

Going Paperless After 18 Years

Company's name:



Company Slogan:

Your energy efficient home improvement specialists since 1999.

Overview:

Breaking Old Habits in the Home Improvement Industry.

The challenge:

Leads were being taken down on paper, searched for through thousands of documents, and eventually, lost.

Services Performed:

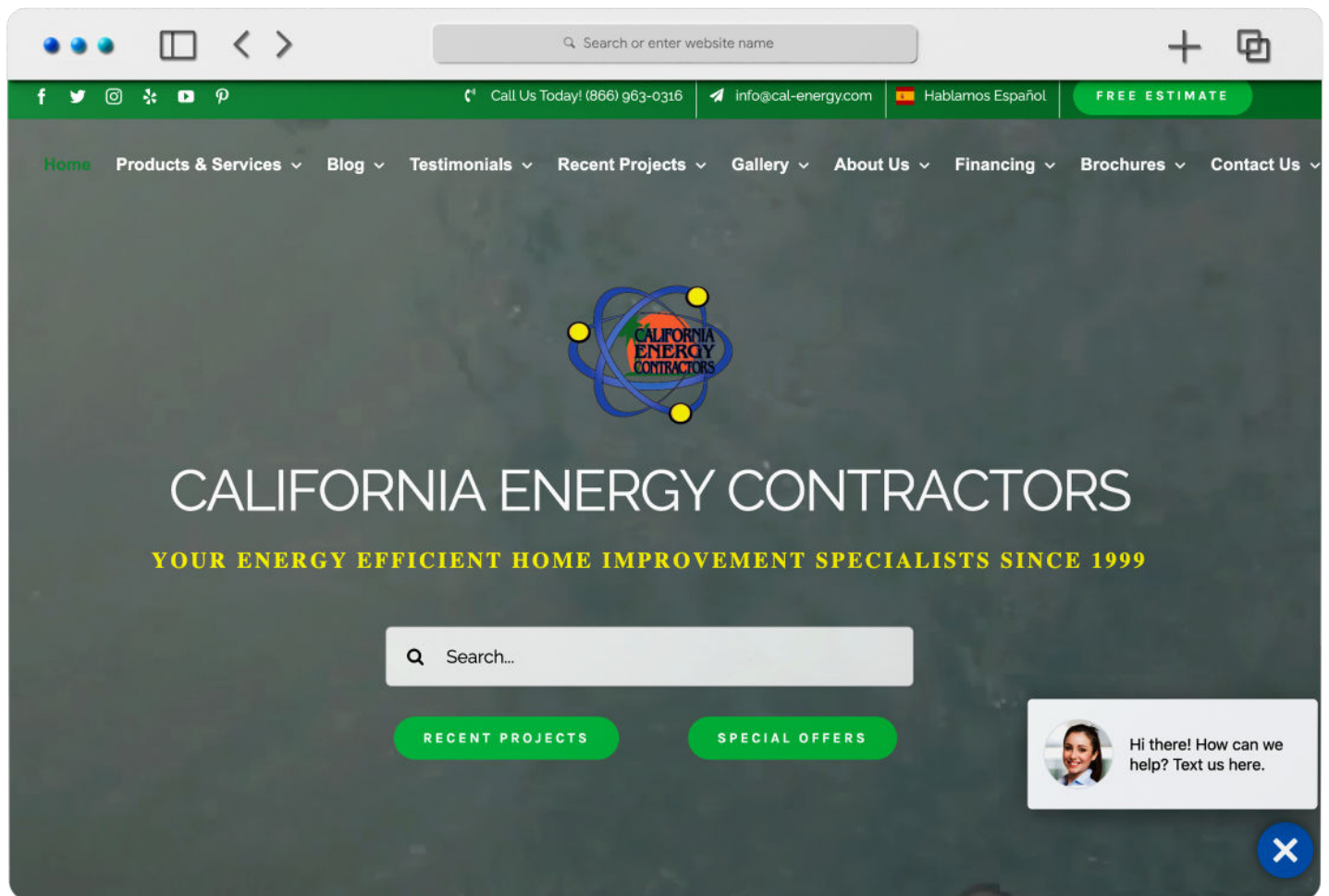
- Sales Cloud Implementation
- Service Cloud Implementation
- Chatter Integration
- Five9 Integration
- Geopointe Integration

Results:

Increased in leads, sales and efficiency.

About California Energy Contractors

California Energy Contractors is a mid-market home improvement company specializing in selling and installing energy efficient windows, tex-cote, roofing, and walk-in tubs. Established in 1999, Cal-Energy continued to use the same system of generating leads and sales for eighteen years. After noticing a plateau in sales, they realized that they had to change their traditional ways to keep up with the newcomers who specialized on technology.



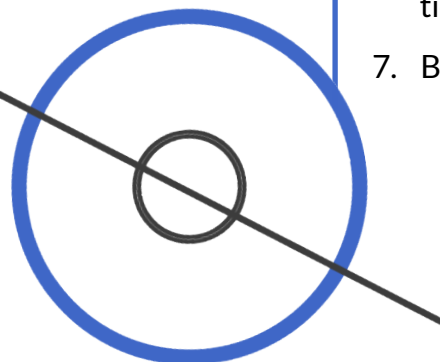
1. The Challenge

Leads were being taken down on paper, searched for through thousands of documents, and eventually, lost.

- Lead generation by a telemarketing staff was not consistent week over week
- Limited visibility into historical appointments of an existing prospect
- Sales were stagnant
- Excel pricebooks were very difficult to update
- Sales Manager spent most of his day scheduling and confirming appointments rather than managing and coaching his staff to increase sales
- Internal communication was done via post-it notes
- Reporting was manually done by looking at every lead sheet and tallying KPIs for every marketer, lead source, and sales representative individually
- Sophisticated reporting was not possible.

2. The Solution

1. Migrated the entire marketing and sales departments from paper to a build out of Sales Cloud Lightning with Chatter.
2. Integrated the Five9 Dialer inside of Salesforce configured with screen-pop and business intelligence
3. Implemented a robust appointment tracking process for managers to reference the full history of any customer.
4. Created automation to deliver appointments to sales representatives faster with complete access to any required information on-demand.
5. Integrated company pricebook for easy pricing.
6. Integrated Geopointe to provide a 360 degree view of all customer locations while scheduling appointments.
7. Built new performance dashboards and reports.



3. The Results



Increased in leads, sales and efficiency.

- ✓ 45% increase in leads generated weekly
- ✓ Reduced time spent to generate a lead from approx. eight minutes to under three minutes
- ✓ Improved appointment confirmations by 70%, resulting in less no-shows
- ✓ 24% increase in the number of monthly sales
- ✓ Reduced hours spent by administrators on coordinating the status of leads between the Sales Manager, sales representatives, and executives from ten hours to two hours weekly
- ✓ Increased the efficiency of scheduling by region leading to an additional three scheduled appointments weekly per sales representative
- ✓ Developed power users into internal champions, which led to a 100% successful user adoption
- ✓ Groundbreaking insight into sales team performance, highlighting gaps and trends previously unknown

Ready to transform the way your company uses Salesforce?

Contact us today to take the first step toward powerful automations that increase productivity and maximize ROI.

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