



The Salesforce logo, consisting of the word 'salesforce' in white lowercase letters inside a blue cloud-like shape.



Customer story

[Lire en français](#)

How Persistent supported La Confrérie des Domaines to revolutionize their operations with Salesforce

Persistent's transparency and advice really added value to our project. Everyone has specific skills, and the entire team has supported us in our ambitious project. Persistent genuinely understand how we've evolved and where we want to go. I know that if I ask their advice on something outside of our project, their suggestions will always lead us in the right direction.



Elliott Dero
Export Manager
La Confrérie des Domaines

Key figures:

16 years of experience

8 area managers

4000 orders processed annually

40 partnering wine growers

64 importing countries

More than **120** appellations represented

The client

La Confrérie des Domaines export French wine to 64 countries. They've been sharing the legendary riches of the French 'terroir' with the world since 2003.

In 2018, La Confrérie des Domaines, merged with the export agency DAD Languedoc Wines. As a result, their portfolio of around twenty partner estates based principally in Burgundy was enriched by winegrowers from the South of France.

The 2020 acquisition of Carcassonne-based wine merchant Vinitrio, specialists in brand building and personalizing bottles, added a new dimension to the business. It also increased the number of wine growers represented by La Confrérie des Domaines' to 40.

La Confrérie's passionate, young team works hand in hand with each of its partner domains to ensure that every single bottle finds its rightful place in the world.

Their mission is to provide impeccable service to the winegrowers whose products embody the riches of the French 'terroir.'

Find out more: www.confrerie-domaines.com/en/home/

Key facts



Licenses

18

users



Duration

4

projects in 2 years



Integrations

ERP Vinistoria



Product

Sales Cloud

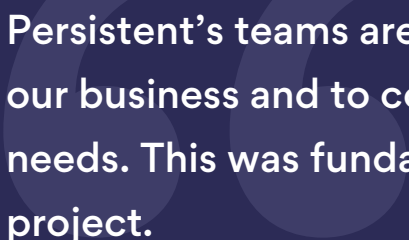
Tableau

Sofacto

Pardot +



www.confrerie-domaines.com/en/home



Persistent's teams are very attentive, they took the time to understand our business and to conduct a detailed and systematic analysis of our needs. This was fundamental to avoid adding weeks of work to the project.

Elliott Dero

Export Manager La Confrérie des Domaines

The challenge

La Confrérie des Domaines is much more than a traditional intermediary between French winegrowers and global importers. They offer a complete marketing and communication service meticulously crafted to meet the needs of the wine-growing and producing industry.

Partner estates are free to concentrate on producing great wine, knowing that the marketing and export of their products are in the safest of hands. Namely, a team of skillful, dedicated enthusiasts with perfect mastery of the language, culture, regulations, and trends across diverse international markets.

To maintain efficiency of their services La Confrérie des Domaines needed to:

- unify the tools and systems used by DAD Languedoc Wines and Vinitrio and integrate them into Salesforce
- create an efficient unified view of all activities by centralizing everything in Salesforce.

After comparing several Salesforce Integrators, La Confrérie des Domaines offered an initial project to Persistent based on:

- the quality of their references in the wine industry
- their track record for running seamlessly structured projects built to specifications developed from detailed analysis of client needs

Persistent has now completed four successful collaborations with la Confrérie des Domaines.

The solution

Persistent has equipped La Confrérie des Domaines with several Cloud-based Salesforce platforms, including an external invoicing solution.

Sales

La Confrérie des Domaines' sales representatives already used a specific Sales Cloud cycle to assess and convert leads and generate sales opportunities. Persistent began by integrating Vinitrio's ERP into the CRM. This integration streamlined after-sales service by entering orders directly into the CRM.

Billing

La Confrérie des Domaines decided to replace Vinitrio and DAD Languedoc Wines' invoicing and inventory management software with a single Salesforce platform. As La Confrérie des Domaines manages both sales and purchases of wine, Persistent needed to customize the new platform to accommodate purchase accounting entries, a function that is not offered by the Sofacto solution to date.

Reporting

At La Confrérie des Domaines' request, Persistent replaced the 'My Report' tool with Tableau, the business intelligence platform native to Salesforce. La Confrérie des Domaines can now analyze detailed data to monitor performance, anticipate trends, and increase conversion rates.

The result: a single platform for several activities

La Confrérie des Domaines' collaboration with Persistent revolutionized their operations' speed, efficiency, and accuracy.

Having centralized key marketing and sales operations in Salesforce Customer 360, the company now has a complete and coherent business overview. Furthermore, they are creating new business opportunities by personalizing customer experiences.

\ Sales Cloud

Allows to save time and minimize data errors by:

- integrating access to product catalogs and automate inventory management
- removing the double-entry requirements for ordering and invoicing
- streamlining internal communications

\ Sofacto

This application, designed and developed in the Salesforce environment, allows La Confrérie des Domaines to:

- manage invoices and edit accounting entries of sales directly in the CRM, automatically and without errors
- the customisation made by Persistent allows to manage purchase orders, quotes, and sales invoices via the Conga Composer solution
- generate purchase accounting entries

\ Tableau

This analysis tool allows La Confrérie des Domaines to compile and analyze customer data generated in Salesforce from databases in previous tools. Managing this data in real-time provides a clear view of customer behavior.

The next step

La Confrérie des Domaines has now asked Persistent to implement Pardot Plus, a marketing tool to complement its Customer 360 suite of applications. Pardot Plus enables La Confrérie des Domaines to automate marketing activities, including its key prospecting and sales tool – email.

Pardot Plus will provide insights into customer behavior based on their interactions with marketing activities.

This information will help La Confrérie des Domaines personalize offers in various ways, including seeking new domain partners, creating new brands, or revising catalog offerings to reflect current customer demands.

We are grateful for our relationship with Persistent as one of our trusted partners for the past 17 years. As a Platinum partner, Persistent's global Salesforce practice works side by side with us as we support our customer's success.



Leon Mangan

Salesforce SVP Alliances et Channels
EMEA & LATAM

Skills & Certifications

Management of complex multi-cloud projects. More than 430 certifications (June 2021), including FSL, CPQ, Marketing Cloud, Pardot, B2B Commerce, Heroku and Mulesoft.

About Persistent

With 13,000+ employees around the world, Persistent Systems is a global solutions leader delivering digital business acceleration, enterprise modernization, and next-generation product engineering.

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