



The IT Architect (ITA) was experiencing growing pains due to using legacy processes that simply didn't scale, running its business through Google Suite (Gmail, Google Sheets, Google Docs, etc.). Also, because they are a national organization, they had a non-centralized staff working all over the US.

ITA needed a way to not only centralize their sales operations process but needed an easier way to manage their sales pipeline. ITA needed a solution that could address the following needs:

- **Centralize Account and Contact data**
- **Centralize Opportunity data and automate their sales process.**
- **Create real-time notifications on stalled deals or new deals.**
- **Mobile accessibility**
- **Integration with Google Suite**
- **Sales reports and dashboards**

"Fantastic! Really appreciate the hard work; the project was very clean and efficient!"

Charles Harrell II, CEO, The Information Technology Architect

Overall, ITA needed a single solution that could integrate and optimize the organization's sales process into a 1-stop shop. Also, for its existing Google Suite solution to integrate with Salesforce....and they needed to do it on a budget of less than \$7k.

In response to these challenges, ITA partnered with SMBHD to create a Salesforce Sales Cloud implementation that was both inexpensive and impactful from a ROI perspective.

CUSTOMER

The IT Architect
www.TheITArchitect.com
Chicago, IL

COMPANY PROFILE

Employees: 10
Industry: Information Technology,
Professional Services

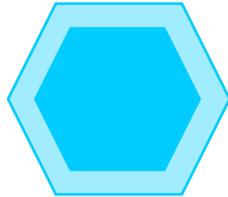
ABOUT

The IT Architect Corporation (ITA) is a full-service technology and telecommunications firm. ITA maintains strong strategic business partnerships with nationwide carriers of both legacy telecommunications and cutting edge commercial and consumer technology solutions to help our customers to architect the perfect solution for their businesses. ITA provides technology development, fulfillment, and support services to public and private sector businesses throughout North America and specializes in areas of design, implementation and management of automated business processes and building controls.

SOLUTION AT A GLANCE

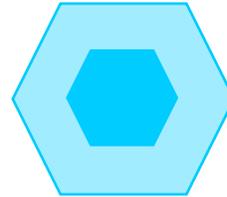
Salesforce Sales Cloud
Salesforce Platform
Google Suite Integration

The ability to move ITA out of spreadsheets and provide real-time mobile accessibility has been a huge benefit to ITA. Specifically, in the areas of client response time and productivity.



+25%

Improved client response time.



+33%

Productivity gain in sales operations

Leveraging Salesforce's highly scalable Sales Cloud, SMBHD implemented a low cost solution that addressed all of ITA's primary needs including the centralization of all of their core sales data (contacts, accounts, opportunities, leads), integration with Google Suite, mobile access, and customized sales reports and dashboards.

RESULTS

Implemented a Sales Cloud solution with real-time integration with Google Suite. A mobile optimized solution that centralized all their core sales data (Accounts, Contacts, Leads, Opportunities), created highly customized reports and dashboards, and automation of alerts for the sales operations team

LEARN MORE: www.smbhd.com • 773.888.7900 • sales@smbhd.com