



Solving Business Challenges with Salesforce

Salesforce Value is Maximized with
Industry-Specific Know-How



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TABLE OF CONTENTS

Solving Business Challenges with Salesforce: Salesforce Value is Maximized with Industry-Specific Know-How	3-7
Aerospace & Defense Case Study: A Rapidly Growing Company Finally Realizes ROI After Years Spent “Flushing Money” On Unused Salesforce Licenses	8-11
Financial Services Case Study: A Real Estate Investment Company Needed to Evolve from Using Spreadsheets and Manual Process	12-15
Professional Services Case Study: A Salesforce-Powered Innovation Enables Insurance Entrepreneurs to Finally Scale	16-21
Public Sector Case Study: Mission, Vision, and Values Meets Cutting-Edge Technology to Impact Lives in a Large Veteran-Focused Organization	22-25
A Digital Transformation That Solves Organization-Specific and Industry-Specific Challenges Is Within Grasp If Done the Right Way	25-26
How To Choose the Right Implementation Partner	27
The HigherEchelon JourneyNav™ Signature Process	27-28
Your Guides on A Successful Salesforce Journey	28-30
How To Work with HigherEchelon	31

This paper is written by Rachel Bryars with substantial contributions from Paul Maggiano, Tim Pash, Katie Levy, Neil Penso, and Steven Spaulding. All graphic designs by Nicole Szews.

Solving Industry-Specific Business Challenges with Salesforce

Salesforce Value is Maximized with Industry-Specific Know-How



BOTTOM LINE UP FRONT: CHOOSING A FLEXIBLE PLATFORM LIKE SALESFORCE WHERE YOU CAN CONSOLIDATE MANY BUSINESS USE CASES IN A SINGLE TOOLSET CAN SAVE TIME, REDUCE COMPLEXITY, AND SIGNIFICANTLY DRIVE ROI OF A PLATFORM INVESTMENT. USING THE RIGHT IMPLEMENTATION PARTNER WHO UNDERSTANDS YOUR BUSINESS AND CAN WORK WITH YOUR BUSINESS STAKEHOLDERS AND YOUR IT TEAM WILL YIELD EXCELLENT LONG-TERM RESULTS.

The complexities of modern business continue to transform the way we work. Rapid technology changes, evolving customer expectations, and the proliferation of data-related needs are just a few of the challenges most organizations face regardless of size or industry.

In an environment in which products and services that are cutting-edge one day are out-of-date the next, modern organizations are continuously compelled to bolster business agility, maximize efficiencies, and be aware of what competitive advantages loom on the horizon within their specific industry and in the wider market.

MODERN BUSINESS REQUIRES DIGITAL SUPPORT

It is becoming increasingly difficult to keep pace with competitors, remain relevant, or execute even basic business functions without a digital strategy and some level of software stack to support it. Depending on an organization's needs within the context of its specific industry, this presents no small challenge in architecture or budget.

For example, an aerospace and defense contracting company working with government clients must operate under evolving and differing system requirements in a highly regulated environment. The solutions needed to drive success in this world are very different than that of a commercial entity. Similarly, professional services providers, public sector organizations, and financial services companies will have their own unique layers of custom requirements as well.





Regardless of industry, for organizations just beginning (or updating) their digital journey, getting up to speed can mean moving from a paper-based system or legacy software solution to a custom solution designed for that company. Another common – but flawed – approach companies take is to stitch together a set of disparate, off the shelf, third party applications to plug specific holes.

THE WRONG SOFTWARE APPROACH CAN CAUSE NEW PROBLEMS

While a step in the right direction, such incremental solutions can sometimes cause as many problems as they solve, particularly when those separate apps stack up in ways that do not integrate with each other.

Combining best-of-breed solutions can cause data to become isolated, contaminated, and ultimately meaningless as information is moved from one platform to another. Managing and consolidating data for the purposes of reporting and dashboarding can become jobs in themselves. Endless logins, license costs, lack of training, and general discrepancies in digital proficiency can sabotage user adoption and ratchet up costs. Siloed uses of different platforms can lead to missed opportunities, poor execution, and lost insights. Overly complex software can go unused due to employee inability or unwillingness to adapt. A general goal should

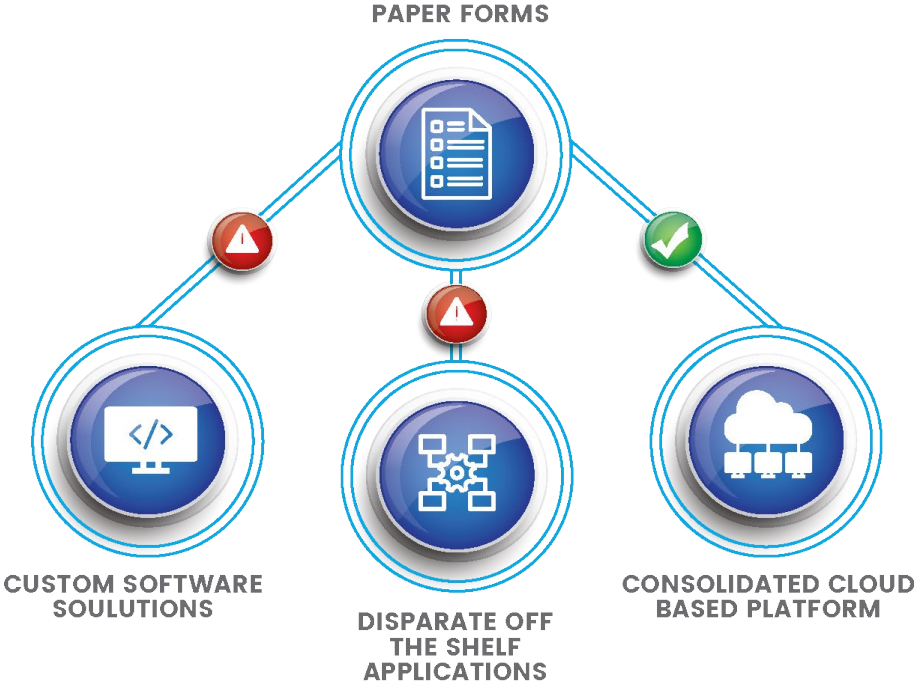
always be to use as few tools as possible and to reduce the number of integrations required to perform the job function; however, many organizations find themselves doing the opposite.

Compounding the problem, every organization and industry has its own array of nuances and needs that are not always solved with commercial off-the-shelf (COTS) software. Even legacy systems that were custom designed with industry nuances in mind become problematic when they aren't easily adaptable and updated by the organizations using them in keeping with industry developments. A common refrain in environments like this is, "We are using 80% of our capacity just to maintain the existing technology stack, leaving very little capacity to support innovation."

In short: the modern working environment is complex, rapidly changing, digitally dependent, and competitive. The wrong software strategy can consume resources without efficiently and effectively solving general and industry-specific business challenges.

