

# Sales Operations on Salesforce.com

## Case Study

### Background

The VP Business Development of this mid-market engineering & testing client needed a sales enablement platform.

The solution needed to integrate **Marketing, Inside Sales, Field Sales, Sales Operations** and an in-house ERP so that they could get Customer 360 insights, pipeline and forecast.

### Hurdles

The company had in-house ERP and Marketing tool that were not connected to their existing Salesforce.com. The company needed an end to end Marketing & Sales process formalizing implemented and adopted.



### Goals

- Define & implement process across sales lifecycle
- Optimize Salesforce.com, integrate two systems.

### Deliverables

- End to End Business Process Mapping
- Marketing Integration
- ERP Integration
- Sales Implementation (Salesforce)
- Sales Management Reporting (Salesforce)
- Sales Operations (Salesforce)

### Applied Experience

- More than 30 years of experience with CRMs
- Worked with Salesforce.com for 20 years
- Over 100 implementations from 2 to 3,500 users



**Dylan Gray Consulting**

*Work Smarter. Manage Better. Grow Faster.*

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### The Return on the Investment



#### Work Smarter

By defining a lead to project initiation sales & sales management process and implementing it in Salesforce.com the sales team can use one system for all their work, eliminating double entry & saving them time.



#### Manage Better

We integrated ERP (Projects) and Marketing which created one customer database for great reporting. We enabled data driven management of Inside Sales, Field Sales, Sales Strategy & Account Management.



#### Grow Faster

By focusing the team on prioritized opportunities, making communications easier and management data driven, the client now executes their sales strategy end to end on Salesforce.com.

*"We had a failing implementation of Salesforce that was not being used.*

*Dylan and his team rescued the project and delivered a robust end to end sales process from marketing to projects all on Salesforce.com with great reports."*

Brian Weaver, Director of Sales & Business Development

Dylan knows what works! Whether you are a start-up or a global enterprise, our team has the experience to guide you to and thru what works best for your organization.



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