How Televerde Streamlined Sales & Marketing Operations With SnapLogic

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Televerde

50% time savings
Reduced time spent building integrations by half

Faster time to value
Ease of use and pre-built patterns benefited the Integration Team

$0
Eliminated API overage costs for clients

HEADQUARTERS
Phoenix, AZ

INDUSTRY
Professional Services

DEPARTMENT
IT

USE CASE
Data syncing between CRM and leads generated from a call center

CHALLENGE
Existing integration solution was expensive and difficult to use

SOLUTION
Televerde efficiently and securely integrated data between their client sales & marketing instances with Televerde systems

BUSINESS RESULTS
- 50% reduction in time spent creating integrations
- Easy-to-use platform relieved integration team
- Reduced API call overage costs to $0

INTEGRATIONS
Salesforce SOQL Snap
Salesforce Upsert & Lookup Snaps
Marketo to Salesforce (Joiner Snap)
Salesforce to Salesforce
Salesforce to SFTP (Directory Browser Snap)

Televerde Backstory

Televerde is a sales and marketing solutions company specializing in inside sales and global demand generation. It has a unique business model, which offers B2B companies marketing and sales support. Their clients range from IT and Tech to Industrial and Manufacturing industries.

The company also helps disempowered women find their voice and reach their potential by employing and upskilling incarcerated women and offering them a fair shot at a meaningful, productive life after release.

The women are contracted by Televerde, where they are compensated, upskilled in sales and marketing techniques and tactics, and certified in technologies such as Outreach, Marketo, Salesforce, and Eloqua.

The Challenge

Televerde's clients include large organizations, which have various business units requiring demand generation and sales pipeline creation support. Some clients have customer relationship management (CRM) software or marketing automation technology (MAT) instances that need to integrate with Televerde's own Salesforce CRM instance. Once the data is integrated, Televerde's workforce can then perform sales & marketing efforts on behalf of their clients. Televerde faced the challenge of integrating their clients' data efficiently with limited downtime for the Televerde team or the client. They had previously tried using a legacy iPaaS solution, but it was complex and expensive to use.

Adoption

Televerde was able to adopt SnapLogic in 3 months and start building integrations quickly. It would have taken twice the time to create integrations with their legacy iPaaS tool.

The Solution

The integration workflow for Televerde involves the following steps:

1. **Pre-built patterns:** They didn't have to start from scratch. Televerde used pre-built integration templates included with SnapLogic to save time and create a repeatable process.

2. **Data preview:** As integration pipelines were being built, Televerde was able to use the "preview" function in SnapLogic to check for data errors and be able to make corrections on the fly. This was a big time saver versus the legacy iPaaS solution that only allowed for a data preview once an integration was fully built.

3. **Client Salesforce (SFDC) to Televerde Salesforce:** Contact lead and account migrations are carried out from the client's SFDC to Televerde's SFDC system by using Snaps. The Salesforce SOQL snap is used for pulling data, Salesforce Upsert for creating or updating data and Salesforce Lookup for matching Salesforce fields.

4. **Client Marketo to Televerde Salesforce:** Data integration is performed to transfer data from the client's Marketo platform to Televerde's Salesforce system by using the Marketo Lead Read and Lead Write Snaps.

5. **SFTP to SFDC:** Televerde uses the Directory Browser Snap to read and pull csv files from their SFTP site to send them to Salesforce for processing. Televerde uses the File Writer Snap to post csv. files back to the SFTP site.

6. **Cost control:** Strict criteria for receiving and throttling API calls to not go over API call limits in Salesforce. Define filter criteria to minimize the number of records running through the pipeline.

Overall, Televerde efficiently integrates data between their client sales & marketing instances to Televerde systems. Snaplogic's ease of use enabled a very small but mighty team: Raylana Schwidde, Integration Developer for Televerde and Ashley Cruz, Director of Information Technology, to create the integrations mentioned above to streamline sales & marketing operations.

Business Results

Televerde have successfully integrated seven clients. Televerde's clients are happy with the integrations and trust the security of the integrations.

The success of the integrations has allowed Televerde to improve customer onboarding and they were able to reduce the time it took to create an integration by 50%. Televerde is also able to reuse their integration pipelines when a new client is onboarded, reducing duplication of work and costs.

Future use cases

Televerde is considering leveraging SnapLogic for various future use cases to optimize their data integration projects and streamline their processes:

1. **Data standardization:** SnapLogic can be utilized to optimize the process of data standardization. By using data transformation and mapping capabilities, Televerde can ensure that data from various sources, such as client Salesforce instances, Marketo, and SFTP files, adhere to a unified format and structure. This will enhance data quality and consistency, leading to improved reporting, analytics, and decision-making across the organization.

