



330 Townsend St. STE 209, San Francisco, CA 94107
(415) FBD-3008 | experts@forcebydesign.com

TriNet Relies on Force by Design's Experienced Consulting Team

The Challenge

TriNet delivers HR outsourcing services that enable small companies to do what they do best. Thousands of organizations have turned to TriNet for human resources, benefits, payroll, workers compensation, and strategic human capital services. As their trusted HR advisor, TriNet helps these companies contain HR costs, minimize employer-related risk, and relieve the administrative burden of HR.

Based in California, with 28 locations nationwide and more than 800 employees, upgrading any technical infrastructure requires precision and pin-point accuracy. As a company that uses Salesforce.com heavily to support their sales and marketing processes, TriNet has embarked on many custom development projects over the years to fully realize the benefits of their CRM implementation.

No stranger to realizing where an organization's strengths lie, TriNet has outsourced much of their custom salesforce.com implementation and development needs to cloud computing experts to obtain the most effective performance, enabling them to focus on their core business.

TriNet understood the importance of effective sales tools, such as salesforce.com, and recognized the need to build a complementary sales tool that would build a compelling and differentiated sales proposition.

The Solution

Force by Design recruits best in class business process consultants and developers to join their team. Together, their consultants have delivered more than 1,000 Salesforce.com implementations and optimizations for clients ranging from nonprofit to manufacturing and technology. Because they come to Force by Design with years of experience in cloud computing and salesforce.com implementations, clients like TriNet often follow talent wherever they go.

TriNet looked to Force by Design to build an ROI calculator that would be accessible to its national sales representative 24/7, support its security requirements, as well as allow for the sales teams to store versions of a prospect's ROI presentation within salesforce.com for future reference. The ROI tool had to build a value story that demonstrated credible, quantifiable value calculations. The



CASE STUDY

TriNet, the nation's largest private HR outsourcing firm, relies on Force by Design for their custom and complex Salesforce.com implementation.

CHALLENGE

Customization done with Salesforce.com assists with data integration and business process administration, which leads to an improved sales and marketing process.

SOLUTION

Force by Design's consulting team continues to serve the evolving needs of the business by integrating tools and mission critical data.

RESULTS

TriNet has been able to scale their business and make important decisions with ease.



“Jamie, our Force by Design consultant, truly understands our culture, requirements and the industry’s best practices,” said Catalina Chan, senior manager, field systems and operations for TriNet. “Not only does she always educate us on the pros and cons of each solution, she knows our business well enough to deliver the right recommendation every time.”

ROI tool factors also had to be substantiated by industry sources.

A consulting relationship that spans more than three years is now handled by the team at Force by Design. Several projects have been implemented to assist TriNet with the most effective use of salesforce.com.

- » Merged two Salesforce.com organizations and over 100 acquired sales users onto one Salesforce.com and integrate a back-end pricing engine in less than two months without impacting sales or affecting productivity.
- » Pricing and approvals was optimized to enable tracking throughout the sales process. Due to intricate pricing tears, tracking approvals was necessary to ensure an effective sales process. Now a scalable solution with customized templates, TriNet is no longer hindered by the limitations of the database.
- » Enhanced reporting allowed the organization to understand profitability and ROI on marketing activities.
- » The out of the box forecasting tool in salesforce.com was not meeting TriNet’s needs. A customized solution has helped TriNet manage pipeline activities and has helped inform marketing activities and staffing needs across the company.
- » Reporting to senior managers with custom snapshot data, leader board rankings, sales data has all be done using a custom Visual Force layout.
- » Built a custom solution to enhance the opportunity sales stage and probabilities feature and allow opportunities within emerging markets to use the same stages but default to a different closing probability based on the region and market.
- » Optimized over 20 APEX triggers and classes created by other outsourced vendors in order to eliminate the errors users were experiencing within Salesforce.com.
- » Advise TriNet on future development options and best practices for managing its existing solutions.

Results

TriNet relies on Force by Design to deliver well architected solutions with a tight turnaround time that meet industry standard best practices and that also serve the specific needs of TriNet’s culture and technical requirements.



Compensation, pipeline forecasting and client contacts are all integrated with other tools used by TriNet during the sales and marketing process. With nearly 150 sales professionals across the organization, the number of hours and human errors saved by using a custom designed Salesforce.com CRM implementation has a direct impact on TriNet's bottom line.

After trying other consultants over time, TriNet has several projects underway to further enable their leadership status in HR outsourcing.

About TriNet

TriNet is a trusted partner to small businesses, providing critical HR-related services on an outsourced basis. TriNet's solutions help contain costs, minimize employer-related risks and relieve administrative burden to keep an entrepreneur's focus on core business functions. From routine employee benefits service and payroll processing to high-level human capital consulting, TriNet's PEO expertise is integrated with every facet of a client's business. TriNet specializes in serving fast-moving companies in fields such as technology and professional services, who recognize that top-quality employees are the most critical competitive asset. For more information, please visit www.trinet.com.

About Force by Design

Founded in 2008, Force by Design, Inc. helps organizations of all size use the power of cloud-computing to run their mission-critical business applications on the salesforce.com platform. Force by Design's consultants have completed more than 1,000 client engagements spanning 10 years. We implement and optimize cloud-based applications, helping organizations put their applications in the cloud and have our own cloud-based apps. Force by Design's headquarters are in San Francisco, California with offices in San Luis Obispo, California. For more information, visit www.forcebydesign.com.

Contact Us

330 Townsend St. STE 209, San Francisco, CA 94107
(415) FBD-3008 | experts@forcebydesign.com

Force by Design and the Force by Design logo are trademarks of Force by Design, Inc. All other products and services are trademarks or registered trademarks of their respective owners.



330 Townsend St. STE 209, San Francisco, CA 94107
(415) FBD-3008 | experts@forcebydesign.com
www.forcebydesign.com | [@forcebydesign](https://twitter.com/forcebydesign)