

INDUSTRY | CONSUMER BUSINESS SERVICES (RECRUITING)



Top Echelon is a boutique software firm that provides the innovative solutions recruiting agencies and companies need to source, screen, and engage high-quality candidates during hiring initiatives.

### Challenge

Top Echelon needed a CRM that could integrate with its primary digital marketing tool (Active Campaign), provide visibility into consumer behaviors, and reduce the manual burden associated with lead management.

- Top Echelon's sales department relied on Excel spreadsheets and miscellaneous digital tools to facilitate daily operations
- There was no standardized sales process; most reps manually managed leads per their own preferred approach
- Lead assignments were handled manually by admins who personally reviewed rep workloads & assigned prospects
- This approach drastically limited the team's efficiency + prevented Top Echelon from gaining any real visibility into consumer activities

### Solution

Our team delivered a Sales Cloud solution designed to streamline + accelerate lead intake, assignment, and management.

- Performed a Sales Cloud implementation
- Integrated Sales Cloud with Active Campaign
- Migrated data from Top Echelon's legacy system into Sales Cloud
- Established automations to manage lead assignments per the client's business logic and drive workflow efficiency

### PRODUCTS USED



### Outcome

Post-project, Top Echelon is able to:

- Eliminate time-consuming manual work & data silos
- Track leads across every touchpoint
- Attribute sales directly to campaign activities
- Leverage data to align outreach tactics with consumer behaviors & preferences .

