

Salesforce Solution

Case Study



HIGHER ECHELON™





Yulista Salesforce and Marketing Cloud Implementation

Yulista Holding, LLC is an Alaska Native Corporation providing aerospace and defense solutions for foreign and domestic customers. They are a subsidiary of Calista Corporation, with a wide scope of government contracting across different technologies and business units. HigherEchelon's objective was to centralize sales/BD data and processes so that leadership could view metrics across business units and better prepare for and meet contract deadlines and requirements. Follow-on upgrades have included revenue forecasting, past performance tracking, and better integration of support elements (HR, Facilities, Pricing) into the Sales cycle.

| | |
|--------------|---|
| LOCATION | Huntsville, AL |
| EMPLOYEES | 1800 |
| INDUSTRY | Government |
| COMPETITOR | In-house systems, Sharepoint, Excel, prior Salesforce org |
| SOLUTION(S) | Sales Cloud, Chatter, Marketing Cloud, Tableau CRM |
| GO LIVE DATE | 9/1/2020 |



Challenges

- Yulista had a legacy Salesforce org, running a 3rd-party app called GovBD. They found this managed package severely restricted in usability, and only had limited reporting. As a result, they suffered from low adoption and most users relied on spreadsheets and independent processes.
- The sales process was not standardized across Yulista's numerous subsidiaries, so it was difficult to tell which subsidiaries were tracking which contracts, and when proposal due dates were approaching.
- Communication and information exchange between all the contributors on a proposal (pricing, capture, proposal, contracts) was conducted across several media, making it hard to keep all stakeholders up to date on important milestones.
- Yulista had no consistent revenue forecast tool. Captured contracts were tracked in TM1 program with minimal reporting capability.
- Yulista has a small marketing department tasked with improving corporate unity and establishing a common community.

Our Solutions

- Started a new Salesforce instance with fresh data. Analysis of legacy data showed that fresh input was far less work than cleaning large volume of old data. Engaged exec stakeholder to spearhead user adoption and ensure success.
- Configured new org around a revised, standardized sales process. Built field validations and automated a stage advancement flow to help users easily follow policy. Built custom suite of dashboards reports to track proposals.
- Added chatter to relevant objects, enabling users to see important communication, collaborate, and update records all in the same space. Custom email notifications sent to team-members to notify them of actionable changes. CalendarAnything app to show waterfall sequence of due dates.
- Custom revenue forecast dashboard system to accurately predict future revenue and show captured value. Analytics dashboard for granular insight into data.
- Marketing Cloud instance sync'd with Salesforce org using MC Connect API. Automated database segmenting and email sends with dynamic content tailored to diverse subsidiaries.

Results

- A cloud-based CRM with immense capability for customization and growth. Adoption has been a great success and users are extremely pleased and continue to ask for more ways to incorporate Salesforce into their business processes.
- Single database-of-record showing live, validated data and easy visualization of corporation's health across large volume of government contracts and subsidiaries. Sales metrics more meaningful because they're the same across business.
- Unified collaboration platform with persistent logs of communications made and actions taken on business efforts. Users notified real-time when updates to deals require their action.
- Leadership able to see live, accurate metrics of sales pipeline health and revenue forecast. Able to present directly from company-branded dashboard, saving significant labor.
- Marketing able to broadcast corporate values across subsidiaries, make a common voice for Yulista to build corporate culture.



Solution Detail

| More Details | |
|--|--|
| Competitors of Salesforce engaged in sales cycle | No competitors identified |
| Previous technology replaced by Salesforce | Excel spreadsheets, Sharepoint, email, paper |
| Salesforce products deployed | Sales Cloud, Chatter, Marketing Cloud |
| Customer Business Model (BSB, B2C, or Both) | B2B |
| Salesforce Product features | Einstein Analytics: Einstein Sales Analytics Deployment Lightning Experience: Lightning Deployment (Sales Cloud, Salesforce Platform) Marketing Cloud: Content Builder/Email, Contact Builder, Automation Studio, Programmatic Languages, Sales/Service Cloud Integration) Sales Cloud: Sales Process, Productivity, Sales Cloud Lightning Deployment Salesforce Platform: Lightning Platform Deployment, Custom App Dev – Coding and Process |
| If using Service Cloud, list use case (e.g. customer support, call center, field service, telesales, etc.) | N/A |
| Integrations | Marketing Cloud via MC Connect |
| AppExchange Apps/Partners | CalendarAnything |
| Solution 'Go Live' date: | 09/01/2020 |

