

# Marketing to Invoicing on Salesforce.com

## Case Study

### Background

The newly appointed CEO of this investor backed MidMarket manufacturing client needed a platform to run the business on.

The solution needed to deliver **Marketing, Sales, Operations, Inventory, Order Processing, Finance** and **Customer Service** so they could take and track orders, manufacturing, shipping, invoicing, and vendor payment.

### Hurdles

The company had previously engaged three partners that did not deliver the desired solution which put the company at risk. They sought a partner to rescue the project help them manage the vendors, map their process and implement it fast.



### Goals

Define and implement a complete business process on Salesforce.com and manage 3<sup>rd</sup> party vendors.

### Deliverables

- End to End Business Process Mapping
- Program & Vendor Management
- Marketing Implementation (Pardot)
- Sales Implementation (Salesforce)
- Inventory Management (RootStock)
- Financial Management (FinancialForce)

### Applied Experience

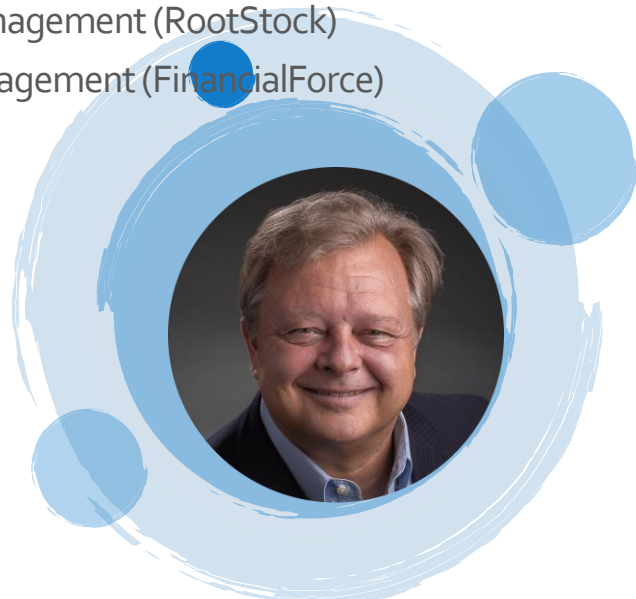
- More than 30 years of experience with CRMs
- Worked with Salesforce.com for 20 years
- Over 100 implementations from 2 to 3,500 users



**Dylan Gray Consulting**

*Work Smarter. Manage Better. Grow Faster.*

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### The Return on the Investment



#### Work Smarter

By defining an end to end business process and implementing it in Salesforce.com the team can use one system for all their work, eliminating double entry & saving them time.



#### Manage Better

We integrated 4 systems creating one database for great reporting. We automated sales metrics, pipeline, operational and financial reporting giving the managers the data they needed to be effective.



#### Grow Faster

By focusing the team on prioritized opportunities, making communications easier and management data driven, the client Now executes their business strategy end to end on Salesforce.com. The client has since more than doubled revenues.

*"We had a failing implementation and partners that were not delivering.*

*Dylan and his team rescued the project and delivered a robust end to end process from marketing to invoicing all on Salesforce.com and in the force.com cloud."*

Matt Boucher, CEO

We know 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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