



Emerald Transformer had a decentralized system for tracking and monitoring data using both ZenDesk and spreadsheets. The level of detail being captured wasn't enough to suit the company's needs and the reporting was not able to provide information in the way the company needed in order to run their business as efficiently as possible.

Emerald needed a standardized way to track lead, account, contact, and opportunity data, allowing them insight to potential revenue. The goal was to keep this information in one system instead of across multiple data tracking systems as they had been using previously. Emerald struggled in the past to report on activities and other key metrics across Leads and Opportunities. To track their data, Emerald needed a process that would allow the following:

- **Entry of both high-level, and detailed information in one easy-to-use interface**
- **Customized reporting and dashboards to allow Emerald to accurately track and review KPIs**
- **Ability to monitor the success of their sales reps from lead creation through opportunity closure.**

Overall, the organization needed a single, flexible solution that allowed potential business to be tracked and reported.

CUSTOMER

Emerald Transformer
www.emeraldtransformer.com
DeFuniak Springs, FL

COMPANY PROFILE

Employees: 283
Industry: Manufacturing

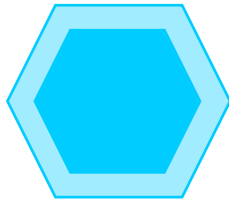
ABOUT

Emerald Transformer, headquartered in DeFuniak Springs, Florida, has 40-plus years in the transformer services industry, and provides services for electrical equipment from cradle-to-grave, including: transformer repair, large transformer decommissioning, field technical services, refurbished equipment sales, oil processing, and PCB disposal among other specialty services.

SOLUTION AT A GLANCE

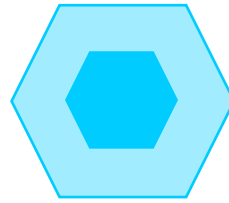
Salesforce Sales Cloud

A single system to manage all data and reporting.



50%

in real-time data visibility



25%

decrease in time spent entering data

In response to these challenges, Emerald partnered with SMBHD to create a centralized process with detailed reporting. A solution that enhances their ability to monitor leads and opportunities throughout their respective processes, allowing high-level and detailed data input, where it could be accessed by all users instead of disparate spreadsheets being created by individuals throughout the company.

Leveraging customized fields, automations, reporting, and dashboards, SMBHD was able to create a streamlined process to meet Emerald's needs.

RESULTS

With the single-system to manage all data entry and reporting, Emerald is now able to better track and monitor customer relationships and revenue streams as they change.

Emerald has streamlined the process of data entry, created a central repository for this information, and gained access to reporting on key KPIs they previously were not reporting.

LEARN MORE: www.smbhd.com • 773.888.7900 • sales@smbhd.com