

Connex Partners

An executive network optimizes, enhances and future-proofs its platform and data.



“Everyone at VRP that we interacted with was very professional and highly skilled at their role. We feel we made the right decision to partner with VRP to help us clean up and redesign our Salesforce instance, and we are happy with the outcome.”

Phoenix Camacho, Vice President Of Revenue Operation

Faster

sales cycle with streamlined processes

4x

less syncing of data required

200,000+

leads migrated to contacts

The Challenge

Connex Partners faced challenges in their sales processes. Their third-party sales enablement tool was not integrated well with Salesforce. Multiple duplicate leads and contacts would map to a single record of an individual, causing major issues including records created against the wrong target objects in Salesforce. Sales cycle complexities also meant a proliferation of duplicate leads, accounts and contacts. Reporting and tracking conversations and activities was difficult.

The Wish

Connex Partners wanted to move to an account-based selling model whereby sales users didn't have to work with the “lead” object in Salesforce anymore. This would eliminate the source of many of the issues they faced. They wished to have a solution that was capable of facilitating new processes, streamlining operations and supporting scalability as their business grew and their services and business model evolved.

The Solution

VRP Consulting configured Connex Partners' Salesforce instance to facilitate new business processes, and also updated integrations so that the third-party tool only needed to work with contacts in Salesforce, meaning sales users only dealt with Salesforce accounts and contacts. VRP de-duplicated and merged existing leads, converting them in bulk and either merging them to existing accounts and contacts or creating new ones.

The Stages

First, VRP quickly set to work migrating the platform to the new account-based solution. This involved creating bespoke apps and tools to help the business migrate existing leads into appropriate accounts, contacts and opportunities en masse, or creating them where missing via sophisticated matching algorithms not otherwise commercially available, or available with standard Salesforce features. VRP then de-duplicated and cleansed existing data and created input validation rules to enforce accuracy and safeguards to prevent future duplication.

VRP then added enhancements enabling sales to Connex Partners' members by introducing new products and processes for subscriptions. VRP also created an "engagement engine" to log contact interactions (e.g., emails, tasks, events, meetings and portal activities) to provide insights to improve marketing and prioritize business activities.

The Result

Connex Partners has now empowered its sales users with ready access to accurate information. Users no longer need to dedicate excessive time to analyzing prospects' interactions with the business. Salesforce admins are free from heavy workloads for manually dealing with invalid and duplicate data, or struggling to group records together into reports. With their improved, streamlined solution, the sales cycle is accelerated and Connex Partners can now be confident their teams are empowered to make the most of every opportunity, and that the future of their business is supported as they grow and progress.

Company Profile

Connex is an exclusive, invite-only network of C-level HR and healthcare decision-makers and meticulously vetted partners. Connex Partners creates value by efficiently identifying alignment around needs and solutions. With nearly 20 years of experience leveraging unique in-person and virtual engagements, Connex engineers opportunities for value generation.

PLATFORM	PROJECT	LOCATION	INDUSTRY
Sales Cloud	Re-configuring and enhancing platform to support new business processes, and cleansing and migrating data.	North America	Consulting

Do you want to **transform your processes** to ensure future success? Then **contact us today** to discuss your individual needs.