Client Case Study:

How Green Team Joined the Next-Generation Opportunity Planning League. Directly in Salesforce.

Introduction
This client case study describes how Green Team Group completely transformed their way of working with accounts and opportunities. Green Team Group went from no CRM system and outdated spreadsheets to planning, tracking and reporting directly in Salesforce.

Sector
Agricultural manufacturing

Website
www.greenteam-group.com

April 2022

About Green Team and this study:

- Green Team Group (Green Team going forward) is Europe's leading supplier of high-end, sustainable Christmas trees. Green Team handles all parts of the supply chain, including sourcing, manufacturing, pruning, nourishing and maintaining the trees, as well as marketing, sales and delivery through their multiple logistic centers across Europe.

- This customer case study is based on an interview with Peter T. Kilt, Sales Director at Green Team Group. During the implementation of Salesforce, Peter acted as the leading sponsor and decision-maker.

Why are we still doing this on paper?

When Green Team first reached out to ARPEDIO, they were dealing with a very low-key and old school account and opportunity planning setup. Green Team didn't have a CRM system in place. Instead they used spreadsheets that continued indefinitely to contain all their critical information. Back then, using a spreadsheet was considered 'good enough', Peter says, and as this might be the case for a Finance department, it's definitely not in Sales.

"It wasn't possible for me to do any reporting before. And you can imagine what it's like when a board member asks you how it's going, and you have to answer that you simply don't know because the information isn't available."

Peter was very well aware that if you want to transform not only a sales department but a company as a whole, you need to have a structured system that's both intuitive and scalable. Better reporting was the cornerstone of Green Team's decision to implement Salesforce, and work with a business partner to initiate and roll out a scalable solution, and ensure the new setup was adopted internally.

"Basically, we started from square one. We didn't have the tools to work with customer data and relationships. We were missing basic structure."

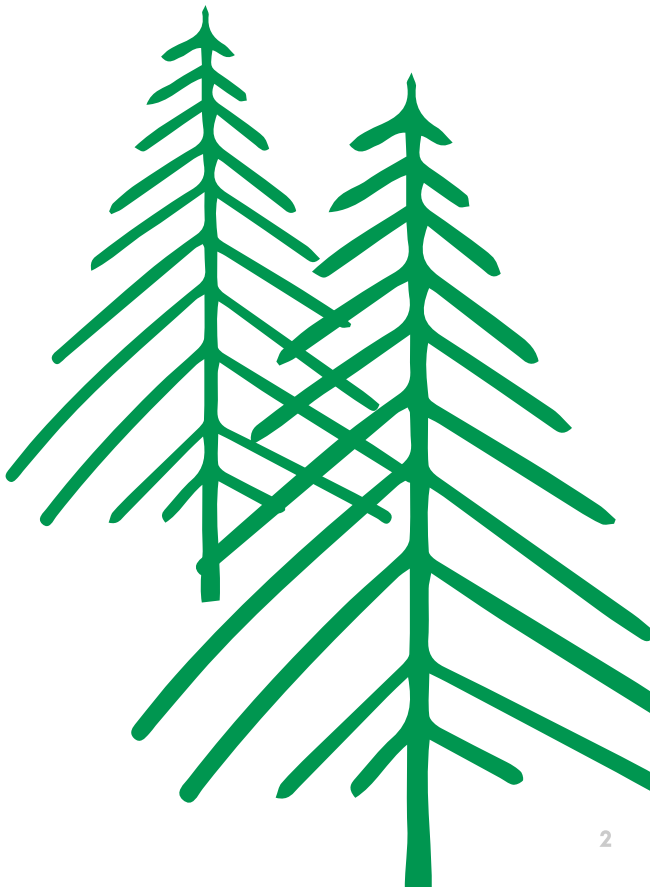
Peter goes on to address that it's of utmost importance that you're commercially aware, when you're running a sales department. On top of that, it's crucial that you're able to create and maintain strong relationships with clients. And to do so, you need data to support you, as well as data to ensure accurate and useful reporting.

"I wouldn't want to be part of a management team, where my Head of Sales wasn't able to do any reporting qualitatively and on time - that must be very unsatisfactory."

Peter was very surprised to discover that Green Team wasn't already leveraging a CRM system, when he entered the company in May 2021. Green Team operates all across Europe with employees spread out across England, Poland, Denmark and France. And for this reason, it's critical that you have an intuitive system that works across borders, Peter says.

With no CRM system in place, Peter was questioning how one can expand a sales organization.

"It's not only about how to sell more. A system to support your sales efforts will have a positive ripple effect throughout the rest of the organizations' departments."



Salesforce and ARPEDIO outperform the competition

There was no question that Green Team wanted - and needed - a new CRM system, and the choice was easy - it had to be Salesforce. The primary reason to go with Salesforce was based on Peter's previous experience with the platform. Peter especially appreciates the intuitive interface, and finds that Salesforce is by far the best CRM option on the market.

"Going with Salesforce was a no-brainer. It's a global, scalable CRM system miles ahead of its competitors."

