

Sales Cloud® Implementation and CPQ Customizations Transform Media Company from Disconnected to Unified Business

Products & Services

- Salesforce Sales Cloud®
- Salesforce Steelbrick CPQ
- Salesforce Lightning Experience
- Oracle

Client – Active Interest Media Inc. (AIM)

Industry – Publishing and Digital Content

About the Client

Active Interest Media (AIM) is one of the world's largest publishers of enthusiast media periodicals covering a range of special interest topics. The company produces leading consumer magazines, websites, movies, TV shows, books, events, and competitions including boat shows and fitness conferences. AIM has a global reach of 40 million readers, fans, and attendees in 85 countries. AIM was founded in 2003 and is headquartered in El Segundo, California.

Business Requirements

- Sales Cloud Optimization
- SteelBrick CPQ Implementation and Configuration
- Lightning Components for Sales, Finance, and Production teams
- Product Configuration
- Pricing Tiers
- Discounting
- Discount Approval
- User Training
- Enhancements

Project Scope, Improvements, and Enhancements

Active Interest Media (AIM) was just getting started with the Salesforce platform when this project began. During Phase 1, Jade Global was brought in to take over post go-live activities. This entailed creating missing documentation, creating a handover plan, coming up with a training plan, and creating solutions for unfinished items. During this time, AIM's implementation had been delayed, and many Phase 1 scope items were at risk of not being completed in time. However, as per the AIM business request, Salesforce had to go-live at the same time as Oracle.

During the Post Go-live Phase, Jade was required to support and improve upon recently implemented Phase 1 items; significant user adoption and business process enhancements were identified for improving CRM effectiveness. Jade Global was also tasked with training all users in Salesforce. Jade Global had to be flexible early in the Post Go-Live Phase, as business requirements were continuously changing, and the system needed to be stabilized. Once stabilized, Jade solidified its Agile methodology and was able to focus on implementing requirements that would make Salesforce work better for AIM business users.

Preparing a Business Solution for Future Growth

Active Interest Media is a fast-expanding company. It has acquired various print and digital advertising firms across the US. In order to unite these locations, AIM needed a solution to store all company data in one place. The CFO of AIM wanted to ensure the company was operating as one large unit, rather than 7 different entities.

Business Challenges

- More than one CRM Instance across the company
- Each group has different sales and business processes
- Each group has different needs and wants from the CRM system
- All systems needed to be integrated (Salesforce, Oracle, etc.)
- Approval processes needed to be more dynamic, in order to accommodate rapid growth
- Discount Approvals did not have a clear definition

Business Benefits

- Company operates as a connected organization
- Efficient and precise communication between AIM and its clients
- Training and small group sessions increased user adoption from 25% to 75%
- Lightning components helped improve key sales, production, and finance functions on a daily basis
- Discount automation helped sales reps gain more business and close quotations with less hassle time
- Improved discount approval process
- Role hierarchy implementation

The Solution: Sales Cloud Implementation and CPQ Customizations

Jade Global analyzed AIM's existing business processes and designed/architected solutions for various business processes for a CPQ and Sales re-implementation. While AIM had already implemented Sales Cloud, Jade Global helped AIM improve upon existing end-to-end scenarios.

Jade configured and customized the Sales Cloud experience in the following ways:

- Opportunity Optimization
- Custom Production Process
- 3 different Lightning components
- Salesforce Lightning Experience
- Discount Approvals

As a SteelBrick CPQ customization partner, Jade Global helped AIM perform the following processes in CPQ:

- Contract Creation and Management
- Product and Price Book configuration
- Optimize product selection process

Business Value and Results

The Salesforce.com Sales Cloud Optimization, Custom Production Process, Lightning Components and SteelBrick CPQ Implementation enabled AIM to utilize a system that has the efficiency and precision to match its rapid growth. Not only was the system more efficient, but it was easier to maintain long-term.

Compared to Day 1 of this 9-month engagement, AIM transformed from a disconnected business to one that works for all business groups and users. The new CRM system allows AIM to add and build components as they continue to grow.

About Jade Global

Jade Global provides enterprise business application implementations, integrations, software product engineering, Cloud services, technology advisory, testing, and managed services across diverse industries. We are headquartered in San Jose, California with U.S. offices in Philadelphia and Los Angeles. Jade Global is an Oracle Platinum Cloud Select partner, Salesforce Silver Partner, ServiceNow Silver partner, Dell Boomi Certified System Integrator Partner and Microsoft Gold partner. We have additional strategic partnerships with NetSuite and Zuora. Jade has been recognized as one of the fastest-growing companies in North America by Inc. 5000 and was featured on the Fastest Growing Private Companies list in the Silicon Valley Business Journal.

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