



# Keeping A Pup Above a Cut Above With AllCloud and Salesforce



A Pup Above is on a mission to provide dogs with fresh meals made from whole vegetables, meats, and fruit. Based in Texas, A Pup Above has been crafting fresh, human-grade dog food since 2019. The company upholds that commitment by using USDA-certified kitchens and abiding by the same safety and quality standards as human food. All of A Pup Above's products are formulated by veterinarian nutritionists to be complete and balanced. A Pup Above products may be purchased in 2,500+ pet stores nationwide or online through their website.

## Challenge

A Pup Above has grown at an impressive clip. But as their business took off, they realized they needed a robust CRM to support and scale their operations. The company bought and implemented Salesforce, but the way it was configured was hindering the business instead of helping it.

Sales reps were having trouble finding certain fields on account layouts, and their calendars weren't syncing properly with Salesforce, making it tough for them to log their activity and prepare for supplier and customer meetings. Account maps weren't plotted correctly, either. And since reps couldn't optimize their routes, they ended up spending more time driving than selling.

To make matters worse, integrations weren't pulling in retail data properly, so trying to create a unified view of company metrics was complex and highly manual. And with multiple Report and Dashboard folders, it was unclear which data leadership should be taking into account when making business-critical decisions.

To continue working at this pace, A Pup Above needed automation and customizations their team didn't have the resources or knowledge to implement. So the company began searching for a partner that could help them make the most of their Salesforce investment.

## Solution

AllCloud rose to the top of A Pup Above's vendor evaluation list owing to the firm's extensive background in retail and proven track record of successful Salesforce implementations. Knowing that AllCloud consultants had done this many times over gave A Pup Above's leadership team peace of mind and encouraged their employees to buy into the new processes AllCloud set out to build.

### Cleanup

Getting rid of extra dashboard and report folders, creating account parent-child hierarchies and fixing the Google Calendar integration were quick wins that scored major points with reps and their managers.

### Account Layout

First, AllCloud began streamlining the account page layout. The new account layout gave reps a place to organize files and attachments so that contracts wouldn't get lost among pictures or other documents. AllCloud also implemented Chatter so that everyone could view new notes or communications regarding each account. And AllCloud set up a task delegation process based on Salesforce roles and hierarchies to ensure nothing fell through the cracks.

To cap off the account portion of the project, the AllCloud team built a custom Flow to show the details of every store visit and associated account, giving reps the information they needed to win a deal, win an upsell or win a supplier back.

### Account Mapping

Next, AllCloud resolved the account mapping bug ensuring pins were plotted in the right place based on zip codes and other internal criteria.

### Revised Data Collection Process

From there, AllCloud moved on to reinventing A Pup Above's Freezer process. To sustain its promise of providing remarkably fresh dog food, the company needed to collect and analyze freezer data — in each store. AllCloud developed a customized process to standardize data intake, use Flows to auto-populate certain fields and automatically create associated follow-up tasks to maintain data accuracy and help A Pup Above track and monitor its freezer network.

## Integrations

AllCloud reconfigured A Pup Above's Salesforce integrations with in-store retail systems and activated the company's CRM Analytics licenses to keep operations humming along. Centralizing data into a few reports and dashboards gave upper management a unified view of company operations, helping them pinpoint areas for improvement.

## Results

To make sure all the Salesforce changes stuck, AllCloud conducted formal in-store training for A Pup Above's employees. They guided associates through the new processes, answering any questions they had along the way. Separately, AllCloud trained A Pup Above's sales reps, showing them the new automation features, flows and sharing tips for managing their territory assignments independently.

### Since then, the A Pup Above team has seen:

- Clear visibility into sales by store and by sales rep. Previously, stores were ordering from multiple distributors and aggregating data was time consuming and at times inaccurate.
- Better relationship management with accounts as teams can now track store visits and communications with stores directly in Salesforce.
- Better visibility of spend by account. AllCloud made it easy to track spend by account with clear insight into whether investments they were making with retail partners were paying off.

And with customized reports and detailed documentation, A Pup Above's go-to-market team can continue to make changes and updates without consultant assistance.

Today, A Pup Above is ready to tackle the challenges of the future and continue providing its customers — and their dogs — with the healthiest dog food in the nation.

*"Prior to AllCloud's engagement, we were adding stores at a rapid clip but having challenges keeping track of engagements with those stores as well as sales performance. AllCloud's work enabled us to have game changing visibility into A Pup Above's performance nationally, regionally and at the store level. We're now better able to service stores and provide a more customized approach to our sales strategy thanks to the way information is collected and stored in Salesforce."* - **Ruth Stedman Marriott, Co-Founder & CEO at A Pup Above**