Three Wire Systems – Lightning Migration & Sales Cloud Enhancements

Conducting a Lightning migration and enhancing Sales Cloud to better serve the Three Wire services division

COMPANY OVERVIEW

Three Wire Systems (Three Wire), founded in 2006 as a service disabled veteran owned small business (SDVOSB), is a leader in innovative and efficient technology solutions for Government and large enterprise corporations. Their foundation is built upon solid program management and process improvement principles designing solutions to support enterprise business goals and delivering superior results in a cost-efficient manner. Three Wire believes in maximizing investments American taxpayers have made in the Government and military, while modernizing and securing America's most important information, infrastructure, and assets. Three Wire supports both the private and public sectors as well as nonprofits and academic institutions.

COMPANY PROFILE

LOCATION	*Falls Church, VA*
EMPLOYEES	*51 – 200*
INDUSTRY	*Information Technology and Services*
SOLUTION(S)	*Lightning Migration, Sales Cloud*
GO LIVE DATE:	*03/26/2018*

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CHALLENGE

- Three Wire operates a product and services division using Salesforce Classic with the product division the primary user. The services division was not using Salesforce as the user interface and design did not meet their needs resulting in increased manual work, frequent re-work and low user adoption.
- The services division needed to re-tool Salesforce by modernizing and customizing it to meet their with no impact to product division users.
- Specific issues included:
  - Low user adoption and poor data accuracy due to unintuitive data fields, page layouts structure and an outdated user interface (UI) experience.
  - No long-term revenue forecasting capability.
  - Manual creation of Salesforce data pipeline reports in PowerPoint.
  - Manual calculation of opportunity PWIN reports in Excel.

SOLUTION

- Created custom profiles to prevent product users with standard profiles from seeing the new Lightning UI.
- Migrated the services division Salesforce users to Lightning.
- Leveraged Salesforce Sales Cloud Lightning features to create the sales division apps with tailored functionality.
- Reconfigured page layouts by editing / creating new data fields on the existing services record types for accounts, opportunities, and contacts objects.
- Leveraged validation rules and required data field settings to ensure data quality.
- Added custom data fields to opportunities to create 10 year revenue forecasting.
- Created a custom object to calculate and track an opportunities PWIN %.
- Developed custom reports and dashboards improving executive level reporting.
- Implemented Salesforce mobile app and Lightning for Gmail for efficient data entry.

RESULTS

- Provided services division the ability to visualize, track, and report on opportunities in real-time which was previously only available monthly.
- Provided services division with a modernized, centralized location to log related details and communications for opportunities, increasing operational efficiency.
- Provided services division the ability to forecast up to 10 years of revenue potential for each opportunity.
- Provided electronic calculation and capture of opportunities PWIN %, replacing manual calculations.
- Provided an efficient reporting platform, leveraging real-time data and eliminating time consuming manual report generation.
- Delivered mobile functionality along with time-saving enhancements to increase services division productivity.
- Provided services division revenue and pipeline goal tracking capability.

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More Detailed Info and Quantitative Results

NOTES

- The services division was managing their pipeline in Sales Cloud Classic using a mismatched organizational structure that had been customized by the product division. The page layouts and data fields did not meet the services divisions needs. All pipeline and executive level reporting was exported from Salesforce and manipulated into Excel and PowerPoint for reporting. The services division pipeline data was not accurately maintained and what data could be accessed, was manually intensive to report.

- *"Higher Echelon was a phenomenal partner to Three Wire Systems. They took and understood all of our requirements and our budget constraints to develop a very quick plan to make our lives easier and increase our usage of Salesforce. They held weekly status meetings identifying work completed, work in progress, and where they needed our support. Upon project completion, they have continued to go above and beyond for us. Highly recommend Higher Echelon for any of your Salesforce implementation needs."… Katie Koehler – Three Wire Systems Director, Operational Development & Growth*

QUANTITATIVE RESULTS IF AVAILABLE

- Recouping 20 to 30 hrs. per quarter time savings of senior executive time by providing real time visibility into the sales pipeline.
- Generated 5 to 10 hrs. in monthly times savings for SVP executive by migrating financial reporting to custom Lighting dashboard reports.
- Generated 8 to 10 hrs. in monthly times savings for analyst staff member by migrating financial reporting to custom Lighting dashboard reports.
- Generated 2 hours in monthly times savings for SVP executive by creating custom opportunity revenue forecasting solution.
- Increased services division Salesforce user count by 100%
- Reduced data capture time to calculate PWIN% by 93%
- Increased services division user adoption from 0 – 100%
- Increased data capture efficiency per opportunity through the implementation of Salesforce Mobile and Lighting for Gmail

