

## Case Study

# Overcoming Dairy MAX's Sales and Marketing Coordination Challenges

Streamlining outreach programmes with Opportunity Planner within Salesforce

## Overview

Dairy MAX Inc., a non-profit Dairy Council, represents 900+ dairy farm families across eight states. Dairy MAX has been at the forefront of promoting American agriculture and supporting dairy farming. As a nonprofit, Dairy MAX has been driving impact for every dairy farmer through its five outreach programs. However, to further their mission and ensure a seamless coordination of these programs, Dairy MAX needed to:

- Establish real-time tracking of sales and marketing progress.
- Implement a streamlined system for efficient monitoring and evaluation.
- Enhance access to up-to-date data for prompt decision-making.
- Ensure seamless coordination of outreach programs.

## Solution

Understanding Dairy MAX's unique challenges and commitment to healthier communities, DemandFarm introduced the Opportunity Planner Playbook. The solution was tailored to streamline Dairy MAX's sales and marketing tracking processes providing:

- **Unified Intelligence View:** Dairy MAX harnessed the Playbook's ability to consolidate all opportunity-related data into one comprehensive view for each buyer-centric opportunity.
- **Streamlined Sales Process:** By directly inputting their sales and marketing plans into Salesforce via the Playbook, Dairy MAX minimized manual interventions and streamlined operations.
- **Informed Decision-making:** Dairy MAX capitalized on the Playbook's objective scoring system, adjusting opportunity scores based on task achievements, ensuring a more informed approach to opportunity prioritization.
- **Precision in Data:** With the Playbook's automation, Dairy MAX gained an accurate snapshot of their opportunities, ensuring they targeted the right areas for maximum impact.
- **Customized Methodology Integration:** Dairy MAX tailored the Playbook to their unique sales approach, integrating popular sales methodologies and even in-house strategies.

With the Opportunity Planner Playbook, Dairy MAX has not only streamlined its sales and marketing functions but also enhanced collaboration, leading to a significant increase in their opportunity conversion rates.

## Impact

- **Enhanced Opportunity Utilization:** With 315 opportunities using the Playbook since July 2022, DairyMax maximizes its potential for growth and revenue generation.
- **Significant Milk Production Impact:** The 9,226,997 pounds of milk associated with these opportunities demonstrate a substantial boost in dairy demand and consumption.
- **Current Fiscal Year Optimization:** Leveraging the Playbook for 149 opportunities in the current fiscal year has already yielded 4,900,800 pounds of milk, indicating a focused and effective approach to annual goals.
- **Long-term value creation:** The sustainable model aligns with Dairy MAX's long-term objectives, ensuring consistent support for their mission. The enhanced reporting capabilities foster team motivation and accountability, driving Dairy MAX closer to their annual milk pounds target.

## At a Glance

**Company :** Dairy MAX Inc.

**Headquarters:** Texas, United States

**Industry:** Food & Beverage Manufacturing

**Total revenue:** USD 10 Million

## Challenges

- Dairy MAX lacked a real-time system for tracking sales and marketing, leading to missed opportunities.
- The organization needed an efficient system to oversee their outreach programs and further Dairy MAX's mission.
- Delayed access to current data hindered prompt and informed decision-making.
- Seamless coordination across multiple outreach programs was essential to promote dairy farming effectively.