

CASE STUDY

PROJECT

Salesforce Administration

The Challenge

Our client had been using a leading provider of Salesforce support services and was having some issues. Client takes their own customer service seriously, so consistently facing slow response time left them frustrated and disappointed. They also wanted to do more with Salesforce but the current provider didn't address their unique challenges and goals with custom solutions. Ultimately, the standard of service fell short of their expectations.

The Solution

After a short trial run, client purchased a large block of Administration service hours. In addition to ongoing help and troubleshooting with Salesforce, we provided targeted support in a few key areas:

- Built APEX triggers to save them time, streamline contact management, and provide insights into the effectiveness of marketing campaigns. We also modified APEX triggers that were not producing the expected results, allowing them to collect accurate, reliable data.
- Helped with data loader projects that their former provider wouldn't touch, and that saved them weeks of manual work. We also provided training so they could handle routine data loader projects on their own in the future.
- Provided best practices guidance specific to how the company uses Salesforce and their expectations for performance and results.

Results

In the first two months of our engagement with client, they:

- ✓ Saved hundreds of hours of manual data manipulation time.
- ✓ Increased data accuracy, which allowed for more reliable forecasting.
- ✓ Improved compliance with business processes through automation.