Solution Detail

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MORE DETAILS

Competitors of Salesforce engaged in sales cycle:	*No competitor identified; current Salesforce users*
Previous technology replaced by Salesforce:	*Salesforce Classic, PowerPoint and Excel spreadsheet reporting*
Salesforce products deployed:	*Sales Cloud, Lightning Migration*
Customer Business Model (B2B, B2C, or Both)	*B2B*
Salesforce product features:	***Sales Cloud:** Workflow and Approval Process, Mobile, Operational Analytics (rpts and dshbds), Opportunity / Pipeline Management, Sales Console, Lightning Migration* ***Service Cloud:** Case management* ***Platform:** Reporting against custom data* ***Lightning:** Lightning Migration; Gmail Integration*
If using Service Cloud, list use case (e.g. customer support, call center, field service, telesales, etc.)	*None*
Integrations:	*None*
AppExchange Apps/Partners	*ConnectWise*
Solution 'Go Live' date:	*03/26/2018*

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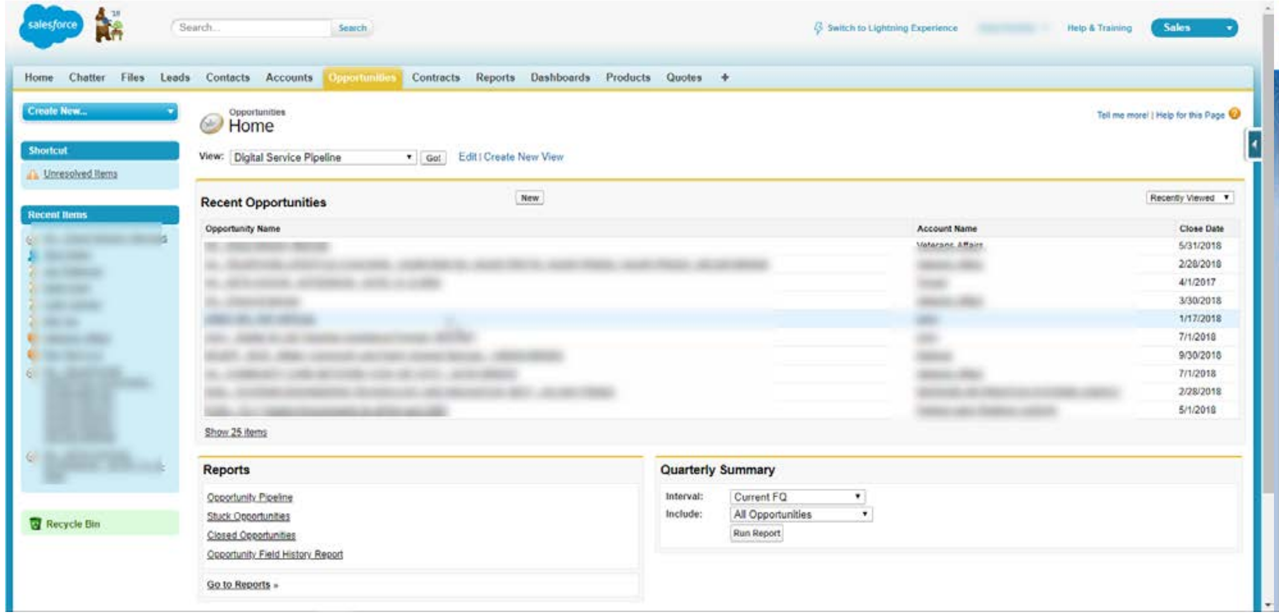
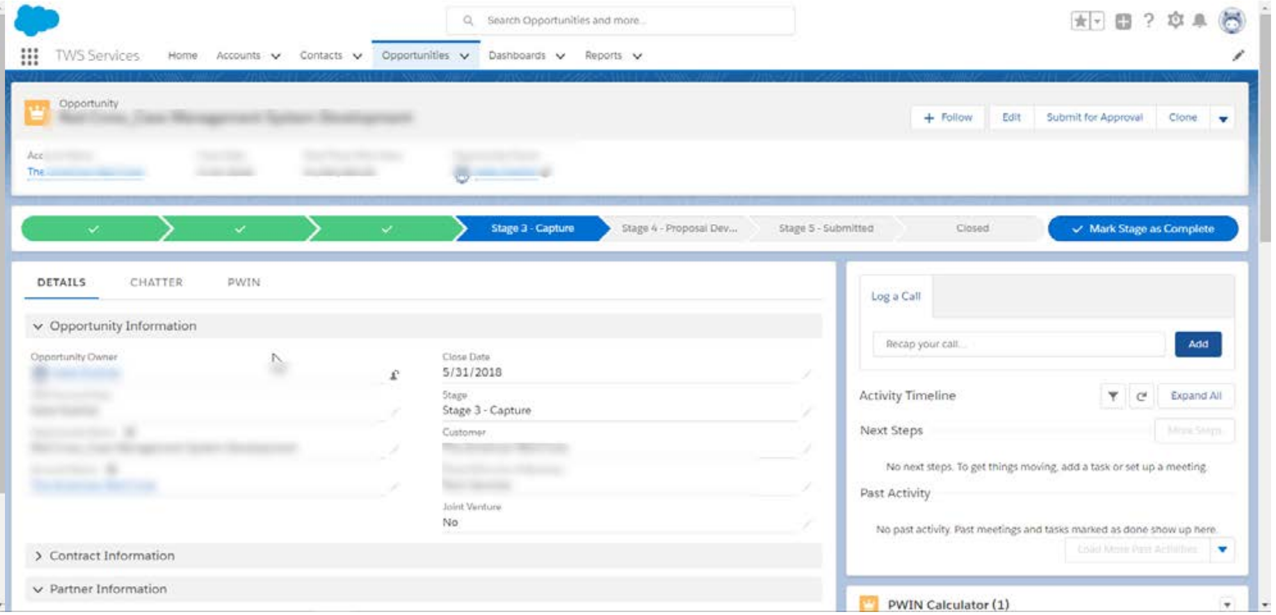
Screenshots of app (if available)