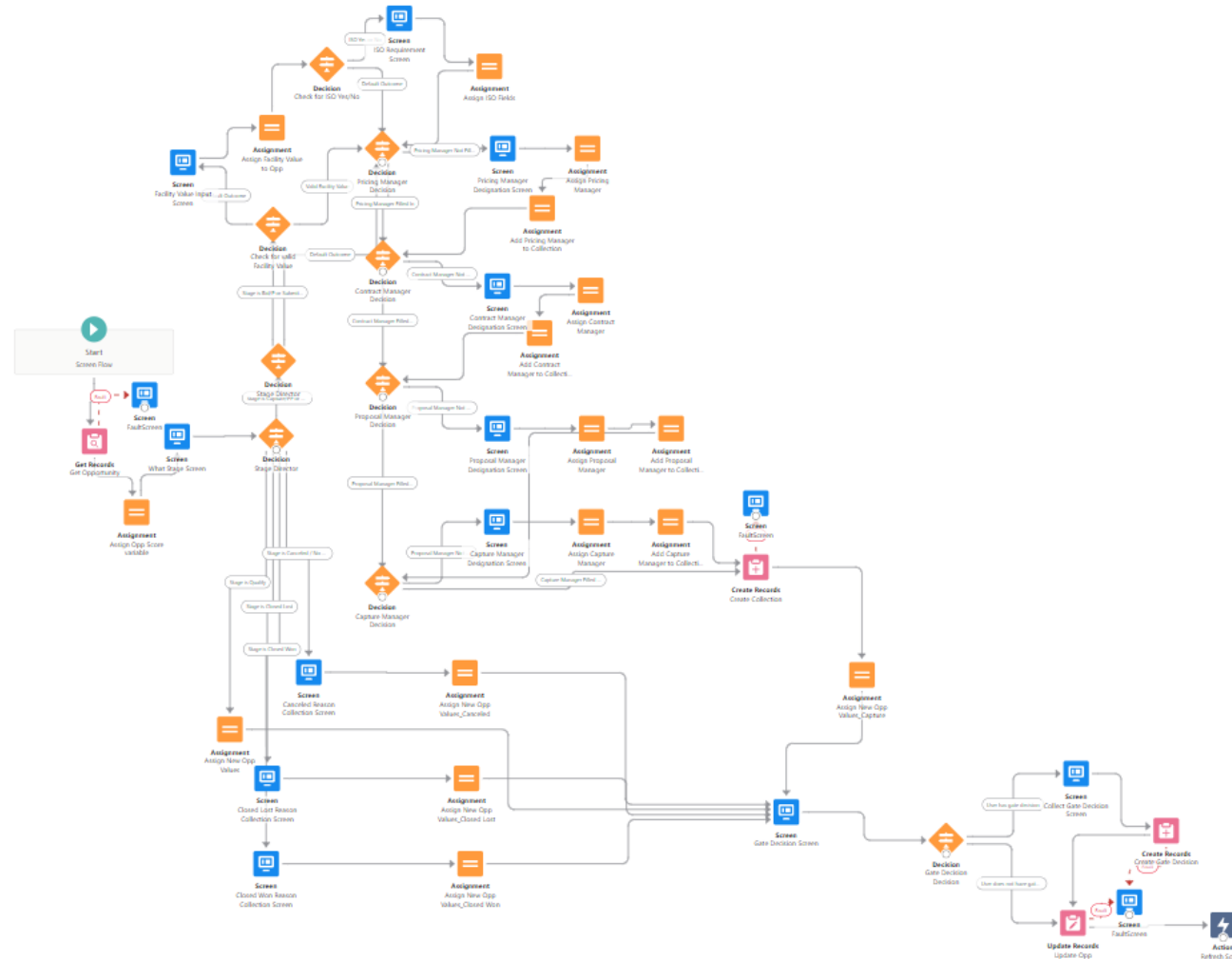


Main Opportunity Page

Custom stoplight visualization as well a dynamic quadrant graphic in related list



