

Success Story

Advocate

Industry: Technology Professional Services

Location: Peachtree Corners, GA

Project: Salesforce Managed Services, Business Process Restructuring, FinancialForce Integration

Engagement: January 2019 - September 2022

Company Overview



Advocate is a leading technology consultancy and managed services provider of Technology Business Management (TBM) solutions, helping organizations align IT spending with business outcomes and maximize the value of their technology investments.

The Challenge

Advocate, an 80-person technology consultancy based in Peachtree Corners, GA, had ambitious goals: maximize their business valuation and position themselves for acquisition.

Their Salesforce environment was not set up to support this vision. Key pain points included:

- Lack of integration across key business functions — Marketing, Sales, Service Delivery, and Finance
- Difficulty tracking and managing MRR and Annual Recurring Revenue (ARR)
- The Director of IT was solely responsible for a Salesforce org with 50+ users, creating a critical bottleneck

The Solution

LogicSpree engaged Advocate as a Salesforce Managed Services partner starting in January 2019. Over the course of the engagement, LogicSpree delivered:

- **Business Process Restructuring:** Redesigned core business processes within Salesforce to align with Advocate's growth strategy
- **FinancialForce (Certinia) Integration:** Unified professional services automation with financial management
- **Data Quality Resolution:** Identified and resolved systemic data quality issues impacting reporting accuracy
- **Enablement & Training:** Developed and delivered training to drive user adoption across the organization

The Result

1. **Maximized Business Valuation** — Valued at 5x Annual Revenue; Salesforce cited as a key driver
2. **Unified Business Operations** — Integrated Marketing, Sales, Service Delivery, and Finance eliminated silos
3. **Reliable MRR/ARR Tracking** — Real-time visibility into recurring revenue metrics for leadership
4. **Reduced IT Dependency** — Distributed Salesforce administration reduced the bottleneck on the Director of IT

"LogicSpree is a Life Saver! Our team at Advocate has loved working with LogicSpree. They are extremely efficient and effective and truly are experts in this space. We always get timely responses and the level of support is first class. They always go above and beyond — they've become an integral part of our team."

—VP of Sales, Advocate

"The impact of LogicSpree's engagement was transformational. With a streamlined, integrated Salesforce environment, Advocate achieved their primary business objective: a successful acquisition."

—Co-CEO, Advocate

