

## Products

salesforce sales cloud

salesforce app cloud

## Industry

Financial Services

## Profile

For over 30 years, DataScan's expertise has spanned 50 clients, more than \$80B of loan collateral in their systems, and over 225,000 audits conducted per year. DataScan is a subsidiary of JM Family Enterprises, Inc.

## Company Size

375 Employees

## Location

Alpharetta,  
Georgia

# Turbocharged adoption & process optimization in Sales Cloud

### THE CHALLENGE

- DataScan had an existing Salesforce org through their parent company that was not being heavily utilized.
- Information was outdated & inconsistent.
- DataScan needed to capture relevant information on leads, opportunities & completed deals (programs)
- Each Program had specific "Obligations" that must be delivered to the client. These had to be identified, documented and then tracked via a Contract Management tool. They had identified Aruvio as the likely choice for that tool.
- DataScan wanted to leverage best practices and native Salesforce functionality for sales process visibility, pipeline management, forecasting and reporting needs

### THE SOLUTION

- Implemented new instance of Sales Cloud & migrated scrubbed client list
- Created custom objects for program & contract obligations
- Facilitated mapping of account, program & obligation info into Aruvio.
- Configured a "Health Status" function for Accounts that rolls up from the program level to provide an overall status across all activities/interactions.
- Set up Approval Processes for Proposals and Contracts.
- Installed OrgChartPlus, Synoptic & SurveyForce apps for dynamic organizational mapping & marketing initiatives
- Configured security, role hierarchies, profiles and users.
- Created custom reports & dashboards to enable visibility.
- Coordinated integration of Salesforce to Gmail via CirrusInsight.

### THE RESULTS

- New instance of Sales Cloud provides operational control and visibility for all departments, particularly into sales/approval processes, hierarchies and contract obligations.
- Client now has improved collaboration and information sharing of data between sales teams, accounting and Compliance.
- Sales can now document all Obligations associated with Programs for seamless loading into Aruvio's Contract Management tool for Compliance.
- DataScan has visibility into Account Health across all activities and sales teams.
- All emails and other tasks are automatically associated to Accounts in Salesforce via integration with Gmail by CirrusInsight.