Complex Flows to Accommodate Business Logic





Use of CalendarAnything for Proposal Planning

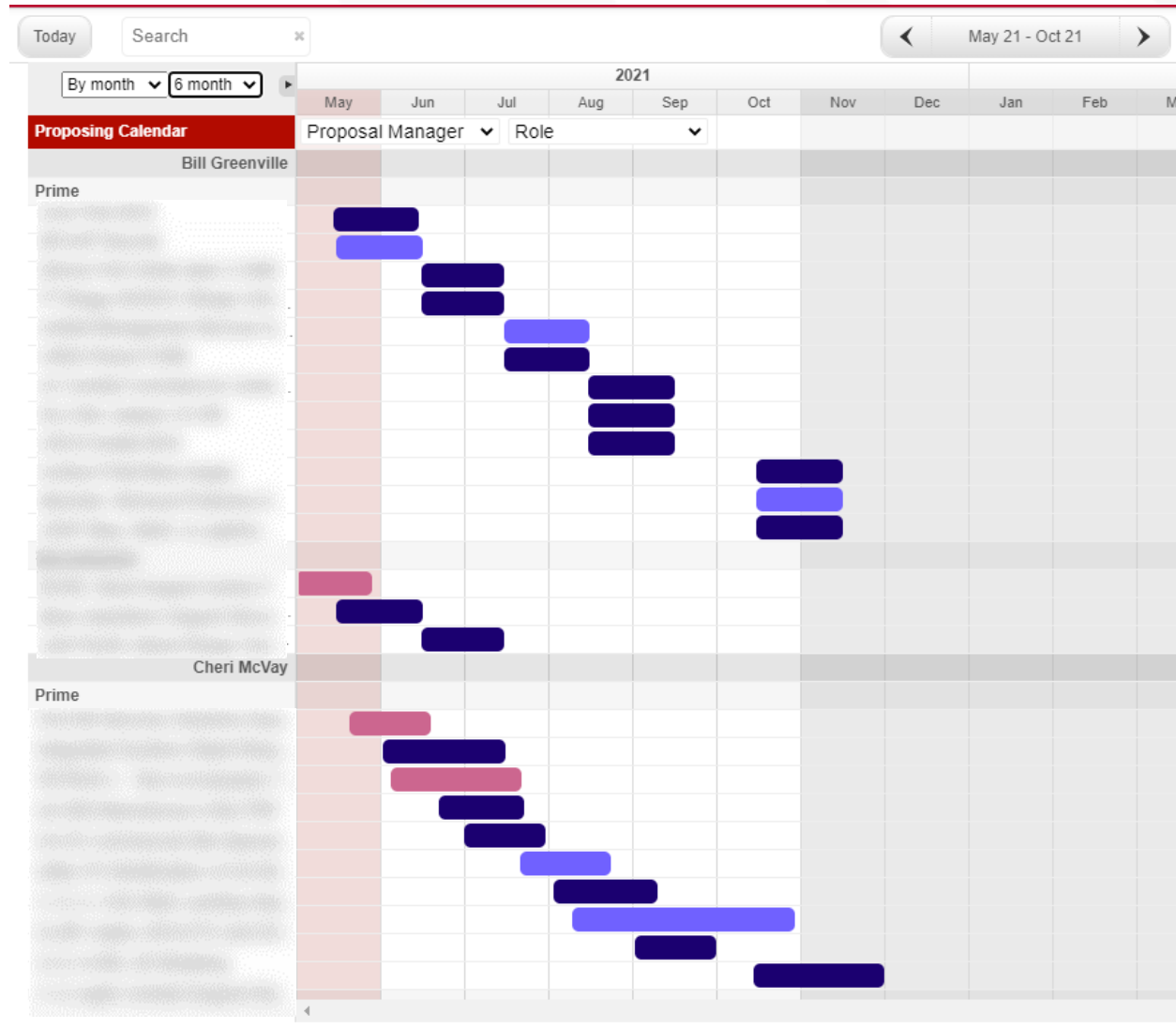




Tableau-CRM for Rich Forecasting Insights





Opportunity-Centric Dashboard

YULISTA All ★ + 🏠 ? ⚙️ 🔔 👤

Yulista Home Chatter Opportunities Accounts Contacts Campaigns Reports **Dashboards** Groups Tasks Calendar Notes Files

Opportunities Awarded Dashboard Refresh Edit Subscribe

Opportunities Closed Won by month, quarter, year
As of May 13, 2021, 1:19 PM-Viewing as Neil Penso

Close Date:

Opportunities Closed Won Monthly

View Report (Opportunities Closed Won Monthly)

