

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. HESFP, LLCs 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.

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.

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

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



Standardized
Processes



Enhanced
Communications



Real-Time
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

1

2

3

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.



<https://www.hesfp.com>

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RESULTS



1

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.

2

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.

3

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.

4

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.

5

Marketing Efficiencies

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

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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

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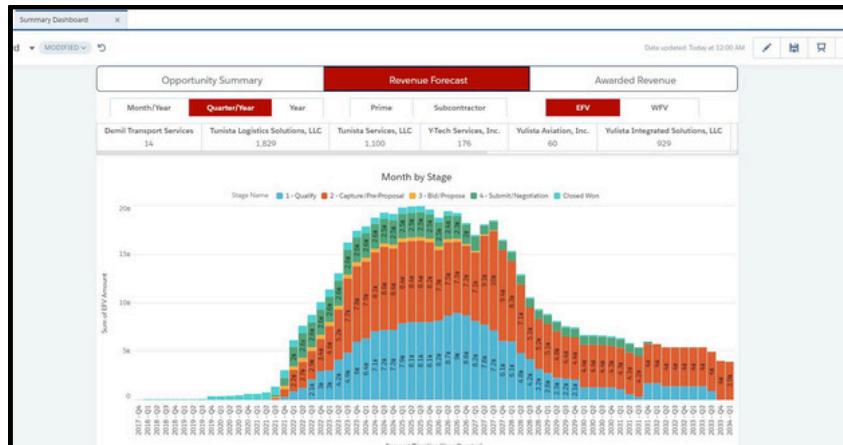
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THE APPLICATIONS

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



A custom dashboard utilizing a forecasting model.



Rich forecasting insights with Tableau.