



## **Case Study**

### **Shipping Materials Company**

#### **Problem:**

- Lack of insight into conversations had duplication of activities/tasks being done or being totally missed for a potential or current customer.
- Permission issues: The incorrect users either had too much or too little authority.
- Lack of insight into how the Sales reps were working Opportunities.
- Lack of ability to track changes made in Salesforce records or who made the change and when
- No integration between LinkedIn and Salesforce and having to copy Lead data into Salesforce with difficulty keeping the information in sync/current.

#### **Solution:**

CloudQnect created solutions for each pain point and implemented based on the priority set by the customer.

#### **Solutions:**

1. Implemented the Outlook Integration for Salesforce
2. Implemented Salesforce Inbox for the Sales team
3. Implemented LinkedIn Sales Navigator integration with Salesforce
4. Trained users on above integrations, the use of tasks, how/where to upload files, and report management/permissions
5. Created different profiles and roles for the different departments with the permissions set-up according to the department's needs, role, and hierarchy within the company
6. Created page layouts consistent for ease of use, visibility, and adoption
7. Enabled Field history tracking and displayed the table in the record page
8. Created a way to track stale Opportunities according to lack of activity
9. Set up custom reports and dashboards for Sales Managers and Reps

#### **Outcomes:**

1. The company is now able to manage their Opportunity pipeline more efficiently
2. An increase in transparency and accountability among reps and the opportunities they are working. Reps are positively incentivized to work opportunities more and record activities and keep data current
3. An adoption rate increase, more information is now input into Salesforce and kept current
4. User can now track emails
5. Managers and other users can now see conversations, activities, and meetings that have taken place with a prospect or customer
6. The ability to get warmer leads and have a faster sales cycle
7. An increase in the security and confidence with the data
8. The client has ongoing Salesforce Admin support via CloudQnect's Managed Services