



SHIFT **HELPS** A CONTENT DELIVERY COMPANY **SUPPORT** **BETTER** TEAMWORK

Tapad's groundbreaking marketing technology helps their clients connect with consumers in a unified way across devices. But maintaining a connection between their sales and operations teams was equally vital.

ABOUT TAPAD

Tapad is the leader in cross-device content delivery. Their ground-breaking, proprietary technology assimilates billions of data points to find the human relationship between smartphones, desktops, laptops, tablets, connected TVs and game consoles. The result: deeper engagement, a more enriched experience and a better ROI.

TAPAD

shift

THE PROBLEM

With ad services that flow across virtually every type of media and device, Tapad relies on flawless co-ordination to deploy impactful marketing campaigns for their clients. Every day, they have to stay focused on dozens of moving targets—ad campaigns that fluctuate continually based on availability, visibility and more.

Using email and spreadsheets to manually manage these complex variables across departments was cumbersome and time-consuming.

"There would be three or four versions of campaigns that people managed and stored in their own way," explains Michael Gelberg, Director of Sales Operations at Tapad. "Some would have the information in an Excel document; for others, their inbox."

As a result, the sales and operations teams needed greater end-to-end campaign visibility and simplified co-ordination. And as Tapad continued to expand, they knew the need would only intensify.

"We've really been focusing on scale," Gelberg says. "We have a team that's very agile at handling a large number of requests, but as we grew—we needed a process that was repeatable and didn't place numerous caveats on every campaign."

"We needed a process that was repeatable and didn't place a thousand different caveats on every campaign."

THE SOLUTION

Shift helped the company bring sales and operations onto a single platform by building and integrating Opportunity Product Scheduler onto Tapad's existing Salesforce system. The ability to track ad sales and schedules in a single system enabled the sales team to communicate campaign changes to the operations team in real time and it allowed management and sales to track post-sales



"We've now created a one-stop shop in Salesforce for all the information that flows between sales and operations."

activities and changes. The enhanced system also brought new levels of efficiency and control to the operations team.

For Gelberg, Shift's extensive media-industry expertise was invaluable to the process. "Working with Shift gave us an opportunity to learn about what other companies in the industry were doing—how they were leveraging systems like Salesforce."

THE RESULT

Tapad now has a system that they know can scale to support their rapid organizational growth.

But the biggest win for Gelberg is the enhanced co-ordination between teams.

"We've now created a one-stop shop in Salesforce for all the information that flows between sales and operations. It's the hand-off between teams that's the core benefit."

LOOKING TO THE FUTURE...

"We really appreciated the flexibility of Shift's approach. Working in an industry that is constantly evolving means initiatives will change often—sometimes without our even realizing it. Shift is very flexible in terms of meeting new requests or last-minute changes. That's something that really helped make the final product a lot smoother." And it is why, when they're ready to move forward with the next phase, Tapad will call on Shift again.

About Shift

Shift is a Salesforce Platinum Cloud Alliance Partner with more than 150 years of combined experience implementing, configuring, and re-envisioning the world's #1 sales and service platform. We also offer a range of off-the-shelf technology solutions designed to enhance and extend Salesforce functionality for small businesses and Fortune 500 organizations in specialized industries including technology, manufacturing, media and communications, healthcare, the nonprofit sector, and professional services. Headquartered in Toronto, Canada, with a local presence in Ottawa, Vancouver and New York, we provide both remote and onsite service to a global client list.

Toronto Office | 416-635-1300

155 Gordon Baker Road, Suite 302,
Toronto, ON, Canada M2H 3N5

Vancouver Office | 604 836-2666

211 – 3030 Lincoln Avenue
Coquitlam, BC, Canada V3B 6B4

info@shift-crm.com

www.shiftcrm.com



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CLOUD ALLIANCE
PARTNER