

Case Study

Unlocking High-Value Leads for a Chemical Manufacturer with Salesforce Marketing Cloud



Customer Overview



Customer

A multinational chemical manufacturer



Profile

The client specializes in performance materials, petrochemicals, and functional materials.



Industry

Chemical Manufacturing



Services

Salesforce Marketing Cloud

Business Need

The chemical manufacturer lacked a centralized marketing automation platform and faced disconnected workflows between Salesforce Manufacturing Cloud and SharePoint, causing inefficiencies and delayed customer updates. It needed an integrated solution to unify marketing, sales, and document management while enabling automation and data-driven decisions.

Key challenges

Lack of a centralized marketing automation platform for campaign execution

Manual lead capture and limited visibility into campaign performance

Disconnected systems between Marketing Cloud, Manufacturing Cloud, and SharePoint

Inefficient document access and management across customer records

Limited automation in lead nurturing and campaign journeys

To support business growth and improve operational efficiency, the client sought an integrated solution that could unify marketing, sales, and document management workflows while enabling automation and data-driven decision-making.



Approach and Solution

Synoptek implemented a comprehensive solution combining Salesforce Marketing Cloud (SFMC) deployment with Manufacturing Cloud and SharePoint integration. The approach focused on building a scalable marketing foundation, enabling seamless data flow across platforms, and introducing automation to improve efficiency and visibility.

Salesforce Marketing Cloud Implementation

- Setup Marketing Cloud account, user roles, and business units
- Configured Email Studio with reusable templates
- Developed branded landing pages and lead capture forms
- Implemented campaign attribution mechanisms
- Configured reports and dashboards for performance tracking

Lead Capture and Campaign Enablement

- Deployment of a web-based landing page integrated with SFMC
- Automated lead capture and synchronization into Salesforce
- Optional support for first campaign launch, including content and design
- Alignment with brand guidelines for a consistent customer experience





Approach and Solution

Manufacturing Cloud and SharePoint Integration

- Implementation of Salesforce Files Connect to link SharePoint with Manufacturing Cloud
- Enablement of document access directly within Salesforce records
- Synchronization of document updates with Salesforce data
- Automated daily scheduler to detect updates and trigger notifications

Notification and Automation Framework

- Configuration of automated email alerts for document updates
- Tracking of last modified dates for SharePoint-linked documents
- Streamlined communication to stakeholders with updated document links

Training, QA, and Post-Go-Live Support

- End-to-end testing and QA to ensure system reliability
- Structured go-live support and deployment readiness
- Training sessions using a train-the-trainer approach
- Ongoing support and optimization recommendations post-implementation

Business Benefits

By integrating Salesforce platforms with SharePoint and introducing automation, the client significantly improved operational efficiency, campaign effectiveness, and data accessibility

Centralized marketing platform enabled streamlined campaign execution	Seamless integration between marketing, sales, and document management systems	Reduced manual effort through workflow automation and scheduled processes	Automated notifications improving responsiveness and collaboration
Improved lead capture, tracking, and attribution across campaigns	Faster access to critical documents within Salesforce records		Scalable foundation for future marketing and digital transformation initiatives
Enhanced visibility through real-time dashboards and reporting			

The Salesforce Marketing Cloud implementation created a scalable foundation for continuous optimization, enhanced customer engagement, and sustained business growth.

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“The Synoptek team demonstrated a deep understanding of our marketing needs and provided solutions that significantly enhanced our campaigns. Their knowledge of Salesforce Marketing Cloud is outstanding. They expertly guided us through the implementation process, ensuring a seamless integration with our existing systems. Their commitment to excellence and client satisfaction is truly commendable. I highly recommend their services to any organization looking to elevate their marketing efforts.”

– Marketing Manager



About Synoptek

Synoptek is the first IT Managed Experience Provider (MxP™), delivering AI-enabled automation, strategic modernization, and experience-led outcomes. Its services span Cloud and Agile Infrastructure, Business Applications and Platform Development, Customer and Employee Experience, and Cybersecurity. With a business-first approach and a global delivery model, Synoptek helps organizations optimize operations, accelerate transformation, and achieve measurable results—guided by a culture rooted in growth, ownership, inclusiveness, and philanthropy.



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