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Partners for Salesforce Solutions
Case Study

Rewards Network: A Similar Challenge

A Transition In Progress

Rewards Network is in the business of providing working capital and marketing services to over 25,000 restaurants across the country. The IT team implemented Salesforce almost 10 years ago. Over the past few years, there have been only minimal changes to enhance the platform or to engage the users. The result is that Rewards Network missed out on many of the broad advancements and integrations that Salesforce has brought to the market.

The Challenge

TowerBrook Capital Partners recently purchased the company with the goal of expanding the company's market share through the integration of smaller independents and additional service offerings to accelerate growth. Management has been struggling with the IT teams' inability to:

- Increase user adoption
- Improve data integrity and reliability
- Eliminate ineffective rules of engagement with customers
- Correct inaccurate forecasting and reporting
- Evaluate each department performances

The Solution

CloudMyBiz (CMB), which had previously worked with a member associated with TowerBrook, was brought in to partner with the IT team – not replace them. CMB was to provide expert guidance and consulting to help IT to optimize its Salesforce instance. The key areas of improvement that needed assistance were:

- Normalize the data model
- Build a scalable system designed for future growth,
- Improve engagement with the staff and sales teams to
- Process and visibility

Through its discovery process, CMB quickly evaluated the situation, discovered the gaps, determine where enhancements and integrations were required to improve customer satisfaction. A process was also implemented on how best to engage and then train the administrative and remote sales teams while also creating an environment where the IT team was viewed as a trusted partner wanting to support all the departments.

The Result

70% of the platform enhancements and integrations have been implemented, and a large portion of the training processes have been determined, tested and are ready for launch.

Management and IT are already seeing vast improvements in the following areas:

- Driving customer acquisition through proper use of CRM
- Creating greater user adoption by automating important end-user processes
- Optimizing Salesforce as a CRM/sales tool to get a greater ROI in Salesforce
- Creating workflows and tools within Salesforce that create a more collaborative, streamlined work environment
- Educating through a smarter approach to team training and engagement