

salesforce



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VIVO RESORTS
OAXACAN BEACHFRONT LIVING

Resort Developer Gains Key Business Insight with BIG and Salesforce

Vivo Resorts sells luxury condos and private residences in Puerto Escondido, Oaxaca, Mexico. After experiencing great success with the company's resort sales program, it became apparent that its manual systems weren't scalable enough to meet the business need. New solutions were sought to overcome the gap between needed visibility and lack of data to provide accurate business intelligence.



PROBLEM/CHALLENGE:

The company imports its leads into a sales database, then potential buyers visit the resort, and then purchase real estate in Mexico. Vivo Resorts needed the ability to track what percentage of leads result in sales conversions, along with the sales cycle time – from lead to close (sale) – to measure the performance of its sales programs and staff.

They were using several spreadsheets to track data manually and these processes were unable to provide key business intelligence, resulting in a lack of visibility into sales performance.

Vivo Resorts also required marketing integration and reporting to track marketing programs, and customer relationship management to ensure that customers were receiving appropriate campaigns and communications during the sales cycle – and that all touches were managed.

SOLUTION:

Choosing BIG as its integration and customization partner, Vivo Resorts purchased a full suite of applications that addressed its sales visibility needs, transitioning its entire 'lead to cash' system into Salesforce:

- IQ Inbox – allows the sales reps to work from gmail, and includes a sidebar in email where the user can log all their emails, contact info, etc. in one easy-to-access location.
- Salesforce Engage – engage alert for email campaigns.
- Pardot – marketing automation software.
- DocuSign and Conga Composer – to create contracts and get them signed.
- Custom Purchase and Sales Agreements – to capture all final sales in one place.
- Invoicing automation that can automatically generate invoices based on milestones.

RESULTS:

Vivo now has visibility into its sales performance, allowing sales and management to track and measure performance using customized dashboards and metrics. Using Salesforce as its CRM solution provides the company with one secure place for all sales data, eliminating manual spreadsheet processes, and providing an efficient data repository for the entire sales team.

The company is utilizing Salesforce reporting to gain key business insights and set strategic business priorities based on sales intelligence. As a result, the company has realised efficiency gains in automating its billing processes so that it can now automatically generate invoices for customers who pay on a project milestone basis.



EFFICIENCY IMPROVEMENTS



BUSINESS INSIGHTS



DOCUMENT MANAGEMENT

“Vivo Resorts now has visibility into what they are doing well and what needs to improve – sales people now access customized dashboards that allow them to “know the score in real time.”

– Shaun Connell, Managing Director Business Development



Salesforce.com is a world leader in cloud-based CRMs. Its software allows you to manage your customer relations and information from any device – smartphone, tablet or pc. And its all-in-one Customer Success Platform ties together sales, service, marketing, analytics and mobile apps. The experts at Bits In Glass are Salesforce certified and have an outstanding delivery record, ensuring that you receive the best value for your Salesforce.com investment.



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