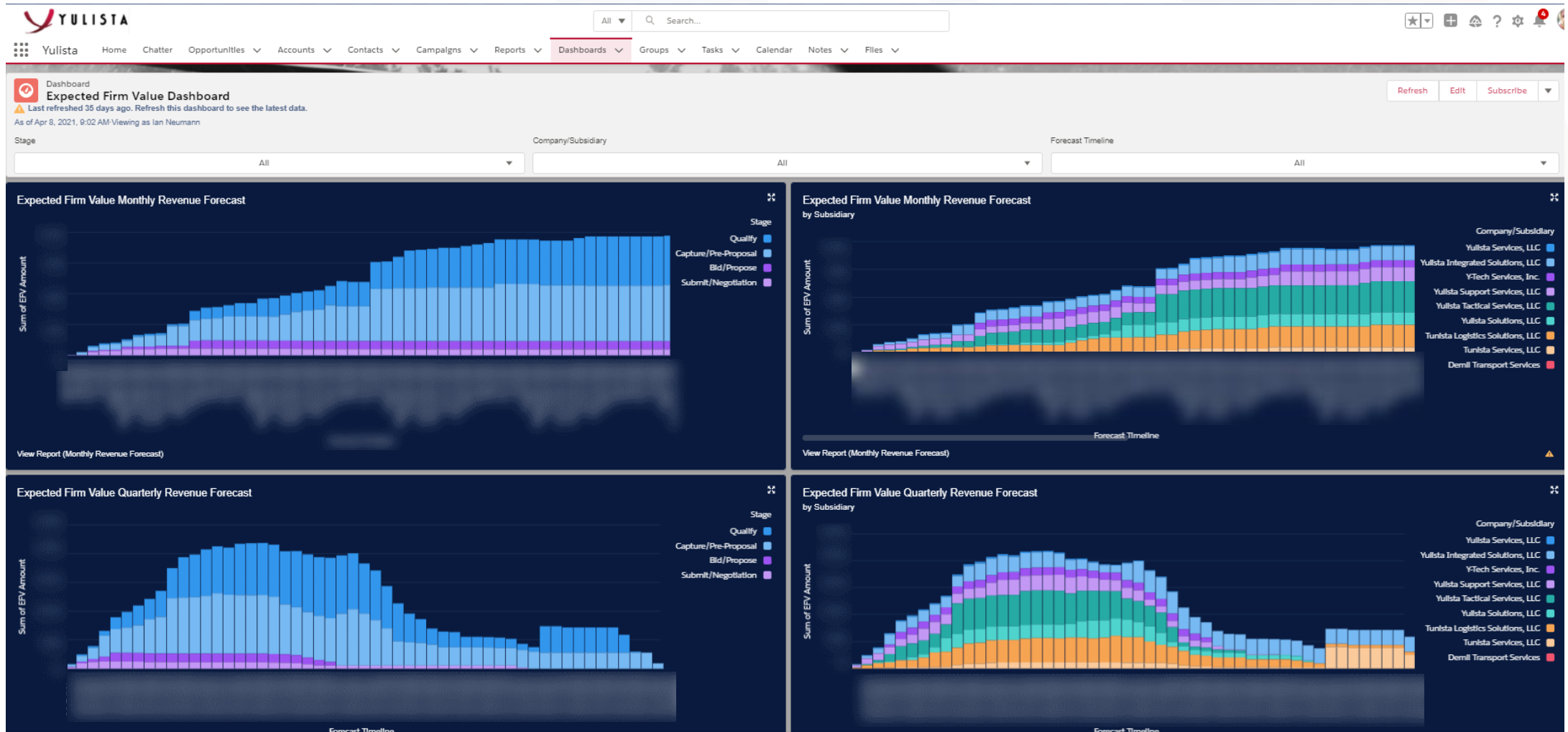
Opportunities Closed Won Quarterly

Opportunities Closed Won

| Opportunity Name | Close Date ↑ | Award Type | Role | Total Contract Value Ceiling | Expected Firm Value |
|------------------|--------------|---------------------|---------------|------------------------------|---------------------|
| | 10/18/2017 | Single Award | Prime | | |
| | 8/29/2019 | Single Award | - | | |
| | 10/1/2019 | Single Award IDIQ | Prime | | |
| | 6/8/2020 | Multiple Award IDIQ | Prime | | |
| | 9/18/2020 | - | Subcontractor | | |
| | 9/24/2020 | Single Award | Prime | | |
| | 9/30/2020 | Single Award | Prime | | |
| | 10/1/2020 | Single Award | Subcontractor | | |
| | 11/16/2020 | Single Award | Subcontractor | | |
| | 3/2/2021 | Multiple Award IDIQ | Subcontractor | | |
| | 3/28/2021 | Single Award | Prime | | |
| | 3/31/2021 | Single Award | Prime | | |
| | 4/1/2021 | Single Award | Prime | | |
| | 4/14/2021 | - | Prime | | |
| | 4/15/2021 | Single Award IDIQ | Prime | | |
| | 4/27/2021 | Single Award | Prime | | |



Dashboard Utilizing Custom Forecasting Model





Pipeline-Centric Dashboard

YULISTA All

Yulista Home Chatter Opportunities Accounts Contacts Campaigns Reports **Dashboards** Groups Tasks Calendar Notes Files

Dashboard **Yulista Holding Pipeline Overview - WFV** Refresh Edit Subscribe
