

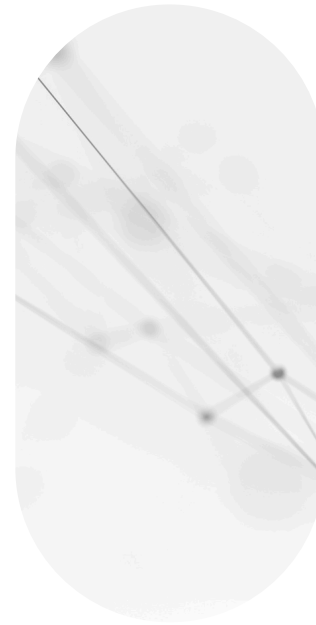
ProServe Excellence

Winning with Lane Four

DIGITAL TRANSFORMATION FOR
A LEADING SECURITY COMPANY

Why Lane Four?

We specialize in strategizing, building, and optimizing vital operations within go-to-market motions and in systems such as Salesforce and HubSpot. Our team is always working to empower our partners and clients with better insights, more transparent metrics, fewer missed sales, and a boost in revenue. We are an organization that values good work and good people. We have a team of certified consultants, administrators, architects, developers, project managers, and operations experts who share one goal: to make you a Revenue Hero at your company.



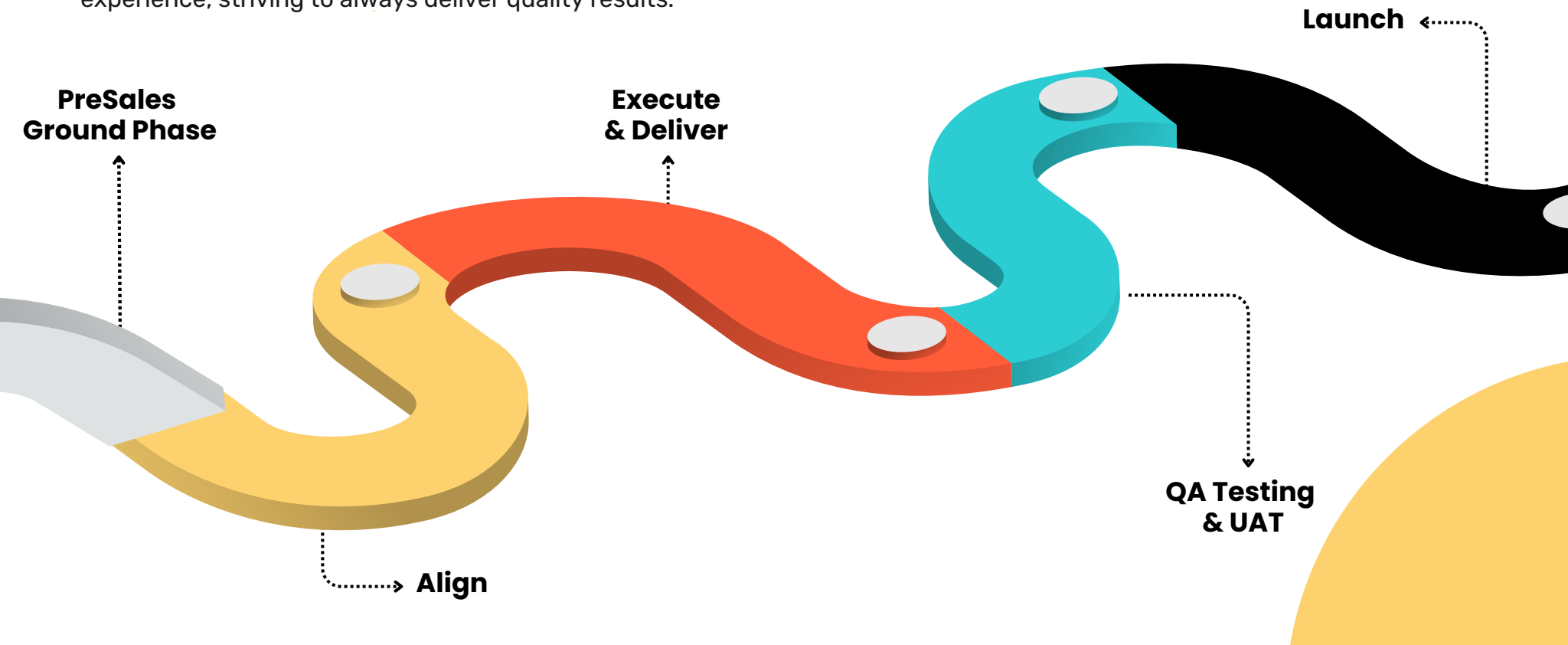
Who **We** Are

Our vibrant culture embraces collaboration, inclusion, and authenticity. Embodying our core values and guided principles, we cultivate an environment where every voice is valued, leading to exceptional solutions for our clients. Through our internal initiatives and programs we stay committed to our pursuit of growth, positive impact, and shared success.

Our unwavering commitment to Diversity, Equity, and Inclusion permeates every facet of our organization. We actively foster an inclusive environment that values and celebrates diversity, encouraging individuals on our team and clients to share their unique perspectives, ultimately creating a space where everyone can thrive.

