



Fast Growing Loyalty Card Startup Scales to Meet Hyper-Growth

Improves Customer Responsiveness and Business Visibility



BACKGROUND

FiveStars was founded in 2010 with the idea of creating one loyalty card that can be used everywhere. While the FiveStars card can be used at any number of businesses, each business retains full control over the rewards and features of their specific loyalty program. The benefits for small businesses using FiveStars include access to their large network of cardholders, as well as advanced data analysis and tracking that can be leveraged for sophisticated and targeted local online marketing.

CHALLENGES

FiveStars is a startup with a very fast growth rate. Since its production launch in August 2011 to October 2012, the rate of purchases logged has grown to 750,000 purchases per month. Data was and continues to be collected at an extremely high rate and continuously needs to be turned into actionable information for the account teams, support team and management.

“We started to use Salesforce as our CRM tool,” said Victor Ho, CEO at FiveStars. “We needed to get it up and running as quickly as possible to handle our current levels and to scale to handle many multiple times growth. We needed both our account management and support teams to work in an integrated fashion so that they could have a 360 degree view of the customer. And both account management and support need to have the right information from our proprietary system right at their fingertips.”

Vital Statistics

- Business Loyalty Card Provider
- Based in Mountain View, CA USA
<http://www.fivestars.com>

Business Challenges

- Extremely fast growth rate which presents process, data and organization challenges
- Needed a single view of the customer for both the account management and support teams
- Information was located in different systems and needed to be made available in a single pane of glass

Solution

- Salesforce.com Sales and Service cloud configuration that modeled the complexity of the business process
- Creation of a platform that would serve current needs but have the flexibility and scalability to support a rapidly changing business in a rapidly changing industry
- Metrics collected from phone call to completed deal
- Automation of commissioning
- Integration with the proprietary FiveStars system so that key data is made available to teammembers at the right time

Benefits

- **360 DEGREE VIEW** of the customer
- **DATA:** Up to date transaction data made available to gain insight on lead source, campaign management, client health and more
- **FUTURE PROOFED:** A platform that supports the current business but also has the flexibility to expand to support FiveStar's rapidly growing business
- **AUTOMATION:** increased efficiency while providing visibility to teammembers and improving responsiveness to prospects and customers
- **SELF-RELIANCE:** Knowledge transfer of best practices so that FiveStars can perform most of the administration and improvements themselves



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~ Adam Wall
Sales Operations

SOLUTION

FiveStars partnered with MondayCall Solutions to configure both the Salesforce.com Sales and Service Cloud to meet their requirements. Important to this process was the need to support many different offices. Because FiveStars' customer base are local businesses, they needed a way to support many geographically dispersed teammembers as they worked with prospects and onboarded and supported new customers.

MondayCall Solutions worked with FiveStars to architect the system to meet its current and future needs. The system was configured to model FiveStars' business process and to provide the needed data gathering and automation to increase efficiency and visibility of information. Once the structure was set up, historical data from legacy systems was imported to Salesforce.com to maintain continuity. Dashboards were created that displayed key performance indicators that drove their business. Sales and Service consoles were set up so that teammembers could see all of their information in one place to better service their customers. Commissions were calculated based on their compensation policies (including handling complex splits). MondayCall worked with FiveStars to revamp their activity tracking from phone calls to completed deals which gave them measurable visibility and improved responsiveness to prospects and customers alike. APEX triggers were created to automate calculations and processes. And, the entire sales team was trained during one of their quarterly meetings where the sales team were all in one location.

Key to this solution was having visibility into the information stored in their proprietary system. FiveStars developed a sophisticated back end system to store all customer data and transactions. Every card swipe at a customer's site is tracked and stored in their proprietary system. This data needed to be aggregated and made available to account representatives and management. Leveraging Web Services, MondayCall worked with FiveStars development to integrate the two systems so that critical data could be aggregated and passed to Salesforce.com.

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~ Adam Wall
Sales Operations

“MondayCall set up the base platform for us to expand our business using the Salesforce platform” said Adam Wall, Sales Operations. “With their collaborative approach, our team has been able to take advantage of their best practices consulting to jump start our own knowledge and capabilities in-house. We have since moved our shipping process to Salesforce and are looking to move our billing system to a product on the Salesforce AppExchange. In addition, the set up that MondayCall put in place has allowed us to easily put our new marketing team onto Salesforce with great insights into lead source, campaign management and more.”

BENEFITS

Automation of their sales and support processes helped improve customer responsiveness and increased team efficiency throughout the whole customer lifecycle. Adam said, “With MondayCall's guidance, we've been able to completely move our sales, account management, service groups and now marketing to the Salesforce platform. As a fast growing company, it is highly critical for us to have the infrastructure to support our current and future needs and have a solution that lets us focus on providing great features and service to our customers.”

Integration of Salesforce.com with their proprietary system was key to improving team productivity. Accessibility of the data was then used to create reports and dashboards that measured general business statistics and “client health”. Eric Burdullis, Operations, noted that “with this data readily accessible in Salesforce.com, we could easily write reports to understand on any given day how well we are doing with a customer and for our team to take action to better service our customers. In addition, we were able to leverage Salesforce.com's reporting capabilities to do ad hoc queries and give us new insights into our business.”



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