

INDIGO TRIGGER

Lead to Cash Operations Review, End State & Recommendations

Prepared by Indigo Trigger for Salem Media

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Background

Salem Media engaged Indigo Trigger to assess and document current-state Lead-to-Cash workflow - including pre-sales, CRM and fulfillment - and to support a new desired end-state recommendation.

Salem Media has four distinct business units and is undergoing a strategic push to sell in a "One World" state where any seller can easily sell and fulfill any product within the separate business units. Salem does not have a single source of truth on common sales KPIs or a 360-degree view of the customer due to multiple CRM systems, lack of adoption within CRM systems, and multiple ways of executing a sales process.

Indigo Trigger was tasked with documenting current-state processes, gaining leadership agreement on a prioritized end state, and developing two roadmaps to execute against the new end state. The first roadmap would require no system changes; the second roadmap will account for as much automation, workflow efficiency, and revenue production efficiency as possible.

Scope of Assessment

The discovery was scoped to all business units: Local/Broadcast, Salem Media Reps, Salem Web Network, Townhall, Eagle Publishing and Salem Church Products. Specifically, the assessment covered:

- Review of the current lead-to-billing workflow for each sales and fulfillment team, including systems used, processes and reporting.
- Identification of common and varying sales and fulfillment processes by team and/or product.
- Financial team workflows, including systematic and manual processes.
- Understanding of the most common pain points for each stakeholder team.

Executive Summary

The discovery confirmed that Salem Media's multiple systems across multiple product lines and/or teams have resulted in no standard sales process, with multiple manual handoffs from lead and pipeline management through customer invoicing and performance reporting. The root cause is well understood: acquisitions of new businesses, products and previous strategic business decisions have created a varied approach with a lack of integration at almost every step in the sales process.

- **CRM / workflow systems:** Four systems are used for varying parts of the sales process: RAB for sales and pipeline management; Salesforce.com for contracting and accounting for a subset of products; Monday.com for digital product fulfillment; and Asana for workflow fulfillment for another subset of digital products.
- **Order / inventory / billing systems:** Three systems are used by subsets of teams: Wide Orbit for Local/Broadcast; Counterpoint for SMR/Townhall; and Great Plains for manual billing and G/L management.
- **Digital advertising vendors:** Multiple vendors are used for digital advertising, each with its own individual fulfillment requirements and workflows.
- **Consolidated campaign performance reporting:** TapClicks is used for most digital performance reporting.
- **Alignment of subject matter experts:** Team members are aligned on pain points and the need to move to a modernized approach for sales management and fulfillment. Transparency across the process is key.

Challenges and Pain Points

The following business and technical pain points were validated during the discovery sessions and frame the recommendations that follow.

Business Impact

- **Unreliable account data:** Duplication of accounts and account owners due to lack of integration with billing systems and standardized process controls. This creates high volume of sales channel conflict, prevents a single view of one business across multiple sellers or teams, and creates KPI inaccuracy for new business, renewals and upsells.

- **No common sales process:** Workflow and accountability vary by sales team and potentially by leader within sales teams, specifically in Local/Broadcast. This leads to lack of trust in pipeline accuracy and forecasting, plus manual tracking in addition to CRM data. No sales operations and/or CRM leadership ownership was also identified.
- **Single-source-of-truth gap:** Revenue data differs across RAB, Wide Orbit and Counterpoint, creating reconciliation work and conflicting numbers in leadership reporting. This critically impacts strategic business decisions and speed to market.
- **Duplicate data entry / manual handoffs:** Due to lack of system integration across the sales process, sellers, coordinators and fulfillment teams collect and enter the same information in multiple systems and forms. This manual process allows for high error rates, inconsistent naming conventions, and no reliable way to match customers across the sales process.
- **Lack of transparency:** Sales and fulfillment teams operate in different systems and do not have full access to systems used by other teams. This shifts communication to email, which is not integrated back into workflow systems, and takes valuable sales and optimization time away from revenue teams. Inventory availability was cited as one example.

Technical Pain Points

- **RAB capabilities:** Account and strategic initiative management is cumbersome. There is no workflow management for ticketing or fulfillment workflow, limited integrations, and no downstream connection to Wide Orbit, Counterpoint, Salesforce or Asana.
- **Salesforce.com:** Used in a very limited fashion for SWN/Townhall contracting. Information is then manually keyed into Counterpoint for billing and invoicing.
- **Monday.com:** Used for digital sales assistance requests and workflow tasks for O&O Digital for Local Broadcast and DMS for all sales teams. The process is manual and not connected to vendor fulfillment or internal CRM/OMS systems.
- **Wide Orbit:** Lack of digital billing setup. One-way integration into RAB. Additional two-way integration and account management controls are needed. Salem has been trying to use the Wide Orbit customer payment portal for 10 years, but it is not compatible with the current setup.
- **Counterpoint:** Not integrated into any CRM or workflow system. Billing is only for SWN/Townhall products.
- **Asana:** Not integrated into any upstream systems. Limited access to customer fulfillment information and statuses.
- **Great Plains:** Wide Orbit and Counterpoint data are moved into Great Plains manually. Great Plains is expected to be sunset in 2029. Finance is looking at replacements now, including NetSuite.
- **Microsoft / Google:** Half the company is on Microsoft and half the company is on the Google suite of products.