Before

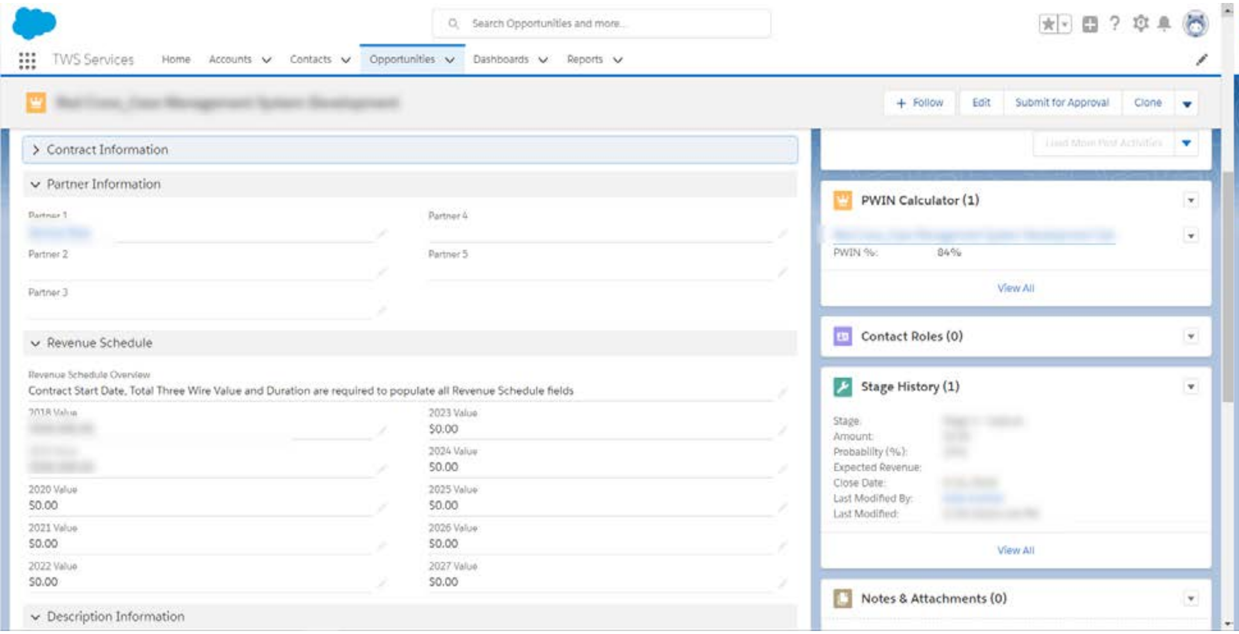


After

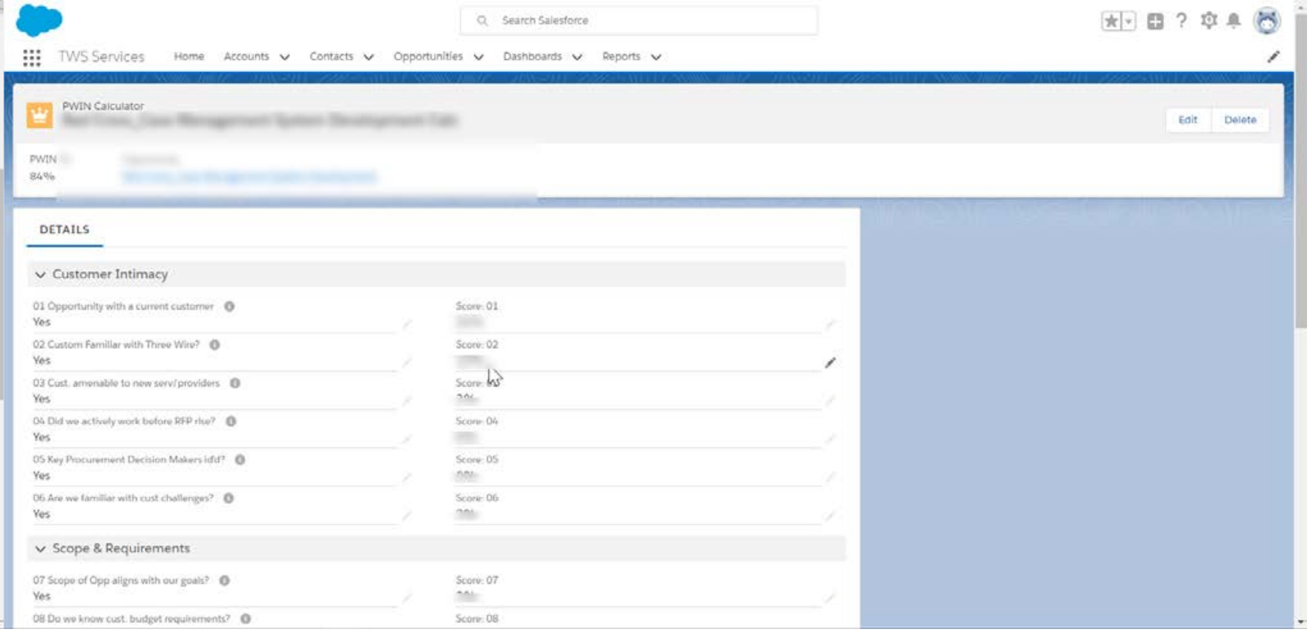


Screenshots of app (if available)

