




Cloud
PERFORMER

Simplify Work... Enjoy Life!
We Get There Together.

CUSTOMER
STORY

Rev-A-Shelf®

Salesforce® Technologies:

Sales Cloud
Service Cloud

EXECUTIVE SUMMARY

Rev-A-Shelf®

Salesforce® Technologies:
Sales Cloud
Service Cloud

Challenges:

- Had Salesforce in place for the sales team and legacy data preserved, but had low adoption of Salesforce among sales team
- Some team members wanted to abandon Salesforce for a cheaper option
- Sales team believed the Salesforce implementation didn't align with their business processes, causing them more work and frustration
- ERP was not integrated, so sales team didn't have historical account data

Solutions:

- Listened to the sales team to determine business processes that needed to be captured in the technology
- Worked with Cloud Performer to remodel and restore their Salesforce technology to align closely with business processes
- Added ERP integration for visual and real time sales metrics

Business Results

- A fluid business model and process for expanding business with existing distributor base
- Technology that supports and enables sales and customer service
- More targeted sales ability leveraging visual data, and the ability to know where to focus efforts based on real-time data

“Cloud Performer is a great partner because when I explain whatever it is, practical or crazy, Cloud Performer works to make Salesforce fit that shape hole, whether it's a star-shape hole or a trapezoid, Cloud Performer has been excellent with saying, all right, well, we can do something. And Kristen always says, “Well, Salesforce is really good with letting there always be some way to do what needs done.”

- Hex Persephone, Rev-A-Shelf

ABOUT

Rev-A-Shelf®, the market-leading innovator of quality, functional residential cabinet storage and organizational products, will literally change the way you think about cabinet organization. Their innovative approach to how we arrange our “whole home” - for the last 36 years - utilizes all the extra wasted spaces and leaves us feeling completely in control of our lives.



Highlights

- Customer base includes kitchen dealers, architects, furniture manufacturers, cabinet industry distributors, and retail home centers worldwide
- 500 employees
- 20 independent sales agents
- 315,000+ sq. ft. facility
- ISO-9002 certified

Summary

Rev-A-Shelf®, headquartered in Kentucky, has a unique sales model, selling to residential design firms, cabinetmakers, and distributors around the world. Although their product wows and speaks for itself, the sales team knows that building and nurturing relationships with distributors is how they will continue to expand and grow their worldwide market share.

Nearly 36-year old company used a legacy CRM to manage sales data. It had been customized over time, and each update would break the custom features. They had outgrown their system, and it was time to move to a robust platform, like Salesforce. After migrating effectively to Salesforce, Rev-A-Shelf accomplished their initial goals. They had a stable system that could handle updates, and they had preserved all legacy data.

When Hex Persephone joined the company as the CRM Digital Development Program Manager, he quickly saw a few areas that needed immediate attention. There was a disconnect between the shiny new technology and how the sales team worked through a distributor model, and therefore, the migration to Salesforce was met with low adoption.

One of his top three goals was Salesforce adoption, and in order to get there, Hex knew he needed to revise and remodel the Salesforce Cloud a bit to make it align more perfectly with how they conduct business, and make it easier for the sales teams to build and nurture relationships with their distributors as they continue to expand across the globe.

The story below talks about the challenges they faced and the path they took to increase Salesforce adoption and usage and to align their technology with actual business processes.

Rev-A-Shelf is a growing business with a somewhat complex business model. They were using a legacy CRM that had grown clunky and slow, and was basically broken. Regular updates would break their customizations. So moving to the Salesforce platform was an easy decision.

But when Hex joined the Rev-A-Shelf team, the first thing he observed was that although their Salesforce implementation was solid and stable, it wasn't being used by the sales team.

Hex notes, "It had been built to migrate from Saleslogix to Salesforce and had successfully preserved all legacy data, but at the end of the day, we didn't have adoption because it wasn't aligned with business processes; the business use of it hadn't been captured in the build out."

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– Hex Persephone, Rev-A-Shelf

Hex listened to how the front line sales team viewed the initial Salesforce build out. They felt like the old system was something they were familiar with, and were now being asked to learn a completely new technology. They felt it was unnecessary and more sophisticated than anyone needed to use. He remembers them saying, "Please, why on earth would I want to record a note, log a phone call, or put my events in there?"

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"There was a question mark if this was going to live or die, and Rev-A-Shelf could easily divorce Salesforce and go to something cheaper. But I'm aligned with Salesforce. If someone says to me, and they want me to consider something different that does the same thing, and I'll laugh and ask them if they've got an Apple iPhone revolutionary idea that's never been heard of before."

– Hex Persephone, Rev-A-Shelf

Hex clearly knows how empowering Salesforce can be, so he made it his number one goal to remodel the system to match the business processes that would make it easy and impactful for the team. They needed to be able to see the value in it and the powerful outcomes at their fingertips, and that would take a bit of revising within the system.

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"I've never seen anything handle customization and updates at the same time like Salesforce does."

– Hex Persephone, Rev-A-Shelf



Hex engaged Cloud Performer and worked directly with Kristen Chase to align business processes with their company technology.

Cloud Performer, a Salesforce Development and Business Consulting firm, helped to guide Rev-A-Shelf through the process of making Salesforce more functional, useful, and meaningful.

Kristen describes the problem with the Salesforce instance when she began working with Hex.

“It didn’t go far enough to be useful. They could log their account details. In large part, they could put their accounts in, and that was great, but they couldn’t see sales data around it. And that is the sort of thing that makes Salesforce much more useful for them, rather than just having a list of accounts and their phone numbers - having solid data that gives them insight and real-time sales metrics for their accounts month over month and year over year.”