Key Findings - Current State

The findings below summarize current-state workflow and system integrations. Salem leadership has agreed to leave Salem Church Products and Eagle Publishing out of the mix because the revenue potential for cross-selling is very low.

- Only system integration is Wide Orbit pushing revenue detail into RAB after orders are complete and approved.
 - In three markets, DMS orders push from AdCellerant Marketing UI into Wide Orbit, but there are complaints about the revenue taking too long to show up. This is not preferred.
- Within Local sales of local offerings, the process to get into Wide Orbit and Monday.com varies based on whether there is sales support. There is no common workflow.
- Within SWN/Townhall sales by SMR or Local, all ordering into SF.com/Counterpoint is done by a limited number of coordinators.
- Finance manually verifies every order and moves money through journal entries between Counterpoint and Wide Orbit so revenue can be recognized correctly.
- Finance uploads revenue files from Wide Orbit and Counterpoint into Great Plains to reconcile.
- There is no single customer record between RAB, Wide Orbit, SF.com/Counterpoint, Monday.com and Asana. Account and campaign information is rekeyed in multiple systems by numerous people.
- There is no systematic connection between pipeline, billing and fulfillment/performance data at the customer level.

Current-State Workflow and System Handoffs

	Marketing	CRM	OMS	Traffic / Fulfillment	Billing	G/L
Local Broadcast	Manual	RAB	Wide Orbit	Wide Orbit / GAM	Wide Orbit	Great Plains
Local Digital	Manual	RAB	Wide Orbit	Monday.com / GAM / Digital Vendors	Wide Orbit	Great Plains
Local selling SWN/TH	Manual	RAB	Wide Orbit	SF.com / Counterpoint	Wide Orbit	Great Plains
SMR (SWN/TH)	Manual	RAB	SF.com / Counterpoint	Counterpoint / GAM / Asana	Counterpoint	Great Plains
SMR selling DMS	Manual	RAB	SF.com / Counterpoint	Monday.com / GAM / Digital Vendors	Counterpoint	Great Plains
SMR selling local	Manual	RAB	SF.com / Counterpoint	Wide Orbit / GAM	Counterpoint	Great Plains

Note: Table recreated from discovery readout to show major system handoffs and fragmentation across current-state workflows.

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Next Steps

Next steps are outlined below to guide the desired end-state recommendations for prioritization. In each of these next steps, Salem and Indigo Trigger would validate integration capabilities, the work product to integrate, and timing/resource needs.

- **Discovery readout to leadership team:** Level set and validate current state. Outline desired end state by SMEs. Review the next steps below.
- **RAB capabilities:** Meet with Jason and Keith to gain agreement on what RAB can and cannot do, covering pipeline and KPI tracking through fulfillment.
 - Understand RAB integration capabilities with billing and workflow management systems.
- **Wide Orbit and Counterpoint:** Gather finance and IT experts to meet with vendor teams on integration capabilities between each other, Great Plains and potential replacements, and RAB or any other CRM.
 - Understand why current account setup structure interferes with Salem utilizing Wide Orbit's payment portal for customers. Define what steps would be needed to correct that with timing.
 - Focus on account/customer record standards and automation.
- **Digital vendors:** Understand where form and fulfillment integration can be built into digital provider systems, ideally from the CRM, including Vendasta, LocaliQ, AdCellerant and email providers.
- **Demo alternative CRM and fulfillment workflow options:** Showcase potential alternative CRM and workflow capabilities to subject matter experts.
- **G/L replacement:** Deeper dive with Autumn and Indigo Trigger, including Chris Prinos and others, to discuss NetSuite integrations and capabilities.
- **Desired end-state workflows:** Design desired end-state workflows for review with SMEs and leadership teams by July 24th.
 - Prepare two draft roadmaps with gaps and pain points addressed through integration and/or automation recommendations.

Meeting Index

Date	Meeting	Link
5/28	Salem Media / Indigo Trigger Kick-off (leadership)	Open in Fathom
6/2	Brooke Zapata's Zoom - org structure & discovery plan	Open in Fathom
6/4	Brooke / Bill Long regroup - org history & tech strategy	Open in Fathom
6/5	Lead-to-Cash Discovery - SME Intro Call	Open in Fathom
6/8	Brooke / Chris Prinos - strategy & dynamics sync	Open in Fathom
6/9	SMR - Lead-to-Cash Discovery	Open in Fathom
6/15	SWN / Town Hall - Lead-to-Cash Discovery	Open in Fathom
6/16	Eagle Publishing - Lead-to-Cash Discovery	Open in Fathom
6/18	Salem Church Products - Lead-to-Cash Discovery	Open in Fathom
6/18	West Team - Lead-to-Cash Discovery	Open in Fathom