



# CRM Consulting & Integration for Education Training Company

## PROJECT DETAILS

IT Consulting & SI

Apr. 2020 - Ongoing

\$10,000 to \$49,999

“*SkyPlanner was professional and had great customer service.*”

## PROJECT SUMMARY

SkyPlanner is helping integrate Salesforce into an educational training company. During the engagement with the client's former sales manager, they established a workflow and trained the team on the CRM system.

## PROJECT FEEDBACK

SkyPlanner made the training easy and delivered what they promised. The team is highly communicative and professional, and they offer great customer service. The former sales manager had a positive experience working with them.



## The Client


Introduce your business and what you do there.


I was the sales manager of an educational training company.

## The Challenge


What challenge were you trying to address with SkyPlanner?

We needed to integrate a CRM.

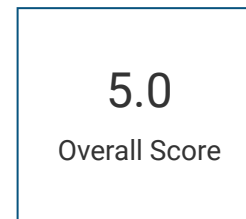
 Former Sales Manager, Educational Training Company

 Education

 11-50 Employees

 Miami, Florida

### CLIENT RATING



Quality: 5.0

Schedule: 5.0

Cost: 5.0

Would Refer: 5.0





## The Approach

### What was the scope of their involvement?

We collaborated with SkyPlanner to strategize and determine the best way to integrate Salesforce CRM. Based on our specifications, we created a step-by-step workflow.

The first phase of this integration was directly related to our company's workflow, and SkyPlanner provided Salesforce training for representatives and administrators. Future phases will involve the integration with our website and social media, such as Facebook and Instagram.

### What is the team composition?

Yoelys (PMO) was my main point of contact. She was in charge of overseeing her team. I had occasional contact with the owner as well.

### How did you come to work with SkyPlanner?

We were introduced to SkyPlanner by a mutual contact. They presented us with the best proposal, which reduced our budget by 10%.

### How much have you invested with them?

We spent around \$15,000–\$20,000 during the time in which I was working with them.

### What is the status of this engagement?

We started working together in April 2021. SkyPlanner is still working with the company, but I have left.





## The Outcome

What evidence can you share that demonstrates the impact of the engagement?

SkyPlanner provided an excellent customer experience, making everything they were teaching us easy to understand. They delivered all of what they promised, and we never got stuck – my experience was completely positive.

How did SkyPlanner perform from a project management standpoint?

We had regular meetings, and they emailed a summary to me after each one. They were excellent communicators.

What did you find most impressive about them?

SkyPlanner was professional and had great customer service – I don't have something negative to say about them.

Do you have any advice for potential customers?

Establish the part of the project that they'll do that will directly affect the company's workflow, and set the priorities to help use the budget wisely.

