



Monograph Implementation and Managed Services Case Study

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Situation

Monograph was facing challenges with poor lead acquisition and bad data quality. The sales team struggled to identify and track potential customers. The marketing team had difficulty analyzing customer information to inform their campaigns. And the leadership team was inexperienced and had little knowledge about how to effectively implement or manage Salesforce, the company's chosen CRM platform. The previous CRM had a lot of technical debt and little actionable data due to a lack of governance. A knowledgeable operational leader was needed to establish best practices for an effective Go-to-Market strategy.

Opportunity

A fresh CRM implementation is an ideal time to reevaluate internal practices on all the revenue team's point solutions, not just Salesforce. Leadership has the opportunity to slow down and determine the best path for managing the systems and people in their revenue organization. This would allow the company to better organize customer data, streamline lead acquisition and tracking, and improve overall data analysis and reporting. This could ultimately lead to increased sales and growth for the company.

Resolution

- The company hired me to help them with the implementation process.
- I worked closely with the leadership team to understand their specific needs and challenges.
- I set up Salesforce in a way that was tailored to the company's unique requirements.
- In addition to setting up Salesforce, I provided training to the sales team on how to use the platform effectively. This included how to manage leads, track sales progress, and generate reports.
- I also helped the company to establish a data governance plan to ensure that data quality was maintained going forward.



Results

- The implementation of Salesforce helped Monograph to better manage its leads, resulting in an increase in the number of sales: 32% revenue growth in the 6 months after the launch of Salesforce.
- The sales team could more quickly access important information about leads and prospects, making it easier for them to close deals.
- The improved data quality also helped the company to make more informed decisions about where to focus its efforts.

Overall, the implementation of Salesforce was a success for the company. The sales team was able to work more efficiently, and the company was able to achieve significant growth as a result. The leadership team also gained a better understanding of the importance of data management in driving business growth.