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How Iceberg helped DispatchTrack bring its pipeline into focus



"Seeing the whole of the pipeline makes forecasting that much better."

— Daren Lauda
EVP of Sales and Customer Success





DispatchTrack optimizes last-mile delivery logistics for retailers and wholesalers. Using AI-powered routing, a mobile application for drivers, and flexible customer service tools, DispatchTrack ensures customers get their deliveries within a two-hour time window, 98% of the time or more.

When Daren Lauda joined DispatchTrack as Executive Vice President of Sales and Customer Success in August 2020, he was tasked with growing the organization from \$20 million in annual recurring revenue (ARR) to \$100 million.

Hitting an ambitious growth target requires an efficient sales and marketing funnel. With only four sales representatives at the time, DispatchTrack managed its sales process using a combination of spreadsheets and Zoho (a small-scale customer relationship management (CRM) platform). Sales leadership built reports using data tracked manually on a weekly or monthly basis. Daren recognized Salesforce, with its robust customization and reporting functionality, as the next logical solution.

A former vice president at Salesforce, Daren tapped his network to find the right implementation partner. After moving forward with Iceberg, the teams built a new sales process in Salesforce plus integrations with HubSpot and email marketing platform Outreach.io to provide DispatchTrack with a complete sales and marketing ecosystem aligned for growth.

The Challenge

Working off spreadsheets made accurate reporting nearly impossible

DispatchTrack targets both B2B and B2C customers using a combination of inbound and outbound marketing. Initially, the team used Zoho CRM to store basic information like customer account records and contact information.

“Historically speaking, pipeline management existed in spreadsheets or on whiteboards,” Daren explained. “Data hygiene in Zoho CRM was poor. An account record may have basic information (account name, email address, amount) and little else. I spent my time downloading CRM data into spreadsheets, appending with detail, and creating an accurate picture of the pipeline. It was a painful, time-consuming process.”

When a lead came through DispatchTrack’s website, it went straight to an email alias where a sales rep would pick it up. With only two or three reps, the process worked. But even then, Daren said he had no way to measure if reps followed up with leads.

“At that point, we had three or four sellers, but now we’ve got a 25-person team. We knew we were going to have to lay a foundation to create rules for territories and routing.”

With an aggressive hiring cycle, Daren focused on the big picture.

“We thought about [our challenges] more as revenue operations than sales operations. We were looking for a partner who knew Salesforce very well along with other kinds of data collection and aggregation tools.”



The Solution

Transition to Salesforce and connect the right systems for funnel-wide insights

Transferring data from one CRM to another gets trickier when definitions differ across systems. Here, Zoho uses Contacts to represent people, whereas in Salesforce people can be either Leads or Contacts based on their level of qualification. The teams needed to figure out the best way to categorize customer data in Salesforce terms.

Iceberg created a framework to determine where each piece of data should live. In the first step, the teams removed old and unnecessary data. Then they categorized potentially necessary data, e.g. prospected companies, as leads. The rest were moved over as accounts or contacts with stricter definitions for deals. Unlike Zoho, organizations pay for the number of deals in Salesforce.

To account for DispatchTrack's expanding sales organization, Iceberg implemented a round robin for lead routing. A round robin provides an automated and fair set of rules for distributing leads to sales reps across multiple geographies. Iceberg deployed structures in Salesforce so they can report cleanly on multiple territories and integrated Salesforce with DocuSign to facilitate contract negotiations.

Iceberg also helped connect Salesforce with HubSpot and email marketing platform Outreach.io. Leads coming through HubSpot now get scored. With a high enough score, the lead moves into Salesforce and automatically gets assigned to a seller via the round robin. Using Outreach.io, leads then receive a relevant email nurture campaign based on their sales stage.

Why Iceberg

"We wanted somebody smaller and agile, and Iceberg certainly fit that bill. We also wanted someone to help us look at a lead from the first website visit to its ultimate disposition in Salesforce. Then, to be able to see the whole picture in our reports."

— Daren



The Results

“My ability to report to our board and investors is now better than it ever was.”

- Daren

The move from Zoho to Salesforce created a valuable opportunity for DispatchTrack to clean up its customer data and transition to a disciplined framework in Salesforce. Now Daren and his team can see how many leads come into Salesforce through HubSpot, where leads sit in the funnel, and if the right sales rep has followed up.

