

High on Success: Elevating Sessions Cannabis with Salesforce

Transforming Operations through
Salesforce Implementation

Rooted in Growth: The Story of Sessions Cannabis Dispensary

Sessions Cannabis is a leading retailer in the Canadian cannabis industry, known for its broad network of franchise locations. As the company expanded, it became increasingly clear that their existing systems were not equipped to handle the growing complexities of their operations. Sessions Cannabis faced challenges in managing sales processes and franchise relationships, which were critical to their continued growth and success.

Recognizing these challenges, Sessions Cannabis sought to implement a comprehensive Salesforce solution that would streamline their operations, integrate fragmented data, and enhance their ability to manage relationships with their franchisees. The goal was to create a centralized platform that could serve as a single source of truth, providing the necessary tools to manage their sales and franchise relationship management processes more effectively.





Clearing the Haze of Operational Challenges

As Sessions Cannabis continued to grow, it encountered several operational challenges that impeded its efficiency and growth potential. The most pressing issue was the fragmentation of its data across multiple platforms, which led to inconsistencies and inefficiencies in its sales and franchise management processes. The lack of a centralized system made it difficult to maintain a unified view of customer interactions and franchise performance, which in turn affected decision-making and operational efficiency.

The manual processes used for tracking leads and opportunities were not only time-consuming but also prone to errors. This hindered the sales team's ability to manage the sales pipeline effectively, resulting in missed opportunities and delays in closing deals. The company also struggled with limited reporting capabilities, which restricted its ability to generate insights from the data it had, leading to suboptimal decisions that could impact its growth trajectory.

A photograph of a modern cannabis retail store. The store features white display cases with glass tops, arranged in rows. The walls are decorated with green and white wave patterns and the 'sessions' logo. Signs for 'oils' and 'edibles' are visible. The floor is light-colored wood-look tile. The ceiling has recessed circular lighting. In the foreground, there are colorful Adirondack chairs (red, blue, green) on a sandy area.

Addressing Operational Challenges

To address these challenges, DTC Force defined several strategic objectives for Sessions Cannabis Salesforce implementation.

First, we aimed to establish a centralized platform to consolidate all sales and franchise management activities. This would involve automating key processes to reduce manual effort and improve accuracy.

Another critical objective was to enhance the reporting capabilities of the system, enabling the company to generate actionable insights and make data-driven decisions.

Finally, the solution needed to be scalable to support the company's future growth and the addition of new franchise locations.



Blazing a Trail: Customizing Salesforce for High-Yield Results

The implementation of Salesforce for Sessions Cannabis was approached with a methodical and collaborative strategy, ensuring that the solution was tailored to meet the specific needs of the business. The project began with an in-depth discovery phase, during which we conducted several scoping sessions with key stakeholders from Sessions Cannabis. These sessions were crucial in understanding the unique challenges faced by the company and in defining the requirements for the Salesforce implementation.

Following the discovery phase, DTC Force moved into configuring and customizing Salesforce to align with the identified needs. We structured the Salesforce platform to handle lead management, account and contact management, opportunity tracking, and activity management. Custom fields and data structures were created to capture the specific information required by Sessions Cannabis, enabling a more organized and efficient sales process. Additionally, we implemented automation workflows to streamline notifications, task reminders, and approval processes, thereby reducing the risk of human error and improving overall efficiency.

