



## Case Study | Sequoia Technologies

**Industry:** Online marketing and web support

**Location:** Pleasant Hill, CA & Indianapolis, IN

**Project:** Salesforce Implementation

### Company Overview

Sequoia Technologies IMS, Inc. provides online marketing solutions and web support to heating, ventilating and air conditioning dealers and distributors.

With a compelling business plan and a dynamic leader, at the end of 2009 Sequoia Technologies IMS raised 2.1 million in a down economy. The company has 30 employees, with offices in California and Indiana. In less than 6 months the company has grown from six Enterprise Edition licenses to more than twenty licenses. The company goes by the motto “if its is not in Salesforce then it does not exist.”

### The Challenge

Sequoia Technologies IMS acquired the client base of an existing company so they immediately had clients to service. They **needed to get up and running quickly with Salesforce** to provide service to existing customers while they built a Salesforce organization that could scale to meet their growth plans. Data associated with the existing client base had to be imported into Salesforce, and at the same time relationships had to be created among the different accounts and contacts that reflected the strategy Sequoia had for managing their business.

Sequoia Technologies **needed real time visibility into key sales and customer service metrics** so they could quickly make assessments on how the business was performing. Were sales goals being met? Were individual sales reps maintaining a high activity level? Were they becoming more effective at resolving customer issues faster? Were there trends to the type of problems their customers were calling in about?

Because the company has offices in California and Indiana, and was quickly hiring new employees in both locations, **a Salesforce training plan needed to be created** that could virtually and effectively be taught to new employees.

### The Solution

In order to quickly address Sequoia Technologies’ requirements StarrForce created a small project team that consisted of a senior-level project manager and a senior-level Salesforce certified engineer/administrator. The StarrForce implementation methodology was followed while allowing for the flexibility necessary to accommodate a fast growing company.





- StarrForce **advised Sequoia on how to clean up and organize its data** so it could be best utilized in Salesforce. Sequoia cleaned the data and StarrForce imported it.
- Account record types were implemented with different page layouts for each record type.
- **Products and price books were implemented** so the company could quickly create new opportunities and report on how well their service products were selling.
- StarrForce **designed workflow and formula fields for use in opportunity line items** to track the different classes of revenue generated by Sequoia Technologies IMS.
- StarrForce **prepared the knowledge base with the appropriate case categories** for tracking question and requests from customers.
- **Web-to-case was setup with queues and assignment rules** to allow customers to create their own cases.
- **In less than three weeks StarrForce implemented Salesforce for Sequoia** to accommodate how they wanted to operate their business and work with their clients and business associates. Hundreds of records were imported into Salesforce without any issues. Everything worked.

*"StarrForce has been very valuable to our company, not only with the initial configuration of our Salesforce instance, but with ongoing support, custom development requests, and training. They have been easy to work with and a true asset to us using Salesforce to the fullest!"*

- Trent Bell, Client Services Manager, Sequoia Technologies IMS

## Results

- **Sequoia Technologies now has a business that they run almost entirely off of Salesforce.**
- The company **provides a measurably higher level of customer service** to clients than they received prior to the acquisition.
- Because they're on Salesforce all **data is always backed up, it is always available, and they can access it from their mobile devices like their Blackberries and iPhones.**
- **Through easy to view dashboards, sales, service and company management have real time visibility into how all areas of the company are performing.**
- **New employees are educated on Salesforce** so that **in less than 2 hours they are up and running** with the product including custom features, reports and dashboards.
- Many of the **new dashboards and reports** that the company needs are **created by internal staff** with StarrForce available to help for more complex issues.
- **StarrForce provides the same engineer to support and administer Sequoia** so that they receive help from someone with a deep understanding of their Salesforce organization.

**Want to see these kinds of results for yourself? Give us a call today at (888) 391-4493.** We're here to make Salesforce work for you.

