



Prior to collaborating with SMBHD, SK Professional Tools already had a Salesforce Sales Cloud implemented, however the team was not using the platform. Most of the users within SK Professional Tools were managing their business through email and spreadsheets. It is unclear as to why the team abandoned the use of the platform – ultimately not seeing the desired results in ROI. In addition, without a regularly leveraged tool the organization did not have a concise or clear business process.

**SK Professional Tools needed a simple and easy solution to manage their customer and consumer account, contacts and Opportunities, this included:**

- **Removing all stale data from their current system – Leads, Accounts, Contacts and Opportunities**
- **Clean existing page layouts, reorder sections and add missing fields**
- **Reorder lighting pages and add suitable components to the lightning layout**
- **Enhance and simplify the client’s ability enter different types of records that be for Leads, Accounts, and opportunities**
- **Ability to track closed lost opportunities and their reasons**
- **Ability to notify internal users of their tasks**
- **Ability to sync emails to Salesforce straight from Outlook**

**Overall, the organization needed a single source of truth to manage their sales process and can be further scaled at a later time.**

“SMBHD not only took the time to understand our project needs, but also added valued input along the way to improve our process.”

Chris Sanford, Vice President, Sales and Marketing

#### CUSTOMER

**SK Professional Tools**

<http://www.sktools.com>

**Sycamore, IL**

#### COMPANY PROFILE

**Employees: 61**

**Industry: Manufacturing, Automotive**

#### ABOUT

**SK Professional tools was founded in the early 1900’s as the Sherman-Klove Company by Mason H. Sherman and Roger Klove. The Company specialized in screw-machine products and spent the early years operating as contract company that manufactured quality tools and parts for other companies.**

**Today, SK Professional Tools manufactures over 3000 products and continues their commitment to providing quality, American-made innovation to the toughest professional in the world.**

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#### SOLUTION AT A GLANCE

**Salesforce Sales Cloud**

#### COMPONENTS

**Outlook Integration**

**SK Professional Tools needed a platform and a single source of truth to manage their day-to-day activities for their customers and consumers.**



**Increased customer and opportunity  
visibility**



**Reduced ad hoc client list.**

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**In response to these challenges, SK Professional Tools partnered with SMBHD to enhance and create a unique customer relationship management system by addressing the client's needs to simplify process and entry of records.**

**Leveraging Salesforce's highly scalable Salesforce Sales Cloud, SMBHD implemented a custom user interface and application that allowed for the traditional tracking of Leads, Account, Contacts, Opportunities; but also, the ability to track the different types of opportunities in each industry and its influencers.**

#### **RESULTS**

**The project allowed SK Professional Tools to eliminate the use of ad hoc and home grown spreadsheet to track client and consumer interactions. This highly scalable solution provides the user with point and click methods of entering data, and reporting capabilities. They also have the capabilities to sync emails to record in Salesforce making it a much easier for internal uses to know the state of an account.**

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