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# How Iceberg helped Patriot Software implement Salesforce and automate its sales process for the first time



**PATRIOT**

*"Iceberg set up the right rules, the right definitions, and the right automation so we can safeguard ourselves and keep our data clean."*

— Steve Hoffman  
Vice President of Business Development

# The Challenge

Until recently, Patriot's homegrown system, Care, served as the organization's primary customer database and help desk. Without a true customer relationship management (CRM) platform that tracked activities at every deal stage, managing leads was a manual process owned by sales reps. When a visitor to Patriot's website submitted a form, a sales rep entered the lead's contact information into Care and the same data into Outreach.io, a sales automation platform, before placing the lead into an email campaign.

Keeping track of leads in spreadsheets and entering data by hand became a losing battle as Patriot's lead volume continued to grow.

Steve Hoffman, Vice President of Business Development, recognized the opportunity cost of not having a well-defined lead nurturing process. If a lead stopped communicating, sales reps were more likely to focus on new ones instead of following up with any that had fallen off the radar.

## PATRIOT

**Patriot Software is a SaaS-based company providing time and attendance, payroll, and accounting software for American businesses for more than 30 years.**

*“We could track our reps' activities in Outreach, but it's not the same as tracking actual deals. To achieve more results, we had to have a well-defined sales process.”*

## Why Iceberg

*“I ultimately decided to go with Iceberg because there's a hunger inside of them that matched who we are. They have that smart, hungry, and humble mindset. It came across in a way that relates to our ethos.”*

Steve also wanted to overhaul Patriot's data infrastructure so leadership could build reports to understand their pipeline and make accurate sales forecasts.

“We needed a source of truth for data that we can measure, analyze, and understand.”

Purchasing a CRM—in this case, Salesforce—required a seismic shift in philosophy for Patriot. When faced with 'build or buy,' Patriot always chose to build. But fast-growing SaaS organizations know that building sophisticated systems in-house can be costly, too. Bringing in an outside team of experts can allow an organization to allocate its own technical resources towards other strategic projects.

Steve and his team collaborated with Iceberg to map out Patriot's two sales processes in Salesforce and integrate the new CRM with Care and Outreach.io so the sales team could have a seamless, predictable process for every stage of Patriot's revenue funnel.

# The Solution

## Implement a new CRM and systematize Patriot's two distinct sales processes

Patriot expected more than just a Salesforce implementation. The next generation of revenue operations needed to support the ideal customer experience at every sales stage.

