

CASE STUDY

CRM modernization for a first-mover in sustainable cannabis packaging

Everett Graphics – SunGrown Packaging · Oakland, CA · December 2015 – December 2016

CRM Implementation	Change Management	Sales Enablement	Web & Brand
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SITUATION

SunGrown Packaging, a subsidiary of Everett Graphics, was operating in one of California’s fastest-moving emerging industries: cannabis packaging. As the only packaging solution on the market that was both fully recyclable and child-proof, the company had a genuine competitive advantage — but its sales operation wasn’t equipped to capitalize on it.

The sales team was relying on outdated manual methods to manage leads, track prospects, and close deals. There was no CRM in place, no standardized sales process, and limited comfort with technology across the team. With a rapidly growing market and a differentiated product, the gap between the company’s potential and its operational capabilities was widening.

APPROACH

Jacqueline joined as Project Manager, reporting directly to the CEO, with a mandate to modernize the sales operation. She identified Salesforce as the right CRM solution and led the full implementation lifecycle — from scoping and configuration through training and ongoing adoption support.

The project covered three work streams in parallel:

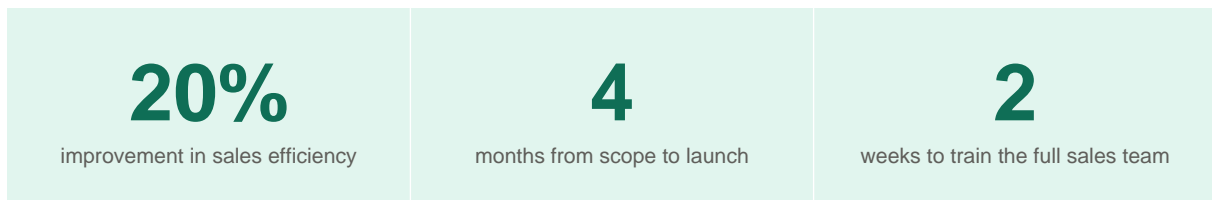
Salesforce implementation	Scoped, configured, and launched Salesforce within four months. Designed the system architecture to match SunGrown’s sales workflow, including lead tracking, pipeline management, and customer records — building a foundation the team could grow into as the business scaled.
Training & adoption	Delivered a focused two-week group training program followed by individualized one-on-one support for team members who needed extra time with the technology. Recognized that tech-skeptical sales staff needed to see immediate personal benefit before they would trust the new system.

Digital modernization

Alongside the CRM rollout, coordinated the development of a new company website with a third-party designer, and oversaw the introduction of new company mobile devices for the sales team — giving the team the tools and infrastructure to match their updated workflows.

“Change management resistance dissolved quickly once the team realized the new tools made their daily work easier, not harder. When technology removes friction instead of adding it, adoption takes care of itself.”

RESULTS



Within six months of launch, sales efficiency improved by 20%. The team that had initially resisted the transition became confident users of the platform, with one-on-one coaching bridging the gap for those who needed more time. The new website and mobile devices gave the company a professional presence that matched the quality of its product.

SunGrown Packaging continues to operate and grow in the California cannabis market, distinguished as the only packaging solution that is both fully recyclable and child-proof — a mission-driven product that deserved an operation built to match it.

KEY TAKEAWAYS

- Direct CEO reporting accelerates decision-making on implementation projects — fewer approval layers means faster course correction
- Change management resistance in non-technical teams is best addressed by demonstrating immediate personal benefit, not by mandating compliance
- Pairing CRM implementation with complementary upgrades (new devices, new website) signals organizational commitment and builds momentum
- One-on-one follow-up support after group training is the difference between nominal adoption and genuine behavior change