

Building Digital Tools To Optimize Sales for a National Memorabilia Company

Giving sales representatives a more efficient way to manage accounts and financial goals with Salesforce



CHALLENGE

A national yearbook and memorabilia company presented CapTech with an opportunity: help their sales representatives actively manage account activity and financial targets, working through the limitations of a decades-old paper pricing process. This company's sales representatives spent multiple hours pricing a single yearbook due to pricing-rule complexity and lacked visibility into their performance to plan throughout the year.

The company knew that a technology upgrade would result in a better, more efficient experience for customers by reducing errors and giving representatives more time to interact with schools. As a first step, they identified Salesforce as a high-quality system that would lead them where they wanted to go. Then, they needed a strong partner who could implement it effectively while balancing requirements against a desire to leverage out-of-the-box functionality to the extent possible – enter CapTech.

We were selected due to our Salesforce domain expertise and ability to understand and accommodate complex business requirements in a rapidly changing environment. We partnered with the client to plan the work, collaborate with other vendors, and develop the system.



CLIENT

National yearbook and memorabilia company



INDUSTRY

Manufacturing



SERVICES

Agile Transformation,
Organizational Change
Management, Salesforce,
data Science + Visualization,
Services + APIs, Design +
Development, Digital Strategy,
Optimization

50% Reduction
IN ADMINISTRATIVE TASKS



RESULTS

By integrating with their own systems for production, finance, customer information and more, CapTech was able to ensure data was accurate and up to date. In addition, custom development on top of the Salesforce platform allowed for a better user experience, as well as more poignant analytics and reporting.

The tools developed are projected to reduce administrative time by more than 50%, in which Salesforce became a singular system for pricing, quoting, budgeting, and planning. The system provided net new transparency that enabled sales representatives to maximize profits. By having everything in one place and automating the pricing logic, it also saved significant amounts of onboarding time for new representatives to learn the business.

The final product is easier to use, can handle millions of configurations of yearbooks, is integrated with the client's downstream systems, and has the right configurations and scripting to complete sales representatives' daily tasks.

As a result of the implementation, the client is now able to enjoy the benefits of new features such as dashboards, pricing changes, commissions, and incentives all intended to help maximize profitability. The new system also yields significant time savings due to simplification, integration of other client systems, and ease of use. In addition, new tools were built to help the organization scale and adapt as the organization grows. Finally, the new system adoption was made more seamless and manageable across the organization with the rollout of a robust change management strategy.

A SOLUTION IN MULTIPLE PARTS

CapTech digitized the paper pricing process while also providing needed program and project management utilizing Agile methodologies to keep the project on track and provide visibility to IT leadership. We also served as lead coordinator between a

pricing vendor, the consultants, and a cross-departmental, cross-functional client team to document existing processes, and then establish Salesforce processes using known best practices. Protocols were established for all parts of the system

through end-to-end testing. Finally, we implemented a custom budget and sales planning solution alongside the product/pricing engine – providing integrated tools for sales representatives and client users.

Connect with us.

Call **844.373.4025** or visit us at **captechconsulting.com** to start a conversation.

CapTech others talk,
we listen.