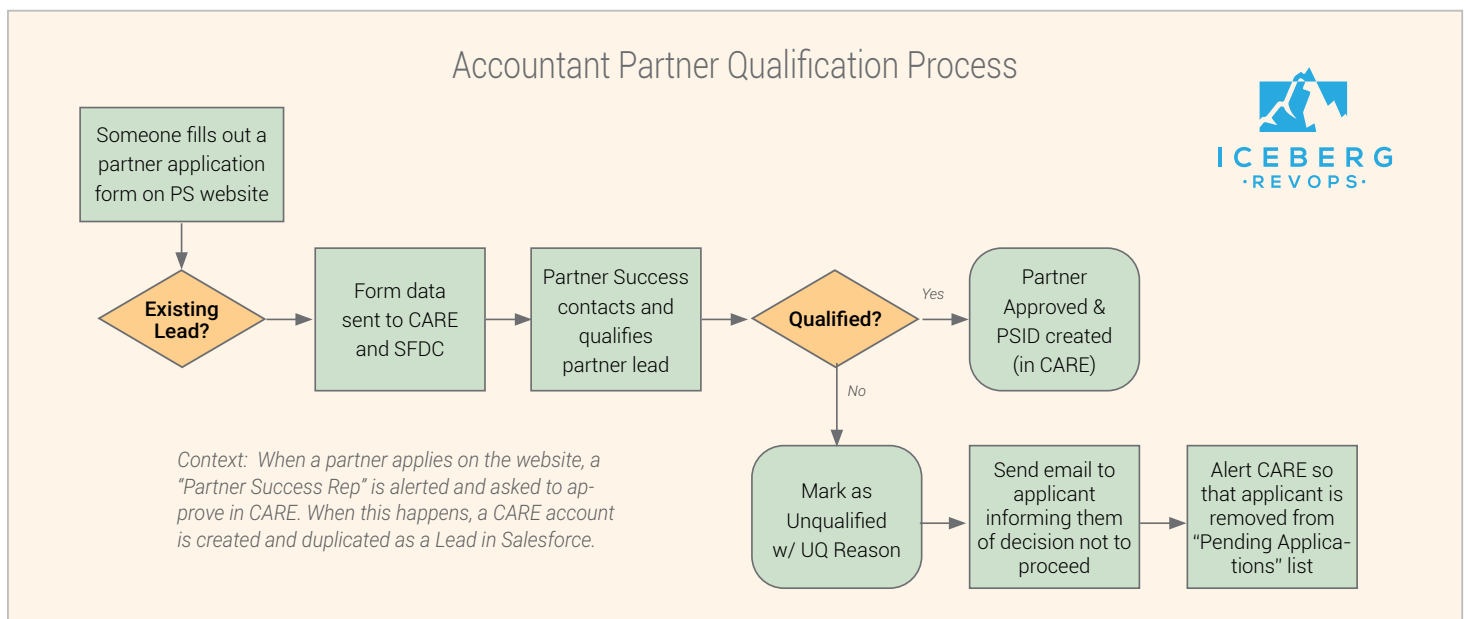
"What's the entire customer journey?" Steve asked. "What kind of technology are we using to encompass that? And now with the mindset of revenue operations, what are some of the gaps that we need to work on?"

Patriot acquires new business in two ways—1) partner channels, and 2) direct retail B2B marketing.

### ▶ Partner sales funnel

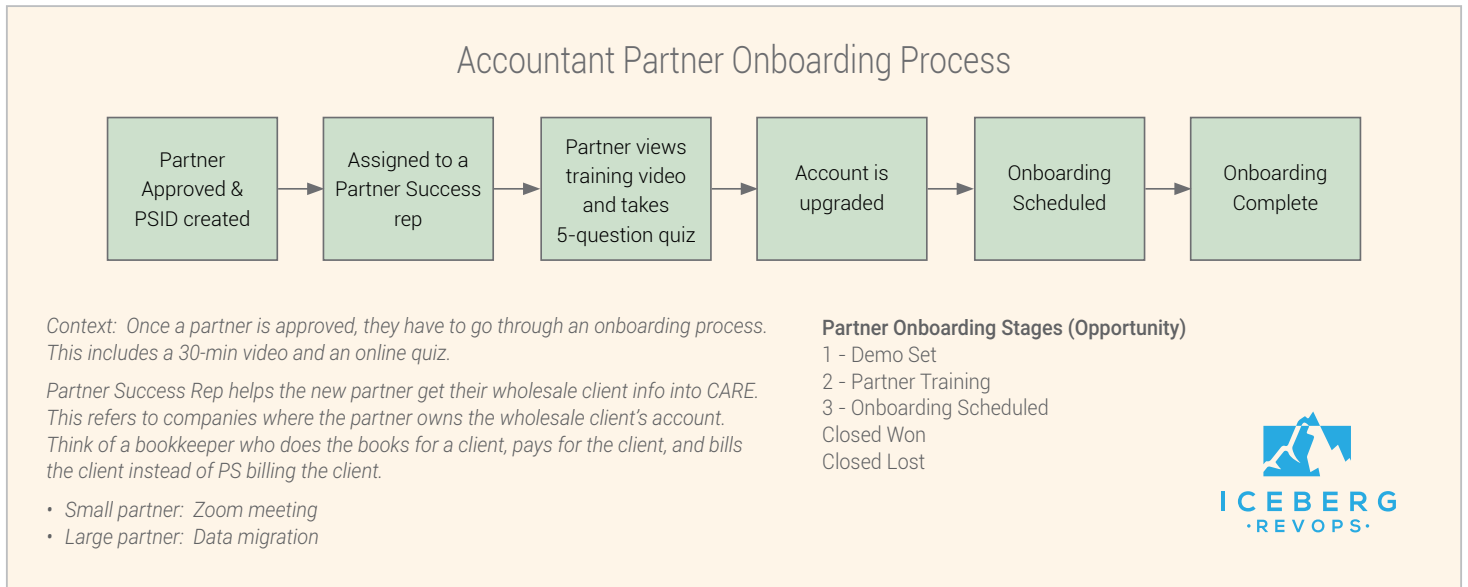
Patriot's definition for a partner opportunity takes a different spin on traditional deal stages. When a partner creates an account through Patriot's website, they don't sign a contract or pay upfront. Instead, Patriot relies on partner success reps to grow revenue through onboarding new partners (e.g., CPAs) who refer Patriot to their clients. Iceberg helped Patriot map this custom sales process to Salesforce and the rest of its tech stack.

