



# Romo Transforms Business

With Salesforce & Continuous  
Improvement

**forv/s**  
**mazars**

# Case Study Snapshot



**Romo’s story demonstrates the power of combining Salesforce with a continuous improvement mindset to help drive user adoption and enhance customer care.**

## The Situation

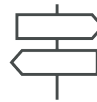
Romo Durable Graphics (Romo) faced sales and service challenges due to outdated systems, reliance on spreadsheets, and limited customer relationship management (CRM) tools. Their commitment to a customer-centric approach necessitated a more robust solution.

## The Solution

Romo implemented Salesforce, a modern and flexible CRM solution, with professionals from Forvis Mazars. Since its implementation, Salesforce has been helping Romo centralize customer data, streamline processes, and improve customer support.

## The Benefits

By embracing Salesforce and continuous improvement, Romo is achieving significant results, including improved efficiency, elevated user adoption, and enhanced customer care.

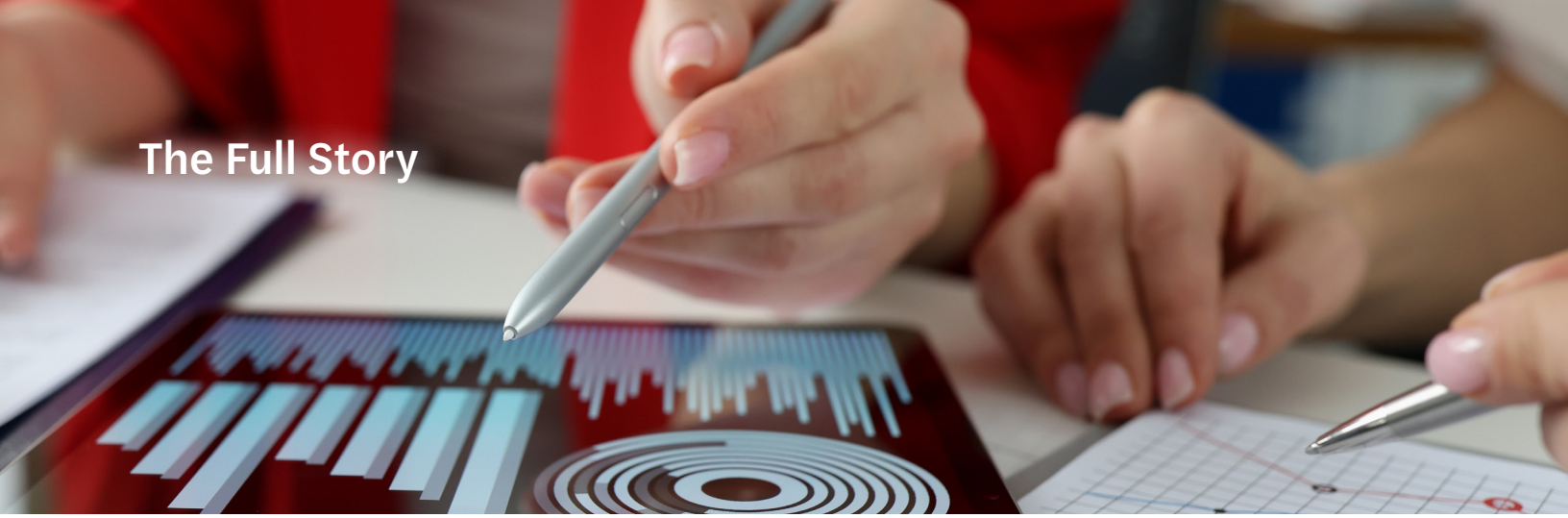


“Our Salesforce consultant at Forvis Mazars makes us custom ‘trailmixes’ in Salesforce Trailhead to tailor our training. We have learned so much, and now our Salesforce administrator is getting more strategic questions versus basic questions about how to use the system.”

– **Katie Kapler**, Romo Account Executive



# The Full Story



Romo Durable Graphics, a company specializing in OEM durable graphics solutions, began a digital transformation journey with professionals from Forvis Mazars and Salesforce in 2018. Prior to implementing Salesforce, Romo relied on a legacy CRM program and countless spreadsheets. The company's customer-centric approach demanded a robust solution that could help streamline workflows, enhance customer care, and drive user adoption.

