

# Powering Digital Transformation



Customer relationship management systems fuel resilience and revenue, especially during uncertain times.

**S**hifting priorities and technology advances were already sparking digital transformation in many industries, but the global COVID-19 pandemic only heightened the need for radical change in small and midsize businesses (SMBs). Two out of three jobs are created by SMBs, yet they are the most fragile and easily impacted businesses in our ecosystem,” says Enrique Ortegon, senior vice president, SMB Sales North America at Salesforce, the world’s most widely used customer relationship management (CRM) platform.

## Connecting at scale

“[The pandemic] was a shockwave that [pushed] many SMBs to accelerate many of their digital strategies,” observes Ortegon. That proved pivotal, as customers experienced an increasing need for personal connection through digital means. “It’s a new market reality

around wanting to feel connected and understood,” Ortegon says.

Couple rising demand for connection with a need to drive down costs, and the impetus for a robust CRM solution becomes evident. With a CRM, companies can manage customer data, automate manual tasks, deliver data insights, and personalize customer experiences, while integrating with existing business tools. CRMs become the hub that makes possible a digital, 360-degree view of customer relationships.

SMBs able to deliver a connected experience, independent of the technology platform they’re using to make a connection, are farther along that journey of digital transformation, Ortegon says.

One such company that has leapfrogged its competition through the use of an integrated CRM is Sunset Transportation, a 2020 Inc. 5000 honoree.

## Accelerating a digital transformation

In the summer of 2019, Sunset made the decision to transition the company’s

sales backbone to Salesforce, because it realized its CRM and sales prospecting data tracking was too manual to be effective for a growing team. Tracy Meetre, vice president of sales and marketing at the third-party logistics (3PL) provider, knew it was time to rely on Salesforce’s expertise. “We calculated that if we were able to implement Salesforce and utilize all of its tools and campaigns and integrate it with Sunset’s main business operations platform, we would improve productivity by 35 percent. By improving the number of qualified leads, the number of opportunities, and closing more at the end of the day, we were easily able to justify the ROI on the investment in Salesforce.”

And they were right. The first year in operation, the number of viable leads jumped by 160 percent, with a 102 percent increase in new customers between June 2019 and June 2020.

In addition to the top line sales growth, Sunset has seen higher efficiency and productivity. “Through Salesforce’s automation, we have been able to sustain the loss of one full-time employee and still contribute to the goal-exceeding numbers,” Meetre says.



**“Salesforce is the solution that is going to help SMBs deliver the personal experiences that customers love”**

-Enrique Ortegon, senior vice president, SMB Sales North America at Salesforce

Tapping into the insights about sales leads, Sunset has dramatically improved the quality and quantity of its lead generation process and considerably increased sales.

“Salesforce is the solution that is going to help SMBs deliver the personal experiences that customers love,” Ortegon says. It’s a solution to help companies connect with their customers and achieve a digital transformation.

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