## Lead qualification for partners



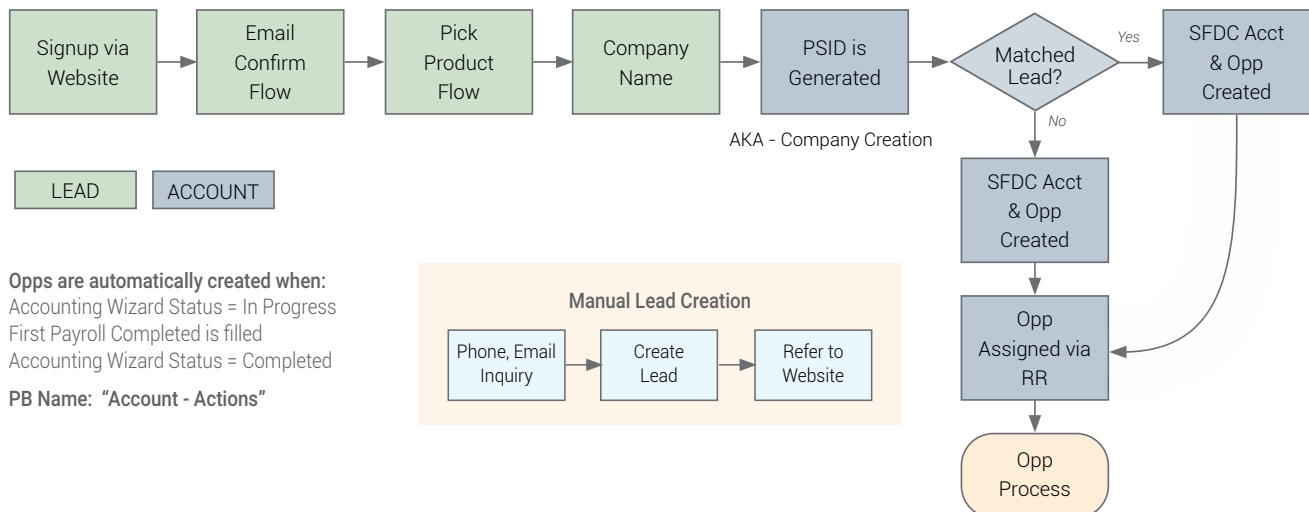
# The Solution

## Opportunity stages for partners



## ▶ Retail sales funnel

Patriot's retail sales funnel resembles the typical lead-to-opportunity deal stage structure. Iceberg built an integration between Salesforce and Patriot's customer database Care so that Care remains the source of truth for customer records, and Salesforce functions as Patriot's relationship management system.



