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How Iceberg helped Oyster set a new standard for reporting in Salesforce



Oyster[®]

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into the sales cycle for a more suitable pro-
cess that drives the right behaviors."*

— Alex Berry
Head of Sales and Partnerships



Project Snapshot

Alex Berry, Oyster's Head of Sales and Partnerships, joined the team in early 2020 to help drive revenue and set a new go-to-market strategy for the organization.

Alex and his team recognized right away that the systems and processes supporting Oyster's current sales motion couldn't scale. For example, sales reps still entered lead data into Salesforce manually and assigned leads to themselves. Oyster had also recently purchased HubSpot for its inbound marketing funnel and needed the right strategic partner to guide the configuration.

Oyster partnered with Iceberg to take its initial Salesforce setup and build the next generation of sales and marketing operations. Projects included cleaning up deal stages so Oyster could track why deals are won or lost, establishing rules for hand-offs between teams, setting up a lead distribution system that automatically routes leads to sales reps across different countries, and providing strategic guidance on configuring HubSpot for inbound sales activities and tracking marketing attribution.



Oyster is a distributed HR platform that allows fast-growing companies to hire, onboard, manage payroll, and maintain compliance for employees located anywhere in the world. By simplifying and democratizing the process of hiring amazing talent, companies are no longer restricted to hiring candidates where they have a physical presence.

The Challenge

Repair sales and marketing operations buckling under Oyster's rapid growth

Between high market demand and a surge in remote work from COVID-19, Oyster entered a phase of significant growth and rapid internal hiring. The organization had recently hired new business development representatives (BDRs), and Oyster needed to add standardized processes that could scale.

Alex explained, "We were growing, and we realized that operationally our Salesforce setup and marketing tools didn't have anywhere near the level of customization needed to be effective."

To help Oyster overcome its operational roadblocks, Iceberg provided strategic guidance and hands-on support in two key areas.

Why Iceberg

"We were looking for best practices, expertise, and the ability to execute. It was clear to me that based on Iceberg's experience with other customers, they would be more consultative partners."

— Alex Berry
Head of Sales and Partnerships

1 Build a sales process in Salesforce compatible with fast, trustworthy reporting

2 Automate inbound marketing activities and measure marketing attribution using HubSpot

The Solution

Build a visibility-first sales process in Salesforce

The first step to improve existing sales and marketing operations is getting clear on metrics that will move the needle.

Alex and his team wanted to know why deals are won or lost. This information is critical for companies like Oyster whose sales team manages large lead volumes. With this end goal in mind, Iceberg worked backward to define and configure controlled inputs for the sales team to report on as a way to track patterns for why deals are won or lost.

Lead routing was a challenge, too. Iceberg implemented a round robin system that automatically assigns leads to the right sales team member across multiple geographies, eliminating the burden of distributing leads manually.

Iceberg also got to work configuring HubSpot so Oyster could systemize its inbound top-of-the-funnel marketing activities and begin to understand which marketing tactics drive the highest ROI.

Although the majority of Oyster's leads come from inbound marketing, Iceberg set up rules in Salesforce and HubSpot that track both inbound leads and outbound accounts so the sales team has access to important historical data.

Together, Oyster and Iceberg designed workflows that help Oyster reduce manual data entry and report building, streamline inbound and outbound activities, and serve up the metrics Oyster's leadership needs most.