How We Work

With a flexible, lean, and customized approach, we're part of your operations team when and how you need us to be. As a client at Lane Four, your journey is meticulously crafted through tailored roadmaps, ensuring a clear and strategic path to success. Whether there is a need for a larger implementation or ongoing support, our commitment to open and vital communication lines guarantees that your needs are not only heard but proactively addressed, emphasizing the importance of responsiveness. Keeping our teams specialized and small, we offer our clients the distinct advantage of streamlined collaboration, ensuring efficiency and effectiveness. With unwavering diligence, we continually optimize your experience, striving to always deliver quality results.

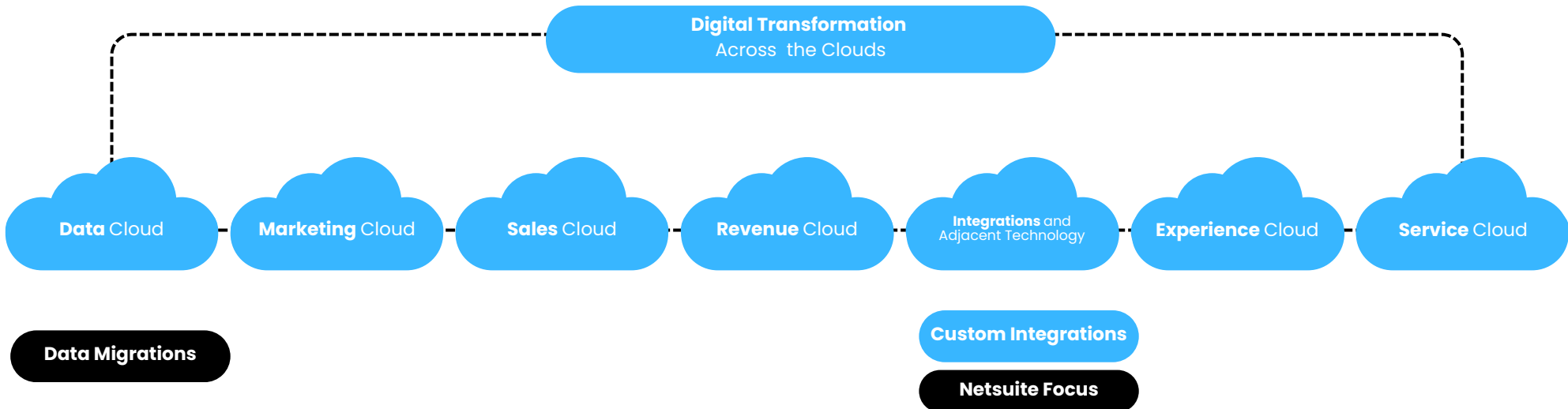


Digital Transformation



Proactive conversations go beyond fixing existing issues—they're about unlocking potential, driving sustainable growth, and expanding business opportunities alongside our partners. By investing in digital transformation today, clients can secure their future growth while avoiding the escalating costs of delayed action.

