



Yellowstone Club Case Study

How Yellowstone Club Fixed Broken Email Workflows in Salesforce



Client Overview

The Yellowstone Club is an exclusive private ski and golf community in Big Sky, Montana, offering premium services including private events, dining, outdoor activities, and luxury member experiences.

Their sales team relies heavily on email communication to manage member relationships and coordinate across departments.

The Problem

Limitations with threading communication and lack of the save draft option

As email volume grew, Salesforce became a system of record - but not a system for managing communication.

- 01** Emails displayed as a flat list - no clear conversations, no context

Their existing system displayed inbound and outbound emails in a simple list, without separating threads. This made conversations hard to follow and track.
- 02** No connection between departments involved in the same customer interaction

When multiple departments were involved in the communication, there wasn't connection between the original thread and newly added departments in conversation.
- 03** Drafts lost when interrupted (calls, navigation, or system changes)

Sales representatives often lost their typed message drafts and replies if a Salesforce call interrupted their work. This led to wasted time and frustration.
- 04** Manual switching between personal and shared sender addresses

Depending on the department, the sender's address needed to either be the individual user or a shared departmental address. This had to be manually updated each time, leading to frequent human errors.
- 05** Inconsistent email formatting across departments

Each department required specific font styles and sizes to align with their business needs. The lack of predefined settings caused inconsistency in external communication.

The Solution

Migration to Goat Email

Quadrix implemented GOAT Email, transforming email into a structured, fully integrated part of Salesforce.

- 01** Structured Email Threads

All emails are grouped into clear, organized threads

 - Full conversation history in one place
 - Easy tracking of ongoing interactions
 - No more searching through disconnected messages
- 02** Cross-Department Collaboration

Email threads are shared and connected across departments.

 - Every team sees the full context
 - No loss of information when new departments join
 - Thread and message relationships maintained across all communication
- 03** Reliable Draft Experience

Drafts are automatically preserved across all actions.

 - No lost work during interruptions
 - Seamless experience when replying, forwarding, or switching context
 - Faster, more confident communication
- 04** Automated Sender Management

Sender addresses are predefined based on context.

 - Correct sender selected automatically
 - No manual switching between personal and shared inboxes
 - Reduced risk of human error
- 05** Consistent Email Branding

Department-specific templates, fonts, and styles are enforced.

 - Professional, consistent communication
 - Alignment with brand and operational standards

The Impact

By bringing email fully inside Salesforce, Yellowstone Club transformed how their sales team communicates:

- Clear visibility across all customer conversations
- Elimination of draft loss and manual errors
- Improved collaboration between departments
- More consistent and professional outbound communication
- Faster response times and improved team productivity

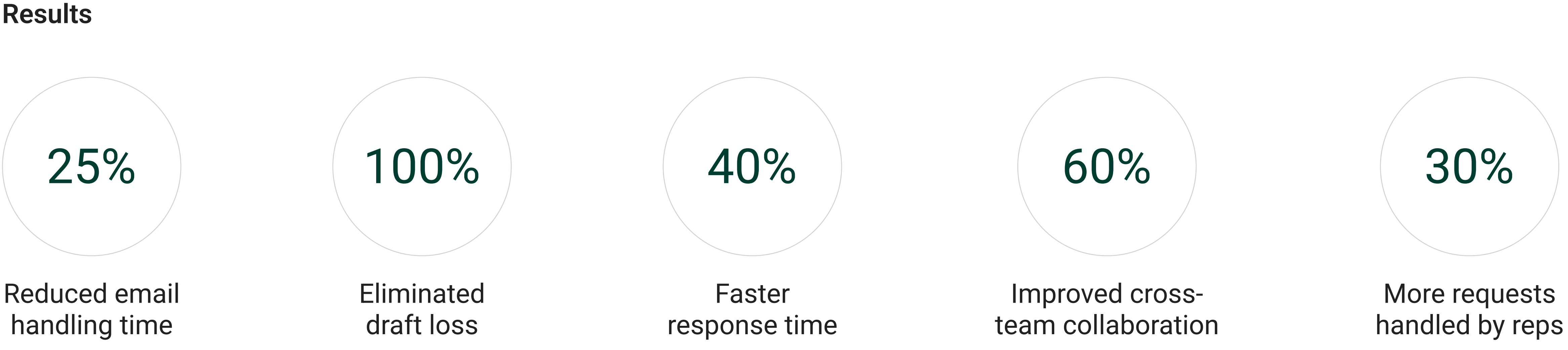
Email became part of the Salesforce process - not something happening outside of it.

Before GOAT

- ✗ Emails scattered
- ✗ Reps switching tools
- ✗ Drafts lost
- ✗ No ownership

After GOAT

- ✓ All threads on one record
- ✓ Drafts auto-saved
- ✓ Departments aligned
- ✓ Faster response time



Team

Our team at Quadrix Soft combined technical expertise and strong project management to deliver a tailored solution for the Yellowstone Club. With a clear focus on improving email communication within Salesforce, each team member played a key role in ensuring success:



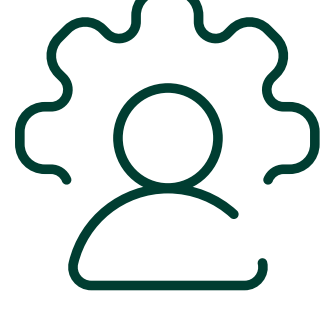
Salesforce Solution Architect

who analyzed Yellowstone Club's existing email challenges and designed a communication model that fit their business needs



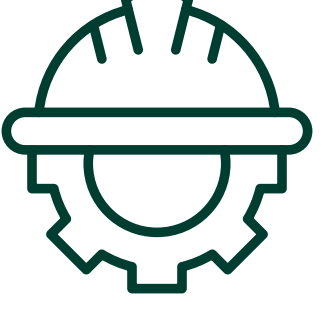
Salesforce Developers

who customized Goat Email (mDrafty), implemented threading functionality, and optimized draft-saving features



Project Manager

who coordinated between the Yellowstone Club and our development team, ensuring timely delivery and smooth collaboration



Quality Assurance Specialist

who tested all communication scenarios, from threading across departments to draft-saving reliability, ensuring a seamless experience for sales representatives

Summary

GOAT Email enabled Yellowstone Club to move from fragmented, manual email handling to a structured, scalable communication model inside Salesforce.

This shift improved visibility, reduced operational friction, and allowed their sales team to operate more efficiently - without leaving Salesforce.