Company Name
Verified First, Inc.

Headquarters
Idaho, U.S.A.

Industry
Background Screening

Business Environment
Move to cloud-based, scalable platforms with full InsideSales and Quickbooks integration with custom development and analytics

Technology

Verified First

Consulting, Custom Development, Implementation, Integration, Training, & Admin Support

Verified First serves as the premier background screening organization in North America. Since 2009, it has provided criminal, financial, and other background information for thousands of businesses spanning across all industries and sizes including Fortune 500 companies.

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> *Our organization's sales floor was prospecting hundreds of thousands of accounts with technology that wasn't scalable. It was only a matter of time before manually entered data in Excel would severely limit our growth and make it harder to remain the nations fastest growing provider of background screening. We needed to evolve a.s.a.p.*
>
> **Ryan Hart**, Director of Marketing

The Challenge

Verified First was using Microsoft® Excel® as the primary method of tracking their prospect and lead database. Managers relied on employees to collect and submit data which was time-consuming and any error in the manual entry stage would cause delays as staff had to re-enter the information. More focus was placed on maintaining software or hardware systems to collect and measure data rather than analyzing the data themselves. There was also the challenge of maximizing speed when accessing data and maintaining the accuracy of exchanged information.

Verified First collected bids from multiple organizations then decided it needed Simplus to implement Salesforce and integrate it with InsideSales and Quickbooks, as well as develop custom triggers and analytics within the systems. It also leveraged Simplus training services and the dedicated support administrator.

Why Simplus

Verified First chose Simplus based on the following criteria:

1. Speed
2. Scalable innovations
3. Dedicated Administrative Support
4. Depth of knowledge within the Salesforce platform

Moreover, Simplus would virtually eliminate the expense of hardware technical support by designing a specialized cloud that provided only what was needed—eliminating having to pay for unnecessary or excessive services

> " *Simplus provided near immediate return on investment in the form of a 36% increase in productivity and a staggering 83% increase in average sales per rep. after implementing and integrating Salesforce with InsideSales and Quickbooks. They were lightning-fast and proficient and the dedicated admin's understanding of the technologies was several times deeper than others we'd interviewed.*
>
> **Ryan Hart,** Director of Marketing

Solution & Results

Simplus implemented Salesforce and integrated the platform with InsideSales and Quickbooks, then was able to customize various portions of the implementation to fit Verified First's exact needs including

- **Custom triggers** that allow InsideSales activities to update parent records for Sales to stay on the dialer screen for increased efficiency.

- **A custom ranking system** that allows accounts in Salesforce to be categorized into ranks (A,B,C,D) based upon the SIC code and number of employees. With some custom work and detailed analytics from Simplus, Verified First now prioritizes prospects by industry and size. A staffing agency, for example, would be ranked an "A" regardless of its size because it runs many background checks, whereas a manufacturing company will vary based on size. This custom development empowers Sales to focus on important accounts and work more efficiently.

- **Advanced analytics** via a new custom dashboard for fine-tuning the ranking system to show key data points for making decisions and changes. In real time, administrators now see data points such as the number of calls per hour, day of the week, connection ratios by time of day, and average invoice size by industry.

- **InsideSales integration** with the industry-standard "Communicate" package from Simplus plus custom development that allows activities being logged through the Dialer to update parent records in Salesforce.

- **Custom formula fields and triggers** in child objects that allow list-views on Contacts to be filtered based on related accounts and/or opportunities, which make the dialer lists be queryable on a single object.

- **Dedicated Admin. Support** since departments are being brought on almost monthly. Onboarding is being done through Salesforce allowing Verified First to view the completion progress for new clients.

The implementation and two integrations are complete and Verified First enjoys increased efficiency and data accuracy. The company considers the implementation and integrations so successful, it has chosen to continue using Simplus for ongoing admin. support. Currently, Simplus is onboarding a new department almost monthly and is offering continual training to the Verified First team. Since Simplus implemented and integrated Salesforce, Verified First reports a 36% increase in productivity. Furthermore, it has seen an average increase of 83% more closed sales per month per sales team member.

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