Custom Revenue Forecasting Solution

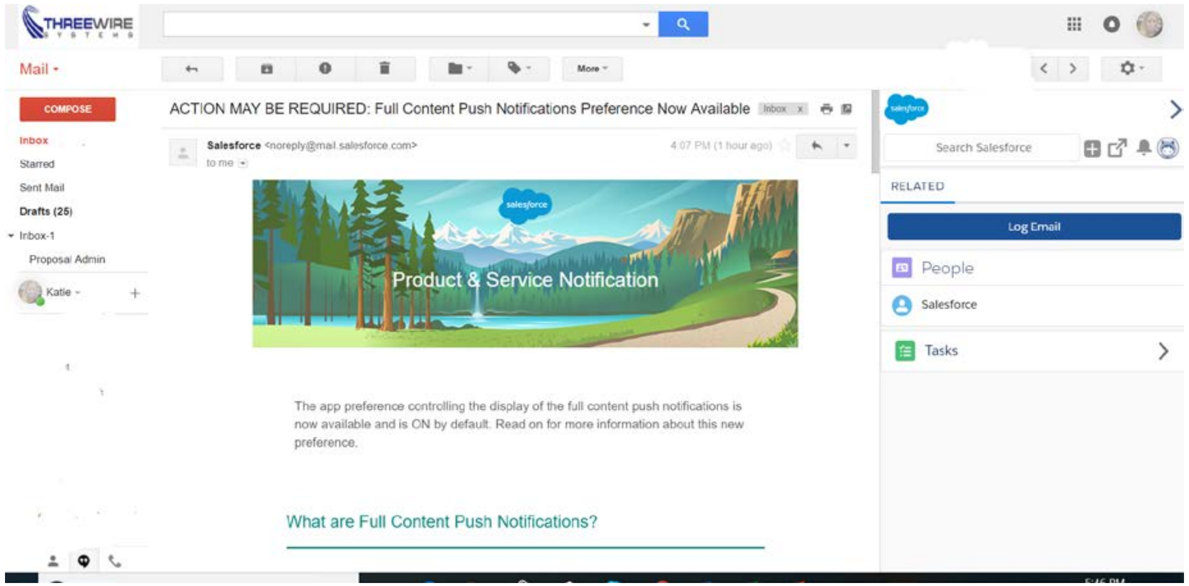


Custom Object Contract Win Probability

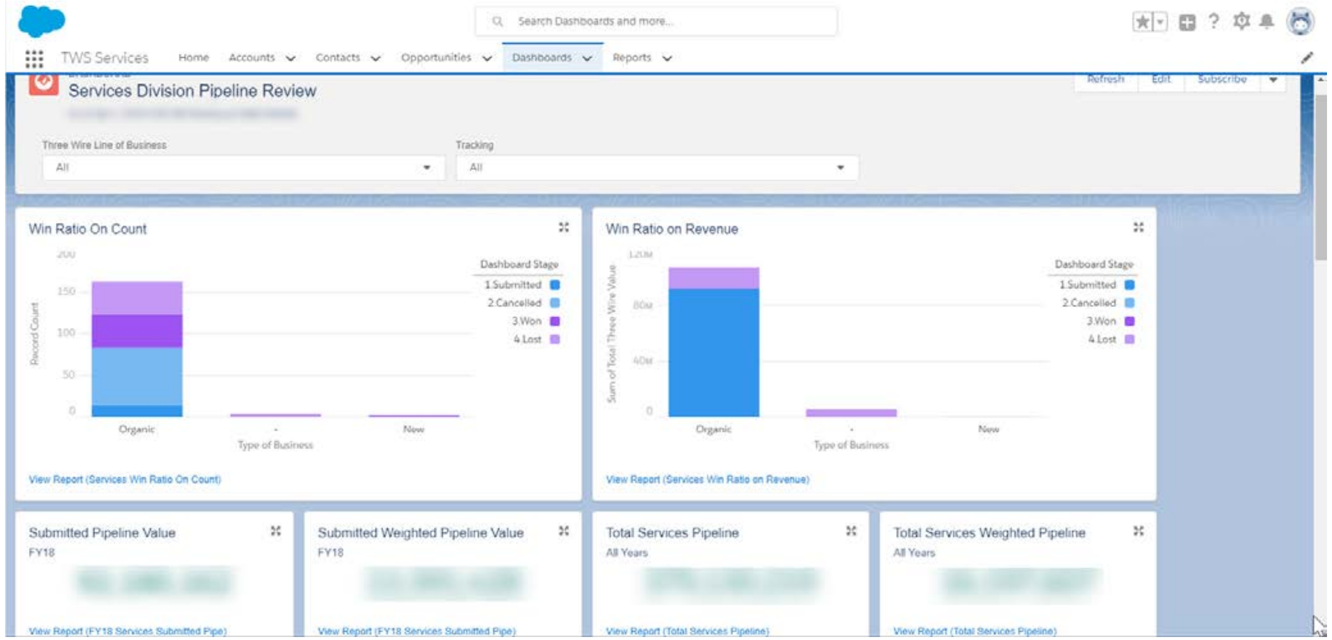


Screenshots of app (if available)

Lighting for Gmail Integration



Custom Dashboard – Replacing Manual Financial Reporting



Sharing Guidelines

These questions are required in order for your story submission to be accepted. Please answer these questions to the best of your ability.

We will not contact the customer without reaching out to you first.

SHARING USE CASE/SCENARIO:	
Can Salesforce AEs share this story and overview slide in sales settings?	*Y*
Can Salesforce AEs mention the customer name in sales settings?	*Y*
Is this customer willing to act as a reference customer for prospects?	*Y*
Would the customer be willing to speak at Dreamforce or other events?	*Y*

Name of reference approver:	**Tim Pash**
Title of reference approver:	**SVP Salesforce and IT Services**
Email of reference approver:	**Tim.pash@higherechelon.com**