

Salesforce Implementation for Manufacturing Company

PROJECT DETAILS

 Custom Software Development

 Apr. - Jul. 2022

 \$10,000 to \$49,999

“
“They worked hard and deliberately to understand my needs as a customer.”

PROJECT SUMMARY

Konnectryx implemented, customized, and launched Salesforce as the CRM for a manufacturing company. They also were in charge of migrating and optimizing the data from the previous CRM used by the client.

PROJECT FEEDBACK

Konnectryx delivered a tailored, functional, and useful CRM, making it an instrumental tool for the client's daily operations. The team provided a transparent and well-laid-out plan from the start, allowing them to complete everything on time. Additionally, they were hardworking and knowledgeable.



The Client

Introduce your business and what you do there.

I'm the director of business development for Celina.

The Challenge

What challenge were you trying to address with Konnectryx?

We needed help implementing the new CRM system we had recently purchased.



Jon Webb
Director Business Development,
Celina



Manufacturing

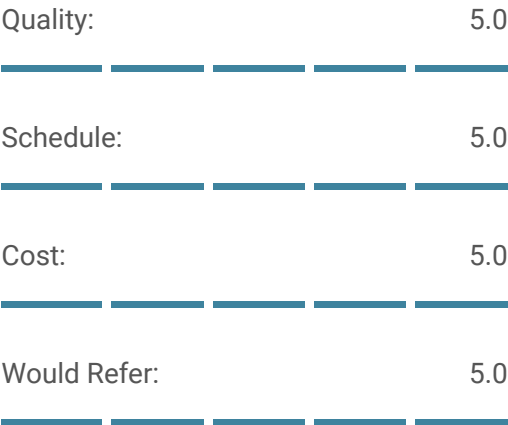
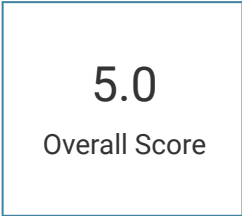


11-50 Employees



Jacksonville, Alabama

CLIENT RATING



The Approach

What was the scope of their involvement?

Konnectryx was responsible for all aspects of implementing Salesforce for our business, getting it up and running, and customizing it for our particular market and product. After the initial agreement with Salesforce, they directed us to Konnectryx, who identified how we made sales, what the nature of our product was, which market segments we were targeting, and what steps were involved in achieving a sale in each specific market.

Then, they took that information and built an initial model of our CRM, customized to our needs. Throughout this process, we engaged with Konnectryx multiple times, where they sought feedback on their progress and provided excellent advice based on their own experience.

Before this implementation, we were using a different CRM, so Konnectryx also assisted us with the migration of the data we had already collected. During this process, they also optimized the data.

Even after completing the implementation, Konnectryx reached out to see if they could do anything else for us. We had been using the tool for a little while and noticed some things that we would have liked to see. Thus, we told them about those things, and they willingly implemented those changes.

Finally, after an iterative process to finetune the CRM according to our needs, they delivered what we needed and set up a meeting with our entire team. In this meeting, we discussed where we were at, as well as some future initiatives we could engage in.

What is the team composition?

I worked with three people from Konnectryx: Michael (CEO), Louis (VP of Sales & Business Development), and a software engineer.



How did you come to work with Konnectryx?

They're a Salesforce partner, so Salesforce directed us to them.

How much have you invested with them?

We spent around \$12,000.

What is the status of this engagement?

We worked together from April–July 2022.

The Outcome

What evidence can you share that demonstrates the impact of the engagement?

Throughout our engagement, Konnectryx gave us excellent advice about how to customize Salesforce best to serve our purposes and ensure that we were tracking the right data, helping us make informed business decisions.

Since our CRM went live, four people on our team have used it daily. It works exceptionally well, as advertised. Recently, we had a business review meeting, and this tool was key for us to provide actionable data to develop our strategic three-year plan moving forward. Thus, what Konnectryx provided us with has been proved to be effective and useful, resulting in a resounding success.



How did Konnectryx perform from a project management standpoint?

Konnectryx performed very well. From the beginning, they laid out a 12-step plan to move the project from discovery to completion, including a post-completion follow-up. Each of those milestones had estimated dates of completion and detailed the person in charge of completing those milestones.

From a project management perspective, their approach made it clear that they had a project course mapped out, and they ensured to complete everything on time following that timeline. Throughout this process, we had a great dialog with them; they were professional, engaging, cooperative, and friendly.

The project's complexity didn't require the use of project management tools. Thus, we mainly communicated via Zoom or Microsoft Teams. Additionally, we exchanged emails and had a few phone calls.

What did you find most impressive about them?

The most impressive asset about Konnectryx was that they worked hard and deliberately to understand my needs as a customer. They strived to understand our requirements, which I found to be a unique and powerful perspective.

Are there any areas they could improve?

No.



Do you have any advice for potential customers?

I would highly recommend working with them. If you're pursuing a similar engagement, rely on them and provide them with as much information about your business as possible. Their expertise allows them to provide you with a product better than you can imagine.

