A Sales Cloud implementation for an Avionics Manufacturing company.

COMPANY PROFILE:

Founded in 1996, Mid-Canada Mod Center (MC2) was derived from their parent company, Kitchener Aero Avionics. MC2 located in Toronto is focused on providing industry avionics expertise to the corporate and 2nd tier commercial aviation markets. Their services include avionics sales, service, repair, design, certification, and installation.

At the time, MC2 managed customers in Excel.

THE CHALLENGE:

> Management wanted to improve visibility, accountability, and transparency with their CRM system
>> They sought visibility into what activities were taking place with Customers, such as emails or any form of communication with Customers

> They recognized that their growth would stagnate if they weren't able to track their Leads, Opportunities, Forecasted Sales, and Sales. They wouldn't be able to make a meaningful analysis of where the Sales pipeline was at.

> They wanted to be able to forecast and project their expected revenue for the quarter
>> This would allow them to analyze and improve on their Sales pipeline
>> They would be able to allocate resources accordingly with visibility into the expected revenue

> Data Migration
>> Needed to incorporate their data into the new system, however, their data required to clean up to be imported into Salesforce CRM

> CRM Adoption
>> Management recognized that training was crucial to adoption of the CRM system

THE SOLUTION:

To address the challenges that MC2 experienced, we implemented Sales Cloud Professional Edition and customized the objects to fit their business needs.
The following issues that were addressed in implementation:
Visibility

> We customized the objects Leads, Campaigns, Accounts, Contacts, Opportunities, Forecasts to reflect MC2's business

> Reports & Dashboards were created to provide Management with insights into the pipeline

> Web-To-Lead forms were configured to ensure that leads captured from web pages were sent directly to their Salesforce CRM

Data Migration

> We collected data from existing data sources
>> Microsoft Excel
>> Microsoft Outlook

> Reviewed, restructure, clean and scrubbed data to be imported into Salesforce.com

> Imported data into Salesforce using DataLoader

> Working with each end user to import the Contact list from Microsoft Outlook

Training

> Salesforce Administration Training was provided to ensure the user was equipped to administer the Salesforce org on a day to day basis

> Carried out user training to help users learn how to implement and configure Salesforce for Outlook connector for all users and to verify bi-directional connectivity