

CASE STUDY

PROJECT

Salesforce Implementation

The Challenge

Our Client's acquired the client base of an existing company so they immediately had clients to service. They needed to get up and running quickly with Salesforce to provide service to existing customers while they built a Salesforce organization that could scale to meet their growth plans. Data associated with the existing client base had to be imported into Salesforce, and at the same time relationships had to be created among the different accounts and contacts that reflected the strategy Client had for managing their business. Client needed real time visibility into key sales and customer service metrics so they could quickly make assessments on how the business was performing. Were sales goals being met? Were individual sales reps maintaining a high activity level? Were they becoming more effective at resolving customer issues faster?

The Solution

In order to quickly address Client's requirements we created a small project team that consisted of a senior-level project manager and a senior-level Salesforce certified engineer/administrator.

- ✓ We advised our Client on how to clean up and organize its data so it could be best utilized in Salesforce. They cleaned the data and we imported it.
- ✓ Account record types were implemented with different page layouts for each record type.
- ✓ Products and price books were implemented so the company could quickly create new opportunities and report on how well their service products were selling.
- ✓ We designed workflow and formula fields for use in opportunity line items to track the different classes of revenue generated by Client.
- ✓ We prepared the knowledge base with the appropriate case categories for tracking question and requests from customers.
- ✓ Web-to-case was setup with queues and assignment rules to allow customers to create their own cases.
- ✓ In less than three weeks we implemented Salesforce for Client to accommodate how they wanted to operate their business and work with their clients and business associates.
- ✓ Hundreds of records were imported into Salesforce without any issues. Everything worked.

Results

- ✓ Our client now has a business that they run almost entirely off of Salesforce.
- ✓ The company provides a measurably higher level of customer service to clients than they received prior to the acquisition.
- ✓ Because they're on Salesforce all data is always backed up, it is always available, and they can access it from any of their smartphone.
- ✓ Through easy to view dashboards, sales, service and company management have real time visibility into how all areas of the company are performing.
- ✓ New employees are educated on Salesforce so that in less than 2 hours they are up and running with the product including custom features, reports and dashboards.
- ✓ Many of the new dashboards and reports that the company needs are created by internal staff with Cloud Certitude available to help for more complex issues.
- ✓ Cloud Certitude provides the same engineer to support and administer Client so that they receive help from someone with a deep understanding of their Salesforce organization.