



Naviant

Location: United States
Industry: Software & IT Services
Website: <https://www.naviant.com/>

Naviant uses business and process automation to help companies increase efficiency, gain insights into their business data and ultimately be more profitable.

How did the client or opportunity come about?

The opportunity originated with Salesforce, they evaluated us and Oracle as 2 feasible customer engagement platforms though we (Salesforce) were their final choice. Through conversations with Naviant, we mapped their priorities, identified various gaps and opportunities and essentially uncovered that due to their varied and disconnected legacy systems, a deeper dive into their stack was required.

Fortunately, Naviant are a system integrator so are very familiar with the world of software, implementation and licensing etc so they understood quickly how having their disparate systems might impact their stack and scale opportunities.

How did you find working with Mission Control?

While our Implementation Partner, Eide Bailly, has done dozens of implementation projects with Mission Control, Robb from Eide Bailly hadn't directly worked with Mission Control before, but since working with Mission Control and onboarding the software, has wondered whether perhaps there weren't past clients that would have found their technology more fit for purpose. Our overall experience of working with Mission Control was very positive

How did the Mission Control trial period go?

Given the size and scope of the project and number of stakeholders it was a very robust and involved a discovery period. The Head of Delivery at Naviant is very experienced and we aligned with him early to understand what was important for them so that we could tailor the demo and deep dive into the features that were mission critical.

Additionally, over and above feature-fit, what was most critical for Naviant was right-sizing - finding a solution that wasn't cumbersome, complex and required a huge amount of resources to administer and maintain.

Learnings

For a business that was brand new to the Salesforce platform one of the biggest initial challenges was making it clear why they needed Mission Control AND Salesforce - the two aren't mutually exclusive so explaining the symbiosis between the two platforms and various licensing requirements etc needed to be handled with some TLC.

Additionally, it really was a lesson in the client *wanting* one thing, but really *needing* another thing. Yes a project management tool was critical, but it's impact would have been curtailed had they not gotten the legacy stack in order.

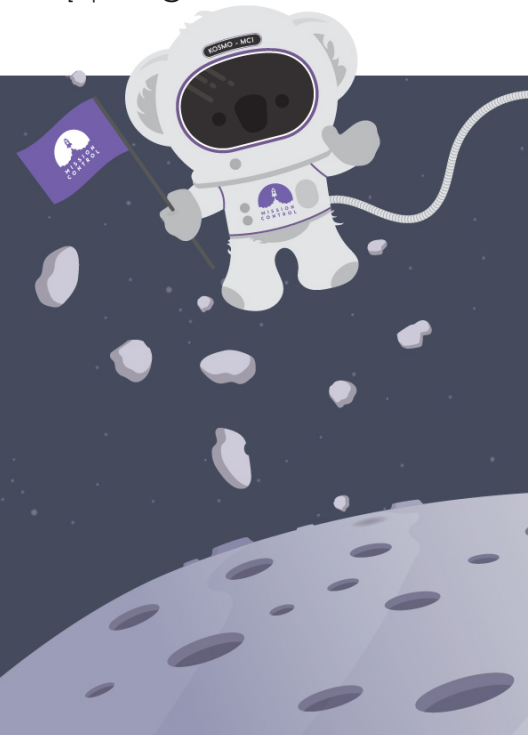
Finally, partnering with an experienced and respected Salesforce Implementation Organization like Eide Bailly really helped us upskill and identify a right-sized solution.

Naviant has since signed on and we're now implementing Sales Cloud, Service Cloud, Accounting as well as Mission Control, which should all be done in the next few weeks.

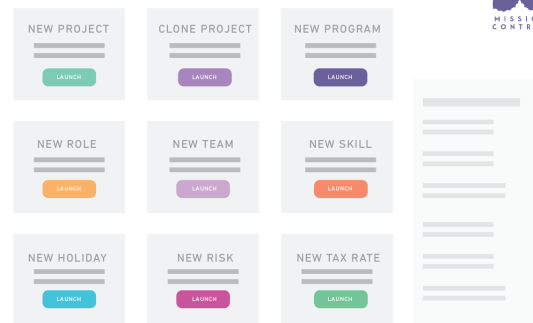


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