



CLIENT SUCCESS STORY: Moving On IT Solutions

Implementing Salesforce integrations to streamline the company's business operations and enable their salespeople to drive prospects down the sales funnel faster.

AT A GLANCE

CHALLENGES

- Overcoming complexities of acclimating and on-boarding to Salesforce
- Inefficient quoting and fulfillment process
- Disruptions and downtime

BENEFITS

- Relieved burden of training from leadership
- Freed up leadership's time to do other executive tasks
- Provided consistent brand messaging
- Streamlined business operations
- Provided seamless transition
- Helped ensure more predictable outcomes for business moving forward

THE CLIENT

Moving On IT Solutions has over 50 years of experience in IT migration, information technology solution design, and technology applications for businesses of all sizes who want to upgrade their IT systems.

They indicated a need for a robust system for creating quotes for IT services and their business of selling a breadth of hardware.

The client's expertise in providing the best IT solutions allows their customers to experience cutting-edge enhancements for the modern world.

OBJECTIVES

The client wanted to ensure they started the business on the right foot by finding a way to send quotes to customers faster while using an intuitive platform within Salesforce that was easy for new salespeople to use.

They also wanted to create purchase orders for fulfillment with their quotes to customers and a blended sales model that enables their independent salespeople to more easily engage in buying and selling operations.

Moving On IT required a solution that provided enough value while keeping all their essential company data in one place for employees to access.

SOLUTIONS

Our team developed a comprehensive strategy with the client to overcome challenges and meet their business goals. Our top priority was to put their sales engine first by providing a flexible and intuitive quoting tool that enhances the user experience and fulfillment process available to the company.

We provided the client with exactly what they were looking for. Our team implemented Salesforce Sales Cloud, Experience Cloud, Conga, and AgileQuote, providing a tailored quoting and fulfillment solution to the client quickly and efficiently. The quoting and business planning tools we implemented equipped the client to have more predictable outcomes in their business moving forward.