



## Admin Within Case Study: Exclaimer

For nearly 20 years, **Exclaimer** has been the recognized global market leader in on-premises and cloud-based email signature software and solutions for Office 365, Microsoft Exchange, and G Suite. Headquartered just outside of London and with regional offices worldwide, its products are used by over 75 million users in 150+ countries.

Its diverse customer base includes renowned international organizations such as Sony, Mattel, 10 Downing Street, NBC, the Government of Canada, the BBC, and many more organizations of all sectors and sizes. The company has been the recipient of multiple industry awards over the years and was the first company of its type to successfully achieve the ISO 27001 Certification for its cloud-based signature management service.

### Project Background:

- Exclaimer were looking to replace their current CRM (Dynamics) and Marketing Automation Platform (Hubspot) with Salesforce and Pardot.
- Exclaimer sales team consisted of approx. 40 individuals: sales representatives, BDRs, and partner management.
- Marketing drives the majority of the lead volume.

### Challenges:

- Exclaimer has a high transaction volume business, but their existing CRM was difficult and inefficient for the sales team to navigate and Sales KPIs were not easily reportable.
- Exclaimer was not getting full funnel visibility from Lead to Cash and wanted to better tie their marketing efforts to sales results.
- Exclaimer's management team required a full POC to ensure both that the transition would not disrupt the business, and that the change would be accepted by the sales team before signing a costly long-term contract.
- Exclaimer wanted a Salesforce partner that could implement quickly and cost-effectively and would use a phased approach (for the smoothest possible transition).

### Solution:

- Admin Within completed a full new implementation of Sales Cloud, Pardot, and High Velocity Sales.
- Existing customer data, as well as open Lead and Opportunities were migrated from multiple prior sources (Dynamics, Hubspot, and a custom database).
- After a successful initial proof of concept, the sales teams were trained and went live on Salesforce on a region-by-region basis over the course of 3 months.

- Exclaimer rapidly adopted Salesforce and has upskilled their internal team on day-to-day system management, while continuing to engage Admin Within for ongoing enhancements.
- Key benefits included:
  - Being able to generate quotes directly in Salesforce
  - Dashboards for the sales team to monitor their KPIs
  - Complete marketing ROI measurement

#### Feedback on Admin Within:

- “They were able to quickly understand the way our business operates and use this knowledge to adapt the CRM to our needs, leading to an efficient and timely roll out. I stepped into a Salesforce Admin role at the same time Admin Within began our roll out. Chris and his team were very supportive of this and the mix of well documented CRM updates and guidance on my own changes were a great help to my own personal development.”



Adam Jacobi, Sales Operations Manager