

Customer Success Story

Transcontinental

About Transcontinental

TC Transcontinental is a leader in flexible packaging in the United States, Canada and Latin America. It is also Canada's largest printer.

For over 45 years, TC Transcontinental's story has been one of innovation and transformation to meet our customers' evolving needs. Our strong family values, entrepreneurial spirit and long-term vision have always been at the heart of our success.



Industry: Packaging manufacturing

Headquarters: Montreal, Canada

Website:

<https://tctranscontinental.com/en-ca>

Environmentally Friendly Packaging Leader Utilizes Work-Relay to Avoid Sales Team Disruption Amid Active Acquisition Activity

TC Transcontinental Packaging leverages Work-Relay to create uniform quoting and sales operations processes, quickly integrating a sales team assembled through a series of acquisitions.

Effectively managing mergers and acquisitions is challenging, but they can provide organizations with transformative opportunities when handled well. TC Transcontinental Packaging, a leader in the North American flexible packaging market, has pursued an active acquisition strategy in recent years, currently operating 25 flexible packaging plants, employing more than 4,000 team members.

TC Transcontinental Packaging **blends art, science, and technology** to create the perfect flexible packaging that accentuates their customers' brand, protects their products, inspires consumers, and, is sustainable. They serve well-respected and renowned brands in more than 15 markets including pet food, coffee, dairy, meat, beverage, confection, home & personal care, medical, agricultural, and industrial, and manufacture well over 30 flexible packaging products in their expansive and growing offering. Each acquisition has increased their capacity, capabilities, and the company's talent pool.

Avoiding sales process disruptions enables scalable growth



Integrating the sales operations of an acquired organization into a new parent company presents many challenges requiring a clear understanding of products, positioning, and processes. Acquisitions tend to generate anxiety inside and outside of the companies involved. Making sure acquired employees feel connected, efficient, and productive ensures loyalty. It is critical to seamlessly integrate disparate processes, accounts, and new products to deliver and meet customer expectations with uninterrupted workflow and business as usual. However, savvy companies, such as TC Transcontinental Packaging, fully recognize that acquisitions offer the opportunity to construct a robust and strategic portfolio of capabilities—that the additions become much more than the sum of its parts.

The flexible packaging market moves quickly and is quite competitive; therefore, allowing all stakeholders within the quotation, trialing, and R&D process to move rapidly and efficiently is paramount to success.

Particularly given the competitive nature of their market, TC Transcontinental Packaging understands the importance of standardizing the disparate quotation processes of acquired companies to avoid disrupting sales processes and risking revenue loss.

Standardizing diverse site-level sales operations across numerous factories

“In 2014, we had adopted Salesforce to create a unified CRM solution across our sales organization,” commented Julien De Matteis, Manager, CRM Service, TC Transcontinental Packaging. “However, as our acquisition activity began to accelerate, we identified the need to avoid disruption to the sales and pricing teams by providing a unified quotation process while allowing the acquired plants to maintain quotation processes that have been working for them.”

In the flexible packaging sector, quotations typically occur quickly in the sales process after an opportunity is created. Additionally, after quoted pricing and terms are agreed to - a trial roll of film is commonly provided to the customer to test run on their packaging lines, assuring that the film performs as expected.

When quoting new types of products, five core sets of functional stakeholders are essential to TC Transcontinental Packaging’s quotation and trial roll management processes—sales professionals, marketing, R&D, pricing and operations teams. Plant-level quotation and trial roll management processes vary considerably given that many plants joined the TC Transcontinental Packaging organization by acquisition.

Out-of-the-box, Salesforce did not allow TC Transcontinental Packaging to create quotation and trial



roll management processes that are consistent across the sales organization while leveling the process differences within each facility at the factory level.

However, one of TC Transcontinental Packaging's early acquisitions was already using Work-Relay in combination with Salesforce.com. Work-Relay is a native Salesforce.com business operations management solution that helps sales operations and other process owners redesign and streamline complex and conditional workflows and approvals to eliminate bottlenecks, control costs, make workflow better -- all without writing custom code.