A SINGLE SOURCE OF TRUTH: THE RIGHT MODERNIZATION APPROACH CAN YIELD IMPRESSIVE RESULTS

Still, when the **right** integrated software solution is applied to the **right** problem with the **right** industry-specific know-how guiding a long-term strategy, with the **right** installation, maintenance, and training in place – the results can be impressive indeed.



A typical organization's journey to digital transformation usually begins with moving from a paper-based system to custom software solutions, an assortment of disparate off the shelf applications, or the gold standard: a consolidated cloud-based platform like Salesforce.

SALESFORCE BUSINESS IMPACTS ARE WITHIN GRASP FOR YOUR ORGANIZATION


Salesforce is the most popular platform for consolidated, cloud-based, customer relationship management (CRM) tools, as measured by number of organizations who choose it. More than 150,000 organizations worldwide use Salesforce, reporting back tangible business impact metrics¹ such as:

- **\$5.7 million** additional new revenue generated per year
- **508%** five-year ROI
- **6 months** payback period
- **24%** faster customer service case resolution
- **39%** increase in sales productivity
- **31%** increase in Gross Merchandise Value (GVM)
- Significant reduction in the number of apps used within an organization.

WITHOUT THE PROPER SUPPORT, EVEN SALESFORCE CAN COMPLICATE BUSINESS PROBLEMS

As a Certified Salesforce Consulting Partner at the CREST (Gold) status level, we at HigherEchelon, Inc. understand such impacts can make organizations hungry for similar results -- and fast. However, organizations that invest in Salesforce will see results that widely vary depending on a variety of factors, number one of which is whether the organization uses a qualified Salesforce implementation partner or whether they attempt to “go it alone” without proper guidance, training, and ongoing support.

Unless Salesforce is correctly implemented, the results can be less than satisfactory. Because the platform is so flexible and broad, there are many ways to accomplish things, and some are smarter, faster, and easier to maintain long-term than others. Also, deploying Salesforce is often a consultative effort that needs to consider specific industry challenges and requirements, while thinking about the future and how the solution may need to evolve. In the wrong hands, a Salesforce implementation can complicate business problems rather than solve them.



HIGHERECHELON PROVIDED EXCELLENT, EFFICIENT, AND SMART SOLUTIONS TO MEET OUR SPECIFIC NEEDS WITH SALESFORCE. THEY WERE ABLE TO SPEED UP OUR CONFIGURATION AND COMPLETED OUR PROJECT NEARLY 8 WEEKS AHEAD OF SCHEDULE. THEY ARE PROMPT AND QUICK TO HELP IF A NEED ARISES. WE HIGHLY RECOMMEND THEM!”
– PUBLIC SECTOR CLIENT

A TRUSTWORTHY SALESFORCE PARTNER ENSURES YOU AVOID COSTLY PROBLEMS & REALIZE A RETURN ON YOUR INVESTMENT

¹ Business impact metrics come from the 2020 IDC White Paper “The Business Value of Salesforce Platform for Application Development” by Harsh Singh and Larry Carvalho and Salesforce Customer Success Metrics Survey - Global Highlights, conducted 2021 among 4700+ customers randomly selected. Response sizes per question vary.

To realize maximum benefit from the Salesforce platform and avoid massive future headaches and costly problems, organizations should work with a certified Salesforce implementation partner. Salesforce highly recommends such partnerships to achieve best results and goes to great lengths to certify and make discoverable qualified partners [on their AppExchange](#). Using that interface you can find a partner, like HigherEchelon, that has proven skills and experience in the products you might want to deploy. However, you need to dig even deeper to find a partner that also thoroughly understands industry-specific nuances and can deliver a highly tailored solution using “clicks not code” everywhere possible. HigherEchelon’s CSAT scores and unsolicited positive reviews speak to our success in this area.

As a result of our partnership, our customers realize deeply impactful results usually revolving around significant savings in time, money and relief of confusion, recurring headaches, and frustration stemming from burdensome and outdated processes. For example:

- One of our public sector customers ***is saving 100s of hours per quarter*** that they were previously spending on manual data entry. The automation provided to this client resulted in much higher data quality and the ability to redeploy critical resources to more value-added tasks.
- An aerospace and defense industry client’s ***executive team are saving dozens of hours each per month*** that they were previously spending creating reports and presentations for their board. They now brief directly from real-time analytics dashboards that enable a single source of truth.
- We configured a Salesforce-powered applicant tracking system so that a professional staffing agency client could ***eliminate the inefficient process of manual data-entry of thousands of records and resumes*** from external job posting sites into their own records.
- We utilized declarative configuration and out-of-the-box tools to implement business workflows that reduced technical debt for a client ***who can now get many things done without manual calculations, saving countless hours.***

As trusted guides on our clients’ Salesforce journeys, we provide immediate relief of the most pressing challenges associated with configuring, learning, and getting the most out of Salesforce, as well as ongoing support that evolves and adapts with the company and with the wider digital environment and industry.

While there are many Salesforce implementation partners, few have the unique expertise and engagement process HigherEchelon is known for when it comes to configuring solutions in common and uncommon use-cases in which understanding of industry nuance is paramount.

Let’s dive deeper into four such scenarios in the aerospace & defense, financial services, professional services, and public sector industries.



CASE STUDY: AEROSPACE & DEFENSE

A Rapidly Growing Aerospace & Defense
Company Finally Realizes ROI After Years Spent
"Flushing Money" On Unused Salesforce Licenses



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Overview



Yulista Holding, LLC is an Alaska Native Corporation headquartered in Huntsville, Alabama, that primarily serves Government clients through services and support in Aviation, Ground, Logistics, Training, and Base Operations/Maintenance. The company has experienced rapid growth in the past five-plus years, bringing on a new group of leaders while expanding to more than 2,000 employees across 23 states.


Challenges

As a relatively new user of Salesforce, Yulista came to HigherEchelon with significant challenges trying to use the platform. Having spent several years “flushing money” on Salesforce licenses, they got minimal value from the investment due to lack of implementation and configuration expertise in-house. To initially solve this (and before they met HigherEchelon), they purchased a managed package from a third-party ISV that promised to provide a turnkey solution.

The resulting system worked at first, but as further business needs surfaced and they attempted to evolve the solution to grow with them, the problems started. Attempts to implement workarounds on the limited solution resulted in a disjointed, broken, not user-friendly system. Eventually, only a few users logged in each week, leading to wasted money and loss of a central source of trusted data from which to make critical business decisions.

Solution

HigherEchelon’s award-winning team of certified Salesforce consultants came in and listened to Yulista’s concerns. Together we developed a detailed plan to help Yulista quickly achieve the full benefits of Salesforce considering their long-term business objectives, which included reconfiguration from the ground up without the limitations of a managed package, allowing for flexibility in the future as their needs changed.



