

ThoughtWorld

An intelligent Salesforce Sales process designed in a small window of time for better tracking and following up the business Sales pipeline.

How a limited time-framed Salesforce Implementation helped an innovative communication company start their Sales Team while building a trustworthy partner relationship.



Ideas That Change The World.

About ThoughtWorld

ThoughtWorld is an interactive digital world of actual thoughts. The platform allows people to share their opinions, collaborate with other thinkers, explore new ideas, and share freely, without fear of reprisal or incrimination, in an anonymous way. It helps ordinary people, businesses, nonprofits, policymakers, and others understand why groups of people think the way they do.

To improve their systems, the company procured Salesforce licenses which will help maximize their efficiency, manage the company's interaction with customers and enhance business relationships. However, they did not have in-house Salesforce experts and needed to implement Sales Cloud before the company's sales team started in a little more than two weeks and to have a Salesforce MVP spun up for the sales team in three weeks. They would require a highly skilled team to work with them on a very tight deadline.

Headquarters: Irvine, CA

Industry: Communication

Webpage: [ThoughtWorld](https://www.thoughtworld.com)

Services we performed:

- [Salesforce Implementation](#)
- [Managed Services](#)
- Salesforce Integration

The challenge.

A smart, well-thought-out project in a short window of time .

After procuring some Salesforce licenses, ThoughtWorld needed to quickly implement Sales Cloud for their brand-new sales team was starting in 3 weeks' time. They lacked in-house Salesforce experts and were seeking a Salesforce minimal viable product (MVP) setup so that their sales team could start tracking pipeline activity.

ThoughtWorld needed to work with a Salesforce partner who could architect the org for scalability and that would encompass the complete sales process. Starting with the Business Development Representative (BDR) generating the lead, turning it over to a Sales Account Executive (Closers) who would analyze the lead and convert to an opportunity, designing a sales process to track the pipeline, and creating collaboration between the BRD(s), AE(s), and Sales Manager(s) prior to bring it to a close.

This project would require Cloudsquare's team to configure the standard Salesforce objects, integrate Salesforce with Gmail, set up the role hierarchy, create automation, and training end users all within a limited budget. This project needed to get done within 2 weeks' time for it to be a success.

The Solution

A Salesforce Customer Community to help Wellness

IQ customers manage their members.

1. The project started with a set of discovery meetings to gather the initial requirements for the buildout which resulted in a well-organized work plan. To stay on track, weekly check-in calls were scheduled to review blockers and in progress tasks. A Salesforce sales process was designed utilizing standard functionality for the sales team to track and follow up with their pipeline of business. Everything was achieved within a limited window of time.
2. Cloudsquare's team configured a lead path with custom values that were meaningful to ThoughtWorld. They created a process that started with the BDR to capture and nurture the lead. Once the leads were qualified, the BDRs would reassign this lead to the Closers, who could then work the opportunity. ThoughtWorld's Sales Team could now track the leads, opportunities, and contacts they were working with. Cloudsquare also configured the opportunity object and implemented a stage path with values that would be functional to the ThoughtWorld Sales Team.
3. Roles, Profiles, Permission, Sharing Settings, and Field History Tracking were configured on two levels: BDR and Closer. **The team also integrated Gmail with Salesforce to relate emails to appropriate records in Salesforce while assisting power users in configuring the sidebar.** Following Power User Training, Cloudsquare's team then added additional custom fields, created list views, and adjusted the page layouts to eliminate all the clutter that comes with Salesforce out of the box, and automated some validation rules for selected fields or when a user added specific data.
4. Finally, they trained end users on what was built.

The Results

A Comprehensive sales process workflow designed for better business process decisions.

Cloudsquare Services

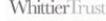
- Implementation
- Development
- Consulting
- Managed Services

- Once the implementation was set in place, ThoughtWorld's team could track their leads and opportunities, pull up any record instantly, and start working on them immediately. They could now see the lead and opportunity sales process through a guided flow, input data, analyze it and make better business process decisions, like selecting which leads should become opportunities and which ones they need to leave behind. Additionally, having a list view with each stage of the lead or opportunity process allowed them to filter and better understand the open pipeline.
- This successful partnership created a trusted relationship between Cloudsquare and ThoughtWorld which continues to the present day— working on improving and maximizing ThoughtWorld's efficiency with innovative ideas, services, and implementations. These new projects will create reports and dashboards to get a manager's view of the process that would allow them to obtain quantifiable data to attain better knowledge and understanding of the status of each lead and opportunity, the number of leads, and the reason behind each status.

We are pleased with the deliverable deliverable and are looking forward to a long, trusted relationship with Cloudsquare - Paul, Kellen, and the Team are amazing!

–Lessie Russel,
Chief Customer Officer
ThoughtWorld

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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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