



"Plative has been extremely helpful in navigating through our salesforce project plan. They always show up positive, kind, forward-thinking, willing to work through our needs and challenges, and are very professional. I would 10/10 recommend the Plative team. Nice work!"



Janelle Brunette
Chief Administrative Officer



Octane is a nonprofit organization based in Southern California that focuses on connecting people, resources and capital in their technology and medical technology ecosystems. Their goal is to create 55,000+ high paying tech jobs in Southern California by 2030 by leveraging their accelerator Launchpad and their platform: Octane Enterprise Solutions. They also host conferences throughout the year bringing together industry leaders, capital and partners.



Plative is a Salesforce Implementation partner as well as an Oracle NetSuite Alliance Partner. As a global consultancy, Plative builds long-lasting partnerships with some of the world's most recognizable organizations to support and augment their missions.

Business Case

Octane needed a Salesforce-based CRM and event management solution to track relationships with their partners, event sponsors, event participants and members. On the sponsorship side, Octane needed the ability to build and sell compressive sponsor packages with multiple products including event tickets. Sponsors needed the ability to log into a platform and manage their invite lists (and tickets) to specific events. On the events management side, Octane needed a customer-facing website to promote events, sell tickets and have the data sync directly into Salesforce.

Solution

Plative was called to architect a solution that integrated the **Soapbox Engage Forms** app allowing sponsors to register event guests and manage their tickets. The Soapbox Engage Events app was also integrated to provide a front-end Ticket purchasing platform that syncs with **Salesforce**. Plative built custom objects to automate the sales and fulfillment of Partner packages and Sponsor packages and closed the loop by generating invoices and partner agreements using **Conga** and **DocuSign**.

Outcomes

By customizing Salesforce and using it as the hub of their operations. Plative was able to leverage 3rd party integrations such as Soapbox Engage, Conga, and DocuSign to simplify the sales process, automate product fulfillment and manage ticket sales. In the midst of COVID, the new streamlined process helped pave the way for Octane's virtual conferences allowing businesses opportunities to network despite the local restrictions.