With a strong reputation in the market for delivery excellence, we align technical work with strategic goals to drive sustainable growth and maximize tech value. Our holistic consulting approach blends business acumen with technical expertise, bridging critical gaps across revenue operations—encompassing people, processes, and technology—and uniting functions such as Marketing, Sales, Customer Success, and Finance.



AI Solutions | Agentforce

The Advantage of Working With Lane Four: Because we excel in both overarching revenue strategy and technical delivery, Lane Four offers a unique advantage: *we keep everything in-house, combining management consulting with seamless technical delivery. Our smaller size allows us to be more agile, foster stronger relationships, and deliver results faster than many competitors in the space.*



Project Overview

The client, a U.S.-based communications security company, specializes in providing advanced security solutions to large-scale enterprises like Amazon. Backed by venture capital, they have expanded through acquisitions, creating a need for unified operational systems.

In 2023, the client transitioned from paper-based processes to Salesforce, purchasing Sales Cloud, Service Cloud, Marketing Cloud, CPQ & Billing, and Mulesoft to centralize and modernize their revenue systems. However, implementing this suite simultaneously posed significant challenges, prompting Lane Four's involvement.

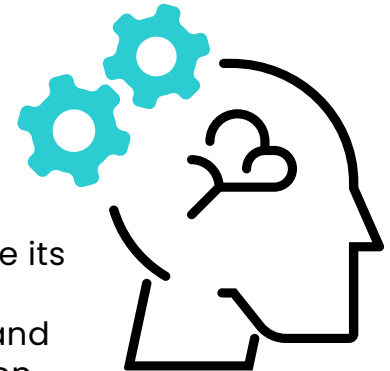


Challenges

1. **Fragmented Systems:** Transitioning from HubSpot and Micro Key while integrating acquisitions.
2. **Complex Field Operations:** With 60-70% of the sales team in the field, mobile-friendly tools were critical.
3. **Limited Salesforce Expertise:** Managing large-scale implementation across multiple clouds.
4. **Unrealized ROI:** Partial implementations and leadership changes hindered progress.
5. **Scalability Requirements:** Establishing a foundation for sustainable growth.

Lane Four's Approach

1. **Phased Implementation Strategy:** To align with the customer's goals and existing Salesforce usage, the team adopted a phased approach to the Salesforce implementation:
 - One Cloud at a Time: The strategy focused on implementing Salesforce clouds sequentially, ensuring smooth adoption and minimizing disruption.
 - Order Based on Current Salesforce Usage: The sequence was determined by how the team was already operating within Salesforce, prioritizing the starting point for their revenue engine and then moving across the customer journey.
 - i. Begin with migrating marketing operations from HubSpot to Salesforce Marketing Cloud (building workflows, audience segmentation, and AI-powered personalization) because this was the start of the customer's Ops process
 - ii. Implementing Sales Cloud and Micro Key to enhance sales processes
 - iii. Followed by Billing Cloud to streamline financial operations
 - iv. Concluding with Service Cloud to elevate customer support capabilities
2. **Build Mobile-Optimized Sales Cloud & CPQ for Field Teams:**
 - Enabled lead creation, mobile quoting, and appointment scheduling via iPads.
 - CPQ was customized to handle complex product configurations and pricing, despite its inherent limitations for mobile use.
3. **Service Cloud for Enhanced Customer Support:** Lane Four implemented SLA tracking and omni-channel case management to improve response times and customer satisfaction.
4. **Integrating Legacy Systems with Mulesoft:** Mulesoft was used to integrate Salesforce with Micro Key, syncing customer data bi-directionally to maintain operational consistency across platforms.





Results & Ongoing Work

Lane Four's tailored solutions addressed immediate needs while building a scalable foundation. Key achievements included:

- Migrating marketing operations and improving audience engagement.
- Equipping field teams with tools for real-time quoting and scheduling.
- Enhancing customer support with Service Cloud.
- Streamlining data flow between Salesforce and legacy systems.

