

# Sales Process Optimization *Case Study*

## Background

With 40 sales representatives producing annual revenue of **\$750m**, the client wanted to be sure that implementation of Salesforce.com would augment market share and increase total revenues. Their sales team and service team needed to earnestly engage with the CRM tool to grow the company through business value, pipeline visibility, and sales operations insights.

## Hurdles

The company had grown by acquisition and had multiple divisions operating differently with an informal sales process, which created huge non-productive time burdens on the sales teams.



## Goals

Define a sales process for 20 products that involved 4 divisions and 3 departments.

## Deliverables

- Sales Team Interviews
- Sales Process Matrix
- Sales Process Playbook
- Sales Management Cadence & Metrics
- Salesforce Adoption Roadmap
- Salesforce Demonstration Environment

## Applied Experience

- More than 30 years of experience with multiple CRMs
- Worked with Salesforce going on 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 streamlining and unifying common sales process elements and adding Salesforce automations we reduced the non productive time and effort required by the sales team to get the information they need.



### Manage Better

We integrated data from multiple sources to create Customer 360 Insights. We automated Sales Metrics and pipeline reporting. Now managers have the data to manage.



### Grow Faster

By focusing the team on prioritized opportunities, making communications easier and management data driven, the client can measure and accelerate growth of the team and revenues.

*"Dylan helped us map our sales processes, refine GTM Strategies and configured a Salesforce demo that worked for teams selling different products.*

*Not only did we come away with great solutions, everybody has a deeper understanding of the why and how."*

Steven C., Sr. Manager Sales Operations

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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