Before implementing Salesforce, Romo faced challenges, including:

## **Legacy Systems & Decentralized Data**

Sales and service teams struggled with disjointed customer information. A lack of centralized CRM data hindered efficient customer interactions and growth opportunities.

## **Low User Adoption**

Before allocating additional resources, a lack of stakeholder support directly impacted technology usage, user adoption, productivity, and the accuracy and consistency of customer information.

Romo's leadership recognized the need for a customizable, scalable CRM system. They chose Salesforce for several reasons:

## **Customization Potential**

Configurable and customizable Salesforce features allowed Romo to tailor the system to its teams' unique requirements. Custom objects, fields, and workflows were designed to align with the company's processes, improving efficiency.

## **Big-Picture Capabilities**

Salesforce provides a wide range of functionality, including sales, service, and marketing features. The leadership team saw the potential for end-to-end visibility and enhanced growth opportunities.

Romo's commitment to continuous improvement proved to be a key CRM success factor. Here's how the company implemented a culture of continuous improvement with Salesforce:

## **User Feedback & Training**

Together with professionals from Forvis Mazars, Romo stakeholders prioritized user feedback and training throughout each Salesforce project. To date, Forvis Mazars has worked with Romo on 12 Salesforce projects, including the initial implementation in 2018. Romo's leadership established channels for CRM users to provide input on the system and its functionality. Furthermore, Romo supports ongoing training to drive user adoption and proficiency.

## **Customized Learning Paths**

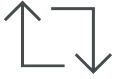
Forvis Mazars identified unique learning needs for users and created personalized trailmixes. For instance, a "Sales Team Trailmix" focuses on lead management, opportunity tracking, and sales forecasting.

After implementing the customized trailmixes, Romo observed increased user adoption, reduced support requests, and improved data accuracy. CRM users felt empowered and equipped to leverage Salesforce effectively.

## **Iterative Customization**

Romo leadership understands that Salesforce is a powerful tool, but it should not be a static solution. So, they adopted an iterative customization approach, routinely adjusting workflows and customizing the system as needed. Since the initial implementation, Romo has worked with professionals at Forvis Mazars on 12 CRM projects. The company's continuous improvement mindset has helped significantly increase user adoption and enabled their team members to use Salesforce more effectively.

## The Full Story, continued



Centralized CRM data helps improve visibility into customer interactions, enabling sales and service teams to provide more personalized, responsive customer care.

By embracing Salesforce and continuous improvement, Romo is achieving significant results.

- **Improved efficiency:** Streamlined processes and reduced manual effort help Romo team members save time and achieve greater efficiency.
- **Enhanced customer care:** Centralized CRM data helps improve visibility into customer interactions, enabling sales and service teams to provide more personalized, responsive customer care.
- **Increased user adoption and sales productivity:** User-friendly features, ongoing training, and a focus on user feedback have led to targeted user adoption rates. Furthermore, Romo has experienced increased sales productivity, empowering the sales team to close deals faster.
- **Growth and scalability:** With a robust and modern CRM foundation, Romo is well-positioned for future growth. This flexible CRM system empowers Romo leadership to adapt to changing customer needs and industry trends.

Romo's story demonstrates the power of combining Salesforce with a continuous improvement mindset. It also exemplifies how sustained investment in Salesforce can help revolutionize business operations, elevate customer-centricity, and empower teams. By routinely refining the use of Salesforce, Romo is improving CRM user adoption, operational efficiency, and customer care.



Romo's story demonstrates the power of combining Salesforce with a continuous improvement mindset.






“Our experience with Salesforce and our dedicated consulting partner has been exceptionally positive. From project completion to ongoing support, we’ve achieved our goals and more. The Forvis Mazars team has been instrumental in helping us stay on track and translate our ideas into actionable plans. The team’s talent and problem-solving abilities have been invaluable, even when faced with unconventional challenges. Their thoughtful approach consistently brings effective solutions that fit our business needs.”

– **Jordan Vandenlangenberg-Konshak**, Romo Marketing Specialist





Learn how Salesforce and continuous improvement can help elevate user adoption and customer care. Visit [forvismazars.us](https://forvismazars.us)

## Contacts

**Melissa Green**

Senior Managing Consultant  
[melissa.green@us.forvismazars.com](mailto:melissa.green@us.forvismazars.com)

**Chad Collett**

Marketing Senior Manager  
[chad.collett@us.forvismazars.com](mailto:chad.collett@us.forvismazars.com)

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