— Kristen Chase, Cloud Performer

When Hex was recruited to Rev-A-Shelf, one of his top three goals was Salesforce adoption. But what really makes this story stand out is that Hex didn’t believe in coercing the team to adopt a technology that made their jobs more difficult or slowed them down. It was important to listen to the sales team and hear how the technology could enhance their progress, not impede it.

“His goal has always been to ensure the system works well for the business. And that when we talk about designing something or talk about how something might flow in the system, what the process might be like, he is always trying to make sure that that will work for the business. And sometimes that means we have to work backwards into things, rather than saying, “well, we’re going to train people to do it this way.” We start with - the reps think of it this way. This is where they’re going to go. This is where we’re going to build it instead of working backwards.”

— Kristen Chase, Cloud Performer

“Whatever they don’t like, and whatever they say was better in the previous system, you do your best to capture those business needs and you find a way in the new view and the new lens.”

— Hex Persephone, Rev-A-Shelf

The aim of the project was to find and enable the most valuable functionality out of Salesforce. Hex and Cloud Performer went through the process of identifying all the business needs and how the business flows naturally, and then came up with a plan to remodel their Salesforce instance to get real CRM power out of it. Then, they began seeing sales team adoption.



ERP Integration

One of the most helpful additions was bringing in sales data from the ERP. Previously, this data was exported to a spreadsheet and shared upon request. In Excel form, one couldn't see the full story year over year or look holistically at data in a meaningful way. After building this integration in Salesforce, the data is visual and organized and supports the sales team's efforts to follow product placement and sales numbers. This makes it easier to get three- and six-month comparisons and follow trends, and see where the company stands in various sales categories.



“Salespeople became more informed, know where to focus, whom to call, and how to spend their time.”

— Hex Persephone, Rev-A-Shelf

Distributor Relations

Rev-A-Shelf doesn't sell directly to consumers, but rather through a distributor model. Prior to the Salesforce restoration project, they didn't have a way to capture distributor relationships; that list was kept separately from the CRM. So they added a process for how to build relationships with their distributors - the heart of the sales efforts.



“That's how they're getting their product out there. And being empowered to build and nurture those relationships is a huge benefit to Rev-A-Shelf.”

— Kristen Chase, Cloud Performer

Service

Hex and Kristen worked together to help the customer service team deliver an exceptional experience; they support distributors in the sales process and homeowners through the warranty and questions.

As they built the Service Cloud on Salesforce Lightning, they included enhancements to make the business process more efficient. First, they integrated Salesforce with their phone system to give their business team the ability to take calls within Salesforce and live in one system.

Hex had heard from the customer service team that they wanted to be able to help those customers who called in and needed replacement parts. Previously, they would write down the request and have to walk it down the hallway to talk to the sales team to get those ordered.



“A replacement part order is not truly a sale, and yet they were manually bringing the sales team into that. Now they are able to capture that and start the process within the system independently.”

— Kristen Chase, Cloud Performer

Hex and Kristen revised the system to enable the customer service team to initiate replacement part orders directly from Salesforce.

At Cloud Performer, we see broken technology every single day. We see companies trying to function and enable their teams to do amazing work so they can make their mark on the world. And we know that each of these companies exists because they can solve problems for their customers and make the world a better place.

Rev-A-Shelf is an award-winning, creative, and innovative business with clever home solutions, and we believe in their ability to make an impact. Our job here at Cloud Performer was to simplify their work - to help Hex match the technology to the actual business processes - so their team can work in flow rather than in resistance. And by doing that, we believe we've made an impact that will free them up to show up for their customers in greater and more impactful ways.

“I couldn't say enough good things about Kristen because she's possibly the best developer, best super admin that I've worked with. It could be that we just have a very synergistic communication style. We definitely have a critical foundation of trust. And I'll say, Cloud Performer is key. They really get it and understand what the mission is and can see the needs and deliver.”

— Hex Persephone, Rev-A-Shelf

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ABOUT CLOUD PERFORMER

Why do we do what we do?

When we look at the state of the workplace, we see too many inefficiencies and breakdowns in processes, technology, and leadership that can be stressful for employees AND their families.

When we really look at what's going on, we see:

- people who are slowed down by legacy technologies
- people who don't have the visibility they need to understand the pulse of the company
- people who work more hours than they should to complete tasks
- people who live in a constant state of trying to catch up

These people likely feel **frustrated, overwhelmed, and even powerless** at work. They work long hours and take work home, sacrificing even more time with their family and friends.

For companies, this level of employee frustration works against a positive culture, responsible revenue growth and great customer service.

We know there's a better way!

We stand with our clients and face their business challenges head-on, guiding them through every obstacle with integrity, empathy, and passion. We're in this together, getting to know our clients - both the executives and the end users. We become their friends, mentors, guides. We're a sounding block, a listening ear, and a true solutions-provider.

We bring the best team and use world-class problem-solving abilities and advanced technology expertise to help our clients - our new friends - alleviate frustration and roadblocks in their business processes so they can get back to the kind of work they do best - serving their clients, and making the impact they set out to make in the first place.

What Can We Do For You?

- Sales Cloud, Service Cloud, and Community Cloud Implementations
- Salesforce Restorations & Rescues
- Strategic Services (e.g., roadmap and deployment planning)
- Architecture, Design & Custom Development
- Integration & Data Migration
- Support Programs



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