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SUCCESS STORY

How RainFocus Leveraged GridMate to
Achieve a **50% Boost in Salesforce Adoption**

 gridmate



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By integrating GridMate into their Salesforce environment, RainFocus streamlined project management, enhanced user efficiency, and successfully addressed adoption challenges. The familiar spreadsheet-like interface of GridMate significantly eased the transition for their Professional Services Automation (PSA) team, contributing to a 50% growth in adoption, while delivering notable improvements in data management and operational efficiency.



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THE CUSTOMER

RainFocus is a next-generation event marketing platform built to capture and analyze unprecedented amounts of first-party data and optimize engagement throughout the customer journey. The platform powers flawless experiences with secure, scalable solutions to support the entire event lifecycle. RainFocus integrates with sales and marketing technologies, simplifying event registration, content management, and exhibitor activation across in-person, virtual, and hybrid experiences, all from a single dashboard. Leveraging real-time data, RainFocus provides actionable insights to drive personalization, accelerate qualification and lead conversion, and close deals.





THE CHALLENGE

- ① Low user adoption due to unfamiliarity with Salesforce's interface
- ① Difficulty managing and visualizing large datasets
- ① Inefficient workflows due to reliance on multiple systems

RainFocus encountered challenges in consolidating its Professional Services Automation (PSA) processes within Salesforce. The goal was to create a single source of truth for project data, but the transition was hindered by the PSA team's reliance on spreadsheet-based systems. This familiarity with spreadsheets made Salesforce's native interface feel unfamiliar and less user-friendly, leading to low platform adoption, operational inefficiencies, and difficulties in streamlining project management.





Key Obstacles That Hindered Efficiency and Adoption

- Low data integrity due to reliance on non-standardized spreadsheets
- Inefficient workflows involving multiple systems and duplicated data
- A lack of flexibility in Salesforce's native components to address specific use cases

These challenges collectively impacted RainFocus's ability to fully leverage Salesforce for streamlined project management and reporting.





THE SOLUTION

- A spreadsheet-like interface to ease user transition
- Enhanced flexibility through GridMate's Field Set Grids and Related List Grids
- Simplified workflows with point-click configurations

GridMate offered RainFocus a tailored solution that bridged the gap between their team's existing familiarity with spreadsheets and Salesforce's capabilities. By leveraging GridMate components like Field Set Grids and Related List Grids, RainFocus enhanced usability, data visualization, and workflow efficiency.





Key GridMate Components Utilized

- Field Set Grid: Enabled bulk editing and streamlined management of large datasets.
- Related List Grid: Offered advanced visualization and flexibility, simplifying data retrieval and updates.

With the GridMate team's proactive and consistent support, the implementation process was seamless from start to finish. Additionally, the point-and-click Config Wizard simplified grid configuration, making it effortless.





THE IMPACT

- ✓ 50% increase in Salesforce user adoption
- ✓ Improved standardization of project management processes
- ✓ Enhanced data accuracy and a single source of truth

Since implementing GridMate, RainFocus has achieved remarkable improvements in user adoption and operational efficiency:

- **User Adoption:** A 50% increase in internal adoption in a single quarter demonstrated the effectiveness of GridMate's user-friendly design.
- **Data Standardization:** Transitioning to Salesforce, supported by GridMate, allowed RainFocus to centralize and standardize project data, improving reporting accuracy and consistency.



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- **Operational Efficiency:** GridMate bridged the gap between native Salesforce features and business requirements, reducing reliance on external systems and streamlining workflows.



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"It's amazing how configurable the solution is - I'm sometimes overwhelmed by the possibilities it opens up for customization and efficiency."

Debra Weller

Enterprise Technical Architect

RainFocus



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By addressing user adoption challenges and enhancing Salesforce functionality, GridMate enabled RainFocus to maximize their investment in Salesforce. The platform not only simplified workflows but also laid the foundation for scalable growth, proving that with the right tools, even the most complex transitions can lead to success.

