

# National Sales Team on Salesforce.com

## Case Study

### Background

The CEO of this MidMarket publishing client needed to create an end to end sales system for their field reps to prospect, track opportunities, take orders, generate billing and track it all.

The solution needed to integrate **Inside Sales, Field Sales, Sales Operations & Analytics** and migrate a legacy in-house ERP so they could get near real time insights, pipeline and forecast.

### Hurdles

The company had an in-house ERP and marketing that was not connected to Salesforce.com. They had been told by 3 consultants that it could not be migrated. We proved them wrong 😊.



### Goals

Define and implement an end to end sales process.  
Optimize Salesforce.com and migrate legacy ERP.

### Deliverables

- End to End Sales Process Mapping
- Inside Sales
- Field Sales
- Order Processing
- Sales Implementation (Salesforce)
- Sales Analytics (Tableau)

### Applied Experience

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



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## The Return on the Investment



### Work Smarter

By defining an end to end inside sales, field sales & sales management 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

By migrating the legacy ERP into Salesforce.com we enabled data driven management of Inside Sales, Field Sales, Sales Strategy & Operations.



### 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.

*"As the new CEO, I walked into a botched CRM integration and had three consultants tell me our project couldn't be done. Dylan and his team came highly recommended, and we immediately knew why. He audited where things were, crafted a plan to fix, and executed flawlessly. He's a difference maker."*

Ray Green, CEO

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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