As of May 13, 2021, 1:21 PM-Viewing as Ian Neumann

Fiscal Year

Pipeline Overview Pending Awards

Submit/Negotiation Stage Only

Sum of Weighted Firm Value

| Opportunity Owner | Sum of Weighted Firm Value |
|-------------------|----------------------------|
| Andrew Gignilliat | High |
| Jong Lee | Medium |
| Richard Carr | Medium |
| Richard Harville | Low |
| Scott Jacobsen | Low |
| Steve Dinome | Low |

[View Report \(Pipeline Overview Pending Awards\)](#)

Pipeline Overview

Sum of Weighted Firm Value

| Company/Subsidiary | Opportunity Owner | Sum of Weighted Firm Value |
|-----------------------------------|-------------------|----------------------------|
| Yulista Aviation, Inc. | Andrew Gignilliat | High |
| Yulista Integrated Solutions, LLC | Andrew Gignilliat | Medium |
| Yulista Services, LLC | Jong Lee | High |
| Yulista Tactical Services, LLC | Jong Lee | Medium |
| Yulista Solutions, LLC | Jong Lee | Medium |
| Tunista Services, LLC | Richard Carr | High |
| Tunista Logistics Solutions, LLC | Richard Carr | Medium |
| Demill Transport Services | Richard Carr | Medium |
| Yulista Services, LLC | Scott Jacobsen | Low |
| Y-Tech Services, Inc. | Steve Dinome | Low |
| Yulista Support Services, LLC | Steve Dinome | Low |

[View Report \(Pipeline Overview\)](#)

Pipeline Overview - Andrew Gignilliat

Pipeline Overview - Jong Lee

Pipeline Overview - Richard Carr