WE WERE JUST FLUSHING MONEY. WE WEREN'T USING OUR MONEY TO HELP GROW OUR COMPANY THE WAY THAT PLATFORM SHOULD ALLOW YOU TO DO. IT WAS SO FRUSTRATING, CHAOTIC, AND MESSY. WE HAD SO MANY GAPS THAT YOU COULDN'T EVEN UNDERSTAND WHAT WE WERE AND WERE NOT DOING.

PEOPLE WERE KEEPING EXCEL SPREADSHEETS SEPARATE ON THEIR DESKTOPS AND TRACKING THINGS, SO WE WERE BECOMING VERY SILOED AND YOU CAN'T DO THAT WHEN YOU'RE TRYING TO GROW INTO A BILLION DOLLAR COMPANY.

– YULISTA HOLDING, LLC SALESFORCE ADMINISTRATOR

SINCE IMPLEMENTING OUR NEW SALESFORCE PLATFORM AND WORKING WITH HIGHERCHELON TO BUILD IT OUT AND CODIFY OUR PROCESSES, WE NOW HAVE OVER 85% OF OUR USERS LOGGING IN ALMOST DAILY. THE REPORTING AND THE DATA ARE SO ACCURATE THAT IT'S NOW BEING LIFTED DIRECTLY OUT OF SALESFORCE AND USED FOR BOARD OF DIRECTOR MEETINGS WITH OUR STAKEHOLDERS IN ALASKA.

HIGHERCHELON HAS CAUSED HUGE CHANGE IN EVERYTHING THAT WE DO HERE, AND WE'RE NOW USING IT ENTERPRISE WIDE. WE ARE SAVING HOURS AND HOURS OF TIME WE USED TO SPEND IN MANUAL PROCESSES. ALL OF THIS ADDS UP TO A COST SAVINGS AND A TIME SAVINGS BECAUSE WE CAN NOW USE PEOPLE'S ENERGY AND TIME AND EXPERTISE TO REALLY DO STRATEGIC THINKING INSTEAD OF JUST DOING MANUAL DATA INPUT.

— YULISTA HOLDING,
LLC SALESFORCE ADMINISTRATOR

More specifically, we:

- **Helped them start fresh** by launching a new Salesforce instance with fresh data. The client's assessment of their legacy data was that there was very little worth saving, and that fresh input was far more cost-effective than cleaning large volumes of old contaminated data.

- **Reimagined the entire sales process** so that the newly configured Salesforce set-up would flow from a revised, standardized sales process tied to corporate objectives. We built field validations and automated a stage advancement flow to help users easily follow policy. This included a custom suite of dashboards with reports to track the company's proposals from start to finish.

- **Launched a collaborative communication system** by adding a community "chatter" function to relevant objects,

enabling users to see important communication, collaborate, and update records all in the same space. This included the ability to have custom email notifications sent to team members to notify them of actionable changes.

- **Enabled teams to see the big picture** by adding in the CalendarAnything app to show a waterfall sequence of due dates on proposals, helping the organization visualize and anticipate resource needs on the proposal teams and ancillary resources.
- **Designed a system to accurately predict future revenue** through a custom dashboard system that also shows captured value.

- **Provided robust ability to analyze data** at a highly granular level for deep insights that drive better business decisions. Yulista has 12 subsidiaries and continues to evolve, and the analytics platform allows them to fluidly filter and compare subsidiaries' performance to one another.
- **Transformed the marketing team's ability to connect** with their target audiences by setting up a Marketing Cloud instance that fully synced with the wider Salesforce org. This equipped the marketing team with automated database segmenting and the ability to send professional emails with dynamic content tailored to diverse subsidiaries.
- **Ensured long-term success** by walking executive stakeholders step-by-step through a robust change management process that included leadership training, executive coaching, and strategic communication planning to spearhead and sustain user adoption.

Read more and see screenshots of the Salesforce solution we provided here: [Yulista Salesforce Case Study](#). Watch a 3-min video showcasing our solution here: [Yulista Salesforce Video](#).

HAVING SOMEBODY WITH EXPERTISE ON HOW TO USE [SALESFORCE] STRATEGICALLY AND TO OUR ADVANTAGE WAS REALLY IMPORTANT. I THINK WE'D BE A LITTLE LOST IF IT WASN'T FOR THE CONSULTANTS FROM HIGHERCHELON COMING IN AND COACHING US THROUGH THAT.

— JOSH HERREN, PRESIDENT & CEO, YULISTA HOLDING, LLC





CASE STUDY: FINANCIAL SERVICES

A Real Estate Investment Company Evolves from Spreadsheets and Manual Processes



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The Financial Services Industry has its own unique nuances and requirements. For example, captured data is often of a very complex model, requiring lots of calculations and interactions. Siloed departments with very different areas of focus (i.e., investment vs asset management) make it difficult to align business processes. Industry requirements tend to generate reliance on numerous 3rd party services and apps.

Overview



HIGHERECHELON'S TEAM IS EXTREMELY PROFESSIONAL AND HIGH CALIBER. THEY ARE VERY KNOWLEDGEABLE ON THE SALESFORCE PLATFORM, WHILE OFFERING SOLUTIONS TO BUSINESS PROBLEMS. THAT'S A HARD MIX AS MOST PARTNERS TEND TO BE OVER INDEXED IN 1 PARTICULAR WAY. HIGHERECHELON KNEW HOW TO LEVERAGE THE PLATFORM TO SOLVE OUR BUSINESS NEEDS.

- FINANCIAL SERVICES CLIENT



One such HigherEchelon client, Federal Capital Partners (FCP), came to us with considerable

business process automation needs for their two business units (Investment Management and Investor Relations). FCP is a privately held real estate investment company founded in 1999 with more than \$6 billion in assets. FCP invests in commercial and residential assets making equity and mezzanine investments in income producing properties.

Challenge

The Investment Management business unit was tracking, reporting, and managing a \$2.6 billion national real estate equity sales pipeline via Excel and Outlook. Shared visibility and activity on deals was not possible as history resided with individual deal owners. The Investor Relations business unit was already using Salesforce to track its core fundraising functions. They lacked the ability to relate and log the associated activities to Fund Commitments, Fund Closings, and Legal Entities. They realized they needed to upgrade to a platform that could coordinate their business activities and allow them to move away from doing property transactions and pipeline management manually in Excel.

Additionally, FCP had minimal communication, tracking, and analysis of their data, as well as problems with the data being out-of-date and unusable during key business stages.

Overall, they wanted to align their business processes within a shared system so that C-level leaders could see the entire process rather than the complex modeling and record-keeping that was taking place on separate systems. They had chosen Salesforce; however, user adoption rates varied across departments, making it hard to get all the information in one place.


Solution

FCP brought on HigherEchelon to help them achieve solutions to these issues and more. After an initial phase of successful work, they began to see new areas for improvements and enhancements based on their specific goals, challenges, and the robust capacity Salesforce offers when configured correctly.

