

ABOUT THE CLIENT

Benchmark International

Offices:

US, Europe, Asia, Africa

Industry: Mergers & Aquisitions



Benchmark International, a mergers and acquisitions firm providing buy-side and sell-side advisory with offices in the US, Europe, Asia and Africa, needed a new sales solution. Their existing sales processes and systems were outdated, inefficient and lacked visibility and tracking of sales and marketing activities.

CLIENT CHALLENGE

When Bayforce first sat down with Benchmark's Senior Director, Nicholas Perry, and Chairman of the Board, Steven Keane, it became clear that a complete overhaul of Benchmark's sales processes were long overdue. Benchmark was seeing strong results in spite of their sales and marketing challenges, but they knew they could do even better if they had a state-of-the-art sales and marketing solution.

When discussing their current issues, they noted disparate prospect data, customer journey and deal process complexity and inefficiencies, lack of visibility and tracking of sales and marketing activities, lack of established processes for new data acquisition, and limited targeted campaign segmentation and lead tracking.

Benchmark's wish list included data consolidation and standardization, implementation of new products to address their entire deal origination process, ability to create more targeted campaign segmentation and track prospect interest to increase total conversions, zero disruption of their day-to-day business during an implementation, consistent branding and imagery, and increase overall operational efficiency.

"Since our US go-live, our sales team has broken company records four out of the last seven months. The UK can't wait for Bayforce to finish their implementation so they can see these same types of results."

— **Nicholas Perry**,
Senior Director

Sales Transformation: Better Visibility, Better Results

How Bayforce helped Benchmark International transform their disparate and outdated sales system with a state-of-the-art Salesforce solution achieving record-breaking results.

CASE STUDY

AREAS OF FOCUS

- Clean and consolidated data
- Increased visibility and tracking of sales
- Reduction in deal process complexity
- Targeted campaign segmentation and lead tracking
- Consistent branding

"Any way we can use new technology effectively to streamline our business is good for the company and good for the entire team."

— **Steven Keane**,
Executive Chairman

Industry veterans delivering expert IT resources & solutions

CASE STUDY

"We become an extension of our client and act as an internal brand ambassador. We treat their brand and corporate voice with the utmost respect."

— Mike Mohrhusen,
Vice President, Bayforce

BAYFORCE SOLUTION & RESULTS

Bayforce's implementation team worked side by side with Benchmark's executives, sales team and marketing group to gain a thorough understanding of their current business processes, challenges they were facing, and what they hoped to achieve.

After agreeing to begin with a US only implementation as a pilot and defining all of the current as-is and to-be processes, Bayforce developed a blueprint that would provide Benchmark with everything they were looking for and more!

The solution would begin with a data consolidation and standardization of all of their existing, disparate (and often times duplicate) prospect and customer information. In parallel, Bayforce would work with one Benchmark deal transactions business process expert and one Benchmark marketing expert to implement Sales Cloud, Data.com and Pardot while ensuring no disruption to their business.

Additionally, Bayforce would implement Conga and custom Visualforce pages to help generate presentations and contract documents with Benchmark's custom branding and imagery from information housed in Salesforce. Finally, we would create a custom calendar within Salesforce for their sales team to show deal progress in real-time on screens throughout their offices.

Bayforce delivered Benchmark's entire wish list in 13 weeks. Data was de-duplicated and consolidated within Sales Cloud giving their sales team visibility into one standardized data source. The implementation of Data.com has also provided Benchmark with a seamless way in which to acquire and import new prospect data allowing

13-week implementation of Sales Cloud, Data.com, Pardot and Conga done on-time and within budget.

allowing for a greater marketing and sales reach that is more effective because the data is up-to-date.

Pardot's ability to segment data as well as create ongoing drip campaigns and track interest has led to an increased conversion rate which has thereby increased sales.

The custom Visualforce pages and Conga implementation improved the efficiency of Benchmark's presentation and contract generation while maintaining their custom fonts and images.

The re-designed business processes and implementation of Sales Cloud has led to greater visibility throughout the organization, helping to move deals through the pipeline more quickly and increase revenue.

There was no disruption to Benchmark's business during the implementation or go-live and user adoption was quick because the users loved the system from day one! Finally, Benchmark saw such great results that their UK division hired Bayforce to implement Salesforce for them as well which also went live successfully at the beginning of 2017. Bayforce will be bringing their South African division live before year end given the great success of these projects.