Increasing Sales Efficiency & Effectiveness through Salesforce Hierarchy Management

THE CLIENT

The client is a medical supply and software manufacturer with a global client-base spanning from blood collection centers to hospitals along with a broad set of product lines and solutions.

THE CHALLENGE

In order to sustain growth in a rapidly changing business climate, the sales organization was faced with the pressure to both maintain the current customer base and expand into new customer regions. To do this, they required a single view into the customer to be able to easily identify their most valuable customers and properly manage upsell and cross sell activities related to products and services.

The sales team leverages the Salesforce Sales Cloud, but the solution posed several inherent challenges around Account hierarchies and obtaining a complete **360 degree view of the Customer**. The current structure of Accounts was flat without any hierarchical structure of a Customer and Region. And knowing where exactly to enter an opportunity was a very cumbersome task. Additionally, from a reporting perspective it was difficult to look at a Customer, opportunity or historical billing information in aggregate. The process was very manual and tedious. Native Salesforce hierarchy functionality is limited which makes it difficult to easily view data that is more than a couple of tiers deep. As the executive team surged into **pipeline management** and **reporting**, it was evident that in order to get their sales users leveraging Salesforce effectively, the view of the Customer needed to be cleaned.

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THE SOLUTION

The client knew from the start they would need to enlist the help of a professional services firm. Since Cervello was already helping with sales reporting, the Salesforce expertise they brought to the table was a natural evolution.

Cervello consultants provided strategic thinking and advice on the most valuable way to approach the solution from a technology perspective. After contemplating sales team needs, considering security implications, future organizational changes and the best way to manage the data, Cervello consultants determined that the data would need to be mastered outside of Salesforce in a solution such as Oracle Data Relationship Management (DRM).

BENEFITS

Since implementing the solution, the client has realized many benefits, including increased sales team effectiveness through better identification of upsell and cross sell opportunities, improved reporting and improved visibility and insight into 20,000 customer Accounts supporting 350+ sales professionals worldwide.

ABOUT CERVELLO

Cervello Inc., is a leading professional services and solutions provider focused on helping companies solve complex data challenges, improve business analytics and optimize business performance. We focus on transformative cloud-based technologies in enterprise performance management, data management and business intelligence and customer relationship management. Cervello works with some of the leading on-premise and cloud software providers such as Oracle, Host Analytics, Salesforce.com and Birst. Our core services include system implementation, advisory services, custom application development and managed services. **For more information, visit us at www.mycervello.com or contact us at info@mycervello.com.**

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