Next, they needed a Salesforce Implementation Partner to help with implementation and adoption of Salesforce, as well as advising Green Team on best practices for the best possible experience and outcome. Luckily, proving the need for Salesforce and ARPEDIO to management and the board wasn't an issue, Peter says:

"Everyone could clearly see that this was a solution we didn't have, but one we desperately needed. Therefore, the implementation budget was vanishingly small compared to the return of investment we get, and have gotten."

And when Peter says 'return of investment', he's not only referring to selling an additional number of Christmas trees, he's also talking about saving a lot of time and money on manual labor, giving his employees a break to be even more innovative. It's been a stepping stone for more motivated employees, he says. It has given them a lot more insights into average price(s), contribution margin(s), visitor activity etc., - everything available from their own dashboards.

Why ARPEDIO?

'Prepared' and 'insightful', those are the two keywords Peter highlights, when we talk about how ARPEDIO stood out from the competition.

"They really came prepared and provided the knowledge that would take Green Team on a transformation journey into technologically advanced account- and opportunity planning."

Green Team was initially talking to multiple suppliers, but decided to go with ARPEDIO. Peter emphasizes that what they were looking for in an implementation partner was someone who showed a deep understanding of their business and was able to deliver the right solution from the beginning. In many ways, Green Team is very similar to other manufacturing companies. However, being a seasonal business, Peter stresses that a bit more understanding of their sales processes is required to be able to advise Green Team in the best possible way - and ARPEDIO was able to demonstrate this.

"ARPEDIO outperformed every competitor by far. They really showed great understanding from the get go. You could tell that they really put a lot of time and effort into getting to know the ins and outs of Green Team Group and how we do business."

When asked to elaborate, Peter stresses that they wanted a partner who understands their commercial standpoint as well as the long term plan: more specifically, where they came from, where they are, and finally, where they're going.

It's about long term relationships, Peter says, why he was very keen on getting a like-minded partner onboard. If you don't share the same view(s) on the importance of relationships and don't have experience running your business with this in mind, it can prove difficult to advise others on the importance of this to drive growth. Peter really appreciated the fact that ARPEDIO was well aware of the importance of building long term relationships, and he believes this to be one of the reasons why ARPEDIO was able to understand Green Team's business so well.

The rollout – bringing in a subject matter expert

'Smooth' is the first word that pops out when Peter is asked to describe the implementation process: *"I've never experienced an implementation process that went this smooth"*, he adds. Peter is very happy with both the process and the outcome, and highlights three key factors for the successful implementation: (1) deciding on Salesforce as their new CRM system, (2) going with ARPEDIO to implement it, and (3) internal support from employees.

Peter was very impressed with the willingness his employees showed to adjust to and adopt the new setup. This of course made the implementation process a lot easier, he says, and adds that APREDIO played a key part in getting everyone on board. At the very beginning of the project, ARPEDIO was brought in to introduce Salesforce to the team, as well as elaborate on the importance and the benefits of having and continuously using a CRM system.

"We gathered everyone in our DK office and let ARPEDIO do an implementation session and introduction. This definitely had a positive impact on the mindset of our employees."

From Peter's experience, it works out really well when experts from outside the organization can support big internal changes. Experienced subject matter experts contribute with new perspectives, and when you bring in an outside expert, you also create a trusted source of information.

Peter addresses that ARPEDIO had a lot more integrity and expertise to show for in this field, which ensured credibility and acceptance among Green Team's employees. ARPEDIO had the ability to simplify the process, spread understanding and get everyone onboard from the get go, Peter says. Every Sales and S&OP employee at Green Team has been in the loop from the beginning of this transformation journey and throughout. This made sure everyone was on board and on the same page, when Green Team hit the 'go live' button.

From Peter's experience, an implementation and adoption journey like this usually takes around 5 years to complete, which underscores his amazement in the speed and adoption with ARPEDIO.

"The journey has been really great. Personally, I'm very surprised that we were able to implement a fully operational CRM system and get everyone on board in a matter of a few months. We're already working on adding claims handling and business planning in addition to the current setup."

Next level opportunity planning

In terms of Green Team's situation now, Peter says, *"We're in a completely different league now. I won't say it's easy to be me, but it's definitely a lot easier than it was before. We went from driving a Fiat 500 to being on our way to Formula 1"*. Overall, Green Team has a much more structured and professional approach to their sales processes, as well as the ability to monitor business performance in automated and customizable reports.

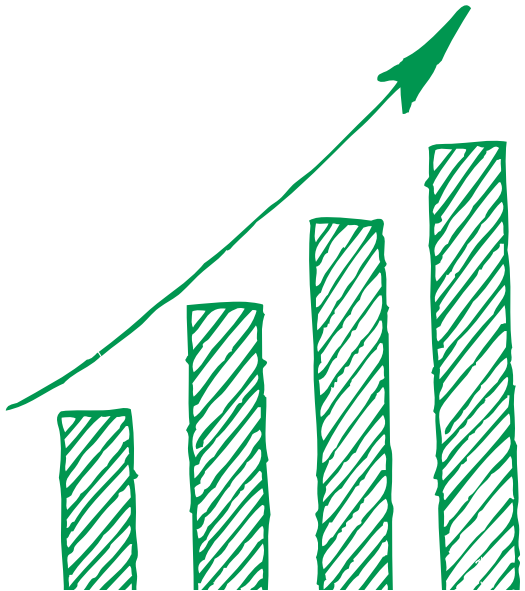
"The toolbox we had before was the old school metal one consisting of two regular screwdrivers. Now we're equipped with a cordless drill and the whole shebang, making it a lot easier to build this house we're currently working on."

