

Rosetree Solutions develops custom human capital solution for hospitality management firm.

THE CLIENT

PHM Management is a hospitality and consulting firm in Dallas, Texas that provides customized solution for management companies and independent hotel owners. PHM places experienced consultants in hotels and other hospitality businesses to boost operational efficiency and develop new business.

THE CHALLENGE

An integral part of PHM's workflow involves matching consultants to opportunities proposed by clients. Before developing a solution with Rosetree, PHM Management stored their opportunity and solutions information in disparate databases, resulting in a time intensive process of cross-checking qualifications before placing a consultant in an opportunity.

THE SOLUTION

Rosetree Solutions built a pipeline on the Salesforce platform for entering applicant details and qualifications for the consulting roles at PHM so that this data could be sorted, filtered, and searched. Rosetree also built a custom matching application to speed up the business process. With both the solution and opportunity data linked in Salesforce, the application finds qualified consultants for any given opportunity data point, allowing for a shortened executive decision period that does not require manually searching through data.



"With Rosetree Solutions, they came in and the listened intently. With their experience and the vision that I had, what I wanted to create, it was a perfect match."

Katie Schur
President and Chief Operating Officer,
PHM Management

THE RESULTS

Rosetree's solution facilitated operational efficiency at PHM Management. The consultant and opportunity matching process was a frequent 30-minute engagement for the Chief Operating Officer. The integrated application that Rosetree built with the Skuid platform reduced the essential process to 5 minutes, as well as providing reports for matched candidates, efficiently supporting both the current business process and future growth.

ABOUT ROSETREE SOLUTIONS

Rosetree Solutions is a Salesforce and Skuid consulting firm that works with clients looking for progressive cloud solutions that create positive organizational change.

As App Innovation Partners, Rosetree Solutions began creating industry-specific solutions on the Salesforce platform. Consulting services shortly followed, and Rosetree now offers end-to-end solutions for clients from initial implementation, to ongoing consulting, and custom development. Customer success is our primary focus, providing solutions you can count on.

"The amount of time it has saved me has been tremendous... The data we're inputting into the solution is more consistent."

Katie Schorn

President and Chief Operating Officer,
PHM Management

process efficiency increase

600%

executive efficiency increase

75%

data integrity increase

70%



ROSETREE
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IMPLEMENTATION | CONSULTING | DEVELOPMENT

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