2. **Automating manual tasks on SFDC:** Televerde can automate manual tasks and repetitive processes within Salesforce. This could include tasks like lead assignment, data updates, or opportunity creation. By automating these tasks, Televerde can improve efficiency, reduce human errors, and free up resources to focus on more strategic initiatives.

3. **Agile support for various requests:** Televerde's team often receives requests from clients or internal stakeholders that require data integration support. SnapLogic's low-code capabilities enable quick and flexible development of data pipelines to accommodate ad-hoc requests without overwhelming the system. This agility ensures that Televerde can respond promptly to changing business needs without exceeding system limits or causing delays.

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4. **Optimization of round robin functionality:**
SnapLogic can enhance the current round robin process for lead distribution for Televerde's sales organization. By implementing intelligent load balancing processes, Televerde can distribute leads, opportunities, or other data evenly among team members, ensuring fair and efficient allocation of tasks. This optimization can lead to improved sales performance, higher customer satisfaction, and better team collaboration.

SnapLogic provides Televerde with a versatile integration platform to automate manual tasks, support client data integrations without straining resources, and enhance customer onboarding. By leveraging SnapLogic's capabilities, Televerde can achieve greater operational efficiency, data accuracy, and responsiveness to dynamic business requirements.
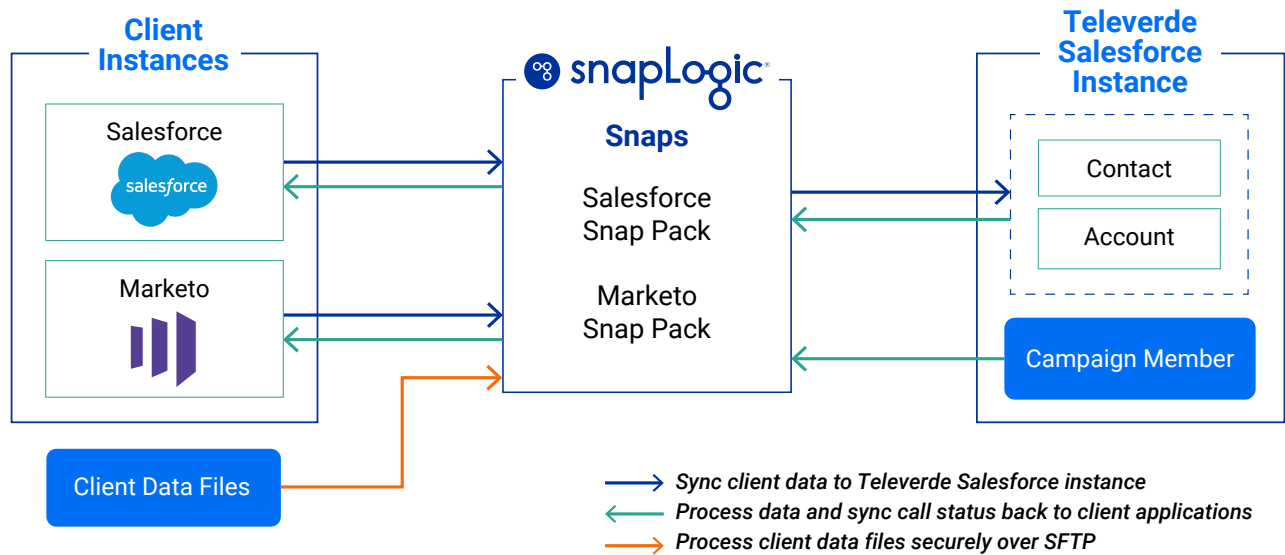
> "
> We chose SnapLogic because of its ease of use and ROI. The pre-built patterns made data transformations so easy and required little coding. We have reduced the time it takes to build an integration by 50%."
>
> **RAYLANA SCHWIDDE**
> Integration Developer, Televerde

Televerde SnapLogic Services Architecture
Bi-directional processing with optimal API usage to manage overall integration costs

Client Instances: Salesforce, Marketo, Client Data Files

snapLogic — Snaps: Salesforce Snap Pack, Marketo Snap Pack

Televerde Salesforce Instance: Contact, Account, Campaign Member

→ Sync client data to Televerde Salesforce instance
→ Process data and sync call status back to client applications
→ Process client data files securely over SFTP

SnapLogic is the leader in generative integration. As a pioneer in AI-led integration, the SnapLogic Platform accelerates digital transformation across the enterprise and empowers everyone to integrate faster and easier.

Whether you are automating business processes, democratizing data, or delivering digital products and services, SnapLogic enables you to simplify your technology stack and take your enterprise further. Thousands of enterprises around the globe rely on SnapLogic to integrate, automate and orchestrate the flow of data across their business. Join the generative integration movement at **snaplogic.com**.

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