



LEGACY UNPLUGGED: A JOURNEY TO A SCALABLE, DATA-DRIVEN FUTURE

DATAMATICS

About the client

The Client is a trusted and leading manufacturer in the complex electrical products industry, known for quality, reliability, and innovation.

As their business grew, they recognized that their legacy systems were no longer sufficient, with marketing, sales, and operations teams working in silos that hindered visibility, collaboration, and scalability. Understanding that sustainable growth required streamlined orchestration rather than just increased output, the Client sought to modernize their internal systems to better align with the pace and scale of their expanding operations.

The Challenges: Outdated Legacy Systems and Fragmented Workflows

The Client realized their legacy systems could no longer support their expanding operations. Each department functioned in isolation, which created a fragmented workflow and a lack of collaboration across teams, making it challenging to manage opportunities consistently and leading to inefficiencies in the sales process, poor lead management, and missed follow-up opportunities that impacted revenue.

As the company attempted to grow, its outdated tools and disconnected systems became a bottleneck, unable to scale or adapt to evolving customer demands. Data was scattered across platforms, making it challenging to gain holistic insights or drive informed decision-making. These limitations not only reduced operational efficiency but also hindered strategic growth, signaling a clear need for digital transformation.

The Solution: Salesforce-Driven Digital Transformation Solution

Datamatics partnered with the Client to modernize their infrastructure using Salesforce's ecosystem. The implementation of Sales Cloud Enterprise Edition standardized and streamlined sales processes, while Salesforce CPQ automated and sped up quoting. Pardot enhanced marketing automation for better lead nurturing, and Manufacturing Cloud with Rebate Management improved partner and channel collaboration.

Service Cloud upgrades strengthened post-sales support, and Work Queue Management optimized task distribution. Tableau CRM provided real-time analytics for informed decision-making. Seamless integration with the Client's ERP eliminated data silos, creating a unified data source.

Key solutions included:

- Sales Cloud for consistent sales and leadership visibility
- Salesforce CPQ for fast, accurate quoting
- Pardot for automated marketing and lead management
- Manufacturing Cloud with Rebate Management for channel management
- Enhanced Service Cloud for post-sales operations
- Org-wide Work Queue Management
- Tableau CRM for advanced analytics
- Full ERP integration

The Impact

Sales & Marketing Alignment

Integrated workflows boosted collaboration across the buyer journey

Accelerated Quoting

Automated quotes via Salesforce CPQ to reduced turnaround time

Scalable Sales Operations

Standardized processes enable easy onboarding and predictable forecasting

Data Transparency

Real-time sales and marketing data improved decision-making

Future-Ready Tech

Flexible, scalable tech stack integrates smoothly with ERP and CRM

ABOUT **DATAMATICS**

Datamatics enables enterprises to go Deep in Digital to boost their productivity, customer experience, and competitive advantage. Datamatics' portfolio spans across three pillars of Digital Technologies, Digital Operations, and Digital Experiences. It has established products in Intelligent Document Processing, Robotic Process Automation, AI/ML models, Smart Workflows, Business Intelligence, and Automatic Fare Collection.

Datamatics caters to a diverse global clientele across Banking, Financial Services, Insurance, Healthcare, Manufacturing, International Organizations, and Media & Publishing. The Company has a presence across four continents with significant delivery centers in the USA, India, and the Philippines. To learn more about Datamatics, visit www.datamatics.com

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