For example, FCP needed a way to track the pipeline of their purchase and sales transactions with a centralized communication model to ensure all parties were in sync. On the Investor Relations side of their business, FCP needed a better way to track investor activity and associated documentation across funds, fund commitments, fund closings, and associated legal entities. In short, FCP needed to evolve as a company and codify their business processes in an enterprise-class toolset.


HigherEchelon has solved these issues and added a variety of enhancements and feature upgrades over several years of partnership. Specifically, we:

- **Increased FCP's operational effectiveness and Salesforce user adoption** by providing enhanced workflow and contact management processes, new reporting capabilities, new communication features, opportunity pipeline, and a more effective data management process for each of the company's two divisions – Investment Management and Investor Relations.
- **Developed a full suite of reports and dashboards** to give team members at all levels better awareness of the process and its success.



WE BROUGHT HIGHERECHELON ONBOARD TO HELP US THOUGHTFULLY AND QUICKLY IMPLEMENT NEW CAPABILITIES ACROSS OUR SALESFORCE INSTANCE. THEIR EXPERTISE, ESPECIALLY IN THE PRIVATE EQUITY SPACE, WAS EXTREMELY VALUABLE... THEY WERE EXTREMELY RESPONSIVE TO OUR NEEDS AND REQUESTS, INCLUDING BEING ONSITE TO HELP TROUBLESHOOT DEVELOPMENT OF OUR PRODUCTION ROLL-OUT TO THE BUSINESS. HIGHERECHELON CONSISTENTLY WORKED TO OUR SCHEDULE AND SCOPE AND DELIVERED A PRODUCT ON TIME AND WITHIN BUDGET.

– BRIAN COHN, DIRECTOR OF INFORMATION TECHNOLOGY, FEDERAL CAPITAL PARTNERS



- **Provided both business units the ability** to visualize, track, and report in real time, giving executives a 360° view of the business.
- **Provided mobile functionality and time-saving enhancements** to increase staff productivity.
- **Improved account and opportunity architecture** to make it more agile and able to handle different use cases by different departments.
- **Brought the teams together** and enabled them to speak the same CRM language.
- **Created an innovative data import plan** to harness capabilities of outside services while still centralizing necessary data.

As a result of our work, FCP:

- Eliminated the need to manually track their \$2.6 billion deal management sales pipeline in Excel
- Eliminated the need to manually track \$301 million in fund closing commitments in Excel
- Migrated 6950 Account and Contact data records previously tracked in Excel and in Outlook
- Is now enabled to track and analyze Investor Management calls and email activities that were previously unquantifiable or trackable by management

HigherEchelon's specific financial services industry know-how and understanding allows us to be a trusted partner to Federal Capital Partners so they can achieve their business objectives with Salesforce.





CASE STUDY: PROFESSIONAL SERVICES

A Salesforce-powered innovation
enables insurance entrepreneurs to finally scale



HIGHER ECHELON™



We have seen how industry-specific know-how in a Salesforce implementation partner is crucial for implementations that are uncommon and/or complex, such as in the defense and financial services industries. What about entrepreneurial spaces in which a business is breaking ground (and scaling) into wholly new markets they may have invented?

HigherEchelon has the expertise to guide such start-ups through Salesforce implementations that ensure systems and strategies are set up with long-term scalability front-and-center to the process.

Overview

Policygenius Policygenius is the leading tech-enabled platform for one-stop-shop insurance shopping and fulfillment with a marketplace of top insurers across life, disability, and home and auto insurance. As an independent insurance broker, Policygenius combines online comparison-shopping technology with the expertise of real licensed agents to help millions of people feel great about their insurance coverage through a better-informed, trust-based buying experience that puts the customer in the driver's seat.

Policygenius was founded by a former Peace Corps volunteer who went on to become one of only four women founders in Fintech to raise more than \$50 million in funding. Her idea? Turn the outdated insurance industry model upside down by empowering people with high quality information and online tools so they can easily comparison shop, conduct research on their own, get trusted advice from real humans, and buy policies, all online, all in one place.

The company has rapidly scaled, serving millions of online-savvy insurance customers while continuing to disrupt more traditional channels by offering the Policygenius insurance solution to financial advisors, independent agents, community

banks, credit unions, and more. The goal with the company's new line of service – Policygenius Pro – is to help partners' clients get the insurance coverage they need. Partners receive access

HIGHERECHELON UNDERSTOOD OUR REQUIREMENTS UPFRONT AND WERE ABLE TO HANDLE OPPORTUNITIES TO DELIVER ADDITIONAL VALUE THROUGH THEIR QUICK AND EFFICIENT ROLL OUT AND IMPLEMENTATION PROCESS. THEIR CUSTOMER FOCUSED APPROACH ALSO IDENTIFIED POTENTIAL VALUE FOR FUTURE ENHANCEMENTS WITHOUT LOSING TRACK THAT ON-TIE PROJECT DELIVERY (THEY WERE ACTUALLY EARLY ON AN AGGRESSIVE SCHEDULE) AND NO SCOPE CREEP WERE IMPORTANT TO US. A GREAT EXPERIENCE DELIVERING A MUCH-NEEDED SYSTEM TO HELP US RAPIDLY GROW OUR BUSINESS.
– PROFESSIONAL SERVICES CLIENT

to a wide variety of insurers, coverage types, and policy options, including accelerated underwriting, as well as support from an expert staff of 300+ dedicated specialists for case management, underwriting, and product support.

Challenge

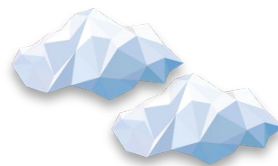
Before working with HigherEchelon, the concepts behind Policygenius's platform were cutting-edge, but internal systems were not -- Policygenius still used spreadsheets for critical business functions. The company realized their standard operating procedures couldn't fully support the ambitious goals of their new business unit, Policygenius Pro, without significant process reengineering powered by Salesforce and implemented by HigherEchelon.

For example, the process of acquiring, onboarding, and activating partners to the Policygenius platform is high touch (by design), complex, and cannot be sustained without the right technology. In addition to onboarding the partner agency, the Policygenius Pro team manages prospecting for and closing of new partners and drives appointment of agents (producers) with selected insurance carriers. The appointments process itself is also complex, requiring management of partner agencies and producers through each stage of appointment application, often with at least ten insurance carriers. Once the process is completed, the partner agency can begin leveraging the Policygenius platform to get their clients the right insurance coverage.

Managing all the moving parts and tracking all the necessary information is a significant challenge in and of itself, especially without the right supporting technology. While the business unit was being stood up, the Policygenius Pro team members tracked appointment requirements, appointment codes, statuses, what documentation had or hadn't been obtained, and more using shared spreadsheets. New agencies and producers were targeted using a separate online tool coordinated across more spreadsheets. All partner contracting took place in yet another system.

