

CASE STUDY

PROJECT

Salesforce Optimization

The Challenge

Our Client had recently implemented Salesforce and during their self-implementation process they found that customizing it to match their business needs was very time consuming and difficult to figure out. They were looking to set up filtering rules, connect with HubSpot, and create a way to connect Salesforce with their complex ecommerce system so they could generate accurate reports.

The Solution

We went through a discovery phase with client to understand their situation and their ecommerce system that tracks their store purchases. Once we learned their sales processes and what purchase information Client needed in Salesforce, we designed a solution that would automatically transfer data from their ecommerce database into Salesforce.

Since Client's database does not have an API option, we worked with their programmers so that they could automatically push data out of their database in the proper format to be consumed by the Apex Data Loader. Before we implemented our solution, we did test exports with Client to test formatting and ensure this solution fit their needs. We then implemented the solution and trained Client on how to use the Data Loader and how to set it up to run automatically.

Results

- ✓ Purchase information is automatically exported from Client's ecommerce database and imported into Salesforce.
- ✓ Client is able to run reports in Salesforce using all their data, giving them more detailed analytics.
- ✓ By training them on how the Data Loader operates, they are able to make changes to it themselves.
- ✓ Our solution helps prevent duplicate records from being entered into Salesforce.
- ✓ Using their HubSpot integration, they can now market to their new and existing customers through campaigns in HubSpot.
- ✓ Client's designers and salespeople are using Salesforce to manage leads, gather information, and see when sales are completed.
- ✓ Improved communication among the design and sales teams.