A photograph of a person in a gym performing a deadlift. The person is wearing black shorts with orange stripes and black sneakers with green accents. They are lifting a barbell with weights. The floor is blue rubber matting. The image is split into three vertical panels by thin white lines. A semi-transparent dark blue rectangle is overlaid on the left and middle panels, containing the title text.

Marketing Automation for a Fitness Franchise

The solution harnessed the power of Salesforce and Pardot to automate marketing and enhance sales processes.

Project Overview

Salesforce Pardot solution for B2B marketing automation, lead generation, and sales. The integrated solution not only streamlined the entire experience of onboarding, upselling, and cross-selling for franchisors but also enabled seamless closure and reopening of franchisees during the pandemic. The solution improved visibility into performance of sales operations and empowered the sales team to close more deals.

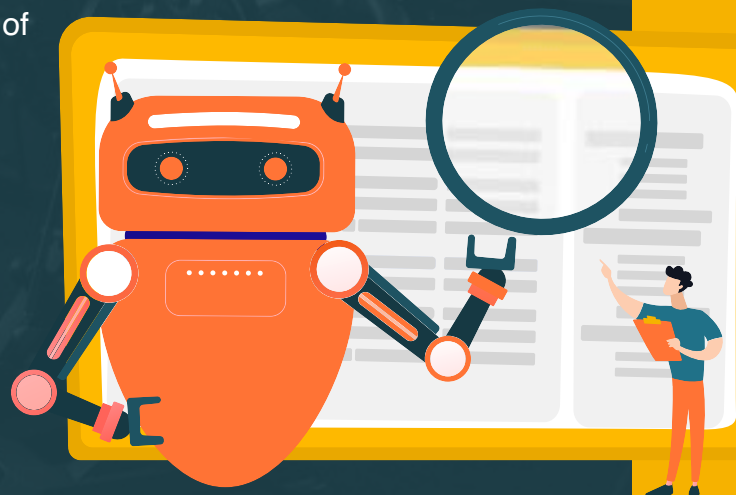
Client Profile

Based in the U.S., the client is a leading software implementation specialist of technology and related services for the health and fitness industry. They support over 16K health clubs and fitness centers and more than 150K fitness professionals across the United States, Puerto Rico, Canada, and Mexico.

Business Requirements

The client wanted to expand Salesforce utilization to accelerate growth and provide enhanced support for various customer engagement teams. They required day-to-day support of Salesforce Pardot marketing automation activities and wanted to customize Pardot in line with their rebranding efforts.

- ◆ Automate lead nurturing process
- ◆ Enable onboarding process for franchisees
- ◆ Facilitate cross-selling and upselling
- ◆ Enable seamless closure and reopening of franchisees during the pandemic
- ◆ Implement a customer portal for owners
- ◆ Leverage business data for insights and decision-making



QBurst Solution

The solution integrated Salesforce CRM and Pardot to bring sales and marketing data in sync with each other. Pardot B2B automation tool is used for marketing, lead generation, and lead nurturing. The solution converts qualified leads into opportunities and accurately forecasts the probability of sales conversions. New wins are onboarded into the client's system and managed as customizable franchisee accounts. Automated marketing features enabled hassle-free re-branding of the enlisted franchisees.