The mix of unintegrated spreadsheets and disparate tools didn't allow Policygenius to easily track partner agencies, producers, and other key information at the scale necessary to achieve the mission of quickly and easily adding new partners onto the Policygenius Pro platform. Reducing the time to get a new partner onboard and activated is critical to enabling partners to obtain the life insurance coverage they require for their clients.

As the new business unit took off, it was clear that it was no longer feasible to add new partner agencies, onboard thousands of new producers, track partner onboarding progress, and accommodate varying state rules and regulations at the scale necessary using these rudimentary tools.



Solution

Against this backdrop, the Policygenius and HigherEchelon partnership began. HigherEchelon's signature process (read more about JourneyNAV™ on page 27) starts with our dedication to listening and understanding, which we do by conducting in-depth discovery conversations and reviewing existing documentation. Starting here ensured our team understood where Policygenius was as an organization and what solution elements were critical to current and future business needs.

**THIS HAS BEEN ONE OF THE BEST IT
VENDOR EXPERIENCES I'VE HAD IN 25+
YEARS OF WORK.**
– POLICYGENIUS EXECUTIVE SPONSOR



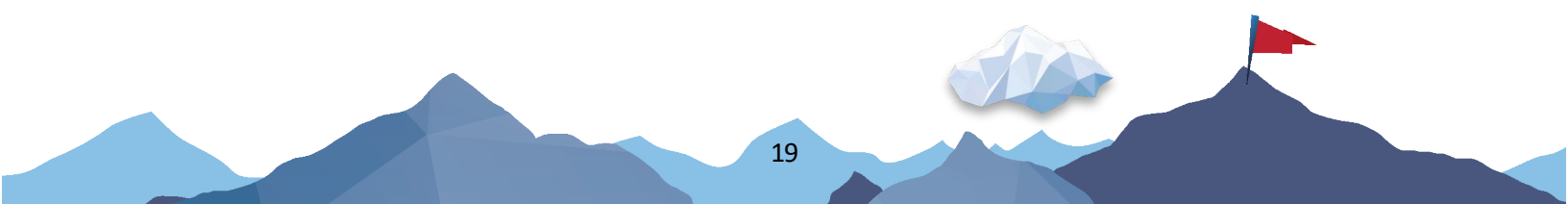
We then got to work translating, developing, testing, assessing, and delivering the solutions in our full Agile shop over more than a dozen two-week sprints. This included multiple collaborative sprints that involved tweaking, refining, and improving existing solutions.

The HigherEchelon team worked with Policygenius to expand and customize the standard Salesforce data model provided with Sales Cloud to include new custom fields and objects specific to the insurance industry, and further enabled adjustments in the security model to ensure Policygenius team members have access to the records they need. This set the base level configuration to support automation around the partner and agency onboarding process. It also set up the structure required for much-needed integrations with various systems to support business development and lead generation activities.

Using record-triggered flows, the HigherEchelon team facilitated the creation of records documenting appointments requirements and corresponding carrier codes, automated correspondence with producers using an org-wide email address, email templates and flow, and tracked completion of onboarding and appointment application steps, significantly reducing the time Policygenius team members spent on data entry and coordinating workflows.

Scaling fast meant improving the flow of priority potential partners through the prospecting funnel. To better support this, HigherEchelon designed a custom object to calculate a prospective partner's revenue potential in real-time based on information added to the lead and opportunity records, removing the need for duplicate data entry in another separate spreadsheet tracker. The team built an integration to an external sales engagement platform to further enable the Policygenius team to see all data in one place, increasing efficiency and making it easier to connect with prospective partners. In parallel, our work supported business development efforts through improvements made to the lead object, lead source tracking, web to lead mapping, campaign object adjustments, and integration of Gmail with Salesforce.

To continue to support the goal of business development, appointments, and partner success teams being able to enter and track data once in a single source of truth, we built a complex integration between Policygenius' agent database and Salesforce. HigherEchelon also identified





“THE TEAM AT HIGHERECHELON WAS VERY KNOWLEDGEABLE OF SALESFORCE, READILY AVAILABLE WHEN WE HAD QUESTIONS OR NEEDED HELP, AND WAS ABLE TO PUT OUR IDEAS INTO A VALUABLE AND WELL-BUILT WEBSITE. THEY REALLY DELIVERED THE FINAL OUTCOME THAT WE HAD DREAMED ABOUT AND EVEN HELPED US ADD ON MORE USEFUL FEATURES THAT WE DIDN'T EVEN KNOW ABOUT. I CAN WHOLE-HEARTEDLY SAY THAT I WOULD RECOMMEND THEM FOR YOUR SALESFORCE NEEDS.” – PRIVATE SECTOR CLIENT



another potential opportunity to increase efficiency and implemented case management, including email to case, for partner agencies and producers wishing to document issues, concerns, or inquiries. The team collaborated on reports and dashboards to support incident tracking, eliminating another spreadsheet and email-based system.

Ultimately, HigherEchelon and Policygenius combined the power of Salesforce with innovative processes and tailored solutions to replace systems that did not fully support the new Policygenius Pro line of service. Now, the Salesforce platform and supporting integrations enable them to onboard and serve partner producers much more quickly and seamlessly, helping the company achieve its mission to deliver innovative term life fulfillment solutions to their partners.

The HigherEchelon and Policygenius partnership has made a significant impact on how the company acquires, onboards, and activates new partner producers on the Policygenius Pro platform. As a result of our work:

- **The onboarding and appointments teams can manage partner onboarding workflow from start to finish**, including requirements tracking and appointment code management, while tracking progress all along the way, eliminating multiple spreadsheets and significantly improving the partner’s onboarding experience.
- **Aggregated onboarding status reporting across multiple partner agency groupings** was not possible before – now it is. And time stamping features enable Policygenius to monitor onboarding turnaround times and identify sticking points for quick resolution.
- **The team can now easily identify partner producers who are ready to sell**, automatically trigger the sending of invitations to the Policygenius Pro platform and communicate using standardized templates to support and drive the onboarding process. This saves time, minimizes potential for errors, and ensures all partners and their producers have a consistent, high-quality experience.



- **The Policygenius team can record and share appointment hierarchies and commission structures for producers**, which is critical for ensuring partners are compensated appropriately for the business they place via the platform.
- **The Policygenius Pro team can now see and update information in their internal agent database**, which facilitates partner producer access to insurance products and carriers and supports client fulfillment through the existing Policygenius CRM system.
- **Ongoing proactive partner engagement (based on onboarding status or activity levels) is much easier to manage** thanks to configuration and integrations into Policygenius's other critical tracking systems.
- **Using Service Cloud features, partner agencies and producers can now submit inquiries and issues that can be tracked** through the resolution process in Salesforce, rather than exclusively via email. Reporting helps the Policygenius team manage cases effectively and ensure time to resolution meets or exceeds partner expectations.
- **Enabling certain processes in Salesforce frees the partner success team from needing to rely on the product team** to add new producers and appointments to the platform. That could take up to 72 hours but was typically turned around the same day or next day. With the recent enhancements, partner success can now initiate the process in real time without the need of a product resource.

