


Higher-Ed
Technology
Firm



eVerge – SUCCESS STORY

Partner Community – Portal for Strategic Partners in only 2 Months

 Salesforce Products

 Community Cloud

 Sales Cloud

Company Information

Higher Education Technology firm who provides Colleges and Universities solutions for Enrollment, Student Success, and Fundraising.

Why eVerge?

Over two decades of experience with CRM Implementations

Experienced in Partner, Customer and Employee Community Implementations

Business Challenge

- Firm sells bundled product offerings featuring their own products along with those of one or more strategic partners. **Insufficient collaboration** between firm and Partner Sales teams existed on Sales Opportunities
- Partners had **delayed visibility** to progress on opportunities, including Sales Stage changes and adjustments to Close Date
- Firm and Partner Sales Teams lacked ability to **coordinate** on Sales Presentations, Calls, Events, and cannot assign follow-up tasks
- **Without shared CRM**, Partners were unable to review sales data in timely manner, relying on firm to email updates and reports

Success Outcomes

- **Partner Community** allows visibility to sales data and active collaboration using Chatter, Opportunity Notifications and Sales Teams
- **No longer holding** weekly status meetings with Partners, as Community allows Partners to review deal progress in real-time
- Efficient Sharing of data resulting in increases in **Total Bookings** and **Revenue Created** by Partners
- Sales teams are **aligned** on selling, can **share updates quickly**, and work together to boost sales
- **Reports & Dashboards** give Partners the information they need to win deals without manual updates

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“eVerge is extremely knowledgeable about all things Salesforce and were able to quickly to provide past use cases which gave great perspective to our project. eVerge was very quick to respond to all needs that were brought up, Just a very professional group all the way around.”

– Senior Vice President

 Get in Touch



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