



## Success Story

# Salesforce Optimization for Woodstream Corporation

**Industry:** Pest and Animal Control | **Region:** Pennsylvania, U.S.. | **Services Deployed:** Salesforce Optimization  
**Technologies Used :** Salesforce Lightning

Woodstream Corporation (Woodstream) is a long-standing privately-held company and a global manufacturer of quality branded rodent control products, caring control products for pets and wildlife, natural solutions for home and garden, wild bird feeding products, and garden decor to consumers and the professional pest control market.

### Challenge

Woodstream had a customer portal integrated with Salesforce for collecting leads and prospective customer information. However, the client wasn't using all of the functionality available in Salesforce for managing the sales cycle and missing the opportunity to understand customers better. The sales team relied instead on using Excel spreadsheets which were not only disconnected from their customer data but were prone to errors and required manual data entry.

### Solution

Speridian initially was asked to create dashboards to enable Woodstream to view their sales funnel, but it was clear there were many features of Salesforce the client wasn't using to optimize their sales operations. After working with Woodstream to understand their sales process and how they managed leads and customer relationships, Speridian identified gaps that could be rectified with the functionality available in Salesforce.

## Results

With Salesforce expertise Speridian was able to provide Woodstream with:

- Dashboarding and data visualization to view and analyze the sales funnel and related KPI's
- Automated data cleansing process to improve the accuracy of forecasts and reporting
- Streamlined CPQ to help manage products, price books, and quoting.
- Modernized UI for capturing lead information that is automatically validated to improve data quality.
- Re-engineered sales process for forecasting, tracking leads and opportunities, CPQ, and territory management in Salesforce.
- Increased user adoption enabled by Speridian-led Salesforce Training.
- Realized cost savings & process efficiencies of over 25% value from combined technical and functional improvements.

Woodstream can now collect leads and manage the sales process more efficiently within Salesforce, eliminating the need for spreadsheets or other disconnected systems. With all of the customer data centralized in one place, the sales team can easily monitor leads and communicate with prospects from Salesforce.