

Optimizing Salesforce Capabilities; Making Time For What Matters

BlueArrow Telematics is a privately owned company located in Raleigh, North Carolina. In operation for more than 30 years, the fleet management company helps business managers develop long-term goals, implement mobile workforce strategies and utilize its sophisticated telematics technology to effectively monitor and manage those strategies. Its mission is to provide customers with accurate insight into how their vehicles are being used to ensure their fleet achieves maximum productivity, driver safety, maintenance and sustainability goals.

Like most successful businesses, BlueArrow Telematics seeks to continually improve not only its products and services but, also, its own processes. It was this sort of introspection that led the company to realize it was not using its potentially powerful Salesforce platform either effectively or, often, correctly.

“As we sought to keep track of a lot of new data points,” explained Tucker Peebles, BlueArrow lead developer, “we saw we weren’t even tracking our current information in Salesforce. We also discovered we were running out of storage space, didn’t have a good place to put the various types of follow-ups we were doing and definitely didn’t have a way to analyze it.”

In addition, he said, they didn’t have a way to differentiate all the technologies BlueArrow sells or see which were related to Geotab, for whom it serves as a reseller. There also was a lack of consistency, he continued, with different sales people following different processes or logging only individual pieces of an overall solution.

In other words, he summarized, “we realized we were not going to do much more with Salesforce without getting everything done the right way.”

FINDING THE RIGHT PARTNER TO EFFECT MEANINGFUL CHANGE

In its search for a certified Salesforce partner, the firm held interviews with several companies, ultimately choosing Next-Mark, LLC.

“We needed someone who understood our vision and what we were looking to do,” Peebles said, and only Next-Mark filled all of our requirements. “They were on the same page with our goals and understood what we were looking for and what our struggles were.” Most importantly, perhaps, “they had good ideas on how to resolve our issues in just our initial conversation.”

BlueArrow representatives also were drawn to Next-Mark’s agile Next-Methodology. “Some of the other vendors interviewed were rigid in how they would work with us,” the developer explained. “There would be a conversation up front, they would design a solution and they would deliver it.” Essentially, he said, “we weren’t going to be part of the process.”

With Next-Mark, he explained, it was obvious the initial conversation would be merely a starting point in an ongoing relationship as the project progressed.



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NEXT-MARK SUCCESS STORY

CLEARING A PATH TO EFFICIENCY

Today, BlueArrow is using Salesforce as intended, not just as a customer database in which to erratically store contacts as it previously did. Now, Peebles said, “we can analyze our activities and track our leads and opportunities and cases more effectively.” Dashboards, he added, “were a huge help for us in tracking follow-up calls, account reviews and other tasks.”

It’s a sea change, he said, from the days in which leads were just “thrown in” as an account, which didn’t allow BlueArrow to utilize many of Salesforce’s built-in capabilities and provided no flow in the process. Now, the company’s sales and support teams can quickly determine what process stage the prospect or customer is in, easily accessing the details from an organized system with appropriate fields.

MAKING THINGS EASIER TO MAKE EVERYTHING BETTER

The ultimate goals of the effort, Peebles said, were to free up time through increased efficiency, better organized data, and analysis to determine if processes could be even further improved.

All, he feels, were achieved.

“Everybody’s getting more out of Salesforce,” Peebles stated, and the company is seeing the benefits. For instance, he said, BlueArrow’s Customer Health Score has gone up from somewhere in the 30s up to the 90s.

Overall, he added, “there have been a great deal of time and organizational savings.”

A SMOOTH TRANSITION AND ORGANIZATIONAL BUY-IN

As the person in charge of most process changes at BlueArrow, Peebles is well aware of his company’s resistance to them. “Everybody hates them every time” he said. This instance, however, was quite different.

“I would say the transition with this was super smooth; there weren’t a lot of issues.” That’s because, he said, “all the changes just made sense,” having an obvious purpose and result. “All the solutions were designed in a way that people wouldn’t be frustrated with them, but they would still see a lot of effectiveness from it. Obviously, there’s a little pushback any time we change processes, but I would say this was one of the easiest ones we’ve ever had to implement.”

A good portion of the credit for this welcome phenomenon, he said, goes to the communication between BlueArrow and Next-Mark, as they traded feedback on how to make changes that made users’ lives easier and drove needed improvements without tremendous struggles in execution.

ABOUT NEXT-MARK

Next-Mark, LLC, is a full-service, award-winning marketing communications agency based in Sarasota, Florida. It helps businesses and organizations exceed their growth and financial targets by delivering better competitive insights, more powerful branding, stronger strategies and faster results. As a certified Salesforce partner, Next-Mark bridges the gap between strategic content and full utilization of clients’ Salesforce application. From implementation to management of Salesforce, we strive to be a strategic, collaborative partner focused on results.



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