

When **Salesforce** Doesn't Work for Your Downtown District

How one client dusted off an abandoned system and
made it work for them again



The Client

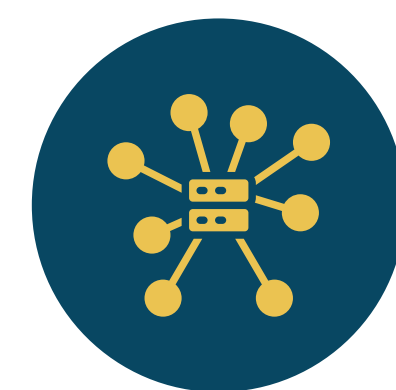
Downtown Santa Monica, Inc. (DTSM) is a nonprofit organization that works with the City of Santa Monica to manage services and operations while promoting economic stability, growth and community life within their unique seaside community. As one of the leading business improvement districts in the country, Downtown Santa Monica generates more than \$1 billion in sales tax revenue for the city annually.



Challenges

- DTSM's existing Salesforce CRM required a complete overhaul. The off-the-shelf version was never customized for the unique and changing needs of their district
- Staff had long since abandoned it because it didn't suit their needs
- Data in the existing CRM was incomplete and outdated, which caused the team revert to operating out of spreadsheets
- Use of spreadsheets made reporting laborious and at times impossible which prohibited data-driven decision making

Goals



Revive an abandoned Salesforce database and transform it into a useful tool that the team enjoys using



Retrofit historic data into the new model and import fresh data from multiple sources



Re-establish the team's trust in the integrity of the data and the system's relevance

Outcomes



Reconfigured and optimized Salesforce specifically for the team's needs and with a bit of training, the team realized a significant increase in usage



Imported several years worth of assessment data and, combined with the existing historic data, made the upgraded CRM the new "source of truth" for information across all departments



Built custom reports and dashboards that attached real numbers to the management of the district and empowered the organization to more effectively pursue new economic development opportunities



Integrated Salesforce with staff email to more efficiently keep contacts up-to-date and make important stakeholder correspondence visible across the organization

Testimonial



Benjamin Dewitte
Downtown Santa Monica

CUBE84 rescued us from an underutilized, poorly implemented Salesforce system and helped us to build a useful tool from the rubble. Their team was professional, responsible, and responsive. Their technical expertise, paired with attention to process improvement, has renewed our confidence in Salesforce as a useful business tool.

