



Meta Platforms, Inc., formerly known as Facebook, Inc., is an American multinational technology conglomerate based in Menlo Park, California. The company is the parent organization of Facebook, Instagram, and WhatsApp, among other subsidiaries. Meta builds technologies that help people around the world connect, find communities, and grow their businesses.

Among other technological advances, Meta is a driving force behind virtual reality (VR) innovation. Meta is building a new VR infrastructure metaverse aimed at connecting users and empowering them to experience anything, anywhere, with anyone.

## The challenge:

Inefficient CRM
workflows
led to wasted
time, frustrated
employees, and
fragmented record
keeping.

Meta is a growing organization that employs over 50,000 people across intervolving corporate divisions and teams.

Given the scale and intricacy of Meta's corporate structure, the company relied on its CRM (Salesforce) to provide a clear, consistent view of data. This data included forecasts, customer interactions, and open projects.

But Meta employees routinely found themselves limited by their CRM's out-ofthe-box capabilities. Among other constraints, CRM users had little flexibility in how they viewed the data they needed to see at any given moment.

While users could view records of multiple objects in a report, they had to open each record individually to make the updates they needed and weren't able to make updates in bulk. This took valuable time away from other projects and frustrated employees.

"To see the information they wanted to act on, users had to go through multiple page changes and waste time on multiple clicks," said Igor Kosoy, Tools Program Manager at Meta.



Our CRM users
didn't want to
be limited in the
amount of data
they could see or
to have to waste
time populating
unnecessary fields.
They just wanted
to see and edit
data the way they
wanted, without
jumping across
multiple pages.

**Igor Kosoy**Tools Program Manager

Because they lacked functionality that made finding and updating CRM data easy, team members turned to alternative record keeping methods. "Our team members would log updates in different reporting tools, like Microsoft Excel spreadsheets and Google Sheets—everywhere *but* Salesforce," Kosoy added.

These manual, error-prone methods led to inconsistent views of the data Meta employees needed to perform their jobs and make strategic decisions.

Previously, Meta relied on a legacy vendor to simplify their CRM data management. But when this contract expired, Meta saw an opportunity to forge a stronger, more strategic vendor partnership.

## The solution:

# A user-friendly CRM experience with GridBuddy Connect, the data productivity platform from Validity.

After a careful vetting process, Meta chose GridBuddy Connect, the data productivity platform from Validity.

The Meta team quickly mastered the platform's robust feature set with help from a dedicated customer support representative. "The onboarding process was amazing," Kosoy recalled. "Our customer success manager spent as much time as needed to help us understand the tool and each different functional area."

Members of Meta's Development Relationships, Applications, and Financial teams quickly became top users of GridBuddy Connect. Once up to speed, they could combine data from separate systems and locations into editable, spreadsheet-style views.

"This really saved users time," said Kosoy. "Rather than bookmarking multiple pages when trying to run reports, users now see only the information they need in one dynamic page view."



# Users now see only the information they need in one dynamic page view.

**Igor Kosoy**Tools Program Manager

### The results:

# Significant time savings and higher employee satisfaction, powered by consistent, user-friendly CRM data.

After implementing GridBuddy Connect, Meta's CRM users quickly saw improvements in their everyday data management workflows. Most noticeably, they saved significant time when finding and updating records.

Instead of running a report and opening each record in a different tab to make updates, users can now simply pull up an editable grid in GridBuddy Connect. As a result, CRM users have reduced their open browser tabs to single digits, as opposed to multiple digits in pre-grid days.

By eliminating unnecessary tabs and clicks, Meta's Salesforce users have reduced the time they spend making weekly updates by over 50 percent. The ease by which users can update their data also eliminates manual data entry errors, giving users even more confidence in the quality of their CRM data.

Meta also achieved stronger team collaboration and productivity by building customizable, job-specific workspaces in GridBuddy Connect. Meta users can now design workspaces (either by team or individual) that present only the fields and records they need to perform their jobs.

According to Kosoy, this functionality helps prevent users from being overwhelmed by irrelevant information and keeps them focused on the task at hand. For example, after building a job-specific workspace, Meta's Development Relationships team can now stay on the same page and see upcoming project milestones and deliverables by team or individual engineer.

"When they need to drill down and see things in more detail, they can expand their view to see the additional fields they need. And when they don't want them, they can hide them," Kosoy said.

This functionality also saves administrators time responding to requests to change the formats of different data sets by giving users the tools they need to do it themselves.

On the management level, managers can easily see upcoming projects in the team's queue and understand where the team spends most of its time. The



The time savings we saw from GridBuddy Connect were so important because they let users concentrate on their work. People didn't need to spend time trying to understand a tool that was supposed to be helping them organically.

**Igor Kosov Tools Program Manager**  platform's reporting functionality also lets managers quickly zero in on businesscritical areas for their team and resolve bottlenecks.

Throughout these workflow changes, Meta has maintained tight data security. Within the platform's customizable workspaces, admins can set user permissions to certain data sets based on roles within the organization. For example, Meta's contract employees are generally not given the same permission levels as full-time staff.

Kosoy notes that GridBuddy Connect is popular among CRM users for the freedom it provides. "The platform gives users options and lets them choose how they want to work and what works best for them," he said.



# **About Validity**

Businesses run better and grow faster with trustworthy data. Tens of thousands of organizations rely on Validity solutions – including Everest, DemandTools, BriteVerify, GridBuddy Connect, and MailCharts – to target, contact, engage, and retain customers effectively. Marketing, sales, and customer success teams worldwide trust Validity solutions to help them create smarter campaigns, generate leads, drive response, and increase revenue.



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