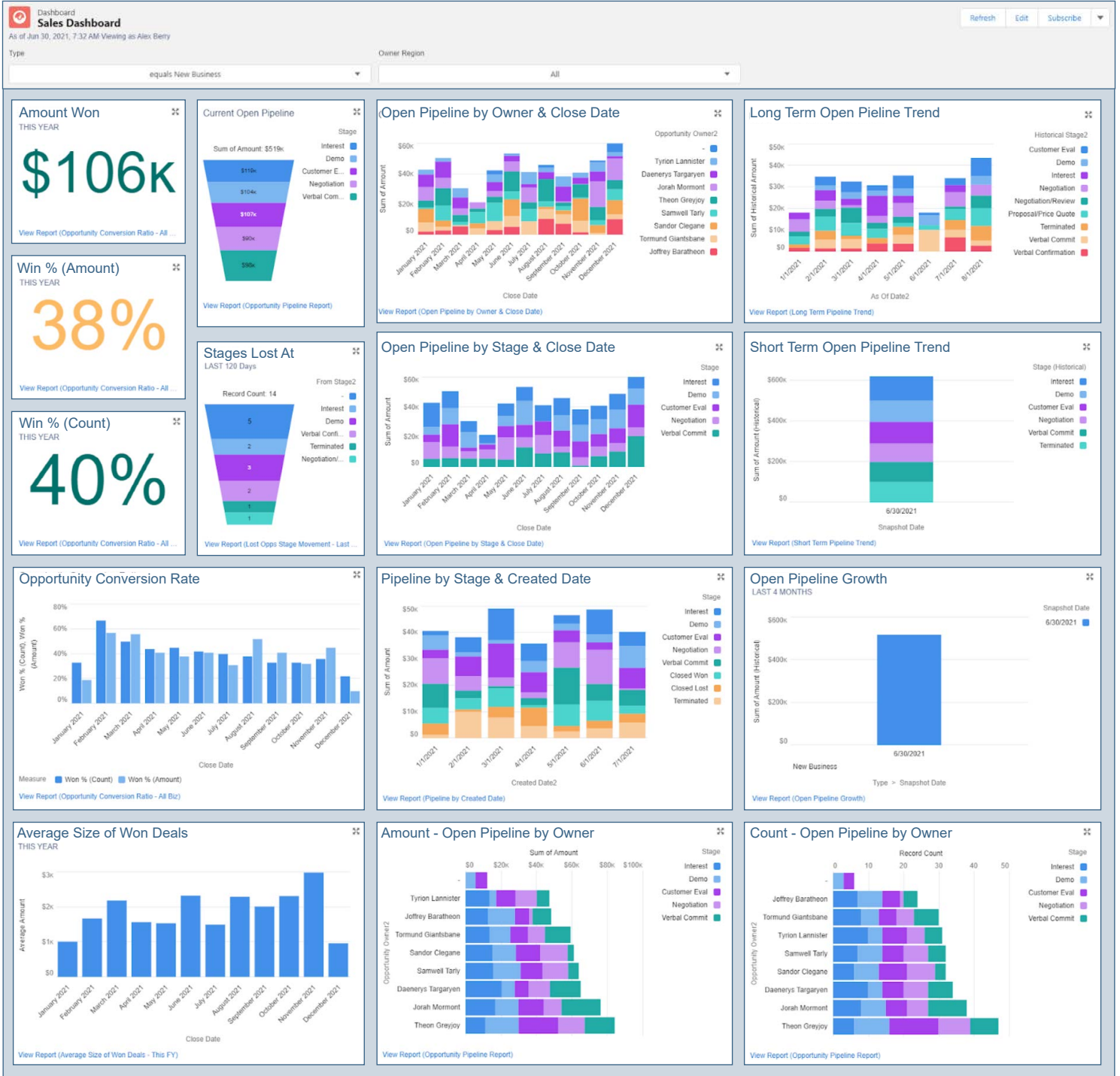
“The visibility into the whole pipeline from raw lead to closed won/lost in Salesforce has been beneficial,” Daren said. “Seeing the whole of the pipeline makes forecasting that much better.”

Integrating with Outreach.io enhances DispatchTrack’s ability to automate marketing messages based on HubSpot’s lead scoring.

