



## Boosting Sales and Operations with Salesforce Sales Cloud



## Company Profile

Founded : 2007  
Industry : Information Technology and Services  
Employees : 51-200  
Location : USA

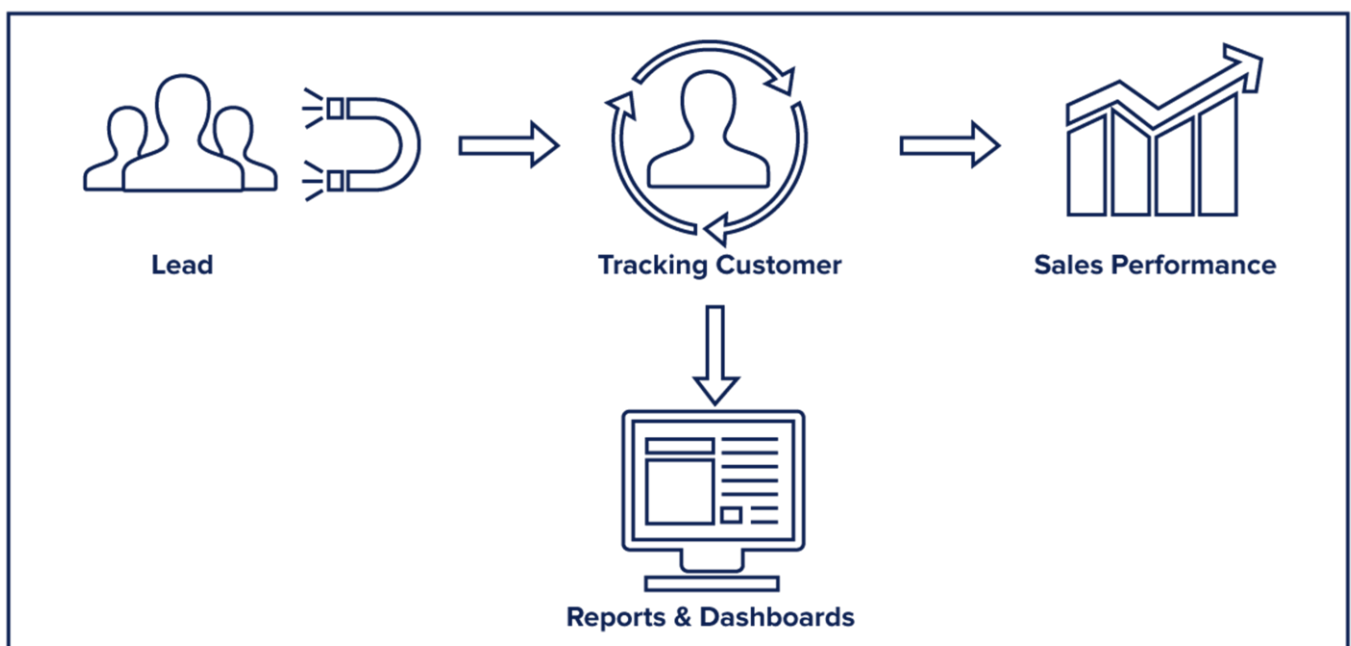
A company specializing in complete turn-key hospitality solutions with a presence in over 50 states were in need of a platform which could scale and manage the pace of their business growth.

