

Sales & Sales Management on Salesforce.com

Case Study

Background

The marketing executive of this MidMarket custom engineering client needed a user-friendly platform to run their Sales operation. Their existing CRM had been abandoned due to lack of adoption & ineffective reporting.

The solution needed to enable **Inside Sales, Field Sales & Sales Management**, to set and measure performance to goal, pipeline sufficiency and forecasting to drive procurement.

Hurdles

The company had a prior CRM which had been abandoned.

The company needed data migration from the legacy CRM, ERP and Outlook into Salesforce.



Goals

- Define and implement a simple Sales Process.
- Implement Salesforce.com and load clean data.
- Train the users on the Sales Process using the tool.

Deliverables

- Simple sales process creation
- Sales Implementation (Salesforce)
- Sales Data Migration & Cleaning
- Sales Management Reporting (Salesforce)

Applied Experience

- More than 30 years of experience with CRMs
- Worked with Salesforce.com 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 defining the sales process for inside sales and field sales 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 created a Sales Management process with Dashboards and Reports covering Sales Pipeline, Forecast & Activity. The leadership now have a clear view of the revenue forecast,



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 failed CRM that was not being used.

Dylan and his team quickly delivered a robust end to end sales process on Salesforce.com with all our data and great reports."

Steve Will, President

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



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