TRACE SYSTEMS

A migration to Salesforce's Sales Cloud from Zoho CRM

COMPANY PROFILE:

Based in Vienna, Virginia, Trace systems supports and defends' our nation's security interests worldwide. Trace Systems provides cybersecurity, intelligence, communications, networking and information technology services, systems and solutions to the United States Department of Defence. Their mission is to champion their customer's mission, aiding them alongside every step of their journey before deployment occurs right down to planning for the next deployment.

THE CHALLENGE:

The method that Trace Systems would utilize to attain federal contracts was through accessing a portal posting thousands of Federal Business Opportunities. Trace would be able to bid on a Federal Business Opportunities, and the winning bid would receive the Opportunity.Alisha Kelly, the Director of Business Development, noticed an incongruity with cross-departmental communication in regards to the bid process. Multiple systems were utilized, in which none communicated with each other. Excel was utilized to prepare reports, which were sent off via email. Email acted as a bridge between the systems but this proved to be inefficient and lacked transparency. It was imperative that the systems connected so that a streamlined view of the organization's bid process was accessible at anytime. There was a lack of transparency, limited communication cross-departmentally and it was difficult to get a streamlined view of the extensive opportunities that Trace was tracking. A case was made by outlining the cost-savings, functionality and efficiencies they would gain from implementing Salesforce's solutions, thereby leveraging their competitive stance in the industry.

THE SOLUTION:

Collaborating with Trace Systems, we derived a solution from Sales Cloud. We took into account long-term scalability as well as addressing pain points that Trace Systems experienced: we enabled integration with Outlook 365, added workflow automation and incorporated a LinkedIn integration to allow users the ability to see who the decision makers were and who was involved at what part of the acquisition cycle. To streamline their move to Salesforce, data was migrated from their existing repository.

THE RESULTS:

The result of moving their system to Sales Cloud included improved efficiencies, streamlined communication, and more insight than ever into garnering new business.