



Case Study

TaskUs is a virtual personal assistant company that allows busy professionals to outsource their lives, one task at a time.

Prior to systematizing Salesforce, TaskUs' sales team would call on leads out of Excel spreadsheets. They knew they needed Salesforce, but didn't know how to maximize its capabilities.

As TaskUs' Business Manager Nick Shum recalls, "Without Sum-Sum Salesforce was just this huge beast that we needed to get the sales team to buy into and make it digestible for team members who weren't familiar with it."

They weren't sure how we could effectively manage the sales team with data. They knew that the information existed, but had no idea on how to access it in a scalable and repeatable manner. They needed someone who better understood the magnitude of Salesforce's functionality who could also align their sales efforts with their marketing plans.

The Marketing and CRM Solution

When TaskUs hired Marketing and CRM Principal, Sum-Sum Chan, about a year ago they really needed someone to optimize and enhance Salesforce. As Nick Shum, Business Manager at TaskUs puts it, "Her direction was crucial in helping our team understand how all the pieces fit together, even down to which fields we should (and shouldn't) create. She helped me map the process in my mind into a useable system for the whole company."

Sum-Sum not only understood the technical details of what they needed to accomplish, but also the business and marketing structure of Salesforce. Nick says, "We leveraged Sum-Sum's distinctive expertise for our Salesforce makeover to not only implement an effective Salesforce workflow, but to ensure sales and marketing alignment too. She was absolutely instrumental in structuring our system and its long-term processes as it runs today and as we grow in the future."

Integration + Sophistication

Since hiring Sum-Sum, TaskUs has implemented Olark Chat to better connect with their future customers and restructured their contact opt in forms to the tune of a big increase in leads which they are also now set up to nurture with the lead scoring.

Sum-Sum helped TaskUs build customized dashboards to manage the team. Nick emphasizes, “More importantly, she used her own personal background in marketing to help us put together the format of our first weekly sales pipeline meeting. It's now become a mandatory, weekly event that has proved beneficial to everyone within our sales + marketing department.”

She brought sophistication to their marketing efforts and analysis by setting up the groundwork on ExactTarget for our newsletters and Pardot for marketing automation. The company can now focus on their content marketing strategy. Nick says, “Her help in developing these systems will be instrumental over the next few months. We have already seen a huge improvement from a reactivation drip campaign that we recently started. This will be our biggest area of growth over the next few months.” With systems now in place, TaskUs has the ability to focus on scaling its business, several tasks at a time.