



ICEBERG
· REVOPS ·

How Iceberg modernized TaskRay's go-to-market operations for less than the cost of a full-time Salesforce administrator

TASKRAY

CUSTOMER ONBOARDING SUCCESS

"[By using Iceberg], I had more time to focus on active deals and alliances activity, which is a substantial portion of our revenue."

— Mike Davis
TaskRay's Vice President of Sales

TASKRAY

CUSTOMER ONBOARDING SUCCESS

About TaskRay

TaskRay offers the #1 onboarding and project management solution on the Salesforce AppExchange.

Built entirely on the Salesforce platform, TaskRay's solution automatically connects to relevant CRM data like accounts, opportunities, and contacts – and it provides businesses in any industry with workflows to onboard new customers faster and more efficiently.

Company size:
30 employees



Project Snapshot

In 2019, TaskRay's leadership team faced a difficult and relatable challenge for growth-stage companies.

“How can we free up resources for customer projects and still improve the day-to-day operations driving the success of our own sales funnel?”

To manage its growing pains, TaskRay explored hiring a full-time Salesforce administrator against outsourcing its go-to-market operations.

After weighing cost vs. value, TaskRay chose to partner with Iceberg RevOps to stretch its resources during a pivotal growth period.

The Challenge

“We had to solve two problems. One was Salesforce administration. And, as a first-time sales leader, I also valued a second set of eyes from a strategy perspective. I was looking for a combination of Salesforce expertise and related systems, plus strategy and thoughtful business requirements.”

– Mike Davis
TaskRay's Vice President of Sales

As a Salesforce application, TaskRay employs the most talented Salesforce professionals in the business. Its leadership only needed to look down the hall to find the right people to manage the technical side of TaskRay's internal operations. The problem is, internal projects rob ROI from improving the product for customers.

“Do we want to burn our technical solution architect and developers to build systems that improve efficiency on our side, or do we want our teams to focus on new solutions for customers?”

Answer? Customers.

Choice 1

Hire a full-time Salesforce administrator

The base salary for a full-time Salesforce administrator is anywhere from \$76,000 to \$144,000. (Source: Mason Frank International)

Including incentives and overhead, TaskRay's leadership faced costs of at least \$100,000.

Cost was only one factor.

The other challenge for TaskRay's leadership was finding the right skillset.

Choice 2

Outsource to a revenue operations team

Mike had already bought into a revenue operations mindset where a company's go-to-market operations align as a single revenue engine.

Any admin or rep can build a report in Salesforce.

But Mike knew the skills TaskRay needed went beyond configuring fields in the platform. He wanted revenue operations experts to work with stakeholders and build consensus across teams. TaskRay's ops needed a strategy watchdog to safeguard data quality, seize opportunities to improve accuracy and sales funnel visibility, and most importantly have the authority to ask, 'Why are we doing this?'

Resource-conscious SaaS companies somewhere between founder-selling and hiring their own operations team often find themselves struggling to:

- ▶ Wrangle their go-to-market operations and produce reliable sales reports.
- ▶ Stay financially nimble for more strategic investments.

Iceberg demonstrated a thoughtful approach to discovery – rather than a one-size-fits-all."

Mike searched groups like Revenue Collective for a RevOps vendor who could deliver high-caliber Salesforce expertise tied to business strategy. After considering several options, Mike trusted Iceberg's careful, customized recommendations.

The RevOps Methodology

Iceberg collaborated with TaskRay on several projects following this framework:

- ▶ Meet with senior leadership to discuss the challenge.
- ▶ Meet with team leaders across the organization to reach a consensus.
- ▶ Perform an audit of the current process.
- ▶ Diagram a proposed solution.
- ▶ Review and update the proposed solution with TaskRay's team.
- ▶ Stress test the solution in a sandbox environment.
- ▶ Work alongside TaskRay's operations teams to configure the new process in Salesforce.
- ▶ Offer training support.

"If you think about it, every report is accurate. It pulls the data it's been given. But it might not be trustworthy. The actual data needs to be filtered properly, and the fields need to have the right information. Your reps should also be trained on the process to input the data accurately."

— Iceberg RevOps

PROJECTS

What's happening with our leads?

Leak-free lead tracking and meeting follow-up reports

"One of the biggest wins for me has been the clarity provided in tracking the number of first meetings completed as a key metric for capacity."

What's our return on a \$10,000 marketing investment?

Eye-popping funnel visibility with a new marketing attribution dashboard

"The marketing attribution dashboard is a world-class level of insight into our pipeline."

The Results

Complete go-to-market operations expertise

By partnering with Iceberg, TaskRay benefited from the strategic support of an entire team of RevOps experts for less than the cost of a single Salesforce administrator.

New lead tracking and meeting follow-up dashboards answer basic questions like, “Did we follow up with this lead?” or “Did we get a meeting?” This way qualified leads stay in TaskRay’s sales funnel.


The marketing attribution dashboard provides total visibility into TaskRay’s marketing ROI. Leadership can see at a glance which tactics generate the highest ROI – in TaskRay’s case webinars – and invest resources based on real data.

TaskRay received industry-leading RevOps expertise during a period of critical growth. The cost savings allowed TaskRay to hire strategic full-time positions in product design and customer service.

Not to mention, sales leaders can concentrate on the big picture.

TaskRay made Iceberg better, too.

TaskRay came to the table ready to tackle projects head on. Their intensity and focus challenged Iceberg’s own project management resources. Since working with TaskRay, Iceberg hired more project management experts to improve its customer experience.



[By using Iceberg], I had more time to focus on active deals and alliances activity, which is a substantial portion of our revenue.”



Ready for growth?

Iceberg can build operations that scale with you.