# Yulista Salesforce and Marketing Cloud Implementation

Standardized and centralized processes to support growth and compliance.

# **OVERVIEW**

Yulista Holding, LLC is an Alaska Native Corporation providing aerospace and defense solutions for foreign and domestic customers, including a wide scope of government contracting across different technologies and business units. Our objective was to centralize sales/BD data and processes to provide leadership access to metrics across business units and better prepare for and meet contract deadlines and requirements.

Follow-on upgrades have included revenue forecasting, past performance tracking, and better integration of support elements (HR, Facilities, Pricing) into the Sales cycle.

# CHALLENGES

- The legacy Salesforce org and 3rd-party app, GovBD, restricted usability and limited reporting, resulting in low adoption and use of spreadsheets and workarounds.
- The sales process was not standardized across numerous subsidiaries, making contract and proposal information difficult to track.
- Information exchange between pricing, capture, proposal, and contracts teams was conducted across several media, making it hard to track important milestones.
- Yulista had no consistent revenue forecast tool.
- Captured contracts were tracked in TM1 program with minimal reporting capability.

## SOLUTIONS

1

2

3

Greenfield Salesforce implementation with process mapping and standardization for consistent usage, taking advantage of native Salesforce tools to support communication and analytics.



## Salesforce Configuration

A new instance with fresh data was built based on the level of effort analysis. Field validations, automated opportunity stage advancement, and other configurations were added to support the standard sales process

#### **Communication and Collaboration**

Leveraged Chatter on relevant objects, custom email notifications about actionable changes, and the CalendarAnything app to show sequence of dates.

#### **Dashboards and Forecasting**

Built a custom revenue forecast object, process, and forecast dashboard to accurately predict future revenue and show captured value.

## **Key Metrics**

- Marketing Cloud instance synced with Salesforce org using MC Connect API.
- Automated database segmenting and email sends with dynamic content tailored to diverse subsidiaries.
- Replaced multiple legacy processes, saving countless hours switching between spreadsheets, SharePoint, email, and paper.





https://www.hesfp.com

# Yulista Salesforce and Marketing Cloud Implementation

Standardized and centralized processes to support growth and compliance.

66

# RESULTS

#### **Single Source of Truth**

Single database-of-record showing live, validated data and easy visualization of the corporation's health across a large volume of government contracts and subsidiaries.

#### **Capacity for Growth**

The cloud-based CRM offers immense capability for customization and growth. Adoption has been a great success and users are extremely pleased.

#### Faster Communication, Streamlined Support

A unified collaboration platform with persistent communications logs made and actions taken regarding business efforts. Users are notified in real-time when updates to deals require action.

**Real-Time Analytics** 

Leadership can see live, accurate metrics of sales pipeline health and revenue forecast. Able to present directly from a company-branded dashboard, saving significant labor.

#### **Marketing Efficiencies**

Marketing is able to broadcast corporate values across subsidiaries, resulting in a common voice for Yulista to build corporate culture.



Exceptional group. Very engaged in ensuring success.

Addresses areas of risk to solution and willing to offer alternatives early to prevent lost opportunity and cost.

- Yulista Executive Sponsor

## **Products Used**

- Sales Cloud
- Marketing Cloud
- Marketing Cloud Connect
- Einstein Sales Analytics
- Lightning Platform Deployment
- Custom App Development
- CalendarAnything



# 1

2

3

# 4

5

# Yulista Salesforce and Marketing Cloud Implementation

Standardized and centralized processes to support growth and compliance.

# THE APPLICATIONS

A custom dashboard utilizing

a forecasting model.

Yulista Home	Dutter Opportunities v Accounts v Contacts v	Campaigns v Reports v Das	M · 0, Search Opportunities					*** • • • ?	0 * 0
C 10 Wardson Hundrig Unit (MIND 199) Public Circle Carlo and Hamesses Det The Management of the State of the									
Program Understanding	Customer Relationships Customer Tert Burn	na Shaping CLIPTW	Discinitutors/ Differentiators	Cost Strategy Techni	al Solution Mgnet Staff.	g Stategy Transition Strategy	Pathetumana	Capture Proposal Resources	Principy
	~ )	Capture/Pre-Proposal		Bill Propose	>	Submit/Negotiation		Crossed	
Cooperantly Karrie Congeny Sanstray and Varkan Karrie Name Congetties Spee Amerit Spee Consent Spee Sonthame Name Sonthame Name Sonthame Name Karrie Sanstra Ching NACS Sonthame Que	It of Userians resulting with their 200 hiters (200 hi	/ Galanti / Galanti / Dim Da / ROT bai / ROT bai / ROT bai / Rot bai / Rot bai	Image         Christopher           Interferenced         11/12/2021           Image         11/12/2021           Image         11/12/2021           Image         12/15/02021           Image         12/15/0	sandrik posel		C Separativity Hamily (1) C	Canto Decisiones (2) Proc. Act (1) Proc. Act (1) Concerns if Sector Proc. Act (1) Concerns if Sector Proc. Act Concerns if Sector Act Con	Level B Mar Hick Market Market Market Kan High Mark High Mark High Mark High Mark High Market	
Dris to Setudiare Dris to Setudiare						-	Share an update.		See
DIQ You						5.		G. Search Ibla head	10
<ul> <li>Opportunity Description</li> </ul>						and a second sec		of hearts and state.	
Description						S Technique Handlin upda	ad this second.		
· Strategic Planning & Fore	casting					Circle Date			
	30% - Competitive - where we are at a chadvantage		53,250.00			5/54/2021 to 11/16/2021			

The opportunity record page has a custom stoplight visualization and a related list with a dynamic quadrant graphic.





Rich forecasting insights with Tableau.

