

TRC CONSULTANTS CASE STUDY

The Story

TRC Consultants develops software for the oil and gas industry, and has been doing so since the mid-1980s. Its customers, primarily small to midsize oil exploration and production companies, use the company's software to manage cash flow of drilling reserves. The company, based in Austin, Texas, has a one-person marketing department led by Katherine Tronolone.

In the past, she had been limited in the breadth of marketing activities she could launch, given the company's three different marketing tools that weren't integrated with each other nor with the CRM system, Act! Further, Tronolone had to manually enter leads from trade shows and other sources into the CRM. Website leads were imported into Act! using Swiftpage, yet the company still couldn't do much in the way of lead scoring or nurturing.

To simplify and streamline these disconnected marketing processes, in 2015, TRC Consultants decided to move to Salesfusion, a full-featured marketing automation system which will also integrate with its new CRM system from Saleslogix. Tronolone also reviewed Marketo and Hubspot but ultimately chose Salesfusion because of its strength in native CRM integration, which doesn't require custom programming. "Salesfusion had all the features we wanted, including event management, at an affordable price," she says. "The software is also extremely easy to use and web-based, so it was a no-brainer."

"This year we're focusing on efficiency," Tronolone says. "We will have one tool to use instead of three and with CRM integration, Salesfusion will give us more control over lead management, particularly understanding where leads are in the pipeline." She's also excited the sales team will gain visibility into all marketing outcomes, including alerts on which individuals are ready for contact and which ones should be included in an automated nurturing program powered by Salesfusion. "I can finally afford time to think out of the box with our marketing strategies, instead of doing a lot of manual, busy work," Tronolone says.

TRC Consultants L.C.

KEY PROBLEMS:

- Marketing and sales were disjointed
- Systems were labor intensive to use
- No integration between systems
- Limited visibility into funnel
- No time for strategic planning

HOW SALESFUSION ADDRESSED KEY PROBLEMS:

- CRM & MAP integration created process efficiencies
- Sales gained greater visibility into funnel
- More time to spend on strategic planning & new initiatives
- Greater control over pipeline & lead management