TC Transcontinental Packaging did consider standardizing using Microsoft tools; however, after evaluation, they concluded that Salesforce.com, in combination with Work-Relay, was a superior option.

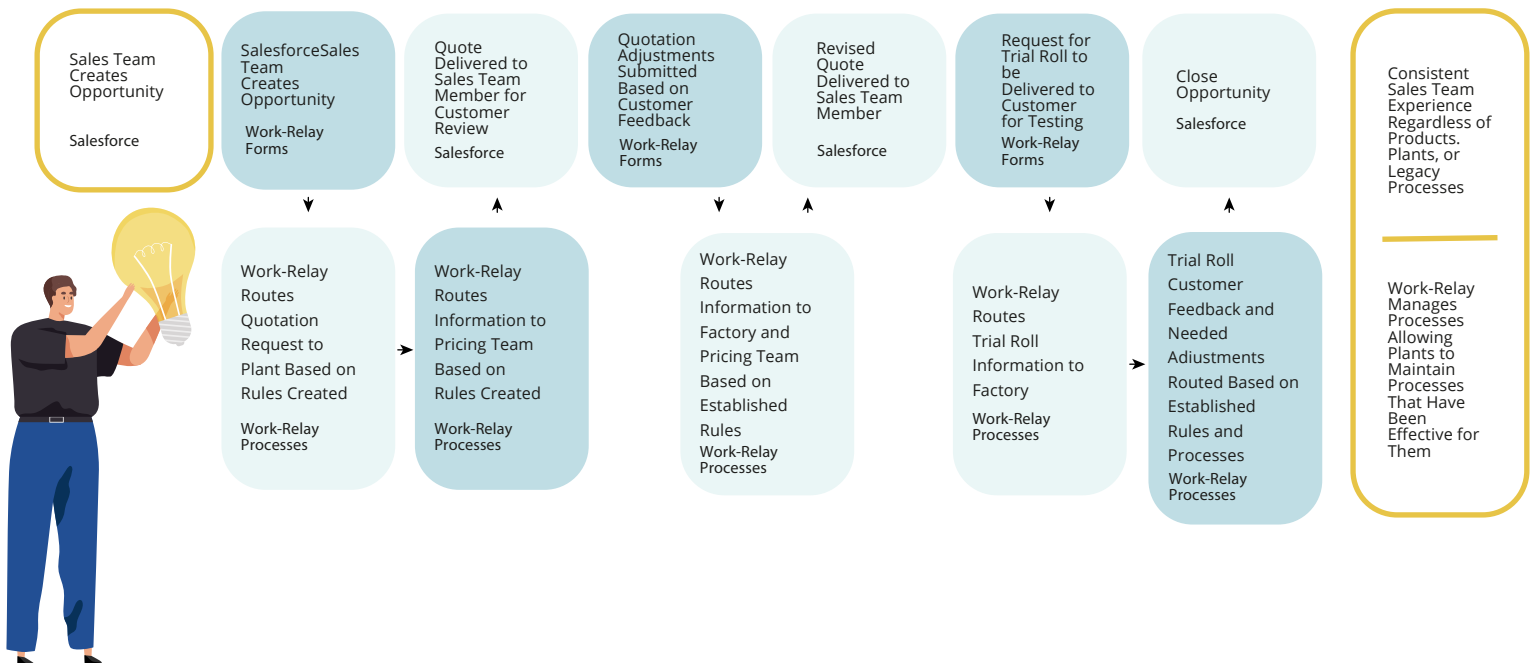
"If the solutions Work-Relay delivers did not exist, we would be forced to conduct custom development work," Julien said.

"We are in the packaging business, not the development business, so we do everything we can to avoid the costly and time-intensive nature of custom development."

Using Work-Relay forms, workflows, and processes, the quotation creation experience is the same for the entire sales team but previously established quotation processes at each respective factory level remain intact and continue to be as efficient as they were before acquisition.