# The Solution

## ▶ Building an API between Salesforce and Care

To integrate Salesforce and Care, Patriot and Iceberg built a robust API that delivers relevant customer data to sales reps at every stage of Patriot's revenue funnel. Any time a new lead submits a form, their contact information gets stored in Care. Once the lead becomes qualified, the API passes additional data to Salesforce and automatically places the lead into an Outreach.io email sequence.

## ▶ Implementing a round robin to assign large volumes of leads

Iceberg also designed a round robin lead assignment system in Salesforce. Leads coming through Patriot's website are distributed automatically and fairly among the sales team. In a [basic round robin](#), leads get assigned to reps one by one until the rotation starts over again. Using the Flows feature in Salesforce, Iceberg architected a slightly more sophisticated functionality that accounts for common scenarios like reps going on vacation or taking a sick day that can throw off the cadence of a standard round robin.

## The Results

*Boost in sales rep productivity & new leadership dashboards with actionable data*

With a scalable sales process in place for both retail and partner leads, Steve can see the status of every lead, and sales reps know which leads to pursue. Using personalized dashboards in Outreach.io, sales reps see leads automatically assigned to them. The lead's contact info has already passed through Care. The API shares this data with Salesforce where the lead is placed into the appropriate Outreach.io email campaign. This means no more manual data entry—reps go directly to making sales calls with qualified leads.

"We defined the sales process and made it user friendly," Steve said. "There's very little administrative work. Now sales reps can focus on their core responsibilities and activities that matter most to the company's bottom line."

Steve also uses the added visibility to create compensation plans for his sales team.

*"We have more flexibility in creating compensation plans to incentivize our sales reps where before we were limited due to technology constraints."*

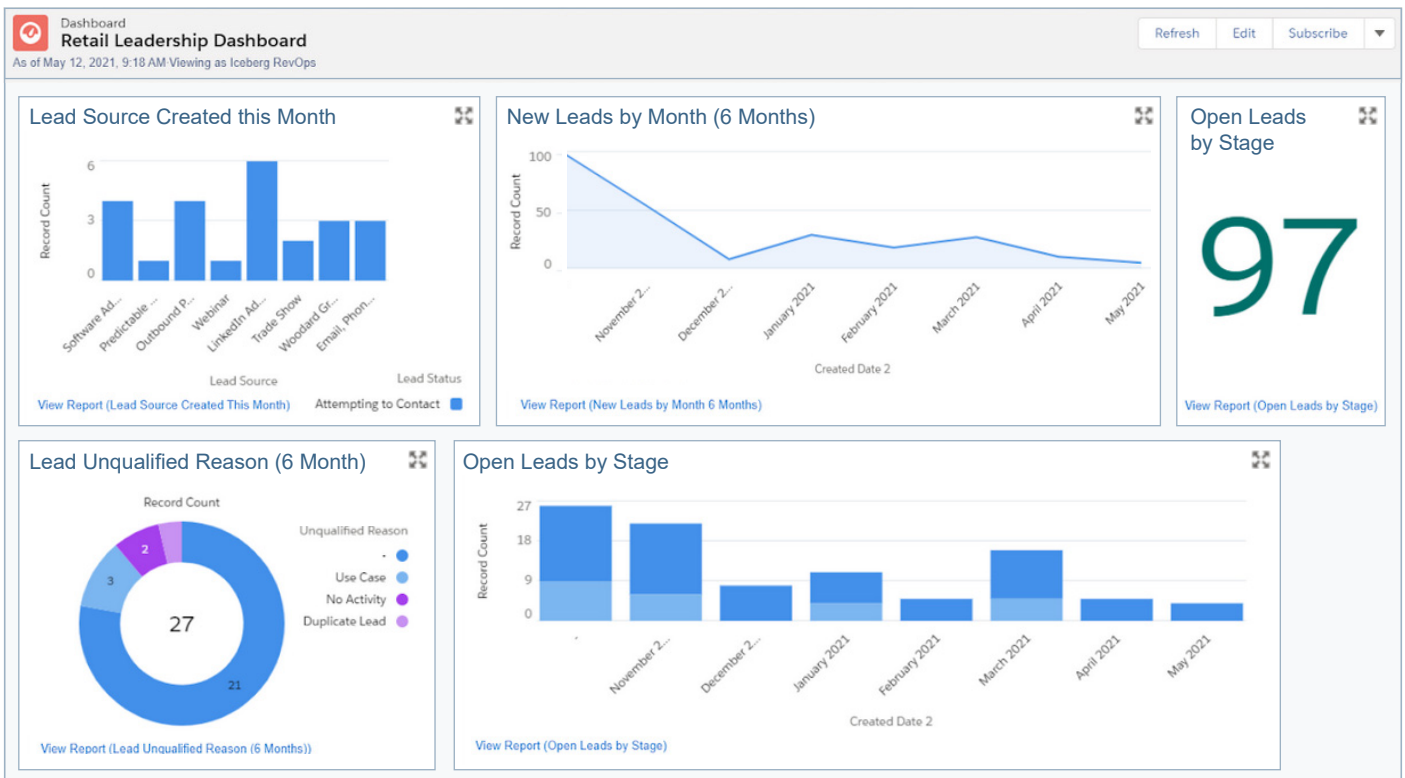
# Replacing gut feeling with trustworthy data