The Results

Better systems > better reports > greater visibility

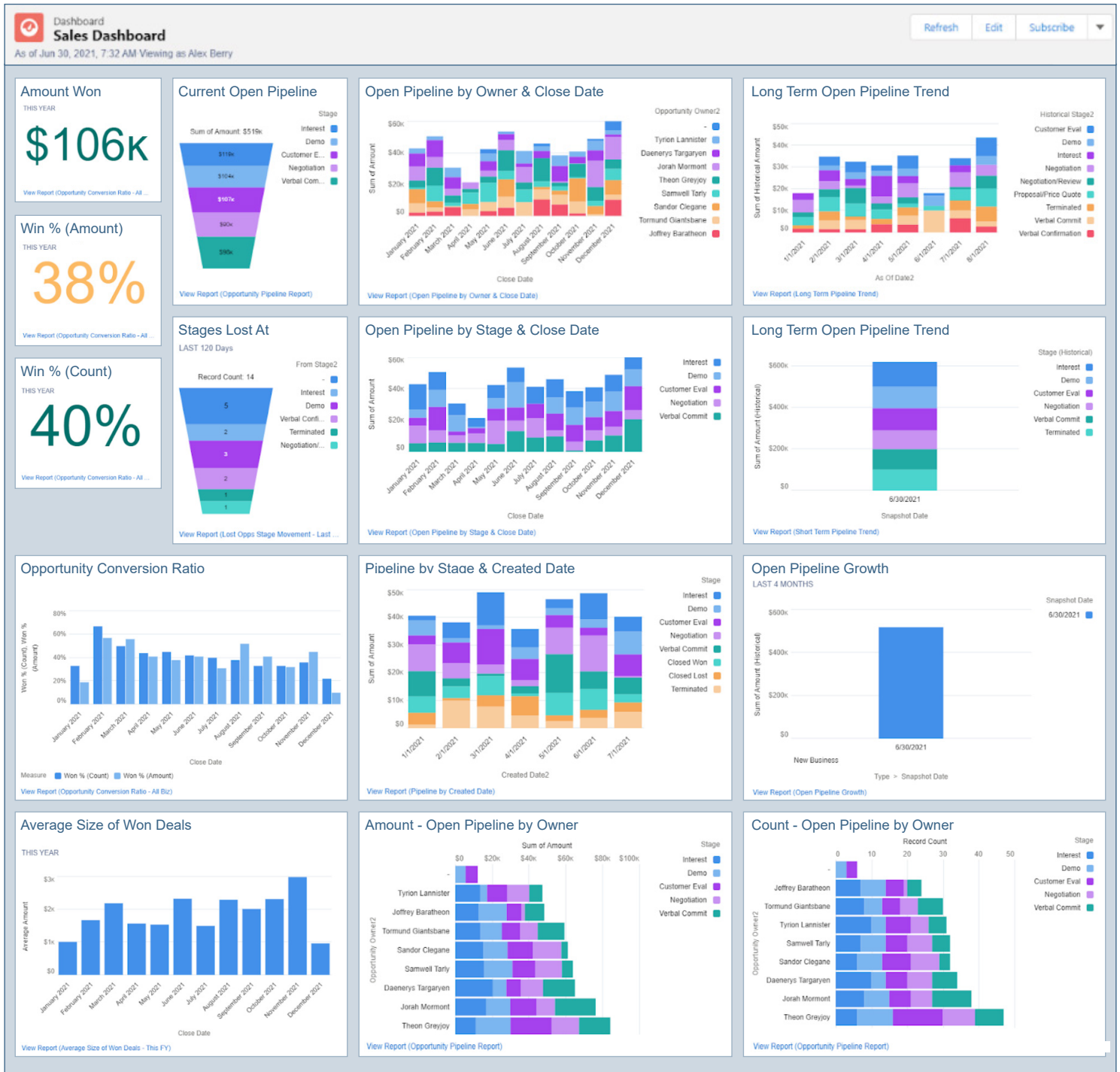
"We now have a much more comprehensive tool [Salesforce] to manage all of our leads and opportunities. From a lead perspective, the process of monitoring is so much easier, not only from a reporting standpoint but for the team to manage. We've been able to build best practices into the sales cycle for a more suitable process that drives the right behaviors."

— Alex

By putting rails around critical data entry points in Oyster's sales funnel, Iceberg helped Alex and his team achieve the visibility they depend on for managing Oyster's growth.

Leadership Dashboard

Oyster's leadership team uses a dashboard like this one to stay current on pipeline health and create sales forecasts.



Charts created using anonymized data

BDR Dashboard

Each BDR has access to their own dashboard for managing sales activities.



Charts created using anonymized data

Account Executive Dashboard

Account executives see a complete overview of their business and track progress over time.



Charts created using anonymized data

On the marketing side, Iceberg helped Oyster configure HubSpot so the marketing team could track data to understand which tactics bring in the highest number of new leads.

Alex said, "The work that Iceberg did with HubSpot enabled us to track which marketing activities drive the most value for the organization."

“One of the standout benefits of working with Iceberg is their fantastic culture. They’re professionals who are dedicated to your success. They have the right balance of letting you design what you need but also bring in best practices to make you successful. That makes them a really valuable partner.”

Make reporting your competitive advantage