

COLLABORATIVE STRATEGY, PRACTICAL RESULTS**Service / Consumer Goods Company**

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CHALLENGE

- 28 Employees in 3 locations
- Workflows that were not working successfully
- Lack of collaboration between different locations
- Missed followup by the sales team
- Lost control of the prospect list
- Sales people had information, but Operations did not
- Non-existent reporting

SOLUTION

- Entire team now has access to all information in real time
- Salespeople have a follow up dashboard
- Cadence tool to follow new prospect journey with reminders and action plans
- Operations can see quotes and notes from Sales
- KPI reporting for Sales and Operations in real time

RESULTS

30 days to build and implement the solution, results below realized after 1 year.

20% ↑**REVENUE**

- CRM Usage
- Improved workflow

37% ↑**CUSTOMER RETENTION****24% ↓****SALES/MARKETING COSTS**

- Sales up
- Expenses down

67% ↑**CUSTOMER SATISFACTION SCORES****EXPERIENCE**

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Having the CRM allows my team to WOW their customers from Sales through Operations. We are proactive now and we find that the team is so much more productive. Implementing it required some change management, and I had to hold myself as well as the team accountable, but the results have been worth it.

– Lisa Garvey, Vice President of Business Development