Overall, the partnership between HigherEchelon and Policygenius fundamentally changed the way the organization conducts their new partner-facing business. As many features and processes are new, qualitative metrics are currently being established. However, it is clear that the business processes enabled in Salesforce are already making a significant impact. Since our partnership began, Policygenius has seen:

- More than **1500% increase** in the number of leads created
- **295% increase** in converted leads
- **867% increase** in accounts in onboarding status
- **2175% increase** in accounts in ready to sell status
- **333% increase** in closed won opportunities
- **601% increase** in Producers that are ready to sell
- **1300% increase** in appointments created with 802% increase in those that are in good order



CASE STUDY: PUBLIC SECTOR

Mission, vision, and values meets cutting-edge technology to impact lives in a large veteran-focused organization



HIGHER ECHELON™





HIGHERECHELON HAS BEEN A WONDERFUL PARTNER AS WE LAUNCHED AND CUSTOMIZED OUR SALESFORCE PLATFORM WITH THEM FROM CRADLE TO GRAVE. THEY ARE ALWAYS READY TO SUPPORT OUR NEEDS AND FIND THE BEST SOLUTIONS TO MEET OUR NEEDS. – PUBLIC SECTOR CLIENT

The public sector is one of the primary industries in which HigherEchelon has developed special skill and expertise. More than half of our clients are mission-minded service organizations in Higher Education, Government, or other not-for-profit contexts.

As a company founded by two Veterans, who currently employ Veterans at more than nine times the national average (more than half of HigherEchelon employees are Veterans compared to the national average of only 5.6-percent), we take pride in ensuring that public sector clients are empowered to bring their mission, vision, and values to fruition through the same cutting-edge technology used by their often better-resourced commercial counterparts.


Overview




The Department of Veterans Affairs is the second largest Federal Agency (similar in size to a Fortune 10 company) with more than 350,000 employees in the US and abroad. VA executes numerous programs aimed at improving the lives of Veterans and their families.

Challenge

One of VA's core values is excellence – to strive for the highest quality and continuous improvement. For a number of VA's programs, this value could not be achieved without significant digital transformation that could ease burdensome processes for VA employees, while improving speed, accuracy, and user experience for Veterans.



THE ENTIRE HE TEAM IS PHENOMENAL AND PROVIDED UNPARALLELED SUPPORT AND SOLUTIONS THE PAST FEW YEARS WE WORKED TOGETHER. – PUBLIC SECTOR CLIENT



As part of a larger team tasked with solving significant challenges through a Salesforce-powered solution, HigherEchelon is transforming how VA engages Veterans in a variety of programs across grants management, stipend awarding, creative arts competitions, suspense management, and

broader program support. For the scope of this case study, we will highlight a program we are supporting in grants management.

The Grants for Adaptive Sports Programs (ASG Program) provides grant funding to organizations that provide adaptive sports activities to Veterans and Servicemembers. The overall goal is to increase and expand the quantity and quality of sustainable adaptive sport activities available to Veterans and Servicemembers with disabilities. ASG Program provides

adaptive sports programs for those with mental health issues within their home communities, as well as more advanced Paralympic and adaptive sport programs at the regional and national levels.

Previously, there were burdensome challenges ASG faced with their processes that were time-consuming, inefficient, and costly, including:

- Manual submission of required reporting from grantees
- Variation in reporting formats increased manual processing in the Director’s Office
- Manual data calls and ad-hoc assembly of reports needed to satisfy Congressional inquiries
- No functional application of business rules or logic
- Difficulty in providing analytics needed to drive development of programs in underserved areas

Solution

To solve these challenges, HigherEchelon created and implemented a Salesforce application to manage the grants awarded to organizations that implement adaptive sports programs for Veterans. The

organizations now create a user profile on the Grants4Vets page and submit a standardized form with required and optional fields to apply for a grant. The applicants’ profile allows them to view previous grant requests and statuses of the applications. Additionally, VA receives notifications of a submitted application to begin processing. VA has protective measures to secure personal and proprietary information of each organization.

More specifically, we created a data model to hold all relevant information about Grants and deliverable elements that are funded and tracked within the Grants program office. We then created all workflow, business rules, and alerts/notifications to allow large swaths of Grants management to be automated. Beyond the hands-on configuration work, HigherEchelon also stood up and staffed a helpdesk support line using Amazon Web Services. Included in our efforts was the delivery of many high-quality training events to a broad array of end users, VA employees, and external support personnel.

Overall, our solution helped VA achieve:

- Completely electronic submission of grantee reporting metrics and cloud-based storage of metrics for easier reporting in real-time
- Standardized formatting and data elements to ease administrative burden for Director’s Office



**THIS IS AN INCREDIBLE TEAM TO WORK
WITH AND THEY GET RESULTS!
– PUBLIC SECTOR CLIENT**



- Integrated reports and dashboards that are automatically updated for metrics tracking
- Reporting tool checks for errors or variations based on business rules and logic
- System data is now leveraged to make decisions about geographic distribution of funding, helping the Director’s Office staff to better direct resources to underserved areas
- Salesforce Lightning Flow is used to automate the approval process for application access, Reports and Dashboards, and Lightning Components, making the entire process faster and more efficient

This has resulted in:

- Significant re-use of institutional data through a slipstreamed solution into a large integrated environment.
- Reduced burden of compliance for grantees.
- Consistent data across grantee populations.
- Significant time savings through the reduction of rekeying of data.
- Dramatically improved reporting abilities.
- Enablement of on-time reporting KPIs and other metrics over time that was previously impossible.

Through our work implementing Salesforce into special use cases for VA and many other public sector organizations, HigherEchelon is fulfilling our commitment to those who serve by enabling their work to be more efficient, effective, and ultimately, more satisfying.

A DIGITAL TRANSFORMATION THAT SOLVES ORGANIZATION-SPECIFIC AND INDUSTRY-SPECIFIC CHALLENGES IS WITHIN GRASP IF DONE THE RIGHT WAY

Life after a successful digital transformation powered by Salesforce is very good indeed. Onerous drudgery related to manual processes vanishes when replaced by streamlined, automated systems that free everyone to focus on work that moves the needle.

“THE ENTIRE HE TEAM IS PHENOMENAL AND PROVIDED UNPARALLELED SUPPORT AND SOLUTIONS THE PAST FEW YEARS WE WORKED TOGETHER. – PUBLIC SECTOR CLIENT”

High level, at-a-glance command of an entire enterprise’s data that was once completely opaque becomes crystal clear – driving worlds-better decision-making processes based on granular insights drawn from accurate, robust, automated reports and visual dashboards.

Swaths of records and siloed record-keeping systems that were once sources of endless frustration become consolidated into one central system that provides a single source of truth for everyone in the organization.

Customer satisfaction skyrockets as marketing, sales, product teams, customer service, and operations departments deliver customer experiences informed by a full customer 360 that replaces old, siloed information.

