



Case Study | AVT Productions

Industry: Event Production

Location: Santa Clara, CA

Project: Salesforce and Data.com Implementation

Company Overview

AVT Productions is a full service event production provider. AVT provides corporate event production services for large organizations locally, nationwide, and at events around the world. They offer an array of technical and creative services, as well as highlight state-of-the-art inventory, which features the latest in event technology.

The Challenge

AVT Productions was transitioning from being a production-focused organization to a sales-focused organization. They had no customer relationship management system in place and they were using Microsoft Outlook and Microsoft Excel to manage their leads and customers. AVT was looking for a system that would help them become a sales-focused company and that would provide better organizational and reporting capabilities. AVT decided to implement Salesforce because it would support their transition and help them better manage their accounts, track their events, and allow them to monitor account activity. AVT was also interested in Data.com.

How We Helped

In order to ensure a successful implementation, StarrData began the implementation process with a series of discovery calls with AVT Productions to understand their business processes and learn their Salesforce requirements. After learning about AVT and their Salesforce needs, StarrData customized Salesforce to fit AVT's business, including changing the date field to include event date, booking date, and closing date, as well as integrating with Microsoft Outlook. In addition to setting up Salesforce, we also configured Data.com and imported their leads and accounts from Microsoft Excel into Salesforce. After we imported their data, we cleaned their database to remove any duplicate records using Data.com's product, Data.com Clean.

Once the implementations were complete, we trained AVT users on how to use Salesforce and on Salesforce best practices. In addition to general training, we also had a training session dedicated to teaching AVT how to use Salesforce Reports. During that session, we reviewed which reports would be the most appropriate and useful for AVT to use, as well as explained how to generate reports and make report customizations.

Results

- AVT Productions is actively using Salesforce and it is customized to fit their business needs
- AVT's data was successfully imported into Data.com and is linked with Salesforce
- Salesforce provides reporting capabilities, allowing AVT to run reports on all of their data to help them monitor account activity
- AVT is able to manage both their database and their full sales cycle within Salesforce and they no longer need to use multiple applications to manage different aspects of their business

Want to see these kinds of results for yourself? Give us a call today at (888)391-4493 x103.

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