

## Salesforce CRM SALES CLOUD



CASE STUDY

## About Ideal Boilers

Ideal Boilers is one of the largest domestic and commercial boiler manufacturers in the UK. With a heritage spanning over a century, they remain an award-winning brand and are one of the most recognisable brands in the UK boiler market. From their manufacturing base in Hull, they continue to innovate their products, and their sales and service approach. Ideal Boilers are a British manufacturing success, with dedicated sales teams working to deliver quality products to a range of key customers, in both the commercial and the domestic environments. They sell to the public, developers, wholesalers and in both regional models, and by audience segment.

### Business Challenge

Sales opportunities and customer service were not optimised because Ideal Boilers did not have a full 360 degree view of the customer. Multiple systems were used to maintain customer records based on multiple sales channels. Opportunities to provide an outstanding customer experience were limited by a silo view of the customer. Sales and Marketing functions did not have transparency of each other's work. Furthermore, lack of effective integration to the back-end systems meant that creating effective and professional quotes for customers was a needlessly time-consuming job.



Gauri we able to quickly understand the remit of the project. They worked competently and effectively at every step of the journey to ensure that our timelines were met and our budget was respected. The Gauri team were happy to be flexible and helpful; even in areas that were not necessarily their responsibility.

With the initial phase delivered, stakeholder buy-in was enhanced as the project progressed. Would recommend without reservation. Their focus and can-do approach was a breath of fresh air.

John Glanville  
CIO Groupe Atlantic UK, ROI and North America  
(including Ideal)

## Our Engagement with Ideal

Working with key stakeholders from the sales teams, and IT, Gauri consultants successfully deployed a Salesforce Sales Cloud and Marketing Cloud. The transparency between sales and marketing has been achieved and the 360 degree view of the customer to ensure that sales focus follows engagement with marketing initiatives.

Furthermore, the Gauri team developed a series of integration interfaces with Ideal Boilers' back-end SAP ERP system to ensure that orders can be processed effortlessly following the acceptance of a quotation. This was the first phase of a project which will eventually see the sales and marketing elements united on a single system with service and field-service elements.



GDPR Compliant  
Marketing



Out of Stock  
Instances

**20%**

Improvement in  
Conversions



It was great to work with the Gauri team alongside my own userbase. They were helpful, responsive and supportive. They helped to build my knowledge so I can carry out my support role, and they helped take my users on the journey. A single-team approach enabled us to present a clear and consistent view to the end-users and to management enabling a good level of transparency.

Mike Rogers

## Our Approach

### Optimal Delivery Model & Resourcing

With an optimised blend of onshore and offshore resources, the Gauri team were able to give personal face-to-face business consulting in the Ideal Boilers office, while also delivering with the speed and agility of an offshore development centre. By blending the approach Gauri were able to deliver a high-quality personalised technical consulting and delivery at a pace and cost which worked in a tight project timeline.

### Deep Business Process Understanding

As Salesforce specialists (and with a wealth of experience with other CRM products) the Gauri consultants were able to challenge, refine, re-imagine and implement the Ideal Boilers sales processes in a slick modern system with customer interaction and real-time reporting at core.

Gauri are specialists in 'greenfield' implementations, where the customer has previously had no exposure to the software, we support every step of the way. With an agile delivery that allowed users to see progress and refine their requirements as the project was in flight we ensured that the customer vision was delivered and enhanced through the project to the point of go-live.

### Onsite Presence & Stakeholder Relationship

The willingness of the Gauri team to travel to various UK sites based on user location was a welcome approach which helped end-users to feel connected with the project, rather than have the project delivered in a central project location.

### Proactive Risk & Change Management

Although not formally engaged to support the change management agenda, Gauri's skilled consultants were able to offer insight into business challenges likely to arise within and beyond the project. Their holistic vision mitigated many risks and helped enable a smooth go-live.

### Technical Superiority & Best Practice Adoption

Alongside their business consulting and domain expertise, the Gauri team are hardcore technical specialists with a focus on minimising the total cost of ownership of the system. By maintaining a standard solution (where possible) the Gauri team were able to ensure that the ongoing support overhead of the system was minimised.

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## About us



# We're Experts in CRM Solutions.

Gauri are leaders in implementing and supporting CRM Solutions for Sales, Marketing, Customer Support and Field Services. We help our clients transition to Cloud and achieve a true Customer 360 on the world's leading CRM platforms.

We have seen CRM evolution since 1990's and have been working on emerging CRM technologies such as Salesforce since then. Our years of cumulative experience and Quick Start Solutions have delivered results for our clients.

Call us for sound advice on choice of platforms and key considerations for the right CRM for your business.



**Keston**

**POLARN O. PYRET**

