



# Helping You Optimize Your Salesforce Investment

Salesforce is powerful and can be complicated, but if optimized correctly it can be a valuable asset. Let us navigate through the tools for you and determine the best approach to provide you with the solutions for your business using Salesforce. We'll assess your data and operational needs, creating an optimized Salesforce solution and train your staff to get your business back to what it does best.

## Benefits of 3Circle Solutions Salesforce Rescue

- Update & automate Legacy Salesforce implementations
- Better relationships with clients/constituents
- Comprehensive project/program tracking
- Improved team collaboration
- Improved data integrity
- Interactive, real-time dashboards
- Return on Investment

## Optimizing Salesforce to its Fullest Potential

Setting your business apart from the others is what will allow you to flourish in our current climate of accelerating change. 3Circle Solutions is ready to work with you and your team to implement a custom-built Salesforce solution that will improve performance and help you with decision making, as well as help you capitalize on business opportunities and avoid threats in our world of commerce. We'll assess your data and CRM needs, create an optimized Salesforce solution and train your staff to get your business back to what it does best.

## Yes, Salesforce was a sound decision.

Year over year, Salesforce continues to be the number one productivity management platform in the world for businesses of all sizes. When optimized correctly, Salesforce will help grow your company into a streamlined and efficient business engine. 3Circle Solutions can help you get out what you put into it.

## Most Common Salesforce Rescues

### LEGACY SALESFORCE IMPLEMENTATIONS

If you're using an older version of Salesforce (5 to 10 years old), we can bring your system up to speed by cleaning up the data, removing outdated coding and implement the latest Salesforce technology to get your business on track.

### INEFFECTIVE IMPLEMENTATION

You hired a consultant who had a narrow view of your industry and tried to fit your needs into a generic Salesforce platform and you're not getting the most out of the technology. We are technical Salesforce experts and we have a deep understanding of business, nonprofits and other organizations—from an operational and strategic perspective. 3Circle Solutions can build a customized platform that works for you.

### DIY INSTALLATION

Salesforce is a powerful platform, but it takes time and expertise to adapt it to your business's needs. If you've purchased and installed Salesforce, but don't feel you're getting the most out of it, 3CS can uncover tools you never knew you needed and get your team up and running more quickly.

# Douglas County Economic Development Authority



**SALESFORCE  
RESCUE**

## SALESFORCE RESCUE IN ACTION

Douglas County Economic Development Authority invested in the Salesforce platform and a consultant to address the specific needs of the organization in 2014. However, after a couple of years, they realized the platform was not delivering value.

“We felt like the consultant was trying to fit the unique needs of economic development into a generic sales platform,” said Chris Pumphrey, executive director. **“We were spending big dollars for very little return and realized quickly that we needed a better solution to help our community be more successful.”** As an EDO, they’re also responsible for reporting their activities to board members and the community, but they weren’t able to do this effectively with the current procedures.

### Working with 3Circle Solutions

With technical adeptness in Salesforce and technology as well as a deep understanding of economic development, 3CS was able to shine a light on the true values of the platform. Douglas County and 3CS together created a design detailing configurations to the platform, process changes, and improvements to the data that would address their needs in a robust and comprehensive manner. 3CS implemented the agreed-upon changes to the platform, created an all-inclusive Standard Operating Procedure, and provided the team with 8-hours of onsite training.

Pumphrey says, “Now when a property owner calls about the status of a site or a public official calls about the status of an attraction project, I can look at my Salesforce dashboard and quickly give them an accurate up-to-the-minute update. This makes us more responsive and accountable to our constituents.”



“We explored other technology solutions for our organization, but starting from scratch would have required an additional, substantial investment. Fortunately, 3Circle Solutions was recommended to us, and it was a game changer!”  
Chris Pumphrey, Executive Director  
Douglas County EDA

### Key Results

**More consistent and relevant data.** They eliminated wasted time chasing down missing information and provided more efficient and accurate reporting of key metrics and goals, like capital expenditures for a particular project or jobs created.

**Macro- and micro-views.** Douglas County EDA now has a comprehensive view of productivity, making communication and project planning more effective. This applies to external partners; so following who is working on what projects, and on what timeline, is easy.

**Campaign reporting is optimized.** The Campaigns feature provides data on engagement at trade shows and events. The team can better evaluate ROI and identify viable opportunities.

**Archaic paper reporting is a thing of the past.** The new EDOIQ QuickStart Dashboard provides a dynamic view of data in easily accessible charts and graphs.

For more information about our Salesforce Rescue Packages call (337) 205-0759 or visit [3CircleSolutions](https://3CircleSolutions.com)