Avoiding sales process disruption

Work-Relay and Salesforce Unite to Provide TC Transcontinental Packaging a Unified Multi-Object Quote Creation Experience for Its Sales Team Despite Diverse Factory-Level Processes



“Particularly when acquisition and growth is central to an organization’s strategy, there are always human factors to consider,” commented Julien. “When we acquire a plant, we acquire far more than merely the capital assets; we also acquire the human resources. **We don’t believe in dictating plant-level process changes when their established processes are working and are efficient.**”

“Work-Relay allows TC Transcontinental Packaging to create a unified sales process so that no matter which factory a member of our sales team is working with, their experience with the quote creation process is the same. However, when a salesperson selects the factory for their quote, a series of Work-Relay rules and process flows allow the plant to utilize its established processes.” Julien continued, “We utilize standardized Work-Relay forms to provide a consistent front-end experience for the sales team. No matter which factory they are working with, the process feels the same. However, behind the scenes, **Work-Relay processes and workflows are established for each factory, allowing their consistent quote creation processes to remain intact.**”

A smooth quotation process - A source of consistency, visibility, value, and efficiency

Since the quotation process is an integral part of TC Transcontinental Packaging’s overall sales process, the time required to create a quote needs to be as minimal as possible to respond to customers quickly to exceed a customer’s expectation. This speed contributes to their competitive advantage by providing a positive experience for their customers and accelerating the overall sales process.

“Work Relay has significantly improved cross-functional opportunity visibility and quoting efficiency,” shared Amy Still, TC Transcontinental Packaging’s VP - Pricing. “The process allows each stakeholder to quickly identify quote status and take real-time actions to refine our commercial response. Capturing data in a centralized module also supports tracking, analysis and reporting within Salesforce, enabling us to identify and assess feedback and performance metrics.”

Work-Relay supports agility and ongoing operational process improvements

Organizations often can’t predict future needs but must be able to quickly respond to changes in the sales organization and new operational or market demands. Work-Relay delivers point and click functionality to build new processes or adjust existing processes without enlisting developers. For example, TC Transcontinental Packaging needed to create a new conditional workflow that allowed the pricing team or factory-level personnel to reject a quotation submission if the sales representative provided incomplete information. Historically, incomplete or mistaken information within a request for quote submission was handled by phone and email communications which are, of course, inefficient and prone to error.

Julien explained, “We were able to fairly easily build a workflow that sent the request for quotation back to the sales representative notifying them of missing information, then directing them to resubmit. These are the kinds of modifications we regularly need, and Work-Relay allows us to complete them efficiently, without requiring developers, which ultimately allows us to optimize our processes continually.”

Helping position TC Transcontinental Packaging for ongoing growth

TC Transcontinental Packaging remains dedicated to avoiding sales team or factory-level disruption as new companies are acquired. Work-Relay allows for a consistent quote creation experience for the sales team but smooth factory-level process differences by creating factory- and personnel-specific quotation workflows and processes.

This approach allows TC Transcontinental Packaging to experience the best of both worlds—standardized sales processes that improve the experience for both their customers and sales team while allowing factory personnel to utilize the processes that work for them.

As their leadership team continues to pursue an aggressive growth strategy that includes future acquisitions, partnerships and/or organic expansion, Work-Relay will allow TC Transcontinental Packaging to quickly integrate acquired organizations so that sales doesn't miss a beat.



Work-Relay seamlessly overlays your Salesforce

implementation, simplifying the design, management, and optimization of complex operational work to maximize worker productivity, increase company-wide visibility, and enable business agility.

Work-Relay will help you systemize and scale complex business operations, provide unrivaled flexibility to solve any business operations problem and build an enterprise standard for solution delivery. Work-Relay clients include large enterprises as well as small and mid-size companies across multiple industries. Typical use cases include installing fiber optics, managing clinical trials, coordinating custom manufacturing, and managing product design.

About Neostella

Neostella is a global enterprise software and solutions company that empowers organizations with the technology resources they need to exceed goals and push the boundaries of what is possible. Offerings include Legal Solutions, Work-Relay process and workflow solutions for Salesforce, Robotic Process Automation, and Application Integration. In addition to technology solutions, Neostella provides a wide range of professional services designed to help customers reap maximum ROI from their technology investments. With offices in four countries around the globe, the Neostella team is committed to providing exceptional customer support 24/7.