BEWARE COMMON PITFALLS THAT CAUSE DIGITAL TRANSFORMATION FAILURE

However, life after an unsuccessful Salesforce digital transformation effort, usually due to deploying Salesforce without help or with an inferior implementation partner or with a mismatched/limited third-party developer of Salesforce overlay products, can be very bad indeed.

Independent Software Vendors (ISVs), that create packaged solutions, can often be very attractive initially. They offer an 80-90% solution pre-configured that results in a quick win for the business. However, as the business evolves and new requirements surface, those solutions can be difficult to work with and can require excessive customizations later in order to keep them relevant. If your organization is dynamic and is likely to evolve quickly with use cases, HigherEchelon recommends avoiding getting “locked-in” with an ISV solution.

WORKING WITH HIGHERECHELON IS A PLEASURE. THEY ARE DOWN-TO-EARTH, RESPECTFUL, THOUGHTFUL, AND, MOST IMPORTANTLY, KNOWLEDGEABLE ABOUT SOLUTIONS. ...THEY FOLLOWED ALL OUR (MANY) SPECIFICATIONS AND WERE ABLE TO SAVE US MUCH STAFF DATA ENTRY TIME WITH THIS PROJECT.
– PUBLIC SECTOR CLIENT

Without a seasoned partner to guide organizations through strategic thinking and change management with long-term outcomes and developments in mind, conflicting stakeholder priorities that have not dovetailed into a seamless plan usually means the solution dies on the vine.

A general lack of understanding of Salesforce can lead to a sub-optimal solution in which poor design practices are followed, overly complex configurations result, and users revert away from the configured system back to what may have “worked” better for them in the past.

In the worst cases, years and money spent on Salesforce licenses and all of the accompanying effort and cost is wasted when organizations decide to scrap their initial implementation and have to bring on an experienced Salesforce implementation partner like HigherEchelon to undo the damage and start from scratch.

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. – PUBLIC SECTOR CLIENT



HOW TO CHOOSE THE RIGHT IMPLEMENTATION PARTNER

Whatever might be gained by going it alone is simply not worth that risk. To realize a return on your investment in Salesforce and start seeing all the benefits possible on the powerful platform, it is imperative that you partner with a highly qualified Salesforce implementation partner like HigherEchelon.

At a minimum, a quality implementation partner will:

- Take the time to understand your business requirements.
- Understand how to tailor Salesforce to your specific industry.
- Follow agile methodology to ensure predictable outcomes.
- Eschew custom code over advanced configuration to keep TCO down.
- Work with your in-house IT team to leverage their knowledge for integrations and do knowledge transfer to them over time so that they can support the solution long-term.

Having an in-house IT team is a great asset. HigherEchelon is good at working side-by-side with that team to help them understand the platform, including security and access concerns. To the degree that integrations are required, your IT team often are experts in the 3rd party systems that Salesforce needs to communicate with and should be a part of the process. HigherEchelon is known for good working relationships with internal IT and provides excellent documentation and training so that our solutions can be supported with in-house resources post-deployment.

THE HIGHERECHELON JOURNEYNAV™ SIGNATURE PROCESS

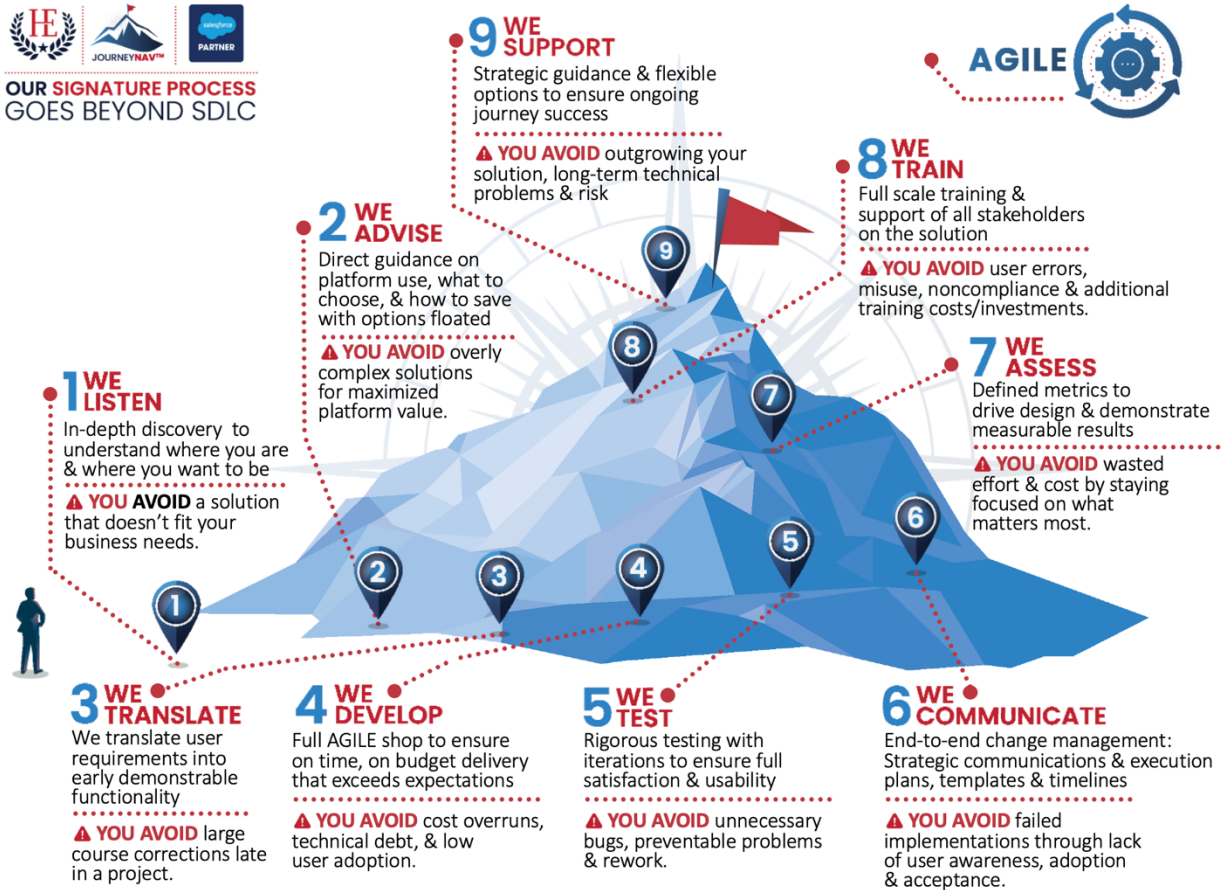
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– PUBLIC SECTOR CLIENT



At HigherEchelon, we go well beyond even these high standards in a signature 9-step process that -- simply put -- no other Salesforce implementation partner comes close to delivering.

