

**ToxStrategies**
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What led ToxStrategies to move into Salesforce?

As the company grew, it had become more difficult for top level executives to see what was going on in the company. There was no centralized place to look. Viewing and updating spreadsheets isn't exactly user-friendly. We wanted to see everything in one place, including the sales cycle and progression for opportunities and leads.

Salesforce has allowed us to get that visibility. It has been helpful for our different business groups to see each others' leads, opportunities, and proposals. There may be a connection that we didn't see at first - someone here may know someone at the client company, or have useful insight from relevant experience.

As you lead Salesforce initiatives, how helpful is it to have a consulting partner like Rosetree Solutions?

Super super helpful. We wanted our system up and running fast, so having experts on our side right away was great. They are so fast at figuring out the best way to approach a problem and configure a solution. I can present them an issue and say "I'm not sure about the best way to approach this." They will respond with my available options immediately. They always help walking me through things and teaching me how do it so can manage it in the future.

How has working with Salesforce impacted your career and job role?

Salesforce has been mine to manage, because I'm the only one at our company who has used it before. It has been a really good learning opportunity and it has made me see the value of Salesforce even more. I didn't think I would like getting into back end data organization and configuration, but I've really enjoyed it.

I'm in charge of tracking our current Opportunities and Pending New projects. I regularly pull reports of those and send them to our marketing team as an internal communications newsletter. Before we got Salesforce, I'd have to ask five different super-busy people for updates. It used to be difficult to pull information together, but now it's easy to compile and share.

How has your department or organization changed since starting with Salesforce?

The Outlook integration is great for identifying leads and getting to work on them right away. Our previous process could have had leads sitting around for a couple of weeks. Now we're seeing data input more quickly.

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How does Salesforce support your digital transformation goals and objectives?

First, Salesforce allows us to view and leverage past relationships with different departments or subsidiaries within one client or company. In our proposals, we list qualifications and relevant experience. It's beneficial to say "I've actually worked with your company before."

Second, we have a custom object configured that allows us to access prior assessments we've completed. This allows us to do future work more efficiently. Basically, we are taking information and learnings that may be useful for a future project, and giving them a place to be recalled when needed.

What message do you have for other business leaders who are considering starting with Salesforce?

Don't be scared off by Salesforce's learning curve. It can look intimidating, but when someone needs help I just hop on screen share with them. Their question is usually answered quickly by walking through it. When teaching people, I do screen-records to send it to them, or I'll write them instructions. People are intimidated by the system because of its size and the number of things you can click into, but there are several ways to teach people how to adapt to a new system. You just have to take that first step and not look too far down the road.



AMANDA HAWS has a varied career background including marketing, corporate communications, recruiting, legal, and psychometry. She has a Bachelors Degree in Psychology from The University of Texas at Austin

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