

Built a resilient Salesforce instance that drives productivity and a seamless workflow

Company

Consumer Goods Manufacturer

Country

USA

Industry

Consumer Goods

Implementation Partner



Teaming with the best



The client is an American manufacturer, marketer, and distributor of consumer goods with a strong portfolio of globally reputed brands. In addition, they own a number of brands that sell consumer and commercial products like storage containers, home organization, and other reusable products.

Challenges

The client had a massive database and required turn-key Salesforce implementation services to set up their own Salesforce instance. The project involved data import, integration, documentation, and immediate community support between different in-house and external brands. They were looking forward to implementing some of the Salesforce cloud products like Sales Cloud, Experience Cloud, Einstein Analytics, and MuleSoft. This required deployment of multiple Salesforce clouds, which gave birth to migration challenges, interface problems, scaling issues, and cross-communication channels.

The client needed an overview on a dashboard with overall productivity performance across the brand entities. This required integrating the Salesforce applications, data, and devices, within the client's ecosystem and completely centralizing the system. The client's database required adequate data security across the clouds developed within the environment - quintessential elements. Greater productivity and information privacy were top priorities for the client while implementing these clouds. Seamless third-party integrations and customizations were part of the implementation, which required more permission sets and user access details. Real-time analytics is always core to multi-cloud deployments, but it is still tricky for so many Salesforce implementation partners. Additionally, maintaining a response chain for the community users within the ecosystem came with complications. The list of issues does not end as the entire project needed to scale from a page-centric vision to a whole portal-centric outlook.



Service Cloud

Solutions

All new modern interfaces will be provided with seamless third-party integrations and customizations to avoid any misconnection in the client's workflow. An integrated suite of Sales Cloud, Experience Cloud, and Einstein Analytics, laced with Mulesoft, will be deployed to set up the Salesforce instance for the client. The client's entire database will be migrated from a service-center service management software to Salesforce. Also, different work processes like call management systems and customer grievance redressal processes will be enabled to resume the official work. Lightning Web Components will be used to recreate the client's user interface and raise user productivity.

The team will create several new permission sets to give users access to the consolidated profiles from region-specific profiles based on the particular business units with more restrictions. Implementation of skill-based checks within the Omni-channel architecture to automatically route email, web, and chat cases to the existing users will be executed to unblock communication. The solution will eliminate/retire an entire legacy application with a distributed structure. A seamless and non-interruptive structure will be planted between the third-party integrations and customizations within the enterprise. Streams will be used to serve as a document generation tool to create pouches and quote documents from Salesforce. The client's standard work procedures like quote creation, follow-up, and acceptance will be achieved with the simple Salesforce email feature. Streamline Salesforce service cloud features of the case and work orders that need to be processed. Pipeline the customer service agents, technicians, and other support agents efficiently.

Benefits

- Empower the organization with the infused community and end-user-centered data from any system and anywhere
- Customers can create and escalate support cases using any device that uplifts the User Experience on the integrated portals

- Account-level and business top-view via profile consolidation, which is an efficient way of applying changes/updates
- Easy monitoring for the administrators when they use the Omni-channel queue, utilizing the "out of the box" solution Omni Supervisor tab
- Business-centric "Information Security" was enabled using 'Third Party Integrations and Customizations' to create a modern application interface