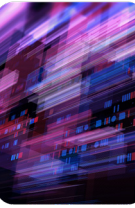
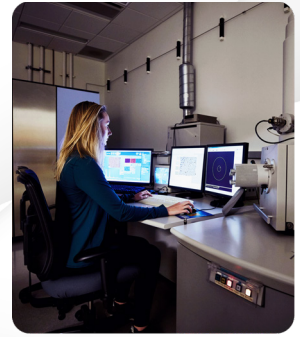




# PakLab streamlines and centralizes sales and marketing processes with AllCloud and Salesforce



Redefining the industry for over 35 years, American contract manufacturing company PakLab offers full turnkey services ranging from creative and manufacturing services. A value-based cosmetics and sustainability oriented company, they offer formulation, design, analytical and manufacturing and filing services for the health, beauty and household industries.

## Challenge

PakLab's deep roots lie in striving for efficiencies to ultimately bring quality brands to the market. To answer global competition and keep up with the speed of technology change, the family-owned company needed to scale the business and implement new strategies for their contract manufacturing business.

PakLab needed to centralize and formalize their sales and marketing processes in order to increase growth and visibility into the organization. They were operating without a CRM, leaving their existing ERP and individual Outlook accounts as the only places to manually house key business-related information. Without a CRM or marketing automation tool to track up-to-date customer data related to sales and marketing, it was becoming increasingly difficult to track activity and manage accounts for the sales team.

PakLab's leadership had a new vision for the company to scale the business. To implement this new vision, they set out to competitively launch their own product/brand into the market, double sales growth, and expand organically with acquisitions down the road. The lack of a defined sales and handoff process with their project management group was inhibiting their ability to grow at the pace they desired and produce successful business outcomes. With the majority of their business coming from existing clients, there was a need to create a lead management strategy to grow the business.



PakLab partnered with AllCloud to help create alignment and provide solutions from the onset. As a trusted advisor with strategic expertise in customized integrations and solutions, AllCloud identified the gaps and customized a Salesforce solution that would help reach business objectives, create visibility into accounts and quantify ROI.

## Solution

New to Salesforce, PakLab looked to AllCloud to create a roadmap that would allow PakLab tackle their key issues and reach their overall objectives with a phased approach. AllCloud developed an implementation plan so that PakLab could easily navigate and implement each phase, allowing the technology to grow with them as they continue to grow their business.

The first priority was to set up a standard Salesforce Sales Cloud for nearly 20 users and support the commercial team. It included creating a sales process that allowed for repeatability and improved success rates; building a centralized marketing process where leads are fed into Salesforce and tracked all the way to closed won revenue; and integrating Outlook exchange environment and ERP for full visibility into sales activity and key data. It also allowed for tracking and reporting of key success factors such as opportunity progression, estimated vs. actual sales, and account health.

AllCloud understood that PakLab's main focus was on implementing Salesforce to support the commercial sales team. To achieve this, AllCloud created a personalized implementation that not only helped to push data integration from Sage to Salesforce, but also made sure Outlook was easily integrated with all sales activities. This would help PakLab continue to build upon activities in the future. By facilitating conversations between the IT team and commercial team, some rules were set around accessibility and visibility into data and unique reporting was developed. This made it easier for sales representatives to access information in one centralized repository and then share information with the product development and research and development teams.

Moving from a complex to simplistic process, different business units were now able to communicate and successfully transition from department to department, creating a seamless customer experience with a 360 view of the customer.

To do this AllCloud facilitated conversations and helped implement a Salesforce solution with some customizations. By bringing together various business units (from sales to R&D to project management and product development), it was easier to collectively understand their needs, develop a holistic process and create forms and templates that worked for each group in Salesforce.

*"AllCloud has been an amazing partner for PakLab. We did not have a formal CRM in place and AllCloud has been tremendous in helping us get onboarded with Salesforce and giving us ideas on how to use this tool effectively. We have extended our time with AllCloud to set up additional tools in Salesforce to get all of PakLab's internal teams set up and fully functioning on Salesforce."*

**- Evan Holmes, VP Sales, PakLab**

## Results

With AllCloud, PakLab was able to successfully transition from Sage to Salesforce Sales Cloud and create a centralized information hub for all business units. PakLab's cross-functional teams have embraced Salesforce as the one-stop location for all projects and opportunities, utilizing Salesforce tasks and Chatter to drive accountability and visibility within the PakLab organization.

Paklab is also effectively using pipeline reports and dashboards within Salesforce for transparency, giving the executive team full visibility into all opportunities and customized dashboards internally to showcase all activities for better reporting across the entire organization.