

Marketing Agency Saves Over \$130,000 Per Year After CRM Optimization



Company Info

Industry:

Marketing & Advertising

Company size:

11-50 Employees

Company location:

Toronto, Ontario
Canada

Products & Services Used



Success Story

◀ Summary

A Toronto-based marketing agency had an ill-configured Salesforce system that hindered user adoption and productivity. MasterSolve configured their system with an easy-to-use interface, making it more functional and simple for all users — ultimately increasing user adoption to 80% and reducing operational costs by over \$130,000 per year on average.

◀ The Challenge

Low user adoption, poor data collection processes, and a lack of strategic vision

This mid-sized marketing agency met with MasterSolve to identify areas of weakness in their CRM system. Three issues were uncovered:

Low user adoption: The marketing agency saw low user adoption rates because of the long number of steps required to enter data into their system and a large number of confusing fields.

Unorganized data collection: The agency used surveys to collect market research data on various clients. Unfortunately, these surveys were taking a long time for reps to complete and often lacked the right data to draw statistically significant conclusions.

Lack of strategic vision: Due to poor data collection, accurate information could not be maintained so reporting on KPIs was nearly impossible for leadership to do. Without tracking KPIs, they were not able to properly set or meet their goals.

◀ The Solution

Simplify organizational processes and adjust CRM workflows

To solve this company's problems, MasterSolve simplified its internal processes and modified its Salesforce system to reflect the new processes, ultimately simplifying the user experience.

Increasing user adoption: MasterSolve shortened the number of data-entry steps and cut down on the number of unnecessary fields. This reduced the amount of time needed by reps to enter data by up to 50%, giving them more time to focus on revenue-generating activities.

Improving survey and data collection: MasterSolve implemented a step-by-step wizard into the agency's Salesforce instance. This wizard contained guided steps for sales reps to follow when collecting data so they knew exactly what information they needed and where to find it. This led to faster survey turnaround times and more accurate data.

Providing strategic vision: MasterSolve restructured the agency's internal reports and dashboards to include strategic KPIs. The end result provided their leadership team a clutter-free way to view how their current strategy is performing and where they have room to improve.

◀ The Outcome

With a simplified user experience, the agency now reports that 80% of their sales reps use their Salesforce CRM daily.

With all of the process and workflow changes MasterSolve made in the agency's CRM, they were able to save a total of 400 hours of sales rep time per month and a total of 24 hours of leadership time per month—resulting in \$134,400 of cost savings each year.

Do you need help optimizing your CRM?

[Reach out to our team of certified CRM experts today.](#)