Delays due to leadership transitions and evolving priorities paused some initiatives, such as full Marketing Cloud adoption. However, Lane Four's adaptive strategy ensures the client is positioned to go live with core functionality in early 2025, aligning their systems for growth and ROI.

By delivering actionable insights and solutions, Lane Four continues to empower this security leader in their journey toward operational excellence.



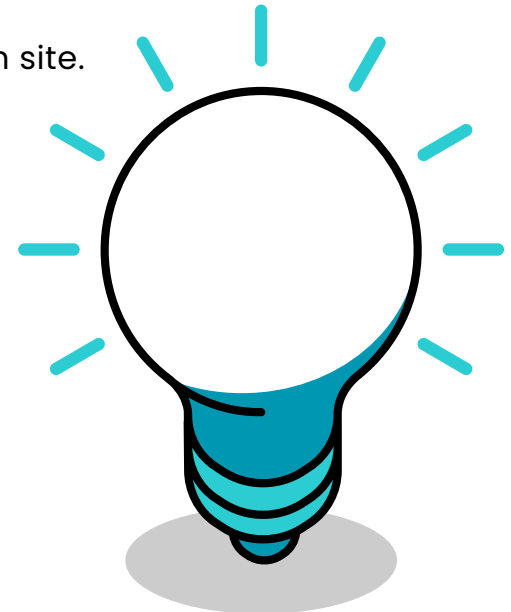


Expected Outcomes and Value

Once fully implemented, the Salesforce platform will deliver unified visibility and efficiency across the client's marketing, sales, and service teams. Marketing teams will execute targeted, AI-driven campaigns with real-time analytics. Field sales representatives will benefit from streamlined processes, including mobile quoting and scheduling. Service teams will leverage SLA tracking and case management tools to provide exceptional customer support.

The digital transformation is expected to **enhance ROI** by:

- Driving faster decision-making and reducing manual effort.
- Increasing customer satisfaction and retention.
- Scaling operations to support future growth and acquisitions.
- Facilitating and removing complexity from the selling process when folks are on site.
- Creating a seamless process from lead-to-cash.



Conclusion

Lane Four's strategic approach to digital transformation is helping this security industry leader unlock the full potential of Salesforce. By aligning tools with team needs and focusing on long-term scalability, the company is on track to achieve operational excellence and customer-centric innovation. As the project continues, the client will be well-equipped to capitalize on new opportunities and lead their industry with confidence.





For Those With Little to No Salesforce Knowledge/Experience

- 1. Start with a Clear Discovery Phase:** Begin by truly understanding the company's business processes, goals, and challenges. Use this phase to map out how Salesforce can align with and enhance the existing operations and what needs to be put in place to achieve future goals. Then, make the connections and find a way to leverage each Salesforce tool, addressing specific use cases and to avoid feeling overwhelmed, especially if working with multiple tools.
- 2. Plan for a Phased Implementation Approach:** Introduce Salesforce incrementally rather than all at once. Start with high-priority tools for high priority processes. If phases need to overlap, understand the what and the why before moving on. This allows the team to gain confidence and competence as they see tangible results from their efforts.
- 3. Prioritize Training and Enablement:** Provide comprehensive, role-specific training for all users to increase understanding and adoption. Tailor sessions to their daily workflows and use real-life scenarios to illustrate the value of Salesforce. Reinforce learning with ongoing support, documentation, and access to quick-reference materials.
- 4. Leverage Out-of-the-Box Features First:** Avoid over-customizing the platform initially. Understand how to use Salesforce's out-of-the-box features to meet the needs of the business and get the most out of the initial purchase. Once the team becomes familiar with the basics, introduce customizations or advanced features to address gaps or specific requirements.
- 5. Set Metrics for Success:** Establish clear goals and KPIs from the outset, such as improving lead conversion rates or reducing case resolution times. Regularly review these metrics to demonstrate progress, keep the team motivated, and adjust strategies if needed.

By focusing on these best practices, you can guide businesses with no Salesforce experience toward a successful implementation and ensure long-term adoption and ROI.

Have a question?

Let's Chat!



CONTACT US

