

Re-invent Cloud Processes IN Salesforce

Learn what makes Cloudy in California's approach unique, flexible and based on results.

Client Experience

Pacific Southwest Irrigation retained Cloudy in California to redeploy Salesforce Sales Cloud for field sales operations and process management.

About Pacific SouthWest Irrigation

The executive team wished to re-implement Salesforce with focused yet powerful sales plays. Cloudy in California worked to understand legacy processes and the sales culture. The result of this project is a simple yet flexible mobile experience that drives field sales teams to success, while gathering important property, crop and geo location data points. With this new enterprise grade foundation, it allows PSWI to grow in the cloud at their pace.

Managed Transactions

- ✓ Custom mapping integration on salesforce mobile
- ✓ Simplified mobile to drive opportunity creation minimal clicks and data entry
- ✓ Cleaned quickbooks data, re-formatted and inserted into Salesforce

Top of Mind



Scale

Numerous departments, responsibilities and focus



Control

Provide a focused but flexible path for each user



Accountability

Dashboards and reports are finally useable and now drive decisions.



Cloudy in California



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Business challenge

For most people that haven't driven through Central California you wouldn't normally associate the golden state with massive amounts of farming and agricultural operations. The California Central Valley is ripe with Ag industry and it is evolving into a modern business diving in to the cloud.

Pacific SouthWest Irrigation originally subscribed to Sale Cloud in the hopes it would drive field sales people to use the tool. The issue is that their environment wasn't customized to be contextual with the work they quote and sell

- Geolocation of sites and farms
- Mobile first
- Minimal clicks for field sales reps
- Opportunity management
- Forecasting

It a heavy expectation for a business to stop what they are doing and reevaluate their business processes to digitize them in the cloud, PSWI was committed.

The PSWI management team had a focused objective in bite sized pieces.

The dream delivered

Cloudy in California met with field sales managers and sales people to understand their appetite for and the requirement of entering data while visiting in field sites.

While we were focused on delivering value in Sales Cloud we also delivered a data model that can easily amend into a Field Service Lighting conversion, it was important that we delivered more than one time value.

This redesign, refocus and deployment was basic in nature but it was immensely important to get it right and assist with the adoption of the technology.

Cloudy's efforts have unlocked data, reports, dashboards, user flows and engrained accountability at all levels. KPI's come naturally as the custom Salesforce design, fully reflects the true sales process that PSWI follows.

Deployed Technologies

- ✓ Salesforce Sales Cloud Lightning
- ✓ Lightning Sync
- ✓ Custom Google Maps Integation
- ✓ Outlook for Salesforce

