



Case Study

Salesforce Sales Cloud & High-Velocity Sales Implementation

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Who Are We?



SP Tech is a Salesforce success partner, helping businesses across the globe to Develop, Sustain, and Manage the digital ecosystem for years now.



We were established in 2015, currently working across the USA & India. Our major expertise and 20 years of combined knowledge can promise you robust solutions across the healthcare and financial domain.



Our experts focus on your problem areas to figure out solutions, which can leverage the best of the Salesforce Cloud Computing platform. In turn helping you get more Sales, drive better revenues, and focus on exponential business growth.

Project Description

Our client needs Salesforce Sales Cloud and High Velocity Sales expertise to transform the Sales Process. The objective was implementation of Salesforce Sales Cloud and High Velocity Sales for the client.



Industry

IT Professional Services



Products

Salesforce Sales Cloud
High Velocity Sales

About Our Client

The Client is a Boston-based employee benefits company serving clients for more than 50 years. It connects millions of employees and thousands of companies. It's one of the leading comprehensive pre-tax commuter benefits in the US.

Challenges

- One of the sales rep pain points was the irrelevancy in data from Leads, Contacts, and Accounts. It affected the sales team's productivity. Since the client had a high volatile in sales, it also affected almost all the sales reps.
- Considering the client's high volatility in sales, it was very important to prioritize leads to contact. Sales reps spent a lot of time prioritizing the callable leads, tasks, emails, phone calls, and activities. So, our client wanted a lead scoring process that helped the sales reps to prioritize their tasks and provide a winning sales process to close deals faster.
- Our client wanted to have a managed sales and marketing team with important KPIs.

Solutions

- Our team assisted in identifying all the unused leads, contacts & accounts based on criteria. We generated the statistics based on criteria for unused leads and deleted irrelevant data using the data loader.

We extracted all the data from Salesforce and applied Fuzzy Lookup. As a result, we got two data sets:

1. One was the Duplicates to be removed and,
2. Other one was unique to be kept in the database.

Since Contacts are the child of an account, we didn't want to remove those unique contacts. We only removed accounts that were duplicates. We again applied some filters and generated those contacts data sets that were needed to attach with their unique account. Once we had all datasets, we used Data loader to update the records that were required in the database and removed all duplicates.

Continued...

- The Salesforce High-Velocity Sales is a streamlined solution tailored to be utilized inside sales teams (including sales development and business development reps). It is designed to speed up the sales process. Bringing together many of Salesforce's core technologies with new features, High-Velocity Sales gives inside sales teams the following benefits:
- a) Insights on how to prospect smarter and faster
 - b) Integrated tools to eliminate busy work and multiple logins
 - c) New levels of best-practice automation for scalable, repeatable success

We helped the client to identify winning sales processes and set up the sales cadence to use for a sales rep. Along with it, we helped to set up a work queue so that the sales rep knows who is the best lead to approach and sort the pending stuff.

Continued...

- Since it's on a console app, the sales rep now knows all the details about the customer, their past activity all in one place. This helps them as they don't have to ask the customers to wait while checking their details during a call.
- As a result, sales reps can now interact with the customers with better knowledge about past interactions along with great gratitude. They can close leads faster than ever.

Continued...

- As our client had high volatile in sales, it's often hard to track individual sales rep activities and take a closer look at the overall company performance. Hence, we suggested implementing a Dynamic dashboard to track individual sales rep activities and view details, update team's performance and more. We implemented several reports such as "Meetings attended within months and years", connected leads and wining rate, etc.
- As a result, now the client had a very close look at the sales rep's activities, and it also helped in identifying sales reps' interest and the domain in which they are more skilled to close business deals faster. This ultimately helped them assign a lead to sales reps and close deals faster along with enhancing the overall company performance.

Results

➤ **Sales Rep's closing leads faster.**

Extraction of unused leads, contacts, and accounts leads for utilization of clean data to achieve sales targets.

➤ **Increase Overall company performance.**

Continuous performance monitoring of Sales reps leads to better management of tasks and enhanced productivity.

➤ **Reduced Prioritizing leads time.**

Better management of past sales records leads to better business forecasts.

➤ **Better Sales Approach and increased Gratitude of Sales Reps**

Streamlined process and improved data management resulted in a better sales approach.

THANK
YOU!

