



Design and Software International (DSI) was experiencing significant growth, but their legacy CRM system was simply not keeping up with the growth. DSI needed a more robust CRM solution that could handle all their sales and customer support needs.

DSI needed an easier way to manage the performance of both their Sales and Customer Success teams. DSI needed a solution that could address the following needs:

- **Provide quick and easy visibility into current sales pipeline performance.**
- **Automation of opportunity renewals to ensure no revenue opportunities are missed.**
- **A quick and easy way to capture customer feedback for real-time performance feedback (surveys).**
- **Real-time visibility into open/closed support cases, so the DSI team has a 360-degree understanding of what's going on with their accounts.**
- **An automated customer support escalation process, to ensure a 100% Case Close Rate.**
- **Custom digital form functionality for both quotes and reseller requests.**
- **Automated onboarding process reminders for the customer success team, to ensure a positive onboarding customer experience.**

Overall, DSI needed a flexible solution that could help their sales team to continue to grow the business and for their customer support team to provide the highest level of service.

In response to these challenges, DSI partnered with SMBHD to create a highly customized CRM solution. This included the Salesforce Sales Cloud, the Salesforce Service Cloud, and Conga (for custom digital documents).

"Very knowledgeable team, good communication, and easy to reach."

Jon Caliguri

Director of Sales and Business Development, Design and Software International

CUSTOMER

Design and Software International
www.dsi-mfg.com
Fairfield, OH

COMPANY PROFILE

Employees: 10-50
Industry: Information Technology

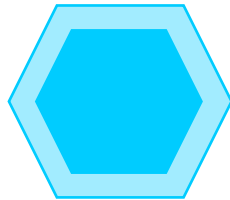
ABOUT

Founded in 1992, Design and Software International (DSI) provides technology and related services to the manufacturing industry. They specialize exclusively in the manufacturing industry - making complex 3D shapes using traditional manual methods. As the industry evolved away from manual methods and into automation using what is known as CNS (Computerized Numerical Controls), the eventual need was to begin programming these machines "offline", using computer software referred to as CAM software (Computer-Aided Manufacturing). Having an early exposure to these new technologies is what brought DSI to the forefront and began offering design services as well as providing the software for manufacturing companies to adopt this new technology.

SOLUTION AT A GLANCE

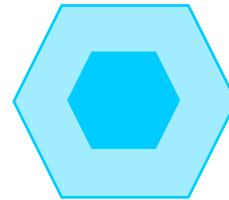
Salesforce Sales Cloud
Salesforce Platform
Conga Implementation
Salesforce Service Cloud

Implementing both the Salesforce Sales and Service Clouds has significantly impacted DSI's business performance. Sales Operations productivity has improved allowing DSI's sales team to spend more time selling and customer support team has improved Response Times and Close Rates by better allocating workloads.



+18%

**Increase in Renewal Opportunities
(Increased Revenue)**



100%

Support Case Close Rate

For the sales team, SMBHD implemented a completely custom application to track all Account, Contact, Opportunity (active sales deals), and Contact information. This included the implementation of Conga, a digital document generator used by DSI for creating both quotes and customer Reseller Requests. For the Customer Success team, SMBHD implemented the Service Cloud with the best-in-class Salesforce Service Console that allows for an omni-channel view of all support cases in the system. This view allows customer support teams to quickly address all open cases in the system because all the information needed to resolve a cases is in this single view.

RESULTS

The implementation of both the Salesforce Sales and Service Clouds, along with the implementation of Conga (used to generate custom digital documents like quotes). Now the executive team has real-time insight in the performance of every aspect of their business; this includes both team and individual performance. Also, DSI now has new sales process automations that ensure there are no missed revenue opportunities for renewing contracts. They also have new support escalation automation to ensure no cases go unresolved due to capacity issues or human error.



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