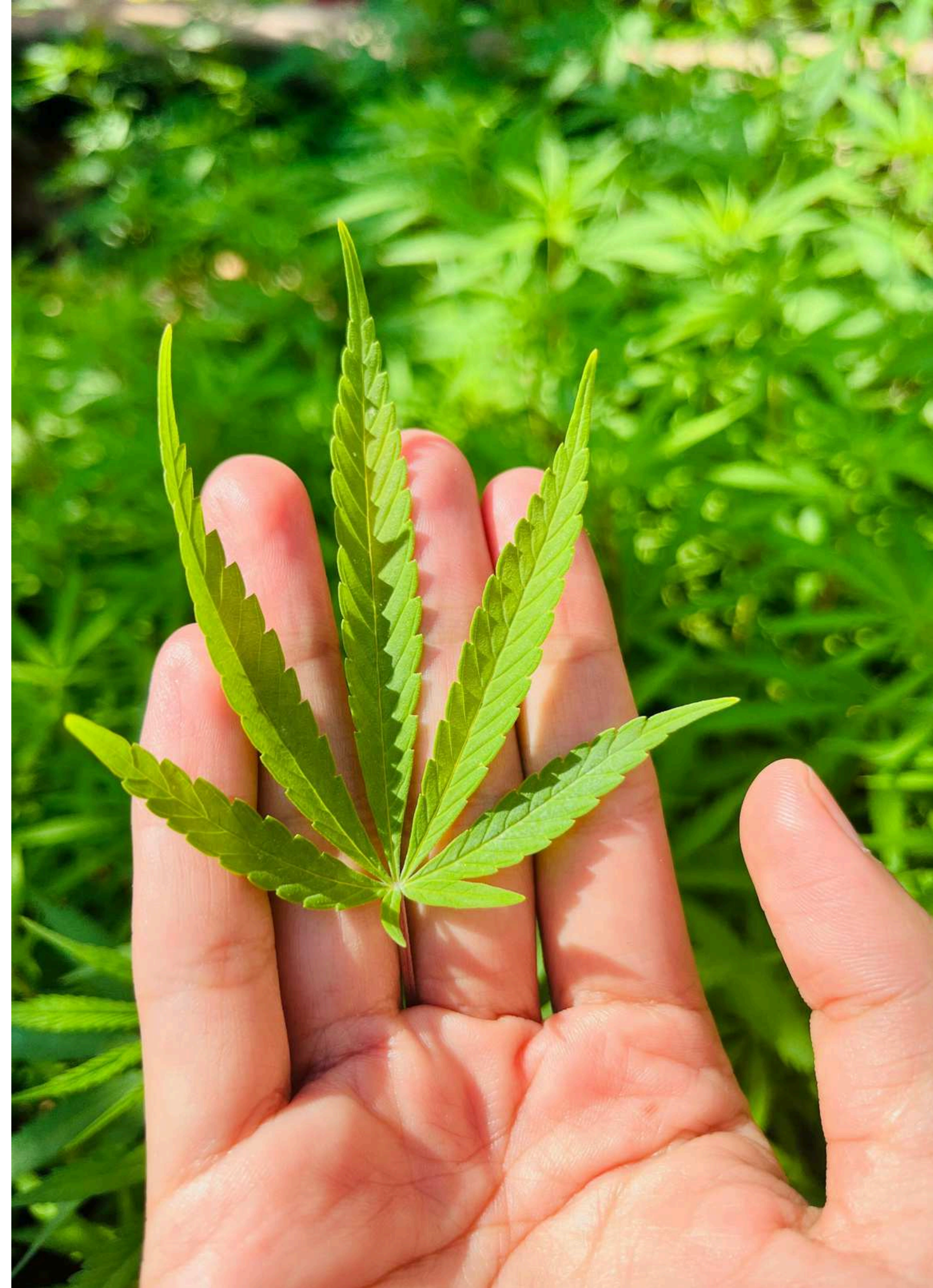
Training and support were integral components of the implementation strategy. We provided comprehensive training sessions for the Sessions Cannabis team, ensuring that all users were proficient in using the new system. Post-implementation support was also established to address any issues that might arise and to assist with further customization as needed.

Harvesting Efficiency and Cultivating Connections

The Salesforce implementation delivered significant improvements across several key areas of Sessions Cannabis's operations. One of the most notable outcomes was the enhancement of operational efficiency. The centralization of data and the automation of manual processes resulted in a more streamlined workflow, allowing the company to operate more effectively and with fewer errors. This had a direct impact on the productivity of the sales team, who could now focus on high-value activities rather than being bogged down by administrative tasks.

The implementation also had a positive impact on the management of franchise relationships. With better tools for data visibility and communication, the management team was able to provide more consistent support to franchisees, fostering stronger relationships and improving overall franchise performance. The advanced reporting capabilities of Salesforce enabled Sessions Cannabis to derive actionable insights from their data, which informed strategic decisions and helped drive business growth.

Perhaps most importantly, the scalability of the Salesforce platform ensured that Sessions Cannabis could continue to grow without being constrained by their systems. The company is now well-equipped to add new franchise locations and to scale their operations in line with their growth objectives, all while maintaining a high level of operational efficiency and effectiveness.



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