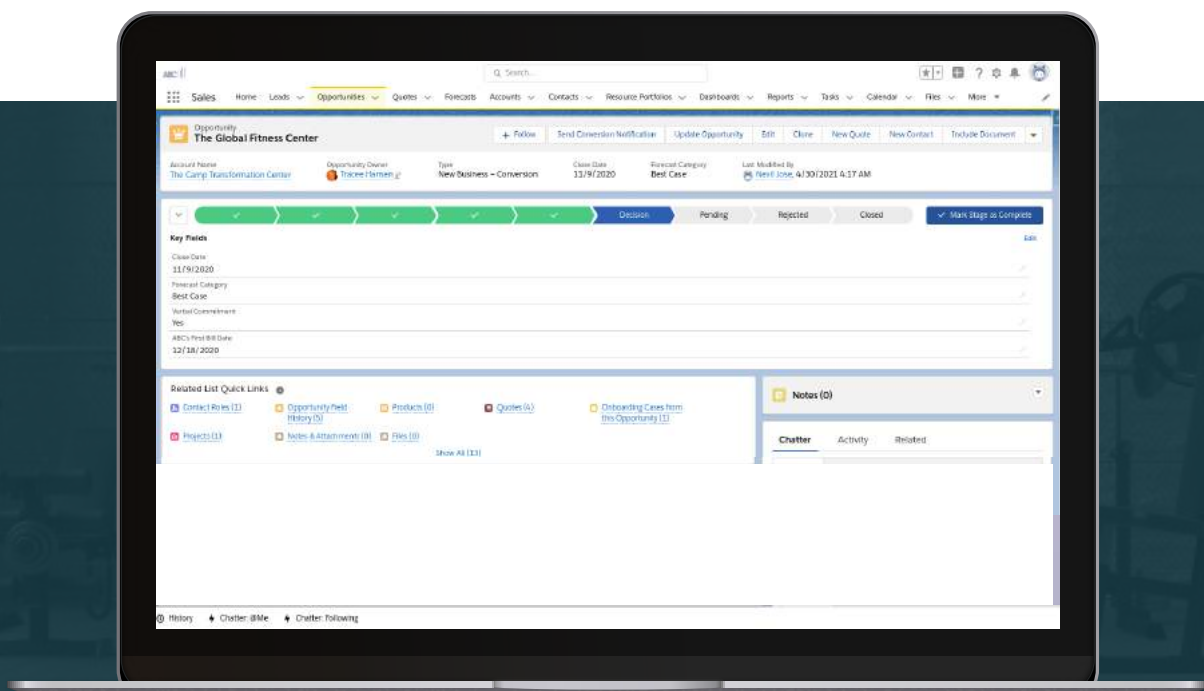
Upselling and cross-selling processes are used to add new products and services such as door access and training software. This is facilitated by a UI wizard built on the Pardot Lightning component. The solution uses record types to filter new sales from upselling and cross-selling activities. Strategically unique sales processes and sales paths are performed to handle each process.



Closure and reopening of franchisees are managed via 'Web-to-Case' and 'Email-to-Case'. The solution provides a wizard to select multiple accounts. An email module acknowledges closure with a link to instructions about the reopening procedure. Alternatively, reopening requests can be sent to the support email address. The reopen requests are backed by 'Email-to-Case' and case assignment rules.

Key Features

- ◆ Automation rules
 - ◇ Updates lead source based on the values of prospects
 - ◇ Initiates assignment rules considering values on prospect records
- ◆ Revamped forms and layout templates in accordance with client requirements
- ◆ Static and dynamic lists are created to send autoresponder emails, segmentation rules, and automation rules
- ◆ Flows create campaign members when Pardot prospect field records are updated
- ◆ Process Builder automates MQLs (Marketing Qualified Leads) for Pardot records
- ◆ 'Sales Process' and 'Sales Pipeline' streamline various business use cases to onboard franchisees
- ◆ Customized user interfaces for Salesforce agents to update multiple franchises at the same time
- ◆ Integrated franchisee master data management with a leading transaction management platform
- ◆ Prospect life cycle data from Salesforce and Pardot provide actionable insights for strategic marketing



Technologies Used

- ◇ Salesforce CRM
- ◇ Apex
- ◇ Visualforce
- ◇ Aura
- ◇ Pardot Forms
- ◇ Automation Rule
- ◇ Email Template
- ◇ Flows
- ◇ Assignment Rules

Business Benefits

- ◆ Increased efficiency of lead nurturing and lead management
- ◆ Streamlined franchisee-opening procedures that reduced cost
- ◆ Established standardized key performance indicators (KPIs) for rating franchisees
- ◆ Enabled promotion of best practices via cloud community



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