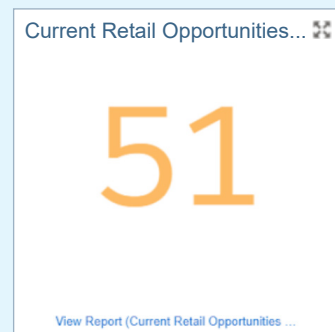
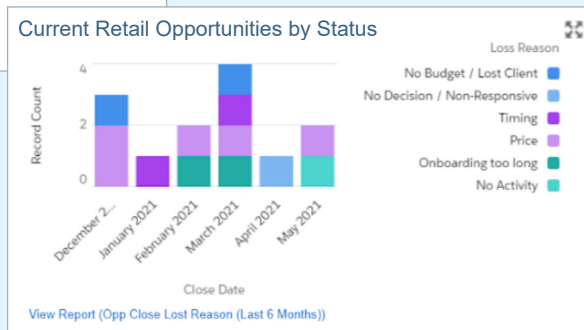
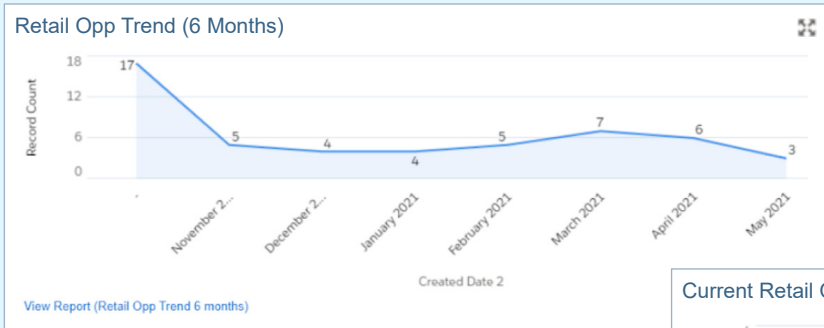
With an intelligent data infrastructure in place, Steve and his team use new leadership dashboards to forecast, make hiring plans, and build Patriot's marketing strategy.

“This information gives us a narrative of what’s happening that’s not based on intuition. It’s here are the numbers. Here’s what’s actually going on.”

## Retail funnel leadership dashboard

Patriot now uses a single dashboard to see important sales funnel metrics. In this example, the retail leadership dashboards show lead source, open leads by stage, conversion rates, deal status, and opportunity trends for Patriot's retail sales funnel.





*“Iceberg set up the right rules, the right definitions, and the right automation so we can safeguard ourselves and keep our data clean.”*

**Iceberg specializes in helping early-stage SaaS organizations build the next generation of sales and marketing operations**