

Silverline helps a content delivery company support better teamwork

Tapad's groundbreaking marketing technology helps their clients connect with consumers in a unified way across devices. But maintaining a connection between their sales and operations teams was equally vital.

Tapad is the leader in cross-device content delivery. Their ground-breaking, proprietary technology assimilates billions of data points to find the human relationship between smartphones, desktops, laptops, tablets, connected TVs and game consoles. The result: deeper engagement, a more enriched experience and a better ROI.

Challenge

With ad services that flow across virtually every type of media and device, Tapad relies on flawless coordination to deploy impactful marketing campaigns for their clients. Every day, they have to stay focused on dozens of moving targets—ad campaigns that fluctuate continually based on availability, visibility and more. Using email and spreadsheets to manually manage these complex variables across departments was cumbersome and time-consuming.

"There would be three or four versions of campaigns that people managed and stored in their own way," explains Michael Gelberg, Director of Sales Operations at Tapad. "Some would have the information in an Excel document; for others, their inbox."

As a result, the sales and operations teams needed greater end-to-end campaign visibility and simplified coordination. And as Tapad continued to expand, they knew the need would only intensify.

"We've really been focusing on scale," Gelberg says. "We have a team that's very agile at handling a large number of requests, but as we grew—we needed a process that was repeatable and didn't place numerous caveats on every campaign."

“ We needed a process that was repeatable and didn't place a thousand different caveats on every campaign.

— Michael Gelberg
Director of Sales Operations at Tapad

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Solution

Silverline helped the company bring sales and operations onto a single platform by building and integrating Opportunity Product Scheduler onto Tapad's existing Salesforce system. The ability to track ad sales and schedules in a single system enabled the sales team to communicate campaign changes to the operations team in real time and it allowed management and sales to track post-sales activities and changes. The enhanced system also brought new levels of efficiency and control to the operations team.

For Gelberg, Silverline's extensive media-industry expertise was invaluable to the process. "Working with Silverline gave us an opportunity to learn about what other companies in the industry were doing—how they were leveraging systems like Salesforce."



Results

Tapad now has a system that they know can scale to support their rapid organizational growth.

But the biggest win for Gelberg is the enhanced co-ordination between teams.

"We've now created a one-stop shop in Salesforce for all the information that flows between sales and operations. It's the hand-off between teams that's the core benefit."

Looking to the future...

"We really appreciated the flexibility of Silverline's approach. Working in an industry that is constantly evolving means initiatives will change often—sometimes without our even realizing it. Silverline is very flexible in terms of meeting new requests or last-minute changes. That's something that really helped make the final product a lot smoother," said Michael Gelberg, Director of Sales Operations at Tapad.

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About Silverline

Silverline creates rewarding experiences for our team, our clients, and the world we live in. We tailor digital transformation solutions to meet your current and future needs. Our team leverages insight acquired through 10+ years in the business and thousands of engagements, along with real-world expertise gained across the Media & Entertainment industry, including: broadcast, publishing, and agencies. From strategy and implementation to managed services, we guide clients through every phase of their journey — enabling continuous value with the Salesforce platform. Silverline also offers CalendarAnything, a popular scheduling application on the AppExchange, as well as industry-proven accelerators. To learn more visit: <https://silverlinecrm.com/media-entertainment/>

