

Cloud Creations Implements Sales Cloud for an RIA

Alpine Investors



LOCATION

San Francisco, CA



EMPLOYEES

18



INDUSTRY

Investment

Challenges

- Lacked ability to capture information from opportunities
- Wanted to automate the opening and closing of opportunities

Solutions

- **Salesforce Products Deployed:** Sales Cloud and Apex Development
- Developed custom logic that set time frame limits for the activity of opportunities
- Built fields in Salesforce where information could be auto-populated

Technology Replaced With Salesforce

- No technology

Established in 2001, Alpine Investors specialize in lower middle-market companies in the software, online, and business services industries. The Alpine team includes 18 professionals with diverse investing, operations, management, and finance backgrounds.

Alpine needs required a coding heavy project. They needed to capture information from opportunities and then auto populate that information into activity fields that updated and closed information within a given 14-day timeline. This meant there would have to be an initiation period where open and close dates for opportunities could be populated into different fields when certain criteria thresholds were met. Using Sales Cloud® and Apex development Code, Cloud Creations created new and complex logic that was able to 1: set time frame limits for the “Activity” of opportunities, then 2: was capable of recognizing that opportunity activities were in the time frame and had to either be initiated or closed. To capture this information Cloud Creations also built out several new fields where the information could be auto-populated using the new logic.

With Apex Development Code and Sales Cloud® integrations,

Results

- Opportunities were now automatically opened or closed based on time frame limits set by Alpine
- Cata is now captured on a timely basis and autopopulated in Salesforce.

Alpine Investors had criteria for work to be initiated and closed, and they had a way to auto-populate fields and update information on a timely basis.

Apex Development Screenshot

Code to pre-populate four fields, including Contact, Stage, Close Date prior to viewing the Opportunity Edit

The screenshot shows the Salesforce 'Opportunity Edit' interface for a 'New Pipeline'. The form is divided into several sections:

- Opportunity Information:** Contains fields for Opportunity Name, Company Description, City, State, Sales, EBITDA, Recurring Revenue %, Growth %, Enterprise Value, Revenue Multiple, EBITDA Multiple, and Deal Notes. On the right, there are dropdown menus for Industry, Opportunity Owner, Alpine Source, Alpine Lead, Source, Competition, Deal Type, Related Portfolio Company, Partner, Primary Campaign Source, Related CIR, and File Location.
- Banker Info:** Includes 'Account Name' (pre-populated with 'Cloud Creations') and 'Contact'.
- Dates:** Features 'Initiated Date' (pre-populated with 8/22/2017) and 'Close Date' (pre-populated with 8/5/2017), both highlighted with red boxes.
- Deal Stage:** Shows a 'Stage' dropdown menu (pre-populated with '0_Dead') and checkboxes for 'Prospect', 'Lead', and 'Review'. A 'Deal Rank' dropdown is also present.

Apex Development Screenshot

Code to update a custom date field on a contact, based on completed activities with specific subject criteria

Contact Detail

Account Name: Cloud Creations
 Name: Gracie Zacarias
 Title:
 Phone:
 Ext.:
 Mobile:
 Email:
 Website:
 Last Of Date: 3/21/2017

Contact Owner: SFDC Admin1 [Change]
 Contact Type: Broker
 Contact Status: Active
 Pronunciation / Name Notes:
 Broker Rank:
 Broker Type:
 Primary Contact:
 Top 100:
 Buy-side Contact:
 BSA Executed:

Industry Information

Industry Focus:
 Industry Notes:

Additional Information

Company Description:
 Company Description (from Contact):
 Person's Bio:
 MailChimp Bounce:
 Email Opt Out:
 Last Stay-in-Touch Save Date:

Address Information

Mailing Address:
 Custom Links: [Google Maps](#) [Google Search](#)

Activity History

Action	Subject	Activity Subtype	Due Date	Assigned To
Edit Del Call		Call	3/21/2017	SFDC Admin1
Edit Del Call		Call	3/20/2017	SFDC Admin1

Contact Roles Screenshot

Deal Stage

Stage: 0. Dead
 Prospect:
 Lead:
 Review:
 Deal Rank:
 Invest Review:
 Qualified Deal:
 Investing Next Step Taken:
 Call:
 IOI:
 Sprint:
 Sprint Visit:
 LOI:
 Closed:
 Dead:
 Reason Killed:

Description Information

Probability (%): 0%

Additional Information

Alpine Revenue:
 Alpine EBITDA:
 Alpine Revenue \$ Add:
 Alpine Team:
 Actual Enterprise Value:
 Actual Revenue Multiple:
 Actual EBITDA Multiple:
 Tags:

Contact Roles

Action	Contact Name	Account Name	Email	Phone	Role	Primary
Edit Del	Gracie Zacarias	Cloud Creations				<input checked="" type="checkbox"/>