After implementing Salesforce, Green Team is working with opportunities in a completely new and improved way. Peter highlights that their opportunity base has grown significantly. In implementing Salesforce, Green Team finally has a system in place that allows for the sales team to work commercially with a CRM system, not to mention a system that actually encourages them to add and assess opportunities, e.g., by providing notifications when it's time to follow up.

Today, Peter and his team work proactively with opportunities completely from scratch. They add all opportunities in a qualification mode – even the ones that won't necessarily turn into an actual sale, however, this is a way to ensure opportunities get the attention they need, and that Green Team have all (historic) data stored in one place. This new setup of course means that Green Team has more closed-lost opportunities than wins now. But this is all according to Peter's plan for expansion:

"Within the last 14 days, our opportunity base in qualification mode (first stage) has tripled. We want our opportunity base to be really big, because the more proactively we work with a larger number of opportunities, the bigger the opportunity to grow the company. We get to talking about these opportunities, and they get the attention they didn't get before, when they were just a name on a piece of paper on someone's desk. And that's fantastic!"

As everything is stored directly in Salesforce, it has opened up for the opportunity to share information across the organization. This is another crucial benefit for Green Team, as their salespeople are spread out across Europe: *"Now we are able to highlight examples in our team meetings, and discuss if a given opportunity is interesting or not, and why."*



A Salesforce to ERP (IFS) integration – minimizing workload and streamlining processes

Along with the Salesforce implementation, ARPEDIO was also in charge of a much needed Salesforce integration to Green Team's existing ERP system (IFS). Prior to implementing Salesforce, Green Team was using their ERP system for everything - including all the tasks you would usually manage in a CRM. It was a hodgepodge of data that was difficult to keep track of. And when an order was placed, Sales would have to manually type in the information in the ERP system. This was an unnecessary workload, which was definitely not optimal, Peter says.

With the new integration, this happens automatically: all customer interaction takes place in Salesforce, and once an order is confirmed, data automatically transfers straight into their ERP.

Today, Green Team's sales team uses Salesforce to manage all customer related data, while the ERP system is still used for day-to-day operations, however, the two systems are now intertwined.

The Salesforce Integration has allowed Green Team to streamline their separate processes from A-Z. There's now a clear distinction between the two and which is used for what, and subsequently, the sales team only has one system they need to update.

Setting the scene for a more commercially minded sales team

In implementing and using a CRM system like Salesforce, Green Team as a company has become much more agile and commercially minded, and it has contributed to making our processes much more simple and efficient, Peter says. He adds that the ability to make a decision in the morning and see the changes in the afternoon is really great:

"In terms of getting a system in place to accommodate the basics we needed, we've really come a long way. It has given me the opportunity to execute on the things I know work. And this is thanks to ARPEDIO and their insights into running a commercial business."

With their new CRM system, Green Team is much better prepared. They show up to meetings with confidence and professionalism and bring along quality material that's relevant to the people they're presenting to. This whole 'package' has improved significantly in line with the implementation of Salesforce. They now have the data it takes to be properly prepared, and Peter says that this has given Green Team a much more attractive product.

"By the push of a button, we can see refreshed dashboards giving us the insights to be completely prepared - both for internal reporting and client relationships as well."

Last but not least, employee satisfaction has gone up, Peter says. Providing more structure has created more fun in the workplace. According to Peter, this is due to

clear communication internally and externally, supported by Salesforce and ARPEDIO. He strongly believes that the more on top of the business they are in Sales, the more it reflects positively on the rest of the business.

"Our employees are more motivated now that we have a process up and running that actually brings value – not only in sales, but also in the rest of the organization."

Next steps: Green Team Group continuous collaboration with ARPEDIO

After going live with Salesforce, Green Team decided to continue the collaboration with ARPEDIO. ARPEDIO is currently working on a solution for claims handling as an addition to Green Team's current Salesforce setup. "And this definitely won't be the last project", Peter says, however, Green Team is doing the new implementations in small steps to ensure the whole organization is able to keep up.

This new claims handling solution will help keep track, manage and prioritize claims internally, which is essential because all claims handling happens in a very short period of time, hence the seasonal business. And Peter is positive that this new setup will significantly improve the jobs for the employees handling claims.

Curious to learn more? Interested in more information on how ARPEDIO's Account-Based Selling Platform can help you make the most of your Salesforce capabilities?

Book a demo or start a 30-day free trial today.

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Any questions or reflections?

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