

Modern CRM & Revenue Operations

Implementation for a High-Flying Tech Startup

Industries: High Tech

Client: Diskover Data

- ✓ Full sales, contact and activity data migration from HubSpot CRM to Salesforce Sales Cloud.
- ✓ Unify lead-to-revenue workflows to better support sales and partner operations.
- ✓ Improve visibility into the pipeline and partner engagement.
- ✓ Track performance of sales programs and partner channels.
- ✓ Enhanced reporting and AI driven activity tracking.



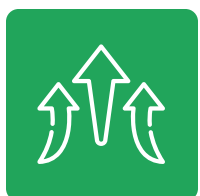
100%

Transition to Salesforce Sales Cloud



Quote to Cash Time

25% ↓



Pipeline Visibility Increase

30% ↑

Challenges

- Stuck on a CRM which limited business operations, hindering growth potential.
- Issues with data quality limited reporting, analytics and insights.
- Existing systems could not support tracking multi-faceted partner programs.
- Lack of automation resulted in inefficiencies in the sales process, impacting CX.

Solutions:

- **1 year of ongoing Salesforce consulting and operational support.**
- **CRM Data Migration** – Migrated historical CRM and sales data from HubSpot to **Salesforce Sales Cloud**.
- **Sales Cloud – Sales Cloud** Lead-to-Cash flow enables BDRs and AEs to efficiently drive revenue.
- **Partner Management** – Tracking partner driven business, sales channels and programs helps business focus on what works.
- **Productivity Integrations** – Integrated **Slack**, **Zendesk** and **Einstein Activity Capture** for maximum sales productivity.
- **Sales Flow Automation** – Automated high impact steps such as renewals, pricing approvals and deal notifications using Flows and Apex to accelerate revenue booking.

What Customer Says



“We had a great experience working with the Gruve team on our migration from HubSpot to Salesforce. They were enthusiastic, knowledgeable, and exceptionally organized throughout the process. As we are growing our business and team, our needs are becoming more sophisticated; Gruve helped us gain clarity on how to use Salesforce in a way that supports our growth without getting overwhelmed by all the platform’s possibilities. Highly recommend!”

Marianne Zuhorski, CRO, Diskover Data