

Catalant leverages Yoxel's Salesforce integration app to streamline sales processes and improve business decision making

Case study

Catalant Technologies, Inc.; Mr. Gary O'Neill, Business Systems Manager; Boston, MA

Client profile

Catalant is a US-based software company that provides global enterprises with an online marketplace for connecting businesses to over 70,000 independent experts and 1,000 consulting firms, for project-based work.

Employees

150-200

Website

gocatalant.com

Industry

B2B software, business products & services, business intelligence, management consulting

Initial challenge

Catalant's business operations team wanted to minimize manual data entry for its sales team and create a more automated, consistent lead-to-contact process.

Solution

Catalant implemented Yoxel's Salesforce integration app for G Suite to automatically capture calendar, email, contact and task data, and to automatically classify when leads convert to contacts.

Results

- ★ The Yoxel application helped automate when leads convert to contacts, and reduced manual data entry, so the sales team could spend more time generating new business.
- ★ Catalant estimates that Yoxel sync saves its 80-person sales team, approximately 15-20 minutes each day, or 400-530 hours every month.
- ★ By improving the quality of data synced to the CRM, Catalant's executive team can rely on the Salesforce reports to make business decisions.
- ★ Better data has empowered Catalant's management to track sales team performance and identify "growth areas" where resources should be redirected.



Increased Salesforce adoption and sales productivity



Custom sync solution for Salesforce



Saves 400-530 hours every month on manual data entry



Improved data accuracy for reporting



Acceleration of sales growth



New customers



Competitive advantage

Catalant background

Catalant offers a technology platform for connecting businesses to expert consultants and freelancers, across a range of skillsets. The firm employs 140 employees, 80 of which work in sales and customer support roles. The company is based in Boston, MA, serves 35% of Fortune 1,000 businesses, and is growing rapidly.

Initial Challenges – an inconsistent lead-to-contact process

In February of 2020, Catalant converted from Salesforce Classic to the updated Lightning platform. The company's sales team was spending a considerable amount of time on manual data entry. Moreover, each salesperson was deciding independently when to change a lead to a contact. Without a consistent process for classifying when a lead converts to contact, Catalant's sales leadership didn't know the true status of opportunities. This limited their ability to forecast sales and revenue numbers accurately.

Gary O'Neill, Catalant's Business Systems Manager clarifies, "If you ask employees to manually enter data, some will and some won't. This will affect the quality and consistency of the information making it into our Salesforce database. We wanted our sales pros to spend their time prospecting and closing new deals, but our executive team needed to know that the reports they were relying on to steer the business, were reliable."

CUSTOMER QUOTE

"We needed to automate multiple workflows so that our sales team could spend more time focusing on closing new business, and our executive team could be confident that the reports they were using to steer our business, were reliable.

Our trust in the data that Yoxel is syncing to Salesforce is second to none.

Yoxel is a wonderful tool and we absolutely love the their support team."

Gary O'Neill

The Solution – a Gmail sync that works behind-the-scenes

Mr. O'Neill leads a technical team of three engineers. They support several software applications including: Salesforce, Google Workspace (Gmail), NetSuite, and Gong. By implementing Yoxel for the entire support and sales team, they automated data entry for multiple sales functions.

Yoxel also helps sales reps incorporate prospecting data from LinkedIn Sales Navigator, ZoomInfo, and SalesLoft. When they reach out to prospects via Gmail or schedule sales-related events, the Yoxel Sync automatically enters information to Salesforce. This allows the sales team to perform most of their daily tasks in their email applications.

Catalant results – automating sales workflows leads to better business decisions

"We can't understate the time savings that Yoxel has generated for our sales team," Mr. O'Neill emphasized. "Our sales reps work in Google Workspace and usually spend little to no time transferring data to the CRM. Our staff appreciate how easy Yoxel is to use, and when we have to train new employees, the process is much simpler."

Data our executives rely on

Mr. O'Neill explained, "Our trust in the data that Yoxel is syncing to Salesforce is second to none. And if for some reason information doesn't transfer properly, the Yoxel Error Logger is so good, you can identify the problem immediately. During our All-Hands Meetings, we see our leadership team reviewing the number of sales events, their quality, and our conversion rates. They're using this data to identify growth areas and where we should focus more time and attention. This would not be possible without Yoxel."

Responsive support from true pros

"Yoxel is a wonderful tool and we absolutely love their support team," commented Mr. O'Neill. "Every time we ask a question, I don't think we ever wait more than 24 hours to get a response. They're experts at solving complex technical problems. A few months back, we had an issue where a sales rep would cancel a meeting in Gmail, and that cancellation wasn't updating Salesforce. Within a few days, Yoxel fixed the problem. That's not easy to do."

About Yoxel

Yoxel is a smart inbox integration for Salesforce that increases user adoption and improves data accuracy. Yoxel's bi-directional sync automatically integrates calendar events, contacts, emails and tasks between Salesforce and Office 365, MS Exchange, Outlook.com and/or Google. To learn more about Yoxel, or to download the application, visit: www.aurinko.io/yoxel or contact us at info@yoxel.com.