Enterprise Applications

Case Study

Leveraging Salesforce customizations to improve Sales and Customer Service efficiency

A leading security company automated their sales and service processes by customizing Salesforce.

Executive Summary

Our customer is a leading expert in security solutions and was looking at leveraging an already available Salesforce tool to track opportunities and sales of multiple products and services. A Salesforce-certified partner would be able to help them implement this by improvising and enhancing their Salesforce ecosystem with minimal disruption.

GS Lab's professionals collaborated with the customer's IT team to understand the intricacies and nuances, to develop advanced features and functionalities. The developed features helped reduce manual efforts and tasks significantly, and delivered efficient automation. The improved ecosystem minimized the processing time significantly, thereby increasing customer satisfaction.

Understanding process nuances and customer needs

As a global leader in providing hardware, software, and services in the security domain, our customer had already used Salesforce extensively. In fact, Salesforce played a prominent role in our customer's sales and after-sales service operations.

The standard Salesforce version is a plug-and-play solution with standard features available. The customer wanted to improve the current manual, time-consuming and complex process to a more seamlessly enhanced and automated solution that would address the following challenges.

Asset and contract items cloning

- In Salesforce, there are many accounts for one single customer in the structure of parent and child. When an end-user purchases a single product from the customer, it gets converted into an asset with a signed contract. However, this end-user always used the parent account to purchase products for their child accounts, resulting in linkage with the parent account. Eventually, our customer manually cloned the assets and the contract from parent to child accounts.

- Cloning was a manual process that required the involvement of a system administrator monthly. This took time to identify correct data, thereby delaying the data import and validation process.
- This manual process led to the creation of monthly tickets for admin support and affected the overall quality of service on the products sold.

Non-Revenue orders approvals

- The customer dealt in various non-revenue orders as well. Their sales team had to grant trial licenses at zero value for demos, which demanded extensive manual efforts to manage POCs and demos for the products. This required strict management approval which took up a lot of time. The sales team had to map the demo licenses manually, eventually leading to difficulties in tracking the sales cycle progress.
- With manual touchpoints within the complete process, the possibility of errors and missing information generally took 2 or more days to reconcile and complete the process. This effected business efficacy when closing sales.

Case management

- The customer support team was using Service Cloud for end-user's case management, although most case assignments were tracked manually. Also, there were limited ways to create the cases and the support team only created cases whenever the end-user raised an issue using different support channels.
- Support engineers had to toggle between different Salesforce pages to go through various communications between team members and customers and to access different knowledge articles around products. The lack of automation and Omni-channel synchronisation was a recurring challenge.

System enhancements

- Apart from the above-mentioned challenges, minor issues in the existing implementation were causing errors in the functionality developed, which required overhauling the existing system.
- Enhancements were needed to address changes introduced by Salesforce in their releases.

GS Lab's Salesforce Expertise and Solution

With GS Lab's expertise in Salesforce across multiple clouds, integrations and customizations, we were all poised to be the right partner for our customer to bring a more optimized version of Salesforce. Let's take a look at the various enhancements and solutions delivered:

Asset Cloning

We developed a new feature in Salesforce lightning UI to overcome the asset and contract items' cloning challenge. This new feature provided the LWC modal (Popup) on the Account record page. At this point, the user was able to see assets that belong to parent accounts and child accounts within the same modal. Post that, users could link the asset with the respective accounts. The feature ushered in a more improvised process, eliminating the intervention of the system administrator.
The developed feature also enabled the following functionalities:

- **Easier page management** and toggling between them, selection of assets to be cloned into selected accounts and submission for cloning
- Seamless asset and account management to easily search related assets in LWC pages
- Integrated asset cloning using the feature's logic
- Enhanced feature performance by avoiding unnecessary trigger execution from different objects that are related to assets and contract line items
- Custom permissions to allow specific users to run the process

Non-revenue order request form

The non-revenue orders for demos/trials and respective approvals needed automation and GS Lab built a standardized, centralized form for requesting product demos, thus eliminating email handling for requests and approvals.

The non-revenue order request form automated order entry and the approval process to govern programs and associated costs, reducing the overall request cycle time from demo requests to actual order booking. Here are the steps outlining how the form works:

- The dynamic request form asks users to add relevant information considering multiple request types.
- Once created, users can add one or multiple products mapped with specific request types.
- With the CPQ advanced approval feature, based on the request type and other associated product-specific criteria, the request will be assigned to the respective stakeholders.
- After the request is assigned, users can see the request's approval history and current status.
- Lastly, the request is approved, and the order entry is created for further process.

This form has reduced the sales team's manual efforts and email-based requests and tracking. With this, the users only need to fill in information relevant to a specific request type, for example, in the CPQ advanced approval, users can assign multiple approvals for different products in one single request form.

Case management enhancements

Case management had much scope for improvement where we have automated certain processes and enabled our customer to log cases directly, without reaching out to the support team. Here are the key enhancements:

- **Automated case assignments**, where cases are assigned to the right queues as soon as they are logged, thereby improving response time and dependency on manual assignments
- **Additional channels** to create cases like email to case and from the customer portal directly so that end-users can create support tickets without depending on the customer's support team

- **Enhanced notifications** to end-users using emails and on the customer portal for continuous updates on cases/tickets
- **Customised UI** for support engineers to get a unified view of all communications across different channels like emails, chatter, comments and call notes

System enhancements

- We tackled the existing and expected issues where multiple steps were needed to complete a particular task, e.g., we improvised the email notification in the existing process by automation.
- Additionally, we identified that the system exceeded its governor limits while using applications, thereby leading to higher application runtime and intermittent failures. We used the Salesforce's coding best practices and code refactor to fix the governor limits issue and optimize the code for better performance.
- Our team focused on developing new features that would automate the existing process, minimize steps to reduce efforts, and enhance Salesforce using the right customizations for optimal benefits.
- We also focused on helping the customer accommodate changes introduced in the latest Salesforce releases and on a continuous basis.

Making an Impact

Asset cloning

- **Automation of asset cloning process within reduced timelines** - The earlier System Admin dependency of 36-48 hours of timeline for asset cloning process reduced to a few minutes of DIY process.
- **Elimination of system administrator's intervention**- With this, users could easily clone the assets in bulk using an easy selection process.

Non-revenue order request form

- **Reduced turnaround-time** - With automatic identification of requests and approval assignments to different stakeholders, time and dependencies were reduced.
- **Default separation of revenue and non-revenue products** - This provides users an easy segregation of non-revenue products based on request types, and separate them from actual revenue-generating products.

Case Management

- **Faster response time** - Automated case assignments to the right teams right away helped with faster response time.
- **Faster resolution** - With all case-related information and product-related knowledge articles available in a single place, faster resolutions were a given.
- **Better customer experience** - The customer could log and track case progress using emails/notifications, and their end-users' customer portal was enhanced to provide a better experience.

Great Software Laboratory (GS Lab) has been the technology partner of choice to 150+ organizations across North America, Europe and Asia-Pacific for over 18 years. Leveraging our expertise in 130+ tools & technologies, we have created 350+ 'first-of-its-kind' solutions to real-world problems. Our 'Beyond code' philosophy ensures that we not only push boundaries of existing technologies but also try out newer problem solving approaches to keep our customers one step ahead of their competitors. Our global team of 1600+ employees is adept at creating 'real value' at each stage of the customer growth journey, right from proof-of-concepts to completely scaled up products. For more information about our solutions & offerings, please visit www.gslab.com

gslab™