



CASE STUDY



E&I incorporated in 1934 to provide cooperative purchase agreements for education providers (higher ed, K12, academic medical institutions, technical schools, museums, libraries and research institutes).

E&I Cooperative Services assists their members in creating supply-chain efficiencies, lowering costs and reducing risks by collaborating with cooperative members, suppliers and strategic partners. They deliver exceptional value to higher education, K-12 and related communities by making it easy for them to access high-quality contracts, strategic sourcing expertise, insights and unrivaled customer service.

THE CHALLENGE:

PROVIDING EXCEPTIONAL SERVICE WITH AN OUTDATED CRM

The key problems the client needed to solve was their utilization of a legacy, non-supported, open-source CRM platform that was difficult to use and that led to inconsistencies in data, lack of visibility to key metrics, and frustration from staff who were resorting to use of spreadsheets and other non-standard processes. Business initiatives therefore could not be driven to completion with any understanding of success. Sales teams were using disparate processes and opportunities were being lost due to lack of actionable planning and interaction visibility.

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" Our Salesforce implementation has been a resounding success. Since we launched, we have noticed a measurable increase in transparency, accountability and information-sharing across all facets of our company. "

– Josh Friedman
IT Project Manager
E&I Cooperative Services

THE SOLUTION:

GUIDED SALES PROCESS FROM LEAD TO OPPORTUNITY CLOSE

Using Salesforce Sales Cloud licenses with custom apps and objects, E&I was able to create a sales process that guided sales reps and automatically move the sales stages based upon key information entered on the opportunities.

Salesforce alerts, validations, guidance prompts and flows aid users in effectively moving customers through the sales process.

Sales Cloud integration with the client's infrastructure to support member engagement (website), and executive reporting (BI tool). Additional metrics showed annual contract usage by member, and number of contract activations by business partner. Case management allows customer service reps to take swift action to correct issues affecting either members or business partners.

THE RESULTS:

EXCEPTIONAL CUSTOMER SERVICE

Working with SaltClick,, E&I has improved customers' experience with efficient, seamless sales and case management processes supported by a single system.

As E&I continues their digital transformation, they will work with SaltClick to further expand the functionality of Salesforce by building on initial objects and processes to include new business initiatives and integrations into the remaining tech stack, and creating more ways for customers and partners to connect.

Increase visibility of sales campaign's measures and successes. Case and territory management led to support of robust sales process. Executive dashboards that monitor campaign success, alerts for stalled opportunities, stale opportunities automatically dropped, guided action plans to direct daily sales rep tasks.

Increase in operation efficiency and maximization of results / Reduction in administrative time. Using Salesforce data validation resulted in better territory alignment, accurate financials and quick case resolution.



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SaltClick is an award winning IT consulting organization specializing in delivering innovative cloud-based technology Salesforce® solutions to small and medium sized businesses.