## What was keeping them awake at night?

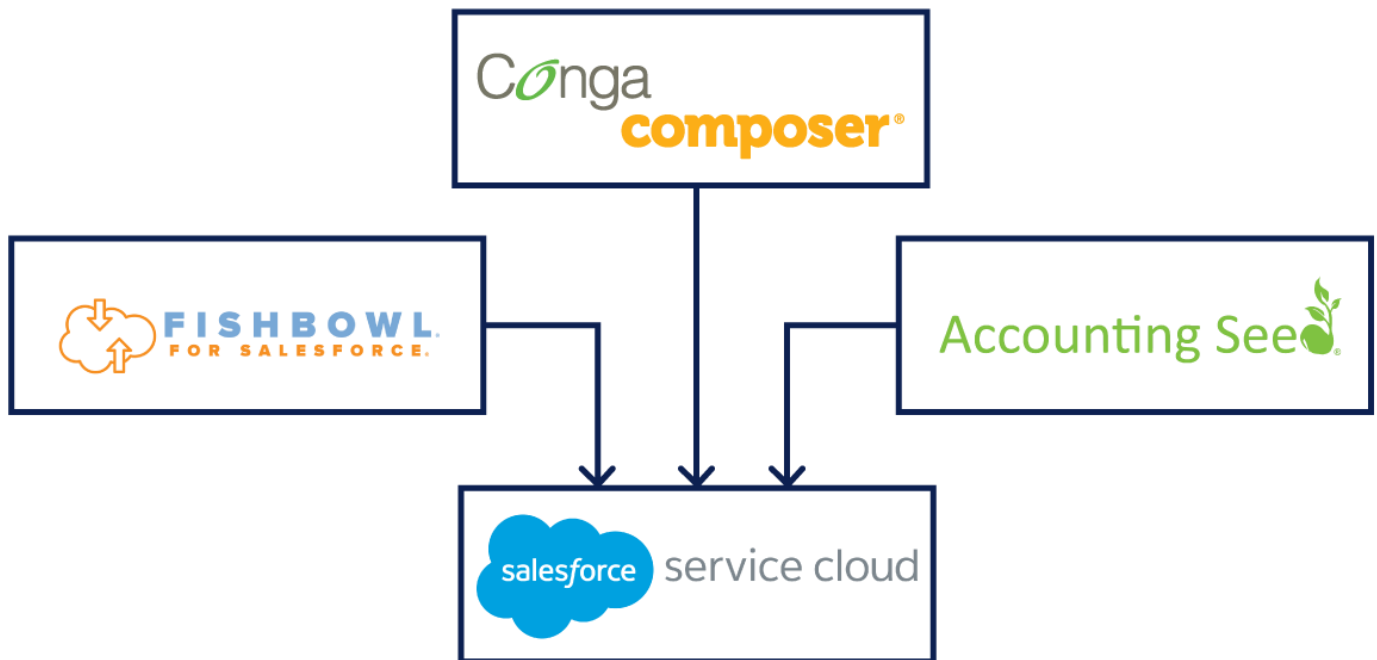
The company wanted to track and improve their sales and operations performance. At the same time they wanted to improve their customer satisfaction by providing the best-in-market customer service. This needed a solution that would help them stay ahead of the market and keep their business growing.

## What was our magic pill for the problem?

Our team of certified Salesforce developers, architects and consultants worked out the perfect solution to address these challenges. We architected and designed their Salesforce system with Sales Cloud to boost up sales performance. Leads were efficiently managed and tracked by the salesperson. We implemented provisions to track a customer who could be a returning customer or a new one. All key information including account history of the customers were tracked to help the salesperson close a deal faster. Reports and dashboards were built for sales managers to track the performance and progress of each individual salesperson.



A well-structured operations design was also setup for managing the projects once the business with a customer was finalised. We built integration with Accounting Seed, Fish-Bowl and Conga composer for efficient management. Every project had milestones and tasks with fixed timeline, which would help the supervisor track progress of the project and easily identify risks. Tight integration with Fish Bowl was set up for managing the inventory and technicians of the company. Conga composer was used for seamless and customisable email sending to customers from within Salesforce.



Customer service being one of the most important features for growing business and gaining the trust of customers, we implemented an efficient service module. Case management, 24x7 support and escalation rules were implemented in Salesforce.

### How well is it working?

The company can now easily track their sales and operations performance. They are also able to identify valuable leads and close them faster. Managers can track the performance of their sales team and take necessary actions without any delay. The Salesforce system we configured helps them identify their ROI and areas they need to focus and improve to increase this ROI. Service module implemented has increased customer retention improving their business. Their entire system is tracked at one centralised Salesforce.org through seamless integration with third party apps.

ROI

## About Dazeworks

Dazeworks is a passionate team of certified Salesforce developers, architects and consultants providing consulting, development, implementation and architectural guidance services. We have worked with companies across verticals to help them understand the power of Salesforce and how it can add value to their business processes.

For more information about our services and customer success stories, visit our website at [www.dazeworks.com](http://www.dazeworks.com) or drop us an email at [info@dazeworks.com](mailto:info@dazeworks.com)

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