FORSYS
Forward Thinking

Top Staffing Firm Closes Deals 60% Faster & 90% Better Pipeline Tracking With Salesforce Sales Cloud

Insight

A leading staffing and recruitment firm faced significant challenges in optimizing lead qualification and managing sales data. Limited system integration & the absence of validation processes impacted their operations, making it tough to capitalize on sales opportunities.

Forsys designed and implemented a comprehensive Salesforce solution using the Sales Cloud - Enterprise Edition - that helped the client seamlessly integrate ZoomInfo for data enrichment and Dialpad for communications purposes. Apart from the integration, Forsys implemented key validation rules, such as mandatory fields for unqualified leads and disqualification reasons for closed-lost opportunities. This resulted in a 70% improvement in data accuracy and fewer data entry errors, a 50% reduction in report generation time, a 50% boost in data-driven decision-making, and a 70% cut in manual tasks.

Industry
Staffing & Recruiting

Revenue
~$120+ M

Employees
1K-5K

Headquarters
Virginia, USA

Business Challenge

As the client's business witnessed robust growth, the massive surge in data volume created considerable hurdles hindering operational efficiency and presenting significant challenges as mentioned below:

- Fragmentation of sales processes across different tools.
- Siloed customer and sales data across systems.
- Dependence on emails and other manual workflows.
- Inefficiency in manual sales reporting processes.

Transformation Journey

To address these challenges, Forsys conceptualized, developed, and implemented a tailored solution using Salesforce Sales Cloud - Enterprise Edition. The process started with discovery, followed by solution design, ensuring the delivered solution successfully met the client's specific needs. The implementation was carried out in phases to ensure a smooth transition and effective adoption.

Here are the key highlights of the transformation journey:

- ☑ **Streamlining of sales processes across the company for uniformity and efficiency.**

- ☑ **Integration of ZoomInfo and Dialpad with Salesforce Sales Cloud to streamline client communication and record-keeping.**

- ☑ **Centralization of customer data to enhance relationship management.**

- ☑ **Real-time sales performance tracking through custom reports and dashboards.**

- ☑ **Consolidation of varied business functions into a single platform to elevate the customer experience.**

Impact

60%
faster deal closures.

70%
more accurate data.

90%
improvement in pipeline tracking & management.

50%
faster report generation.

30%
increase in lead-to-client or placement conversions.

About the Client

The client is a nationally certified and minority owned staffing company headquartered in the Washington DC Metro Area, USA. Since its inception in 2010, the client has grown to a strength of over 3000 consultants nationwide and continues to grow as one of the largest staffing companies in North America.

Solution Components

Salesforce Sales Cloud - Enterprise Edition, Reports and Dashboards, ZoomInfo, Dialpad