate  
fulfillment

**99.996%**  
system  
accessibility

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### Innovative Solutions at IFS Fulfillment Center

For the past two decades IFS has been a leader in marketing automation and sales enablement serving clients in both pre-sales and post-sale communications with integrated, personal, cloud-based solutions for regulated industries. The IFS fulfillment center delivers end-to-end sales enablement and customer communications solutions with the highest quality accuracy, reliability and value for companies in the financial, insurance and travel industries.

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