Case Study

CloudJungle

Salesforce CRM upgrade for legal content marketing experts

Overview of Berners Marketing

Berners Marketing works exclusively with the legal profession in the UK, providing two core services:

- outsourced marketing for small firms with no inhouse team; and
- expert legal content which is licensed to law firms to use on their website and social media via a monthly subscription.

The number of subscribers to syndicated legal content has been growing rapidly, and has significant potential for additional growth.

Having previously invested in developing the efficiency of client management and content production via their bespoke software: IDAHO®, other technology was not keeping pace with the business, especially the CRM system.

Time to upgrade Salesforce

Salesforce CRM had been used by Berners Marketing since the business was established in 2004, and it is home to an enviable database of legal contacts.

But it was not configured to reflect the current sales journey or to accommodate the growing number of subscriptions which needed to be managed.

It was still running in 'Classic' mode and the director and founder Sue Bramall recognised that it was time for an upgrade and reconfiguration.

'As a small business, efficient processes are critical to our growth strategy as they enable us to handle high volumes of content. Our long term plans are to digitise the entire subscription process, from sign-up to content delivery.'

Upgrading and getting the CRM system to work effectively was the obvious next step.

Why choose Cloud Jungle?

'Having worked with a developer on creating our workflow software IDAHO®, we already had our client journey mapped out and I knew the importance of a clear and tight software brief. Despite this, I still found it difficult to find a developer who could give me a fixed price for the work, or who really understood what this business is about.'

'Steve Mursell at Cloud Jungle was the only one who grasped our business model and the role that Salesforce needed to play in making things more efficient. His initial proposal (laid out in colourful Post It notes) hit the nail on the head – and he was full of ideas about how Salesforce could develop and later integrate with the website for subscriptions and the accounting system for payments.'
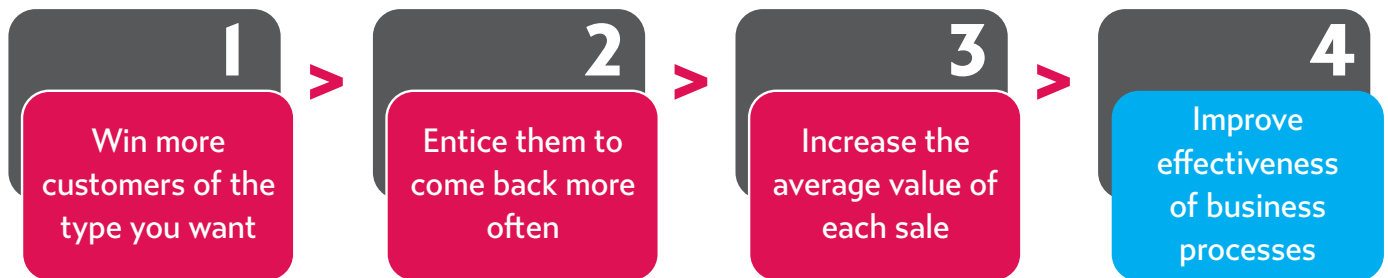
Project scope
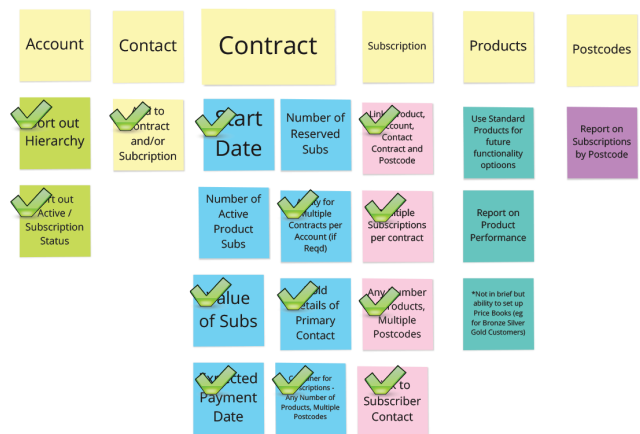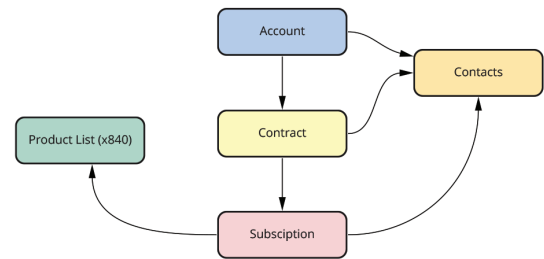
The Cloud Jungle team set out a six-week timeline and quoted a fixed price, which was really important.

'As a small business, I didn't want to embark on an open-ended software project,' says Sue.

'Naturally, the timetable stretched a little, due to finding out we needed features which we had not planned for. Despite this, Steve stuck to his fixed price, which I understand is a rare thing in the world of software development.'

The new Lightning version of Salesforce went live in May 2021 and Cloud Jungle supported us for a couple of months so we could test drive our month-end reports. Any wrinkles were soon ironed out.

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Win more customers of the type you want	>	Entice them to come back more often	>	Increase the average value of each sale	>	Improve effectiveness of business processes

Key milestones

The project plan was as follows:

- **By end of Week 2**
  Deliver the first iteration of the solution for testing and feedback. A helpdesk page was set up within Salesforce to log change requests.

- **By end of Week 3**
  Deliver change requests and agreement on solution. Berners continued testing and feeding back throughout the week as required.

- **By end of Week 4**
  Deploy to production and end user support. Berners prepared historical data for import and provided templates and KPIs for reporting.

- **By end of Week 5**
  Deliver final reports and dashboards. Import historical data.

- **Week 6 -** Flex week - Sorting final snags.

Steve Mursell commented: *'This was a fun project. Sue and the Berners team were well prepared and the project had a clear purpose. Frequent demos and feedback were essential in aligning our focus towards the goal. These valuable interactions helped us to deliver the solution quickly allowing time to deliver additional tweaks and iterations that are a natural part of every project.'*

What the client says…

Sue Bramall reflects, *'They always say that improving processes is the most neglected of the four growth strategies open to businesses, and it is easy to understand why. It can be quite a commitment in time (specifying what you need and then testing what you get) plus the financial cost. But this is the second tech project we have invested in and it has proven its worth very quickly.'*

'We now have real-time data on all our subscriptions, and the postcodes which are sold, available, reserved or under offer. My KPIs are visible at a glance on the dashboard and we have saved a lot of time duplicating data and creating manual reports at the end of each month.'

'If you need someone to help your business to get the best from Salesforce CRM, I can whole-heartedly recommend Cloud Jungle.'

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