“*Now we know that we’re sending the right messages to the right people at the right time. I can see which sequences are driving the best yield and maximize top-of-funnel entrance into the pipeline to make sure I’m getting the best yield there, too.*”

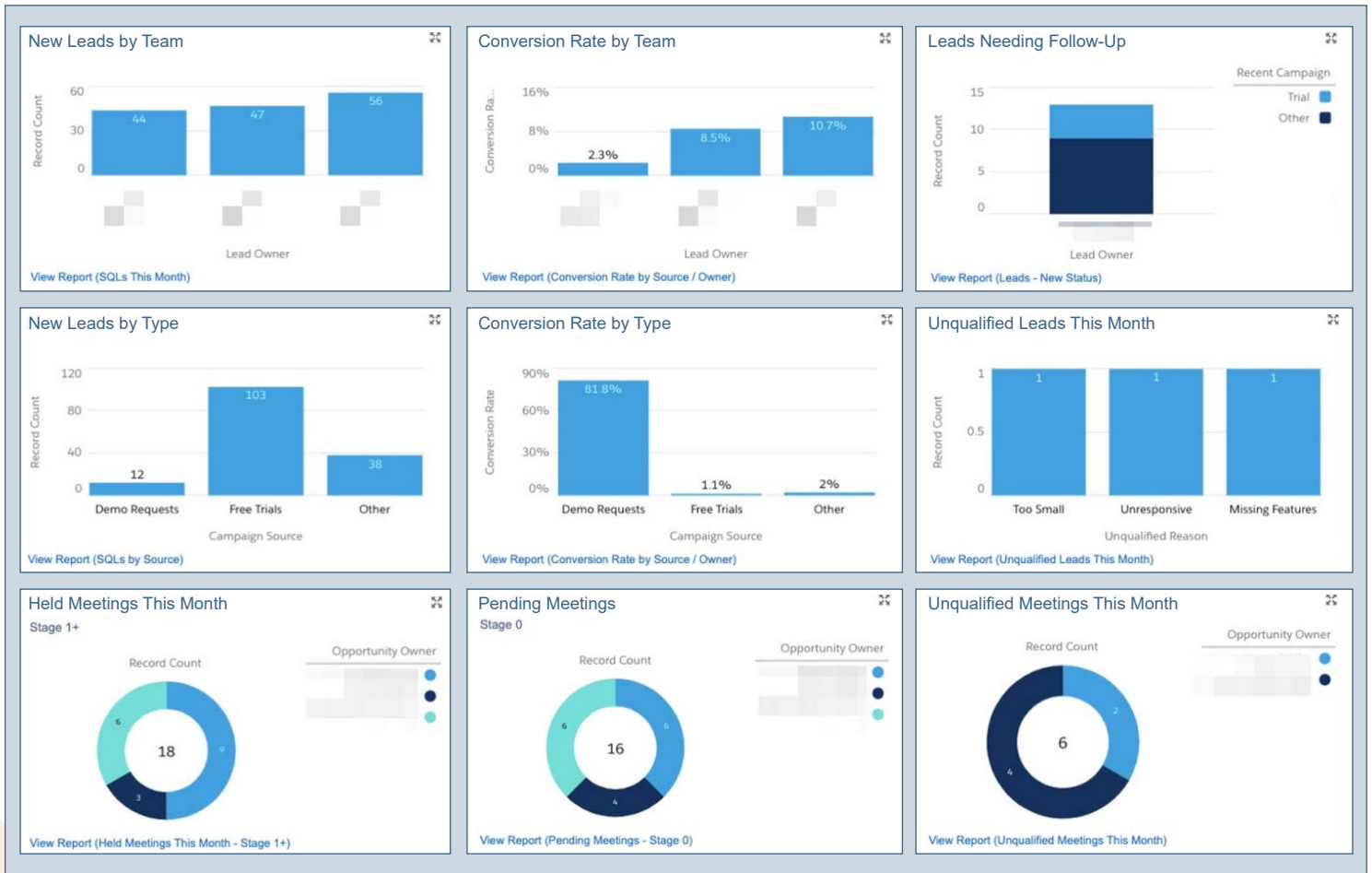


Pipeline & Forecasting Dashboard



Charts created using anonymized data

Account Executive Dashboard



Charts created using anonymized data

Ongoing support >>>

DispatchTrack continues to work with Iceberg as its primary revenue operations resource for a variety of projects.

“Iceberg’s given us a lot without having to deploy a massive amount of resources. They’re saving us money on headcount now. We don’t have a sales operations person, and we don’t have an IT person dedicated to Salesforce. Those are two headcounts right there that we haven’t needed to hire because Iceberg’s in place.”

Ready to uplevel your sales and marketing operations with a strategic partner?