AllCloud | **emerald** HEALTH THERAPEUTICS

Emerald Health Formalizes Sales Processes with AllCloud

Emerald Health Therapeutics is a licensed producer and seller of dried cannabis and cannabis oil for medical purposes under Canada's Access to Cannabis for Medical Purposes Regulations. Part of the Emerald Health group, Emerald Health Therapeutics is a vertically integrated, seed-to-sale enterprise with decades of experience in pharmaceutical innovation. The company has large-scale agriculture expertise focused on developing value-added cannabis-based products with potential wellness and medical benefits.

The Challenge

As Canada began to change its regulations around cannabis, Emerald Health found itself operating in a market with exponential growth. In particular, the legalization of recreational marijuana opened an entirely new channel of sales for the company.

Faced with this enormous growth potential, Emerald Health saw the need to revamp its sales process. The company had always managed its sales through spreadsheets, however this approach left the team with minimal visibility into its customer base. Specifically, Emerald Health primarily tracked customer purchase history through its accounting program and tracked buyer information anecdotally through email. In an effort to standardize, automate and improve visibility and reporting on its sales process, Emerald Health decided to introduce a CRM program.

The Solution

After significant research, Emerald Health narrowed down its options for a CRM system to two solutions: Sage, which it was already implementing for ERP, and Salesforce.

During this selection process, Salesforce introduced Emerald Health to AllCloud, a Platinum Salesforce Partner. AllCloud spent time upfront digging into Emerald Health's current challenges and long-term needs and then used that information to propose what a CRM program built on Salesforce could look like for the company. Along the way, AllCloud also shared best practices for integrating Salesforce with other data models, including Emerald Health's new ERP system.

> *The upfront discovery work by AllCloud really brought home for us the robust nature of Salesforce for CRM. It also revealed the extent of AllCloud's expertise in these projects, making the choice to go with Salesforce and AllCloud an easy one.*

Rob Hill, CFO at Emerald Health

With the decision to partner with AllCloud to implement Salesforce made, it was time to get to work. To start, Emerald Health tasked AllCloud to build core sales processes in Salesforce and integrate the final solution with its ERP system.

AllCloud began the project with a complete discovery process to ensure the team fully understood all of Emerald Health's current and future needs. Based on those findings, AllCloud configured Salesforce Sales Cloud to give Emerald Health the ability to:

- Enter or insert leads and distribute or assign leads to sales reps
- Manage existing relationships through accounts and contact records for stores, physicians and partners
- Track activities, including calls, emails, meetings with leads, store visits, meetings with physicians and key order dates for stores
- Manually track stock levels for each store
- Capture emails and schedule calendar events with Salesforce Inbox
- Track and forecast opportunities based on predicted volume
- Associate pricebooks and products to opportunities
- View dashboards and reports for activity tracking and sales forecasting
- Track budgets and expenses

AllCloud also built a data model to allow for future process changes and integrations into other systems, including Emerald Health's ERP, to support the growing business long-term.

The Result

Since introducing Salesforce with AllCloud, Emerald Health has gained the ability to manage leads, contacts, accounts, opportunities, products and quotes for two unique lines of business: Medical and recreational cannabis sales and distribution. While each line of business has its own process, users can share accounts and leaders can report on sales across the board.

These capabilities have already delivered enormous benefits to the business by giving Emerald Health the ability to better understand its customers and easily track information throughout the sales process. Now, sales users can quickly identify their buyers to understand what their existing network looks like and to find potential new customers. Notably, this deep insight into customers extends across all of Emerald Health's distribution channels. Equally as important, AllCloud customized the sales process for Emerald Health to accommodate the local regulations in each province.

Based on the success of this first phase, Emerald Health plans to continue its relationship with AllCloud by partnering on a long-term technology roadmap designed to help further expand the business.