No matter the size of your organization or project, HigherEchelon applies the same rigorous approach to every project we take on. This means that you benefit from all the bells and whistles we bring to massive implementations, no matter your size, sector, or scope.





More specifically, our signature process goes beyond Software Development Life Cycle (SDLC) to deliver an iterative, AGILE, communication-rich approach that walks customers through every stage of implementation, with ongoing training and support long after the product is delivered.

YOUR GUIDES ON A SUCCESSFUL SALESFORCE JOURNEY

When clients choose to work with HigherEchelon, they get peace of mind. No more diverting valuable time and resources from the daily mission to learn Salesforce. No more worrying about missing something important that will cause problems down the road. No more wondering if every ounce of value is being realized from the Salesforce investment.

Our clients get white-glove treatment and custom solutions from our award-winning, all-U.S. based team with deep experience serving clients across a diverse range of complex public and private sectors.



THE KNOWLEDGE AND UNDERSTANDING OF THE SFDC ARCHITECTURE IS EXCEPTIONAL. THEY WERE ABLE TO QUICKLY IDENTIFY AND IMPLEMENT A SAFE, EFFECTIVE SOLUTION FOR A PROBLEM THAT WE HAD BEEN STRUGGLING WITH FOR A LONG TIME. THE COMMUNICATION WAS EXCELLENT THROUGHOUT, AND THE COMMERCIAL ENGAGEMENT PROCESS WAS FAIR AND COLLABORATIVE.

– RETAIL INDUSTRY CLIENT

But it's not just about what you get when you work with HigherEchelon. It's also about what you avoid. There are common pitfalls along the Salesforce journey – you can rest easy knowing we will navigate you around them. That's why we named our signature process JourneyNAV – think of us as your trusted guides, there with you for every step of a journey we designed with your needs front-and-center:

1. **WE LISTEN:** No organization or project is quite the same. That's why we spend ample time conducting in-depth discovery to understand where you are & where you want to be. This helps you avoid a solution that doesn't fit your business needs.
2. **WE ADVISE:** There are many options in Salesforce. You get the full benefit of trusted independent advice from partners who are committed to your best interests. You will get direct guidance on platform use, what to choose, and how to save with options floated so you know you are getting the best value. This helps you avoid overly complex solutions and unnecessary licenses so that you get maximum platform value.
3. **WE TRANSLATE:** Your users will have many requirements that will need to be translated into functionality. We demonstrate this early on so you get a very clear idea of how your solution will work. This helps you avoid large course corrections late in a project that could come without that early insight into the end-product.
4. **WE DEVELOP:** Rest easy knowing we utilize AGILE methodology in an iterative, communication-rich process that ensures on time, on budget delivery that exceeds expectations. This helps you avoid cost overruns, technical debt, and low user adoption from a solution that wasn't quite right.
5. **WE TEST:** Your solution will be tailored to you – rigorous testing with iterations ensures we work out every detail until it's just right and you are fully satisfied with solution usability.

THE TEAM IS VERY ENGAGING AND LISTENS. I WAS ABLE TO MAP OUT WHAT I WANTED TO SEE AS A FINISHED PRODUCT AND THEY DELIVERED.

– CONSUMER GOODS CLIENT



6. **WE COMMUNICATE:** One of our key differentiators is our communication process. We are change management-certified professionals with tried-and-tested insights into digital transformation best practices. You will get end-to-end change management tools and guidance, including strategic communications and execution plans, templates, and timelines. This helps you avoid failed implementations through lack of user awareness, adoption, and acceptance.

7. **WE ASSESS:** You won't have to guess if you are hitting the right KPIs. You won't have to worry about how to justify the investment to your executives. We guide you through establishment of defined metrics to drive initial design as well as demonstrate ongoing measurable results. This helps you avoid wasted effort and cost by staying focused on what matters most.

8. **WE TRAIN:** The end solution is only as good as the end-users' ability to fully leverage it. We provide full scale training and support of all stakeholders on the solution so that you feel confident and ready to get maximum benefit out of your new system. This helps you avoid user errors, misuse, noncompliance, and additional training costs/investments. Everything you need is in our one-stop-shop.

9. **WE SUPPORT:** We are in it with you for the long haul. You don't have to worry about what will happen if issues come up or you have new requirements down the road. We are still by your side, ready to provide strategic guidance and flexible options to ensure your ongoing journey success. This helps you avoid outgrowing your solution, long-term technical problems, and risk associated with working with a partner who doesn't stay with you for the long-haul.

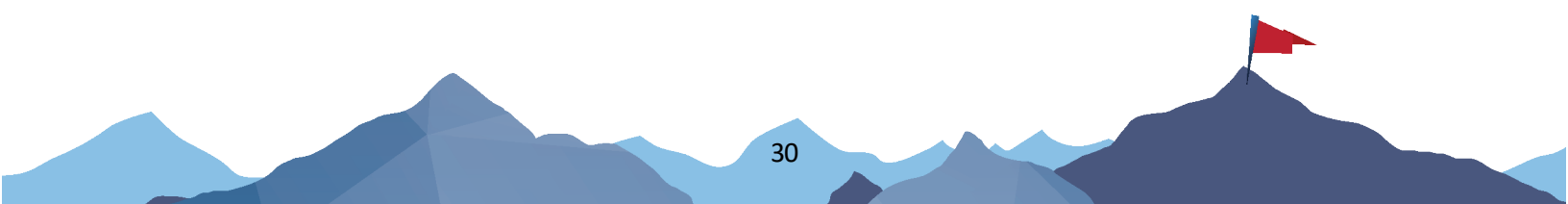
HIGHERCHELON CONTINUES TO UNDERSTAND OUR BUSINESS MODEL, OBJECTIVES WITH SALESFORCE AND THINKING SMARTLY ABOUT UTILIZING SALESFORCE'S CAPABILITIES. WE CONTINUE TO BE HAPPY WITH THE DECISION TO STAY WITH SALESFORCE AND HIGHERCHELON IS A BIG PART OF THAT.

– ENGINEERING, CONSTRUCTION & REAL ESTATE CLIENT



HIGHERCHELON WAS A TERRIFIC PARTNER. THEY WERE VERY ORGANIZED AND COMMUNICATIVE, AND WORKED DILIGENTLY TO FIND EFFECTIVE SOLUTIONS THAT FIT THE UNIQUE NATURE OF OUR BUSINESS.

– ENERGY INDUSTRY CLIENT





HOW TO WORK WITH HIGHER ECHELON

The best way to launch your journey with us is to schedule a first consultation so we can hear the full range of your unique challenges and concerns and answer any first questions you may have.

Call us at 866-488-9228, email us at solutions@higherechelon.com, or [fill out this form](#) to get the conversation started. We also invite you to [read feedback and reviews](#) that have resulted in our 5-star average rating on the official Salesforce AppExchange.

Learn more about our services [at this link](#) or by scanning the QR Code:



HIGHER ECHELON™

